



**City of Hamilton**  
**GENERAL ISSUES COMMITTEE**  
**AGENDA**

**Meeting #:** 23-015  
**Date:** May 3, 2023  
**Time:** 9:30 a.m.  
**Location:** Council Chambers  
Hamilton City Hall  
71 Main Street West

Angela McRae, Legislative Coordinator (905) 546-2424 ext. 5987

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1. **CEREMONIAL ACTIVITIES**
2. **APPROVAL OF AGENDA**  
(Added Items, if applicable, will be noted with \*)
3. **DECLARATIONS OF INTEREST**
4. **APPROVAL OF MINUTES OF PREVIOUS MEETING**
  - 4.1 April 19, 2023
  - 4.2 April 24, 2023 - Special GIC
5. **COMMUNICATIONS**
  - 5.1 Resignations from the Arts Advisory Commission:  
Recommendation: Be received.
    - a. Annette Paiement
    - b. Janna Malseed
    - c. Monika Ciolek

**6. DELEGATION REQUESTS****7. DELEGATIONS**

- 7.1 David Braden, respecting an approach that the City could adopt to respond to and encourage climate sensitive, demonstration projects (In-Person) (Approved April 5, 2023)
- 7.2 Charlie Mattina, Hamilton Community Land Trust, respecting an introduction to the Hamilton Community Land Trust, a grass roots all volunteer Non-for-profit community organization (In-Person) (Approved April 5, 2023)
- 7.3 Daniel Freiheit, respecting vaccination requirement and how that's creating resource issues in the system (Virtual) (Approved March 22, 2023)

**8. STAFF PRESENTATIONS**

- 8.1 Our City Survey 2022 Results (CM23011) (City Wide)
- 8.2 Better Homes Hamilton - Home Energy Retrofit Program (PED23106) (City Wide)
- 8.3 Hamilton Region Decarbonization Hub (CM22013(a) / PED22176(a)) (City Wide) (Outstanding Business List Item)

**9. CONSENT ITEMS**

- 9.1 2023 Employer Survey (PED23087) (City Wide)
- 9.2 Labour Relations Activity Report & Analysis (2018-2022) (HUR23006) (City Wide)
- 9.3 Efficacy of the Existing Staff COVID-19 Vaccination Policy (BOH23015) (City Wide) (Outstanding Business List Item)

**10. DISCUSSION ITEMS****11. MOTIONS****12. NOTICES OF MOTION****13. GENERAL INFORMATION / OTHER BUSINESS**

- 13.1 Amendments to the Outstanding Business List:

a. Items Considered Complete and Needing to be Removed:

Hamilton Region Decarbonization Hub

OBL Item: II

Added: August 8, 2022 at GIC (Item 2(e))

Completed: May 3, 2023 at GIC (Item 8.3)

Amendment to Appendix "A" of Item 4.1 or the August 26, 2021 Council Minutes, respecting Report HUR21008, the Mandatory COVID-19 Vaccination Verification Policy, which was approved by Council on August 26, 2021 - REVISED

OBL Item: 2023-G

Added: February 1, 2023 at GIC (Item 11.1)

Completed: May 3, 2023 at GIC (Item 9.3)

b. Items Requiring a New Due Date:

Revenue Enhancement Opportunities at the John C. Munro International Airport

OBL Item: D

Current Due Date: June 14, 2023

Proposed New Due Date: December 6, 2023

Recommendations and Alternative Options for the Hamilton Farmers' Market

OBL Item: N

Current Due Date: June 14, 2023

Proposed New Due Date: December 6, 2023

Annual Report on the Operations of the Hamilton Urban Precinct Group LP, with regard the lands known as the FirstOntario Centre, the Hamilton Convention Centre and the FirstOntario Concert Hall

OBL Item: U

Current Due Date: July 10, 2023

Proposed New Due Date: September 20, 2023

Agreements with Aeon, including a Master Development Agreement and/or proposed Agreement(s) of Purchase and Sale, based on the materials submitted by Aeon Studio Group, for Barton-Tiffany Lands

OBL Item: EE

Current Due Date: June 14, 2023

Proposed New Due Date: September 20, 2023

Temporary Outdoor Patio Program's Compliance with the Accessibility for Ontarians with Disabilities Act

OBL Item: 2023-S

Current Due Date: June 14, 2023

Proposed New Due Date: July 10, 2023

**14. PRIVATE AND CONFIDENTIAL**

**14.1 Closed Session Minutes - April 19, 2023**

Pursuant to Section 9.3, Sub-sections (a), (c), (e), and (k) of the City's Procedural By-law 21-021, as amended, and Section 239(2), Sub-sections (a), (c), (e), and (k) of the *Ontario Municipal Act, 2001*, as amended, as the subject matter pertains to the security of the property of the City or a local board; a proposed or pending acquisition or disposition of land for City or a local board purposes; litigation or potential litigation, including matters before administrative tribunals, affecting the municipality or local board; and, a position, plan, procedure, criteria or instruction to be applied to any negotiations carried on or to be carried on by or on behalf of the municipality or local board.

**14.2 Closed Session Minutes - April 24, 2023 - Special GIC**

Pursuant to Section 9.5 of the City's Procedural By-law 21-021, as amended, and Section 239(3.1) of the *Ontario Municipal Act, 2001*, as amended, as the meeting is being held for the purposes of educating or training members; and, at the meeting, no member discusses or otherwise deals with any matter in a way that materially advances the business or decision-making of Council or the Committee.

**15. ADJOURNMENT**



## **GENERAL ISSUES COMMITTEE MINUTES 23-013**

9:30 a.m.

April 19, 2023

Council Chambers, City Hall, 2<sup>nd</sup> Floor  
71 Main Street West, Hamilton, Ontario

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**Present:** Mayor A. Horwath  
Deputy Mayor B. Clark (Chair)  
Councillors J. Beattie, C. Cassar, J. P. Danko, M. Francis, T. Hwang,  
T. Jackson, C. Kroetsch, T. McMeekin, N. Nann, M. Spadafora, M.  
Tadeson, A. Wilson, M. Wilson

**Absent:** Councillor E. Pauls - Personal

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### **THE FOLLOWING ITEMS WERE REFERRED TO COUNCIL FOR CONSIDERATION:**

**1. Housing Sustainability and Investment Roadmap (HSIR) (HSC23028 / FCS23055 / PED23099) (City Wide) (Item 8.1)**

**(Horwath/Tadeson)**

- (a) That the Housing Sustainability and Investment Roadmap attached as Appendix "A" to Report HSC23028 / FCS23055 / PED23099 be approved in principle and that it be used to guide cross-departmental work related to affordable housing issues and the City's housing crisis;
- (b) That the City Manager be authorized and directed to establish an Affordable Housing Secretariat Division within the Healthy and Safe Communities Department to lead the implementation of the Housing Sustainability and Investment Roadmap and to work across departments and divisions to develop and recommend an annual program of work to be approved by Council each year and to report annually on progress;
- (c) That the Senior Leadership Team be directed to review resource requirements of the Roadmap in light of Term of Council Priorities and existing work underway across the corporation, and report back to Council in Q4 of 2023 with any recommended changes that would best resource, align and integrate the work of the Housing Sustainability and Investment Roadmap across the corporation;

- (d) That staff be directed to implement the Year 1 priority actions and workplan contained in Appendix “A” to Report HSC23028 / FCS23055 / PED23099 and/or any other actions that progress the work that do not require a change to policy or additional financial or other staffing resources;
- (e) That the Canadian Housing Evidence Collaborative report attached as Appendix “B” to Report HSC23028 / FCS23055 / PED23099 be received and that the General Manager of the Healthy and Safe Communities Department be authorized to extend the length of original contract with the Canadian Housing Evidence Collaborative to 2025, not to exceed the original \$150 K committed through report HSC22042, funded from external sources first and any unfunded balance remaining be funded from the Human Service Integration Project ID 6502141100;
- (f) That the Affordable Housing Secretariat be directed to report back to Council in Q4 of 2023 on the proposed program of work for 2024, including required resources that would be included in the 2024 Budget, and to report back on the progress of work in the 2023 workplan;
- (g) That the Affordable Housing Secretariat report back in Q4 of 2023 on any required delegated authorities recommended to improve the effectiveness and efficiency with respect to executing on the annual program of work and Roadmap initiatives;
- (h) That Council approve the allocation of up to \$1M from Homelessness Prevention Program to establish of a new Housing Benefit, aligned with Rent Geared to Income program, to be provided as a subsidy for up to 166 households per year at \$500/month/household and that this amount to be increased annually by the allowable rent increase guideline set by the Ministry of Municipal Affairs and Housing;
- (i) That staff be directed to communicate to Council on how the remaining balance of the Homelessness Prevention Program (HPP) funding will be applied in support of the Housing Sustainability Investment Roadmap (HSIR) and Housing and Homelessness Action Plan (HHAP) once final amounts are known and able to be publicly communicated;
- (j) That Council approve retaining a consultant to conduct an asset rationalization of the City’s social housing stock, up to an amount not to exceed the funding available through the Social Housing Transition Reserve, #112244; and,
- (k) That the General Manager of the Healthy and Safe Communities Department or their designate be directed and authorized, on behalf of the City of Hamilton, to enter into, execute and administer all agreements and

documents necessary to implement the purchases and grants outlined above on terms and conditions satisfactory to the General Manager of the Healthy and Safe Communities Department or their designate and in a form satisfactory to the City Solicitor.

**Result: MOTION, CARRIED by a vote of 15 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Yes	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

**2. Five-Year Review of the Environmental Remediation and Site Enhancement (ERASE) Community Improvement Plan and Associated Financial Assistance Programs (PED23076) (City Wide) (Item 8.2)**

**(Kroetsch/Nann)**

- (a) That staff be directed to bring forward to the Planning Committee for a statutory public meeting, in accordance with Section 17(15)(d) of the *Planning Act*, the following:
- (i) Appendix “A” to Report PED23076, respecting a proposed updated Environmental Remediation and Site Enhancement (ERASE) Community Improvement Plan;
  - (ii) Appendix “B” to Report PED23076, respecting a proposed updated ERASE Community Improvement Project Area;
- (b) That staff be directed to bring forward to the Planning Committee the following proposed new/updated implementing Environmental Remediation and Site Enhancement (ERASE) Program descriptions for consideration in conjunction with the proposed ERASE Community Improvement Plan and ERASE Community Improvement Project Area By-laws:



- (i) Appendix “C” to Report PED23076, respecting the ERASE Study Grant Program;
  - (ii) Appendix “D” to Report PED23076, respecting the ERASE Redevelopment Grant Program;
  - (iii) Appendix “E” to Report PED23076, respecting the ERASE Tax Assistance Program;
  - (iv) Appendix “F” to Report PED23076, respecting the ERASE Commercial Districts Remediation Loan Program (currently the Downtown / West Harbour Remediation Loan Program);
  - (v) Appendix “G” to Report PED23076, respecting a new ERASE Affordable Housing Grant Program;
- (c) That staff be directed to implement necessary administrative processes required to enable the existing Brownfield Pilot Project ID 3621755102 to be utilized for the provision of grants under the proposed new Environmental Remediation and Site Enhancement (ERASE) Affordable Housing Grant Program;
- (d) That funds, in an amount not to exceed \$1,000,000 be transferred, as required, to the Brownfield Pilot Project ID 3621755102 to fund future grants under the proposed Environmental Remediation and Site Enhancement (ERASE) Affordable Housing Grant Program, from available funds currently allocated to the Annual Commercial Property Improvement Grant Program, Project ID 8201703704, to an upset limit of \$500,000 and the Annual Commercial District Revitalization Program, Project ID 8201703703, to an upset limit of \$500,000; and,
- (e) ***That the City of Hamilton request the Province of Ontario invest provincial staff resources as required to avoid unnecessary provincial delays to the construction of new housing by ensuring timely approval of remediated sites in alignment with municipal approval timelines.***

**Result: Main MOTION, As Amended, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis

Yes	-	Ward 6	Councillor Tom Jackson
Absent	-	Ward 7	Councillor Esther Pauls
Yes	-	Ward 8	Councillor J. P. Danko
Yes	-	Ward 9	Councillor Brad Clark
Yes	-	Ward 10	Councillor Jeff Beattie
Yes	-	Ward 11	Councillor Mark Tadeson
Yes	-	Ward 12	Councillor Craig Cassar
Absent	-	Ward 13	Councillor Alex Wilson
Yes	-	Ward 14	Councillor Mike Spadafora
Yes	-	Ward 15	Councillor Ted McMeekin

**3. Potential Parking Layout Design Improvements and Greenway for the Pier 8 Development (PED23039) (Ward 2) (Item 8.3)**

**(Kroetsch/Spadafora)**

- (a) That staff of the Municipal Land Development Office be authorized and directed to submit a City-initiated Zoning By-law Amendment application to permit underground parking within the below-grade strata land within the Pier 8 “Greenway” defined by Blocks 12, 13, and 14 as shown on Appendix “A” to Report PED23039;
- (b) That, subject to Council’s future approval of the Zoning By-law Amendment outlined in Recommendation (a) to Report PED23039, the below-grade strata land within the Pier 8 “Greenway” defined by Blocks 12, 13 and 14 as shown on Appendix “A” to Report PED23039 be deemed surplus for the purposes of disposition, and staff of the Corporate Real Estate Office be authorized and directed to negotiate agreements with Waterfront Shores Corporation (WSC) for the disposition of the subject below-grade strata land, while retaining full public ownership of the above-grade Greenway, on terms and conditions that align and are consistent with the Pier 8 Development Agreement between the City of Hamilton and WSC, and such other terms and conditions deemed appropriate by the General Manager of the Planning and Economic Development Department, and report back to General Issues Committee for approval;
- (c) That staff be directed to explore the opportunity to accommodate public parking spaces within the Pier 8 development blocks, including consideration of how it could fit within a transaction structure of the proposed disposition of below-grade strata land within the Pier 8 “Greenway” defined by Blocks 12, 13 and 14 as shown on Appendix “A” to Report PED23039, and report back to General Issues Committee; and,
- (d) That funding of all costs associated with the rezoning and potential disposition of below-grade strata land within the Pier 8 “Greenway” defined by Blocks 12, 13 and 14 as shown on Appendix “A” to Report

PED23039, up to \$200K, through the West Harbour Capital Project Account No. 4411806107, be approved.

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Absent	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

#### **4. DISCUSSION ITEMS**

**(Nann/Spadafora)**

**(a) Light Rail Transit Sub-Committee Report 23-001 - March 31, 2023  
(Added Item 10.1)**

**(i) APPOINTMENT OF COMMITTEE CHAIR AND VICE-CHAIR (Item 1)**

(a) That Councillor M. Wilson be appointed as Chair of the Light Rail Transit Sub-Committee for 2023.

(b) That Councillor Nann be appointed as Vice-Chair of the Light Rail Transit Sub-Committee for 2023.

**(ii) Schedule of Discussion Topics and Presentations for Future Light Rail Transit (LRT) Sub-Committee Meetings (PED23091) (City Wide) (Item 9.1)**

That Report PED23091 respecting Schedule of Discussion Topics and Presentations for Future Light Rail Transit (LRT) Sub-Committee Meetings, be received.

**(b) Advisory Committee for Persons with Disabilities (ACPD) Report 23-004 - April 11, 2023 (Added Item 10.2)**

**(i) Review of the Code of Conduct for Local Boards (Item 11.1)**

- (a) WHEREAS, the Advisory Committee for Persons with Disabilities feels that the Code of Conduct for Local Boards holds Advisory Committee members to the standard of elected official, which is asking a lot of City volunteers.

THEREFORE, BE IT RESOLVED:

That the Code of Conduct for Local Boards be revised to hold Advisory Committee members to a volunteer standard rather than the standard of an elected official.

- (i) That the language within the Code of Conduct for Local Boards be simplified.

**(ii) Invitation to a Representative of Canadian Housing Evidence Collaborative, McMaster University to Attend a Meeting of the Housing Issues Working Group to Discuss their Report “Toward a Sustainable Housing System in Hamilton: Framing the Issues” (Item 12.1)**

WHEREAS, the Advisory Committee for Persons with Disabilities’ (ACPD) Housing Issues Working Group (HWG) is mandated to advise Council on removing and preventing new barriers in housing for persons with disabilities, highlight deficiencies, seek solutions and anticipate accessible housing needs for the future;

WHEREAS, the HWG is currently working on recommendations regarding affordable/attainable housing and more accurately highlighting the barriers that not having enough affordable housing creates for persons with disabilities;

WHEREAS, on March 9th, 2023, Steve Pomeroy from the Canadian Housing Evidence Collaborative (CHEC), McMaster University, presented a report to the General Issues Committee entitled, “Toward a Sustainable Housing System in Hamilton: Framing the Issues” that contains important information that is directly related to the HWG’s current work; and

WHEREAS, inviting Steve Pomeroy or a representative from the CHEC to attend an upcoming HWG meeting would greatly improve members’ understanding of the complexities around these issues

enabling the HWG to provide more comprehensive recommendations and advise Council more thoroughly.

THEREFORE, BE IT RESOLVED:

That a representative from the Canadian Housing Evidence Collaborative (CHEC) be invited to attend a future meeting of the Advisory Committee for Persons with Disabilities' Housing Issues Working Group to discuss their report "Toward a Sustainable Housing System in Hamilton: Framing the Issues".

**(iii) Invitation to Planning and Economic Development Staff to Attend a Meeting of the Advisory Committee for Persons with Disabilities', Strategic Planning Working Group, for an Update Respecting the E-Scooter Pilot Program (Item 12.2)**

That Planning and Development staff be invited to attend a future meeting of the Advisory Committee for Persons with Disabilities', Strategic Planning Working Group, to provide an update respecting the E-Scooter Pilot Program.

**(iv) Participation of the Advisory Committee for Persons with Disabilities in the 2023 Seniors Kickoff Event (Added Item 14.7)**

That the Advisory Committee for Persons with Disabilities participation in the 2023 Seniors Kickoff Event, at a cost of \$50, to be funded from the ACPD approved budget for Conferences and Related Travel Expenses (ID 300303), be approved.

**(c) West Harbour Development Sub-Committee Report 23-001 - April 14, 2023 (Added Item 10.3)**

**(i) Appointment of Chair and Vice-Chair (Item 1)**

(a) That Mayor Andrea Horwath be appointed Chair of the West Harbour Development Sub-Committee for 2022-2026.

(b) That Councillor Mike Spadafora be appointed Vice-Chair of the West Harbour Development Sub-Committee for 2022-2026.

**(ii) West Harbour Re-Development Plan - Status Update (PED17181(e)) (Ward 2) (Item 8.1)**

That Report PED17181(e), respecting West Harbour Re-Development Plan - Status Update (Ward 2), be received

**(iii) West Harbour Redevelopment: Interim Conditions and Transition Plan (PED23078) (Ward 2) (Item 8.2)**

That Report PED23078, respecting West Harbour Redevelopment: Interim Conditions and Transition Plan (Ward 2), be received.

**(iv) Pier 8 Redevelopment Work Plan Overview and Upcoming Initiatives (PED23079) (Ward 2) (Item 8.3)**

That Report PED23079, respecting Pier 8 Redevelopment Work Plan Overview and Upcoming Initiatives (Ward 2), be received.

**Result: MOTION on Items 10.1, 10.2 and 10.3, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Absent	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

**5. 2023 Reporting of the Housing Sustainability and Investment Roadmap (Added Item 11.1)**

**(M. Wilson/Clark)**

- (a) That staff be directed to report back to the General Issues Committee respecting the progress of work in 2023 and the proposed program of work for 2024 for the Housing Sustainability and Investment Roadmap; and,
- (b) That in the Q4 2023 report, staff include a recommendation on the most appropriate Committee for future reports on the Housing Sustainability and Investment Roadmap to report to.

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Absent	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

**6. Conditional Grant to CityHousing Hamilton for the Repair and Renovation of 476 Units (Added Item 11.2)**

**(Nann/M. Wilson)**

WHEREAS, the housing affordability crisis continues to deepen and widen in every neighbourhood across Hamilton;

WHEREAS, the Access to Housing waitlist as of December 31, 2022 was at 6,110.

WHEREAS, CityHousing Hamilton has identified 476 units in need of repair at an estimated cost of \$5.7M;

WHEREAS, Council on August 16, 2019, through Report HSC19048, directed staff to use any future year-end Alectra / Hamilton Utilities Corporation dividend surpluses to reduce the reliance on debt financing for Council approved Housing projects;

WHEREAS, 2022 dividends from Hamilton Utilities Corporation and Alectra dividends net of administration costs were higher than budgeted resulting in a surplus of \$2.792M and subject to Council approval of Report FCS22042(b), this surplus will be transferred to Housing Project ID #6732341301 and used to partially fund the estimated cost of \$5.7M;

WHEREAS, CityHousing Hamilton identified \$900,000 in CityHousing Hamilton Reserve funding that is available for units in need of repair;

WHEREAS, CityHousing Hamilton identified approximately \$1,000,000 in Canada Mortgage and Housing Corporation (CMHC) funding that can be applied toward units in need of repair;

WHEREAS, the Hamilton Future Fund has an expressed purpose to “create and protect a permanent legacy for current and future generations of Hamiltonians to enjoy economic prosperity and improved quality of life”;

WHEREAS, the Hamilton Future Fund A Reserve (112246) has a 2022 balance of approximately \$63.4M for allocation at the discretion of Council;

WHEREAS, the success of the Hamilton Future Fund rests in its ability to be regenerative for ongoing and future use;

WHEREAS investing in the repair of CityHousing Hamilton units helps maintain the existing affordable housing stock and provides a return in investment by enabling the collection of rent;

THEREFORE, BE IT RESOLVED:

That the \$1M in backing to CityHousing Hamilton to repair and renovation of 476 units with the requirement that the units be available for tenancy by December 2024, be funded as follows:

- (a) That a \$1 million conditional grant to CityHousing Hamilton be funded via an internal loan from the Hamilton Future Fund A Reserve (#112246) to be repaid from the annual Housing Services tax supported operating budget over a term of 10 years at an annual interest rate of 3.86%, resulting in a net tax levy impact of \$122,433 annually beginning in 2025.

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Absent	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin



**7. Animal Services Facility Report (PED20074(a) / LS23021) (City Wide)  
(Added Item 14.2)**

**(Horwath/Spadafora)**

- (a) That Hamilton Animal Control Services facility (Project 4502350001) created for all revenues and costs flowing from recommendations in Confidential Report PED20074(a) / LS23021 be approved;
- (b) That the directions to staff in closed session respecting this Report PED20074(a) / LS23021, Animal Services Facility Report be approved; and,
- (c) That the complete Report PED20074(a) / LS23021 and its Appendices respecting the Animal Control Services Facility Report remain confidential and not be released as a public document.

**Result: MOTION, CARRIED by a vote of 13 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Absent	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Absent	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

**FOR INFORMATION:**

**(a) CERMONIAL ACTIVITIES (Item 1)**

- (i) **Jacki Levin, Past President of the Hamilton Jewish Federation - Yom Hashoah (Holocaust Remembrance Day) Commemoration Remarks (Item 1)**

Jacki Levin, Past President of the Hamilton Jewish Federation addressed the Committee to provide Yom Hashoah (Holocaust Remembrance Day) Commemoration Remarks.

**(b) APPROVAL OF AGENDA (Item 2)**

The Committee Clerk advised of the following changes to the agenda:

**6. DELEGATION REQUESTS**

- 6.2 John Gerrard, Hamilton Burlington SPCA, respecting Item 14.2, Animal Services Facility Report (PED20074(a) / LS23021) and the property at 245 Dartnall Road and its relationship with the HBSPCA (In-Person) (For today's meeting)

**10. DISCUSSION ITEMS**

- 10.1 Light Rail Transit Sub-Committee Report 23-001 - March 31, 2023
- 10.2 Advisory Committee for Persons with Disabilities (ACPD) Report 23-004 – April 11, 2023
- 10.3 West Harbour Development Sub-Committee Report 23-001 - April 14, 2023

**12. NOTICES OF MOTION**

- 12.1 Conditional Grant to CityHousing Hamilton for the Repair and Renovation of 476 Units

**14. PRIVATE AND CONFIDENTIAL**

- 14.4 Animal Services Facility Report (PED20074(a) / LS23021) (City Wide)

**(Spadafora/Horwath)**

That the agenda for the April 19, 2023 General Issues Committee meeting, be approved, as amended.

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Absent	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko

Yes	-	Ward 9	Councillor Brad Clark
Yes	-	Ward 10	Councillor Jeff Beattie
Yes	-	Ward 11	Councillor Mark Tadeson
Yes	-	Ward 12	Councillor Craig Cassar
Yes	-	Ward 13	Councillor Alex Wilson
Yes	-	Ward 14	Councillor Mike Spadafora
Yes	-	Ward 15	Councillor Ted McMeekin

**(c) DECLARATIONS OF INTEREST (Item 3)**

Councillor M. Wilson declared a non-disqualifying interest to Item 8.1, Housing Sustainability and Investment Roadmap (HSIR) (HSC23038 / PED23099) as her husband is the President and CEO of the Hamilton Community Foundation.

**(d) APPROVAL OF MINUTES OF PREVIOUS MEETINGS (Item 4)**

**(i) April 5, 2023 (Item 4.1)**

**(Danko/Francis)**

That the Minutes of the April 5, 2023 meeting of the General Issues Committee be approved, as presented.

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Absent	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Yes	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

**(e) DELEGATION REQUESTS (Item 6)**

**(Hwang/Beattie)**

That the following Delegation Requests, be approved, as follows:

- (i) Michelle Diplock, and Mike Collins-Williams, West End Home Builders Association, respecting support for the City's ERASE Grant program, Item 8.2 (In-Person) (For today's meeting) (Item 6.1)
- (ii) John Gerrard, Hamilton Burlington SPCA, respecting Item 14.2, Animal Services Facility Report (PED20074(a) / LS23021) and the property at 245 Dartnall Road and its relationship with the HBSPCA (In-Person) (For today's meeting) (Added Item 6.2)

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Absent	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Yes	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

**(f) DELEGATIONS (Item 7)**

The Delegates addressed the Committee, as follows:

- (i) Vic Djurdjevic, NikolaTesla Educational Corp, respecting permission to hold Tesla Electric City Festival and the Hamilton Museum of Steam and technology (In-Person) (Approved April 5, 2023) (Item 7.1)
- (ii) Michelle Diplock, and Mike Collins-Williams, West End Home Builders Association, respecting support for the City's ERASE Grant program, Item 8.2 (In-Person) (Added Item 7.2)
- (iii) John Gerrard, Hamilton Burlington SPCA, respecting Item 14.2, Animal Services Facility Report (PED20074(a) / LS23021) and the property at 245 Dartnall Road and its relationship with the HBSPCA (In-Person) (Added Item 7.3)

The that following Delegations, be received:

**(Hwang/Cassar)**

- (i) Vic Djurdjevic, NikolaTesla Educational Corp, respecting permission to hold Tesla Electric City Festival and the Hamilton Museum of Steam and technology (In-Person) (Item 7.1)
- (ii) Michelle Diplock, and Mike Collins-Williams, West End Home Builders Association, respecting support for the City's ERASE Grant program, Item 8.2 (In-Person) (Added Item 7.2)
- (iii) John Gerrard, Hamilton Burlington SPCA, respecting Item 14.2, Animal Services Facility Report (PED20074(a) / LS23021) and the property at 245 Dartnall Road and its relationship with the HBSPCA (In-Person) (Added Item 7.3)

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Yes	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Absent	-	Ward 12 Councillor Craig Cassar
Yes	-	Ward 13 Councillor Alex Wilson
Absent	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

**(Kroetsch/Tadeson)**

That the General Issues Committee recess for 15 minutes until 11:20 am.

**Result: MOTION, CARRIED by a vote of 12 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Absent	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis

Yes	-	Ward 6	Councillor Tom Jackson
Absent	-	Ward 7	Councillor Esther Pauls
Yes	-	Ward 8	Councillor J. P. Danko
Yes	-	Ward 9	Councillor Brad Clark
Absent	-	Ward 10	Councillor Jeff Beattie
Yes	-	Ward 11	Councillor Mark Tadeson
Yes	-	Ward 12	Councillor Craig Cassar
Yes	-	Ward 13	Councillor Alex Wilson
Absent	-	Ward 14	Councillor Mike Spadafora
Yes	-	Ward 15	Councillor Ted McMeekin

**(g) STAFF PRESENTATIONS (Item 8)**

**(i) Housing Sustainability and Investment Roadmap (HSIR) (HSC23028 / FCS23055 / PED23099) (City Wide) (Item 8.1)**

Janette Smith, City Manager, provided an introduction to Report HSC23028 / FCS23055 / PED23099, Housing Sustainability and Investment Roadmap (HSIR). Angela Burden, General Manager of Healthy and Safe Communities; and Dr. Jim Dunn, Canadian Housing Evidence Collaborative, addressed the Committee with the presentation.

**(Tadeson/Spadafora)**

That the presentation respecting Report HSC23028 / FCS23055 / PED23099, Housing Sustainability and Investment Roadmap (HSIR), be received.

**Result: MOTION, CARRIED by a vote of 15 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Yes	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

For disposition of this matter, refer to Item 1.

**(Jackson/Cassar)**

That the General Issues Committee recess for 30 minutes until 3:00 pm.

**Result: MOTION, CARRIED by a vote of 15 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Yes	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

**(ii) Five-Year Review of the Environmental Remediation and Site Enhancement (ERASE) Community Improvement Plan and Associated Financial Assistance Programs (PED23076) (City Wide) (Item 8.2)**

Phil Caldwell, Senior Project Manager, Planning and Economic Development provided the presentation respecting Report PED23076, Five-Year Review of the Environmental Remediation and Site Enhancement (ERASE) Community Improvement Plan and Associated Financial Assistance Programs.

**(Spadafora/Jackson)**

That the staff presentation respecting Report PED23076, Five-Year Review of the Environmental Remediation and Site Enhancement (ERASE) Community Improvement Plan and Associated Financial Assistance Programs, be received.

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch

Yes	-	Ward 3	Councillor Nrinder Nann
Yes	-	Ward 4	Councillor Tammy Hwang
Yes	-	Ward 5	Councillor Matt Francis
Yes	-	Ward 6	Councillor Tom Jackson
Absent	-	Ward 7	Councillor Esther Pauls
Yes	-	Ward 8	Councillor J. P. Danko
Yes	-	Ward 9	Councillor Brad Clark
Yes	-	Ward 10	Councillor Jeff Beattie
Yes	-	Ward 11	Councillor Mark Tadeson
Yes	-	Ward 12	Councillor Craig Cassar
Absent	-	Ward 13	Councillor Alex Wilson
Yes	-	Ward 14	Councillor Mike Spadafora
Yes	-	Ward 15	Councillor Ted McMeekin

**(Kroetsch/Nann)**

- (a) That staff be directed to bring forward to the Planning Committee for a statutory public meeting, in accordance with Section 17(15)(d) of the *Planning Act*, the following:
- (i) Appendix “A” to Report PED23076, respecting a proposed updated Environmental Remediation and Site Enhancement (ERASE) Community Improvement Plan;
  - (ii) Appendix “B” to Report PED23076, respecting a proposed updated ERASE Community Improvement Project Area;
- (b) That staff be directed to bring forward to the Planning Committee the following proposed new/updated implementing Environmental Remediation and Site Enhancement (ERASE) Program descriptions for consideration in conjunction with the proposed ERASE Community Improvement Plan and ERASE Community Improvement Project Area By-laws:
- (i) Appendix “C” to Report PED23076, respecting the ERASE Study Grant Program;
  - (ii) Appendix “D” to Report PED23076, respecting the ERASE Redevelopment Grant Program;
  - (iii) Appendix “E” to Report PED23076, respecting the ERASE Tax Assistance Program;
  - (iv) Appendix “F” to Report PED23076, respecting the ERASE Commercial Districts Remediation Loan Program (currently the Downtown / West Harbour Remediation Loan Program);
  - (v) Appendix “G” to Report PED23076, respecting a new ERASE Affordable Housing Grant Program;



- (c) That staff be directed to implement necessary administrative processes required to enable the existing Brownfield Pilot Project ID 3621755102 to be utilized for the provision of grants under the proposed new Environmental Remediation and Site Enhancement (ERASE) Affordable Housing Grant Program;
- (d) That funds, in an amount not to exceed \$1,000,000 be transferred, as required, to the Brownfield Pilot Project ID 3621755102 to fund future grants under the proposed Environmental Remediation and Site Enhancement (ERASE) Affordable Housing Grant Program, from available funds currently allocated to the Annual Commercial Property Improvement Grant Program, Project ID 8201703703, to an upset limit of \$500,000 and the Annual Commercial District Revitalization Program, Project ID 8201703703, to an upset limit of \$500,000.

**(Danko/Horwath)**

That Report PED23076, respecting the Five-Year Review of the Environmental Remediation and Site Enhancement (ERASE) Community Improvement Plan and Associated Financial Assistance Programs, **be amended** by adding an additional sub-section (e), as follows:

- (e) ***That the City of Hamilton request the Province of Ontario invest provincial staff resources as required to avoid unnecessary provincial delays to the construction of new housing by ensuring timely approval of remediated sites in alignment with municipal approval timelines.***

**Result: Amendment, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Absent	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

For disposition of this matter, refer to Item 2.

**(iii) Potential Parking Layout Design Improvements and Greenway for the Pier 8 Development (PED23039) (Ward 2) (Item 8.3)**

Chris Phillips; Manager, Planning and Economic Development, provided the presentation respecting Report PED23039, Potential Parking Layout Design Improvements and Greenway for the Pier 8 Development.

**(Kroetsch/Hwang)**

That the staff presentation respecting Report PED23039, Potential Parking Layout Design Improvements and Greenway for the Pier 8 Development, be received.

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Absent	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

For disposition of this matter, refer to Item 3.

**(h) NOTICES OF MOTION (Item 12)**

**(i) Conditional Grant to CityHousing Hamilton for the Repair and Renovation of 476 Units (Added Item 12.1)**

**(Nann/Spadafora)**

That the Rules of Order be waived to allow for the introduction of a motion respecting Conditional Grant to CityHousing Hamilton for the Repair and Renovation of 476 Units.

**Result: MOTION, CARRIED by a 2/3 vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Absent	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

For disposition of this matter, refer to Item 6.

**(i) GENERAL INFORMATION / OTHER BUSINESS (Item 13)**

**(i) Amendments to the Outstanding Business List: (Item 13.1)**

**(Tadeson/Nann)**

That the Amendments to the Outstanding Business List, be approved, as follows:

**(a) Items Requiring a New Due Date: (Item 13.1(a))**

Strategic Land Acquisition Plan Along the Hamilton Light Rail  
Transit (LRT) Corridor

OBL Item: W

Current Due Date: May 17, 2023

Proposed New Due Date: June 14, 2023

Proposal to the Red Hill Valley Joint Stewardship Board for the  
Expansion of the Red Hill Valley Parkway

OBL Item: Y

Current Due Date: June 14, 2023

Proposed New Due Date: September 20, 2023

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes - Mayor Andrea Horwath

Yes	-	Ward 1	Councillor Maureen Wilson
Yes	-	Ward 2	Councillor Cameron Kroetsch
Yes	-	Ward 3	Councillor Nrinder Nann
Yes	-	Ward 4	Councillor Tammy Hwang
Yes	-	Ward 5	Councillor Matt Francis
Yes	-	Ward 6	Councillor Tom Jackson
Absent	-	Ward 7	Councillor Esther Pauls
Yes	-	Ward 8	Councillor J. P. Danko
Yes	-	Ward 9	Councillor Brad Clark
Yes	-	Ward 10	Councillor Jeff Beattie
Yes	-	Ward 11	Councillor Mark Tadeson
Yes	-	Ward 12	Councillor Craig Cassar
Absent	-	Ward 13	Councillor Alex Wilson
Yes	-	Ward 14	Councillor Mike Spadafora
Yes	-	Ward 15	Councillor Ted McMeekin

**(j) PRIVATE & CONFIDENTIAL (Item 14)**

**(i) Closed Session Minutes – April 5, 2023 (Item 14.1)**

**(Beattie/Spadafora)**

That the General Issues Committee Closed Session Minutes of April 5, 2023, be approved and remain confidential.

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath	
Yes	-	Ward 1	Councillor Maureen Wilson
Yes	-	Ward 2	Councillor Cameron Kroetsch
Yes	-	Ward 3	Councillor Nrinder Nann
Yes	-	Ward 4	Councillor Tammy Hwang
Yes	-	Ward 5	Councillor Matt Francis
Yes	-	Ward 6	Councillor Tom Jackson
Absent	-	Ward 7	Councillor Esther Pauls
Yes	-	Ward 8	Councillor J. P. Danko
Yes	-	Ward 9	Councillor Brad Clark
Yes	-	Ward 10	Councillor Jeff Beattie
Yes	-	Ward 11	Councillor Mark Tadeson
Yes	-	Ward 12	Councillor Craig Cassar
Absent	-	Ward 13	Councillor Alex Wilson
Yes	-	Ward 14	Councillor Mike Spadafora
Yes	-	Ward 15	Councillor Ted McMeekin

**(Spadafora/Kroetsch)**

That Committee move into Closed Session to discuss Item 14.2, pursuant to Section 9.3, Sub-sections (a), (c), (e), and (k) of the City's Procedural By-law 21-

021, as amended, and Section 239(2), Sub-sections (a), (c), (e), and (k) of the Ontario Municipal Act, 2001, as amended, as the subject matter pertains to the security of the property of the City or a local board; a proposed or pending acquisition or disposition of land for City or a local board purposes; litigation or potential litigation, including matters before administrative tribunals, affecting the municipality or local board; and, a position, plan, procedure, criteria or instruction to be applied to any negotiations carried on or to be carried on by or on behalf of the municipality or local board.

**Result: MOTION, CARRIED by a vote of 14 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang
Yes	-	Ward 5 Councillor Matt Francis
Yes	-	Ward 6 Councillor Tom Jackson
Absent	-	Ward 7 Councillor Esther Pauls
Yes	-	Ward 8 Councillor J. P. Danko
Yes	-	Ward 9 Councillor Brad Clark
Yes	-	Ward 10 Councillor Jeff Beattie
Yes	-	Ward 11 Councillor Mark Tadeson
Yes	-	Ward 12 Councillor Craig Cassar
Absent	-	Ward 13 Councillor Alex Wilson
Yes	-	Ward 14 Councillor Mike Spadafora
Yes	-	Ward 15 Councillor Ted McMeekin

**(ii) Animal Services Facility Report (PED20074(a) / LS23021) (City Wide)  
(Added Item 14.2)**

For disposition of this matter, please refer to Item 7.

**(k) ADJOURNMENT (Item 15)**

**(Francis/McMeekin)**

That there being no further business, the General Issues Committee be adjourned at 5:40 p.m.

**Result: MOTION, CARRIED by a vote of 13 to 0, as follows:**

Yes	-	Mayor Andrea Horwath
Yes	-	Ward 1 Councillor Maureen Wilson
Yes	-	Ward 2 Councillor Cameron Kroetsch
Yes	-	Ward 3 Councillor Nrinder Nann
Yes	-	Ward 4 Councillor Tammy Hwang

**General Issues Committee  
Minutes 23-013**

**April 19, 2023  
Page 25 of 25**

Yes	-	Ward 5	Councillor Matt Francis
Yes	-	Ward 6	Councillor Tom Jackson
Absent	-	Ward 7	Councillor Esther Pauls
Yes	-	Ward 8	Councillor J. P. Danko
Yes	-	Ward 9	Councillor Brad Clark
Yes	-	Ward 10	Councillor Jeff Beattie
Absent	-	Ward 11	Councillor Mark Tadeson
Yes	-	Ward 12	Councillor Craig Cassar
Absent	-	Ward 13	Councillor Alex Wilson
Yes	-	Ward 14	Councillor Mike Spadafora
Yes	-	Ward 15	Councillor Ted McMeekin

Respectfully submitted,

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Deputy Mayor Brad Clark  
Chair, General Issues Committee

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Angela McRae  
Legislative Coordinator  
Office of the City Clerk



## **SPECIAL GENERAL ISSUES COMMITTEE MINUTES 23-014**

9:00 a.m.

Monday, April 24, 2023

Tim Hortons Field, Caretaker's Lounge, Main Floor  
64 Melrose Ave. N., Hamilton, Ontario

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**Present:** Mayor A. Horwath  
Deputy Mayor B. Clark (Chair)  
Councillors J. Beattie, C. Cassar, J.P. Danko, T. Hwang, T. Jackson,  
C. Kroetsch, T. McMeekin, N. Nann, M. Tadeson, A. Wilson, and  
M. Wilson

**Absent:** Councillors M. Francis, E. Pauls, and M. Spadafora – Personal

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### **THE FOLLOWING ITEMS WERE REFERRED TO COUNCIL FOR CONSIDERATION:**

#### **1. Indigenous Awareness Training (Item 5.1)**

**(Beattie/Hwang)**

- (a) That the Indigenous Awareness Training presentation be received; and,
- (b) That the Indigenous Awareness Training presentation be released publicly following approval by Council.

**CARRIED**

### **FOR INFORMATION:**

#### **(a) LAND ACKNOWLEDGEMENT AND WELCOME (Item 1)**

##### **(i) Welcome (Item 1.2)**

Travis Hill, Curator Indigenous Culture and Heritage, addressed the Committee to provide the Traditional Greeting and Welcome.

##### **(ii) Land Acknowledgement (Item 1.1)**

Jennifer DiDomenico, Senior Project Manager, Indigenous Relations addressed the Committee to provide the Land Acknowledgement.

**(b) APPROVAL OF AGENDA (Item 2)**

The Committee Clerk advised that there were no changes to the agenda.

**(Tadeson/Hwang)**

That the agenda for the April 24, 2023 Special General Issues Committee meeting, be approved, as presented.

**CARRIED**

**(c) DECLARATIONS OF INTEREST (Item 3)**

There were no declarations of interest.

**(d) STAFF PRESENTATIONS (Item 4)**

**(i) Indigenous Relations Team Introduction and Initiatives (Item 4.1)**

Jessica Chase, Director, Healthy and Safe Communities, introduced the following members of the Indigenous Relations Team and shared the Initiatives of the Team with the Committee:

Shelly Hill, Manager, Indigenous Relations  
 Travis Hill, Indigenous Curator, Culture and Heritage  
 Lucas Gambacort, Indigenous Community Outreach and Research  
 Coordinator, Indigenous Relations  
 Brandy Pasalic, Indigenous Subsidy Eligibility Worker, Indigenous  
 Relations  
 Beth Dockstator, Project Manager, Indigenous Initiatives  
 Jennifer DiDomenico, Senior Project Manager, Indigenous Relations

**(ii) Introduction of First Peoples Group and Presenters (Item 4.2)**

Shelly Hill, Manager, Indigenous Relations introduced the following members of the First Peoples Group who will be providing the Training for Committee:

Bob Watts  
 Paul Robitaille  
 Charlotte Qamaniq  
 Melissa Hammell

**(Beattie/Nann)**

That the following Staff Presentations, be received:

- (i) Indigenous Relations Team Introduction and Initiatives (Item 4.1)
- (ii) Introduction of First Peoples Group and Presenters (Item 4.2)

**CARRIED**



**(e) PRIVATE & CONFIDENTIAL (Item 5)**

**(i) Indigenous Awareness Training (Item 5.1)**

**(Hwang/Beattie)**

That the following individuals from the First Peoples Group be permitted to attend the Closed Session portion of the meeting, in order to provide the Indigenous Awareness Training:

Bob Watts  
Paul Robitaille  
Charlotte Qamaniq  
Melissa Hammell  
Rick Powless

**CARRIED**

**(Horwath/Cassar)**

That Committee move into Closed Session respecting Item 5.1, pursuant to Section 9.5 of the City's Procedural By-law 21-021, as amended, and Section 239(3.1) of the *Ontario Municipal Act, 2001*, as amended, as the meeting is being held for the purposes of educating or training members; and, at the meeting, no member discusses or otherwise deals with any matter in a way that materially advances the business or decision-making of Council or the Committee.

**CARRIED**

For disposition of this matter, refer to Item 1.

**(f) ADJOURNMENT (Item 15)**

**(A. Wilson/Horwath)**

That there being no further business, the General Issues Committee be adjourned at 4:09 p.m.

**CARRIED**

Respectfully submitted,

---

Deputy Mayor Brad Clark  
Chair, General Issues Committee

---

Angela McRae  
Legislative Coordinator  
Office of the City Clerk

From: Annette Paiement

Sent: February 1, 2023 3:03 PM

To: Anisef, Jen [Jen.Anisef@hamilton.ca](mailto:Jen.Anisef@hamilton.ca)

Subject: Re: AAC meeting and Arts Awards monitor(s)

Hi Jen and team,

I am sorry I haven't been in touch. I cannot attend the March 28th AAC Meeting.

I also wanted to re-confirm that I will not be participating as part of the AAC in 2023. I have had a great three years and have learned many things about working with the City and the arts community.

Thank you for your support and for sharing your knowledge so openly.

Sincerely,

Annette Paiement

From: Janna Malseed

Sent: March 31, 2023 1:20 PM

To: Wolker, Ingrid <Ingrid.Wolker@hamilton.ca>

Cc: Anisef, Jen <Jen.Anisef@hamilton.ca>

Subject: Resignation from the AAC

Dear Ingrid,

The email is to advise that I will be resigning from the current Arts Advisory Commission. I have a tremendous amount of respect for the City of Hamilton and the staff who worked with the AAC to promote the arts. Thank you for all your support.

Cheers

Janna Malseed

MONIKA CIOLEK

April 6, 2023

City of Hamilton  
*Arts Advisory Commission*  
Hamilton, ON

Dear City of Hamilton Clerks' Office:

My name is Monika Ciolek, and I have written this letter to you as a Formal Resignation from the City of Hamilton Arts Advisory Commission.

I believe, I have successfully served on the commission for the last two consecutive terms, and it is with a bittersweet sentiment that I feel it is time for me to move forward.

In the eight years that I got to serve our community, I feel, I was given an opportunity only a few can dream of. I also got to meet and collaborate with some of the best professionals in the business of art and politics. It has been an experience I will never forget and will forever be grateful for as it has greatly contributed to my professional and personal growth and success. It has truly been one of the most rewarding experiences of my entire career.

Thank you for this opportunity and I hope that our relationship continues to evolve as we move forward from here.

Sincerely,

Monika Ciolek

Submitted on Thu, 03/23/2023 - 18:27

Submitted by: Anonymous

Submitted values are:

**Committee Requested**

Committee  
General Issues Committee

Will you be delegating in-person or virtually?  
In-person

Will you be delegating via a pre-recorded video?  
No

**Requestor Information**

Requestor Information  
David Braden

Preferred Pronoun  
he/him

Reason(s) for delegation request  
I intend to describe an approach that the City could adopt to respond to and encourage climate sensitive, demonstration projects. My business, no longer operational, pioneered low energy development for 35 years before it was topical. My suggestions will be useful, practical and affordable.

Will you be requesting funds from the City?  
No

Will you be submitting a formal presentation?  
No

Submitted on Wed, 03/22/2023 - 06:19

Submitted by: Anonymous

Submitted values are:

**Committee Requested**

Committee  
General Issues Committee

Will you be delegating in-person or virtually?  
In-person

Will you be delegating via a pre-recorded video?  
No

**Requestor Information**

Requestor Information  
Charlie Mattina  
Hamilton Community Land Trust

Preferred Pronoun  
he/him

Reason(s) for delegation request  
Introduction to the Hamilton Community Land Trust, a grass roots all volunteer Non-for-profit community organization. We are one over 40 Community Land Trusts in Canada and growing.

What is a Community Land Trust?

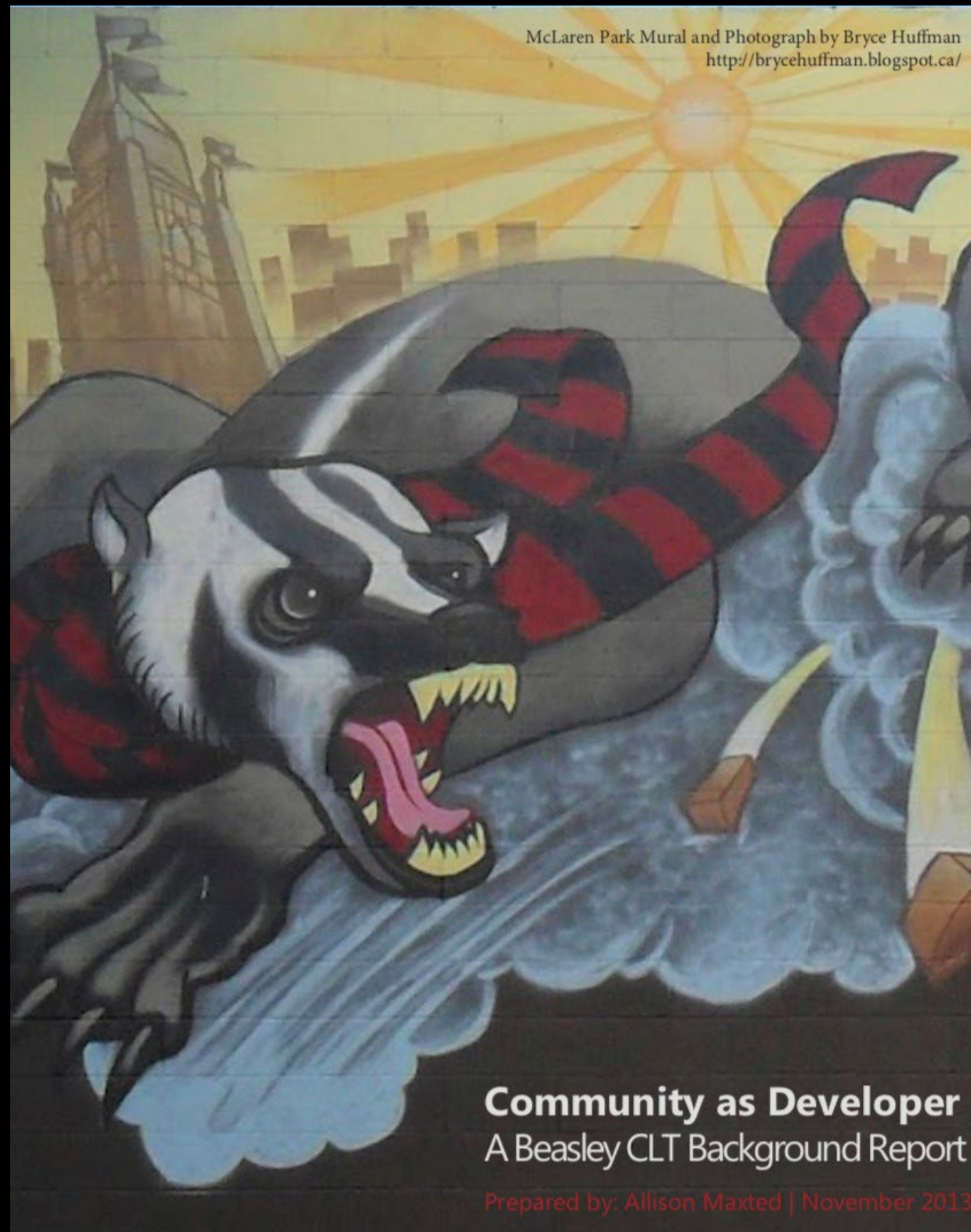
A Community Land Trust (CLT) is a non-profit corporation that obtains and holds land and housing for the benefit of the community in which it exists. With the shared value of housing as a right, the goal is to remove land and housing from the real estate market through either purchase or donation, and perpetually hold it in a trust to preserve the affordability of that land and housing asset.

Will you be requesting funds from the City?  
No

Will you be submitting a formal presentation?  
Yes

# Community Land Trusts: Overview and Opportunities in Hamilton





## “Growing Roots, Strengthening Neighbourhoods”

(Hamilton Community Foundation Initiative- 2002)

Hamilton Community Land Trust (HCLT) is a grass-roots volunteer-based organization, which works with residents and community partners to identify and facilitate real estate projects that are sustainable, affordable, and meet community needs. Our focus is on projects that would make better use of underused land, and preserve or create new community assets, such as housing, parks, community space, work space, and community gardens. We acquire and steward land on a permanent, non-profit basis to maintain affordability and community control of our projects.



# Our Vision

A Hamilton where communities are active in the inclusive and sustainable ownership of land for community benefit, forever.

# Our Mission

To acquire and steward land, facilitating its use by and for Hamilton's communities.

The HCLT is part of a growing movement of community land trusts across Canada and is a member of The Canadian Network Community Land Trust.

There are currently at least 13 CLTs in Ontario — including in Hamilton, Owen Sound, Ottawa, Toronto — and more than 35 across Canada.

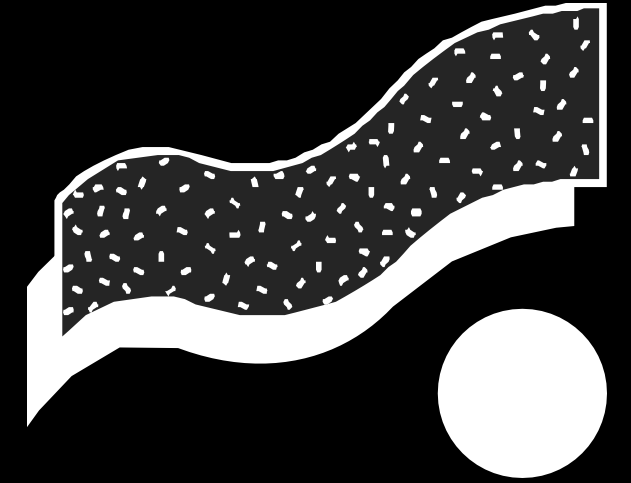
# **Preservation of Affordability**

---

## **Long Term approach**

**Community land trusts (CLT) preserves the affordability of the land by permanently removing it from the speculative market and controlling the uses that occur on the land for Social and Community Benefit.**

# Guiding Principles



Community ownership  
of land & resident control  
of housing

Community  
stewardship: long- term  
tenure approach to land  
reform, sustainable  
housing & community  
building

Permanent  
affordability

# How does a CLT work?

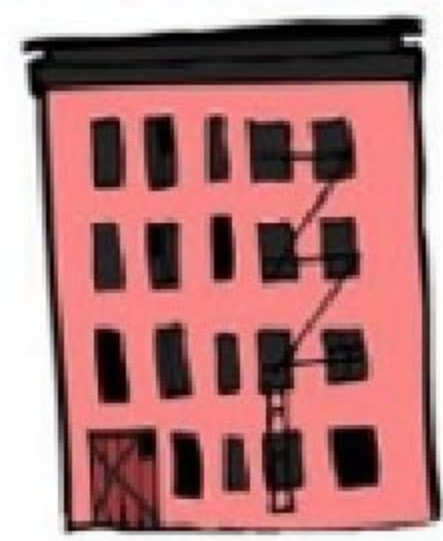
1. A community is struggling with things like:

Rising housing costs  
and commercial rents

Overcrowding  
and Displacement

Lack of  
community  
and open  
spaces

Vacant buildings



2. Community Members work together to form a Community Land Trust (CLT), a non-profit, democratically governed organization that gets and keeps land in trust on behalf of the community.



3. The CLT facilitates community-driven planning to address the community's immediate and long-term needs. It works with resident groups, non-profit housing developers and other organizations to:

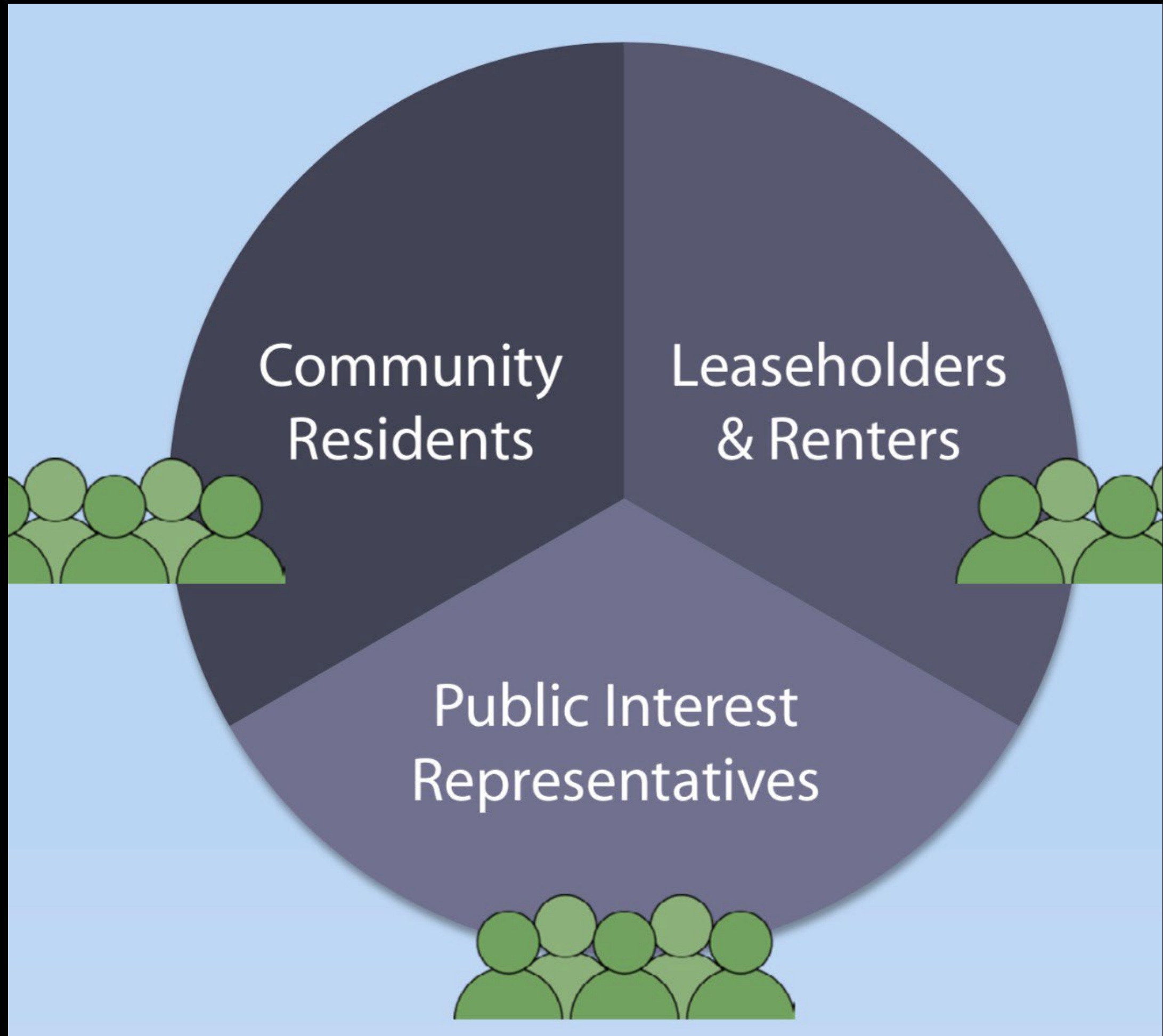
Preserve and enhance low-income housing and other places of value to the community

Develop unused spaces to meet community needs



Source: NYC community land initiative

**Commitment To  
Collective Ownership  
and Democratic  
Governance**



# Displacement of Limited-Income Households From the Their Neighborhoods

## An Unfortunate Outcome

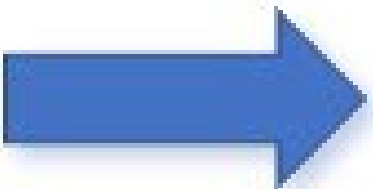
De-Stabilized Neighbourhoods



# 278 Wilson Street: An Affordable Home Ownership Model

On Tuesday, January 17th, 2017, Hamilton City Council’s planning committee approved a motion to transfer the first ever property to the city’s first CLT. By the fall of 2017 the HCLT officially acquired possession of 278 Wilson street.

Just a year from acquiring possession, the HCLT had partnered with Habitat for Humanity, and the site has been transformed from an empty lot in the downtown core into a beautiful new home!



# Dual Ownership and Shared Equity

SINGLE-FAMILY HOME



LIMITED EQUITY HOUSING COOPERATIVE



CONDOMINIUM



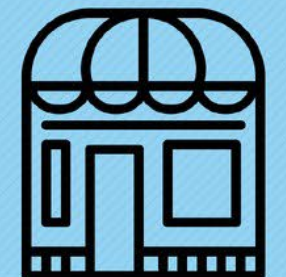
MULTIFAMILY RENTAL



SMALL BUSINESS



NONPROFIT



99 YEAR GROUND LEASE

COMMUNITY OWNERSHIP OF LAND



# Shared Equity

**The separation of land ownership (owned by the CLT) from ownership of the housing or buildings on the land itself, is the key feature that allows CLTs to maintain affordability .**

**Typically a buyer who qualifies for a mortgage can purchase a house that sits on land owned by the community land trust, but not the land on which the houses sit. The purchase price is more affordable because the homeowner is only buying the house, not the land.**

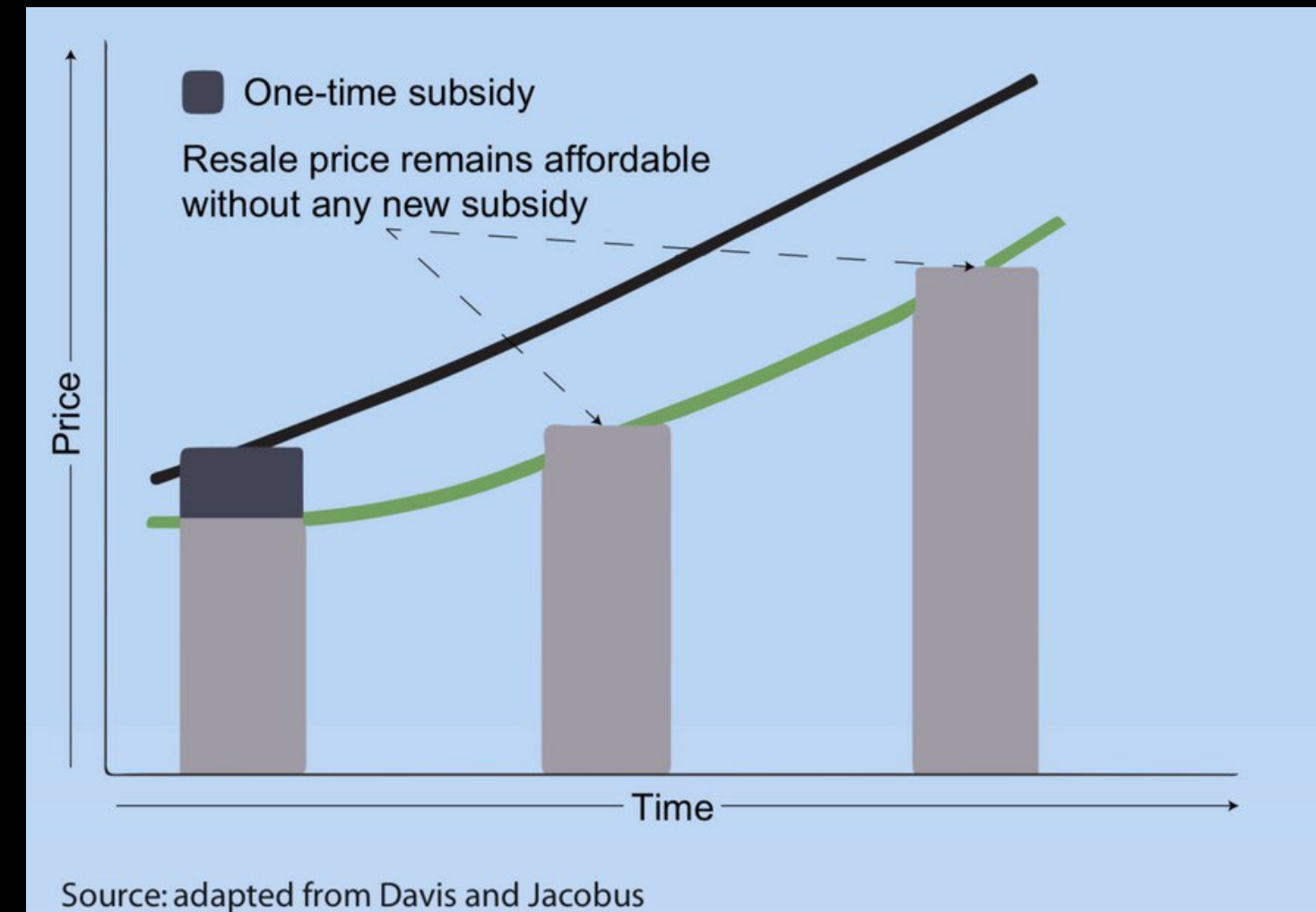
**Residents enter into low-cost, long-term property leases with the CLT, known as ground leases, typically for a 99-year period which is renewable. During the term of the ground lease, they enjoy full and exclusive use of the property, as well as common privacy rights associated with homeownership.**

# Pay it Forward

**In return for being able to buy a home at a discounted price, the homeowners agree to pay it forward and sell to another income-qualified family at a price they can afford. The shared equity program manages the homebuying process, ensuring that each homebuyer builds some wealth from a predetermined, limited amount of the sales proceeds.**

# Subsidies That Go Further

In a shared equity model, a one-time public or private investment or donation in a home makes lasting affordability a reality. This long term view allows CLTs to stabilize communities by preserving and protecting housing for a long-term residents; helping to build stronger, safer and higher quality diverse neighbourhoods. In the long term this can contribute to greater educational attainment, employment opportunities and better health outcomes.



# Beyond 278 Wilson Street

The HCLT's long view on affordability requires scaling up and further land acquisitions for it to be truly impactful.

One of the strengths of CLTs is the aggregation of ownership rights to defend against property speculation and out of control market increases. This strength is enhanced by the growth of its land holdings in an area.



# CMHC -CLT Land Acquisition Exploration Main Insights

**Insight:** CLTs need to know what guaranteed funding they have access to in order to be competitive on the open market where speed is essential

**Insight:** Requesting long conditional periods to satisfy risk-averse due diligence reduces overall CLTs' competitiveness as buyers

**Insight:** A CLT is often viewed as a less sophisticated buyer, increasing the perception of risk for the vendor.

## OPPORTUNITIES:

**ENSURE CLTS HAVE A CONFIRMED SOURCE OF FUNDS**

**LEVEL THE PLAYING FIELD IN TERMS OF CONDITIONAL PERIODS**

**INCREASE ORGANIZATIONAL CAPACITY AND READINESS OF NEWER CLTS**

# Examples of Canadian CLT's and Municipal Relationships

**"Vancouver signs deal to turn former site of Hogan's Alley into community land trust"**

**"TCHC transfers 81 single-family homes to The Neighborhood Land Trust (NLT) to preserve affordable housing in Toronto"**

**"TORONTO, April 4, 2022 - The City of Toronto and Toronto Community Housing Corporation (TCHC) has transferred 81 single-family homes and small buildings in Toronto's west end to The Neighbourhood Land Trust (NLT). The NLT has partnered with YWCA Toronto to operate this unique social housing portfolio and ensure that it forever remains affordable housing."**

**Chatham -Kent: " Council supports land trust proposal to boost housing" - Opportunity Village Land Trust**

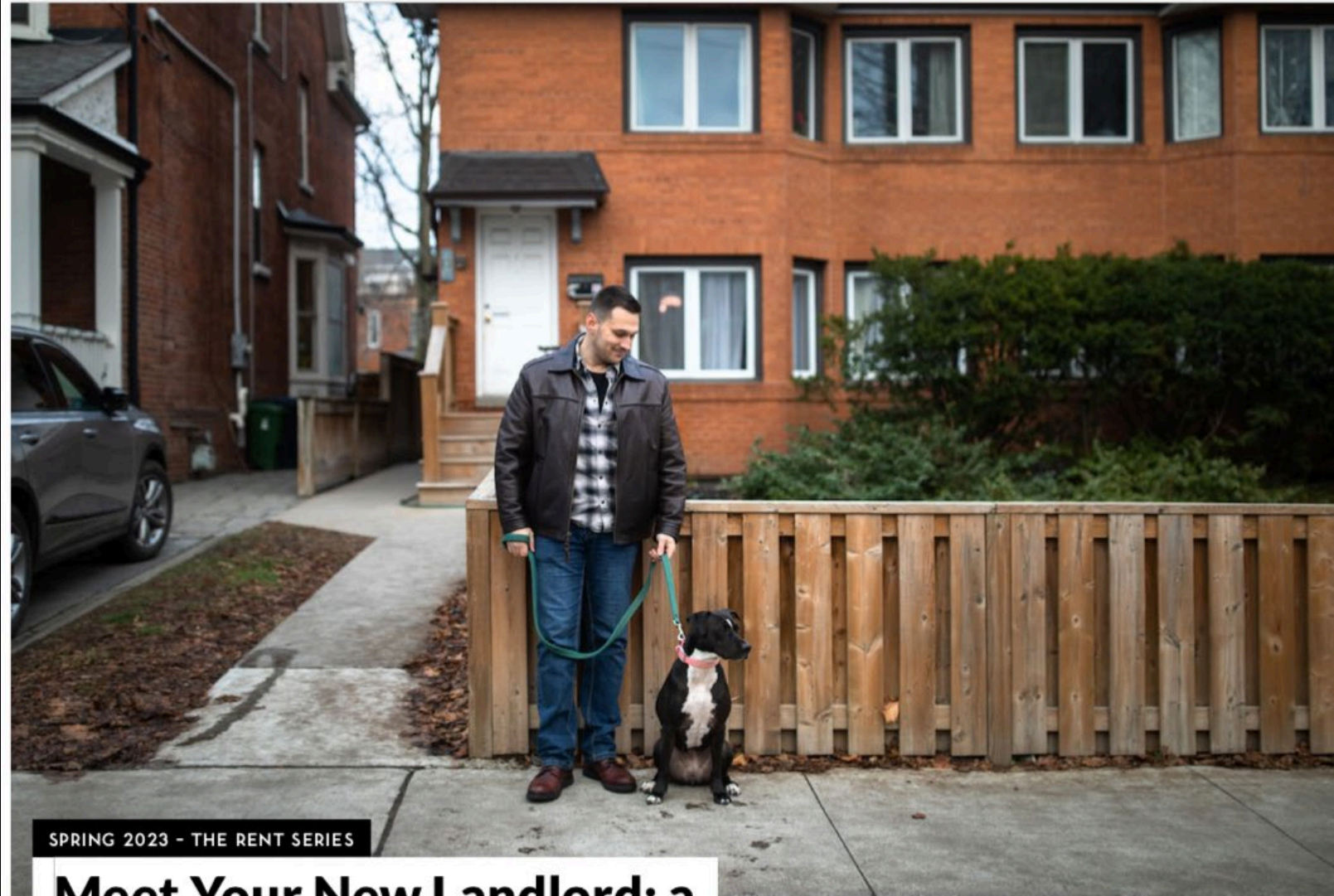
**"City of Toronto launches call for new Multi-Unit Residential Acquisition program to protect affordable housing"**

**"City council votes to give \$3M to land trust to keep Kensington Market building as affordable housing"**

**"City of Toronto delivers final phase of Tenants First plan by transferring 760 homes to community land trusts" - Circle community Land trust**

# Community Land Trusts Summary

- Community ownership (through democratic governance)
- Community stewardship
- Community empowerment
- Preservation of land for perpetual affordability
- Subsidy retention Protection
- from speculation
- Promotes community engagement
- Promoting stable and healthy neighbourhoods



SPRING 2023 - THE RENT SERIES

## Meet Your New Landlord: a Local Non-Profit

APRIL 10, 2023

FEATURE by JASON MCBRIDE

The Neighbourhood Land Trust has been snapping up buildings across Toronto, taking them off the market and into the community. Over 200 units later, they say they're ready to do much more.

SHARE ON [f](#) [TWITTER](#)

In 2022, Anthony Foster's apartment building at Bathurst and Bloor was purchased by the Neighbourhood Land Trust. Photos by Nick Iwanyshyn.

**A**nthony Foster has lived in the same two-bedroom apartment in a Toronto Community Housing building for 14 years. The building is a six-unit, market-rent triplex at Bloor and Bathurst. For a while, the 34-year-old had a roommate, but currently, it's just him and his dog, a rescue named Abby. When Foster found the place, back in 2008, he was a second-year student at the University of Toronto. He stumbled across the apartment through a friend of a friend, but was so excited to find a convenient and



Submitted on Mon, 02/06/2023 - 09:59

Submitted by: Anonymous

Submitted values are:

## **Committee Requested**

Committee

GENERAL ISSUES COMMITTEE

Will you be delegating in-person or virtually?

Virtually

Will you be delegating via a pre-recorded video?

No

## **Requestor Information**

Requestor Information

Daniel Freiheit

Preferred Pronoun

he/him

Reason(s) for delegation request

Vaccination requirement and how that's creating resource issues in the system

Will you be requesting funds from the City?


No

Will you be submitting a formal presentation?

No



**CITY OF HAMILTON**  
**CITY MANAGER'S OFFICE**  
 Digital, Innovation & Strategic Partnerships

<b>TO:</b>	Mayor and Members General Issues Committee
<b>COMMITTEE DATE:</b>	May 3, 2023
<b>SUBJECT/REPORT NO:</b>	Our City Survey 2022 Results (CM23011) (City Wide)
<b>WARD(S) AFFECTED:</b>	City Wide
<b>PREPARED BY:</b>	Aimee Tan (905) 546-2424 Ext. 5332 Lisa Zinkewich (905) 546-2424 Ext. 5312
<b>SUBMITTED BY:</b>	Cyrus Tehrani Chief Digital Officer City Manager's Office
<b>SIGNATURE:</b>	

## RECOMMENDATIONS

- a) That Report CM23011, respecting the Our City Survey 2022 results, be received,
- b) That staff are directed to report back with recommendations on the next steps for the evolution of the Our City Survey, including best practices, recommendations on methodology, resourcing and data integration opportunities, prior to initiation of the 2024 budget process.

## EXECUTIVE SUMMARY

The Our City Survey helps the City to understand the resident's perceptions and perspectives on various issues and topics related to the City. It covers a wide range of topics including:

- Perception of the quality of life;
- Views toward the City's vision and priorities;
- Views toward tax direction and service level;
- Assessment of quality and usage of City services;
- Assessment of the quality of interaction with the City;
- Preference for service delivery and communication channels; and
- Views toward community engagement.

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 2 of 14**

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The 2022 City of Hamilton Our City Survey was conducted between November 1 and December 18, 2022 via two distinct survey methodologies; a random phone survey and an open online survey. The phone survey collected 1,052 completed surveys. The margin of error +/-3.0%, 19 out of 20 times. The open online survey, which allowed a broader audience to participate, received 2,500 responses. Under this open online format, a margin of error can not be applied.

Amid the challenges facing the community since the last Our City Survey undertaken in 2019, the survey, particularly via the random phone methodology, continues to find positive assessments in most areas. The online survey results are consistent with the expectation that self-selected methodologies report lower satisfaction rates than a random sample survey. Although the online survey supplements the phone survey, the results between the online survey and phone survey can not be directly compared due to the differences in survey methodology, sample size, and respondent profile. Generally though, the distribution of the results between phone and online, followed similar patterns.

Overall, the large majority of phone respondents (78%) are satisfied or very satisfied with their life in Hamilton, and close to half of the phone respondents (46%) are satisfied or very satisfied with what the City of Hamilton is doing in providing and supporting services for the community. Only a little more than half of online respondents (58%) are satisfied or very satisfied with their life in Hamilton, with slightly less than one quarter of online respondents (23%) satisfied or very satisfied with what the City of Hamilton is doing in providing and supporting services for the community.

The insights gained from the survey can help to inform recommendations on strategic planning, and continuous improvement activities across the City.

**FINANCIAL – STAFFING – LEGAL IMPLICATIONS**

Financial: None.

Staffing: None.

Legal: None.

**HISTORICAL BACKGROUND**

The Our City Survey was first launched in 2018 (as the Our Citizen Survey), funded through the 2017 Council approved Capital Project #3381757506. The 2018 survey results were presented as part of Report [CM18016](#) and was completed at the City-wide level only (no ward level data) with a targeted sample size of 550 completed phone surveys, resulting in a margin of error accurate to within +/-4.2%, 19 times out of 20.

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## **SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 3 of 14**

1,307 online surveys received a response for at least one survey question. The survey was active for 3 weeks.

As part of the 2019 budget process, the Our Citizen Survey Business Case (BC-08) was approved at \$130,000 on a biennial basis (\$65,000 annually). These operating funds supported the undertaking of the 2019 Our City Survey to a +/-1.3% margin of error at the City level, 19 times out of 20, with ward level results at a margin of error of +/-5%, 19 times out of 20, which was new in 2019. The cost difference to achieve the Council approved ward level margin of error was \$130,000 over the cost of the 2018 survey, with the survey active for a total of 18 weeks. The length of the survey was due to the high number of completed surveys required to meet the ward level margin of error, which was challenged in part due to changes in social behaviours in answering phones. The online survey collected 3,374 surveys, where a response was provided for at least one survey question, and the phone survey had 5,771 completed surveys. Prior to the undertaking of the 2019 Survey, the name was changed from Our Citizen Survey to the Our City Survey to be more inclusive. Due to Covid-19 pandemic, the results of the 2019 Our City Survey were delayed till November 2020 and presented as part of Report [CM20009](#).

The costs associated with internal staff resourcing of both the 2018 and 2019 survey, including the planning, analysis and reporting, were covered from surplus operating budgets from the City Manager's Office and Healthy and Safe Communities Departments. To accommodate future iterations of the survey within the existing Our City Survey operating budget, including in-house resource requirements to support the planning, analysis and reporting (although there is no permanent full-time equivalent (FTE) attached to the Our City Survey operating budget), while maintaining an acceptable margin of error at both the City and ward level, the following changes to the Our City Survey were put forward and approved by Council as part of Report [CM20009](#):

- Reduction in the phone survey sample size from 5,775 (margin of error of +/-5%, 19 times out of 20 at the ward level) to 1,500 surveys (City-level margin of error accurate to +/-2.5%, and ward level results accurate to +/-10%, 19 times out of 20);
- Frequency of conducting the Our City Survey moved to a triennial (every three years) cycle as opposed to a biennial (every two years) cycle.

As part of the 2022 Our City Survey, 2,500 online surveys were collected, where a response was provided for at least one survey question and 1,052 phone surveys were completed, with a margin of error +/-3.0%, 19 out of 20 times. Although the undertaking of the 2022 Our City Survey is considered statistically significant, the Council approved margin of error was not met for either the City or ward level, although the time the survey was active was extended by 10 days (total 6 weeks). Due to the inability to meet the Council approved margin of error at the ward level, and in keeping in line with the objective of the Our City Survey, the 2022 Our City Survey analysis and reporting contained within this report highlights city-wide results only; no ward level results.

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 4 of 14**

The full 2022 Our City Survey (phone results) is attached as Appendix A to Report CM23011 and the full 2022 Our City Survey (online results) is attached as Appendix B. Table 1 summarizes the changes from year to year in Council approved direction related to the undertaking of the survey.

**Table 1: Survey Changes from Year to Year**

Year	2018	2019	2022
Phone Surveys Completed (target, if not met)	550	5,771(5,775)	1052 (1,500)
Phone Margin of Error 19 times out of 20 - City (target, if not met)	+/- 4.2%	+/- 1.3%	+/- 3.0% (+/- 2.5%)
Phone Margin of Error 19 times out of 20 – Ward (target, if not met)	NA	+/- 5%	(+/- 10%)
Phone Margin of Error 19 times out of 20 – Ward (target, if not met)	NA	+/- 5%	+/- 10% to +/- 17% (+/- 10%)
Online Surveys Completed	1,307	3,374	2,500
Total Survey Active Time	3 weeks	18 weeks	6 weeks
Survey Cost (undertaking - third party vendor)	\$12,500	\$143,000	\$32,665
Internal Resourcing (planning, analysis and reporting)	Funded through surplus operating budgets (City Manager’s Office and Healthy and Safe Communities Departments)	Funded through surplus operating budgets (City Manager’s Office and Healthy and Safe Communities Departments)	Funded from approved Our City Survey operating budget (no FTE)

Challenges in meeting the Council approved margin of error for the phone survey are a concern going forward, leading staff to review potential alternatives to support future iterations of the Our City Survey. Staff will report back to Council prior to the initiation of the 2024 budget process with proposed recommendations, including best practices, recommendations on methodology, resourcing and data integration opportunities.

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 5 of 14**

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**POLICY IMPLICATIONS AND LEGISLATED REQUIREMENTS**

None.

**RELEVANT CONSULTATION**

Through the course of planning, analyzing and reporting on the results of the 2022 Our City Survey, internal consultation was undertaken with Procurement and Communications staff as required to ensure alignment with procurement policies and to support awareness and participation in the Our City Survey when it was active. In addition, the Senior Leadership Team and subject matter experts were consulted in the development of the survey for applicable service areas.

A best practice review and conversations with 11 municipalities was also undertaken, particularly around trends seen in the results of these types of surveys and to discuss challenges experienced with undertaking phone surveys in today's social environment.

**ANALYSIS AND RATIONALE FOR RECOMMENDATIONS****SURVEY AND METHODOLOGY**

The 2022 City of Hamilton Our City Survey was conducted between November 1 and December 18, 2022, through phone, online and paper formats. To qualify to participate in the survey, the participant had to be an adult age 18 years or over, residing in Hamilton.

The Our City Survey 2022 is an updated version of the Our City Survey 2019 with enhancements to question-wording to clarify the overall survey intent while ensuring questions remain comparable to previous years. In particular, the service-specific questions were revised to focus on those who have used the service in the past year. The survey also included the addition of general information questions related to COVID-19 impact, demographic details, digital access and communication preferences.

The phone survey was administered by a third-party vendor, using a random sample method, where Hamilton-based residential and cellular phone lines were randomly called using Computer Assisted Phone Interviews (CATI), and phone respondents were invited to participate in the survey. The survey collected 1,052 completed phone surveys. Approximately 60% of completed phone surveys were landline, and 40% were cellular. The phone results are weighted by ward and age according to the latest 2016 census data to reflect the population of the City of Hamilton. The phone survey results are accurate to +/-3.0%, 19 out of 20 times at the City level.

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 6 of 14**

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Neither the Council approved margin of error at the ward level nor City wide level was met due to the challenges experienced with the methodology. Challenges in meeting the Council approved margin of error were experienced in 2019 and this trend has been confirmed as a challenge experienced by other municipalities due to changes in the social behaviour of not answering calls from an unknown number.

An online version of the survey was made available on the Engage Hamilton website to supplement the phone survey and allow more residents to participate. The online survey collected 2,500 surveys where a response was provided for at least one (1) survey question. While the open online survey greatly expanded the opportunity for participation, this methodology may be subject to self-selection bias and a margin of error can not be applied. In addition, the online results cannot be directly compared to the phone results due to the differences in methodology, sample size & respondent profile.

Paper surveys were also made available at Hamilton libraries, recreation centres and municipal service centres. No completed paper surveys were submitted.

The phone, online and paper version of the survey was available in English and French, and teletypewriter service was available for phone surveys.

Digital/online ads, city newsletter ads, local newspaper ads, digital banners (City Hall, Gage Park, Farmers Market), social media and promotional posters were used to raise awareness about the survey and encourage participation from residents.

## PROJECT MANAGEMENT

The survey development, data analysis and reporting for the 2022 Our City Survey has been completed in-house to ensure the Our City Survey could be delivered within the available operating budget (although there is no permanent full-time equivalent (FTE) attached to the Our City Survey operating budget).

## SURVEY RESULTS

It is important to note that significant, ongoing events at the time the survey was conducted, such as the ongoing COVID-19 pandemic and reputational issues present in the media, may have influenced some of the survey responses. While the phone survey results find positive assessments in most areas, the 2022 results are lower compared to previous years. This trend is not however unique to the City of Hamilton, with a trend of lower satisfaction in post-COVID surveys being observed by other municipalities/cities in Canada, although the degree of severity varied. Municipalities that observed a similar trend to Hamilton include the City of Vaughan, City of Winnipeg, Municipality of Halifax and City of Thunder Bay.

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## **SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 7 of 14**

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The results highlighted as part of Report CM23011, primarily come from the statistically representative random phone survey in accordance with Council approved [CM20009](#). The online survey results are consistent with the expectation that the self-selected method reports lower satisfaction rates than the random phone sample survey, but generally, the distribution of the results followed similar patterns. Trend analysis is for phone only, given previous online survey results were not analysed in detail as the focus of previous analysis was on the statistically significant results achieved through the random phone survey.

Complete survey findings for the phone and online survey are attached as Appendix A and Appendix B to Report CM23011.

### PERCEPTION OF THE QUALITY OF LIFE

Phone - Most respondents (78%) are satisfied with their life in Hamilton and agree that Hamilton is a great place to live (75%), work (70%), play (69%), and learn (83%). There is a growing trend that the perception of quality of life has worsened in the past two years. This is a decrease from previous years' results where satisfaction with life was at 87% in 2019 and 92% in 2018.

One of the many variables that impacted the quality of life is the COVID-19 pandemic, where many respondents described that it has worsened their mental health (38%), financial situation (35%) and physical health (27%).

Online – Most respondents (59%) are satisfied with their life in Hamilton and agree that Hamilton is a great place to live (59%), play (54%), and learn (62%). Less than half (44%) of respondents agree or strongly agree that Hamilton is a great place to work. The majority of respondents (59%) viewed the quality of life in Hamilton as worsened in the past two years.

One of the many variables that impacted the quality of life is the COVID-19 pandemic, where many respondents described that it has worsened their mental health (58%), physical health (44%) and financial situation (43%).

### VIEWS TOWARD THE CITY'S VISION AND PRIORITIES

Phone - Less than half (42%) of the respondents agree that Hamilton is on the right track toward its vision. There is a downward trend in the agreement that Hamilton is on the right track from 2019 (51%), and 2018 (61%).

The top priority (33%) identified to reach the City's vision is to address social issues. Social issues mainly comprised of comments related to "housing and rental affordability", "homeless and poverty", "daycare and children services", "youth services" and "senior services".

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 8 of 14**

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The next top-mentioned common themes are related to “parks, activities & recreation” (8%), “invest in/clean up the City” (7%), “City’s work principles and values”(6%) and “safety and policing”(6%).

Online – Less than a quarter (22%) of respondents agree that Hamilton is on the right track towards its vision of being “the best place to raise a child and age successfully”.

One fifth (19%) of respondents identified addressing social issues as the top priority to reach the city’s vision.

The next top mentioned common themes are related to “City work principles and values” (11%), “Infrastructure, Transit and Roads” (10%), “Safety and Policing” (8%) and “Parks, Activities and Recreation” (8%).

**VIEWS TOWARD TAX DIRECTION AND SERVICE LEVEL**

Phone - The majority (70%) of respondents indicated that the City should maintain taxes and keep the current service levels. This is consistent with the results of both the 2018 (72%) and 2019 (72%) surveys.

Online - Most respondents (53%) prefer to maintain tax and keep the current service level.

**ASSESSMENT OF QUALITY AND USAGE OF CITY SERVICES****Phone:**

Nearly half (46%) of the respondents are satisfied or very satisfied with what the City of Hamilton is doing in providing and supporting services for the community. This is significantly higher than those who are dissatisfied or very dissatisfied (29%).

Although the result of this question is lower than previous years’ results, with satisfaction at 62% in 2019 and 66% in 2018, the change was expected given the modified question wording, which is to get a high-level look at how residents feel about services being provided across the community rather than the overall satisfaction of services, which is difficult to gauge from this type of survey.

29 service-specific questions were included in the survey, including Police and Libraries. 23 out of the 29 service areas are rated as good, very good or excellent by most respondents. While the service-specific questions were revised in 2022 and focused on those who have used the service in the past year, the survey methodology cannot verify whether the respondent used the service.

The ratings should not be compared between service areas.

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 9 of 14**

The services most rated excellent, very good or good by respondents are:

- Fire Department (97%)
- Libraries and Bookmobiles (92%)
- Paramedic Services (88%)
- Cemeteries (87%)
- Parks and Open Space (84%)

The services most rated poor by respondents are:

- Community Housing (49%)
- Roads and Sidewalks (39%)
- Services for Seniors including Long Term Care (30%)
- Traffic Flow and Roadway Safety (30%)
- Social Services (28%)
- Wastewater Management (28%)

The rating for most service areas did not change significantly compared to the 2019 results. The services that had the greatest change are:

	2022	2019	Change
Hamilton Street Railway (HSR) Buses	75%	66%	+ 9%
Snow Plowing of City-owned Facilities	78%	70%	+ 8%
Social Services	45%	52%	- 7%
Legislative Services and Information Management	61%	67%	- 6%

**Online:**

Nearly a quarter of the respondents (23%) reported that they are satisfied or very satisfied with what the City of Hamilton is doing in providing and supporting services for the community.

29 service-specific questions were included in the survey, including Police and Libraries. 20 out of the 29 service areas are rated as good, very good or excellent by most respondents. While the service-specific questions were revised in 2022 and focused on those who have used the service in the past year, the survey methodology cannot verify whether the respondent used the service.

The ratings should not be compared between service areas.

The services most often rated as good, very good or excellent are:

- Libraries and Bookmobiles (89%)
- Fire Department (87%)
- Drinking Water (80%)
- Paramedic Services (77%)

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 10 of 14**

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- Parks and Open Space (74%)

The services most often rated as poor are:

- Community Housing (69%)
- Social Services (54%)
- Roads and Sidewalks (47%)
- Traffic Flow and Roadway Safety (40%)
- Building Permits (40%)

There may be gaps between the rating by residents of the City's services, service standards and the actual performance. The ratings are based only on those respondents that provided specific feedback to the questions and not those that indicated they have not used this service or do not know. These ratings along with other city data help to identify communication and knowledge gaps between the City's service performances and the perceptions of the community. In some cases, though every effort was made to clarify the specific service area related to the city, some respondents may associate the questions with services provided by other levels of government or community providers. The 2022 Our City Survey questions have been attached as Appendix C to report CM23011.

**ASSESSMENT OF THE CITY'S RESPONSE TO THE COVID-19 PANDEMIC**

A new question was added to the 2022 Our City Survey to address Council direction in response to (Report [CM22010\(a\)](#)) After Action Report COVID-19 Pandemic Response, which is to understand the public's perception of the city's response to the COVID-19 pandemic.

Phone - More than 3 out of 4 (77%) respondents rated the City's response as good, very good or excellent.

Online –More than 6 out of 10 (62%) respondents rated the City's response as good, very good or excellent.

**ASSESSMENT OF THE QUALITY OF THE INTERACTION WITH THE CITY**

Phone - 4 out of 10 respondents (42%) reported they had contacted the City of Hamilton in the past year, and for those who have contacted the City, the majority (74%) reported a positive experience. They felt that city staff were courteous (87%) and knowledgeable (75%), their question was answered (75%) and they received a timely response (74%).

This is consistent with the 2018 and 2019 survey results:

- Overall positive experience 72% (2019) and 83% (2018)\*
- Staff courteous 86% (2019) and 88% (2018)
- Staff knowledgeable 79% (2019) and 81% (2018)

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 11 of 14**

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- Question answered 74% (2019) and 80% (2018)\*
  - Timely response received 74% (2019) and 79% (2018)
- \* denotes a significant change between 2019 and 2018

Online –More than 6 out 10 (62%) reported they had contacted the City of Hamilton in the past year, and for those who have contacted the City, just over one-third (34%) reported a positive experience. Only 45% felt that city staff were courteous, 36% felt that staff were knowledgeable, 37% felt their question was answered and that they received a timely response (37%).

**PREFERENCE FOR SERVICE DELIVERY AND COMMUNICATION CHANNELS**

There have been notable shifts in the preferred way of interacting with the City. The majority of respondents preferred the City of Hamilton website, phone, and email services over in-person services for all types of interactions. This is mostly consistent with the online survey.

Resident service channel preferences were as follows:

- Residents most prefer to use the City of Hamilton website to get information, register for programs and services, apply for licenses and permits, book/rent city facilities or parks, and make payment for programs, services, permits, licenses, fines etc.
- Residents prefer to use phones to make complaints / provide feedback or compliment.
- Residents prefer to pay their property taxes through their bank

Topic areas where most respondents reported that they would like to receive information on from the City of Hamilton are:

- Updates on what the City of Hamilton is doing or planning to do and the impacts in the community
- City of Hamilton service changes and updates, resident safety tips and reminders
- Events run/sponsored by the City of Hamilton

Residents have a broad range of preferences for how they like to get information about the City of Hamilton's programs, initiatives, news and events. The top three methods are E-mail, the City of Hamilton website (hamilton.ca) and postal mail. The top three methods for the online survey included social media instead of postal mail.

This data help to inform the digital services and communication planning process.

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 12 of 14**

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**VIEWS TOWARD COMMUNITY ENGAGEMENT**

Phone - One-third of the respondents agree that the City of Hamilton engages residents (34%) and uses residents' input (32%) in the decision-making process for City programs, services, and initiatives. This is consistent with the 2019 responses of 32% and 33% respectively (the first year the question was asked). Fewer respondents strongly disagreed that the City engages residents (3%) and uses input from residents in decision-making (3%) compared to 2019 where responses were 11% and 11% respectively.

Online - Nearly a quarter (23%) of the respondents agree that the City of Hamilton engages residents and nearly one fifth agree residents' input (19%) is used in the decision-making process for City programs, services, and initiative.

**SHARING & USING SURVEY RESULTS**

Survey results have been shared with the Senior Leadership Team and Departmental Leadership teams, who were responsible for sharing the results within their respective service areas. The Our City Survey results, combined with more specific data, including service satisfaction data where available, can help to identify potential opportunities for improvement within city services. In addition, Our City Survey results on questions related to service delivery and communications preferences and digital services helps to identify opportunities within these service areas for alignment with the needs and preferences of our community.

The survey findings will be available through the City of Hamilton website [hamilton.ca/ourcitysurvey](https://hamilton.ca/ourcitysurvey) and open data files for 2018, 2019 and 2022 are all available via the City's open data portal at [open.hamilton.ca](https://open.hamilton.ca). The 2022 data are non-aggregated to provide a more open and transparent source of information that can be accessed and read by the public.

A communications plan has also been created for further public outreach to advise around the results of the 2022 Our City Survey. A one-page infographic, attached as Appendix D to Report CM23011, is a quick reference tool and can be utilized for a general snapshot of random phone results.

**SURVEY LEARNINGS**

Areas of improvement were identified for future surveys including ensuring future iterations align with the intent of the survey by minimizing non-relevant questions and linking the survey structure and questions to the City's priorities and initiatives to inform decision-making. This will achieve a greater understanding around how the City is doing in meeting the expectations of the community, while allowing for future integration of survey results with more focused surveys that support more specific questions

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 13 of 14**

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related to levels of services, budget and service satisfaction, resulting in a more complete picture around how the City is doing in regards to service delivery.

**ALTERNATIVES FOR CONSIDERATION**

Not Applicable.

Subject to Council approval of the recommendations to Report CM23011, more Information related to survey learnings will be included in a follow-up report, including best practices, recommendations on methodology, resourcing and data integration opportunities.

**ALIGNMENT TO THE 2016 - 2025 STRATEGIC PLAN****Community Engagement and Participation**

Hamilton has an open, transparent and accessible approach to City government that engages with and empowers all citizens to be involved in their community.

**Economic Prosperity and Growth**

Hamilton has a prosperous and diverse local economy where people have opportunities to grow and develop.

**Healthy and Safe Communities**

Hamilton is a safe and supportive City where people are active, healthy, and have a high quality of life.

**Clean and Green**

Hamilton is environmentally sustainable with a healthy balance of natural and urban spaces.

**Built Environment and Infrastructure**

Hamilton is supported by state-of-the-art infrastructure, transportation options, buildings and public spaces that create a dynamic City.

**Culture and Diversity**

Hamilton is a thriving, vibrant place for arts, culture, and heritage where diversity and inclusivity are embraced and celebrated.

**Our People and Performance**

Hamiltonians have a high level of trust and confidence in their City government.

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**SUBJECT: Our City Survey 2022 Results (CM23011) (City Wide) - Page 14 of 14**

**APPENDICES AND SCHEDULES ATTACHED**

Appendix "A" to Report CM23011: Our City Survey 2022 Phone Survey Report

Appendix "B" to Report CM23011: Our City Survey 2022 Online Survey Report

Appendix "C" to Report CM23011: Our City Survey 2022 Survey Questions

Appendix "D" to Report CM23011: Our City Survey 2022 Results Infographic

# CITY OF HAMILTON

## 2022 OUR CITY SURVEY DRAFT REPORT (PHONE RESULTS)

MAY 3<sup>RD</sup>, 2023



## Contents

- Background and Objectives .....4**
- Survey Methodology and Administration .....5**
- Report Notes - Phone .....6**
- Executive Summary – Phone.....6**
- Detailed Findings – Quality of Life.....9**
  - Satisfaction with Life in Hamilton.....10
  - Overall Quality of Life .....11
  - Changes in The Quality of Life in Hamilton .....12
  - Health.....13
  - COVID-19 Pandemic Impacts.....14
- Detailed Findings -Views Toward the City’s Vision and Priorities.....15**
  - Views Toward the City’s Vision .....16
  - Views toward the City’s priorities.....17
- Detailed Findings - Preference Towards Tax Direction and Service Level.....20**
  - Preference Towards Tax Direction and Service Level.....21
- Detailed Findings - Assessment of The Quality and Usage of The City’s Services .....22**
  - Satisfaction with the City Services for the Community .....23
  - Usage of the City’s Service .....24
  - Rating of the City’s Services .....26
  - Rating of The City’s Response to the COVID-19 Pandemic .....29
- Detailed Findings - Interactions with The City.....30**
  - Contacting the City .....31

**Customer Experience .....32**

**Detailed Findings – Preferred Service Delivery and Communication Channels .....33**

**Preference of Service Delivery Channels.....34**

**Topic Areas to Receive Information on From the City.....37**

**Preference of Communication Channels.....38**

**Access to Internet and Digital Devices .....39**

**Detailed Findings – Community Engagement.....40**

**Perception of Resident Engagement by the City.....41**

**Perception of the City uses Input from Residents in Decision-making .....42**

**City of Hamilton’s Online Engagement Platform .....43**

**Weighted Sample Characteristics.....44**

## Background and Objectives

In alignment with the 2018 – 2022 Term of the Council's priority to enhance trust and confidence in city government and improve its ability to undertake evidence-based engagement practices consistently, the Our City Survey 2022 was launched between November 1<sup>st</sup> 2022 and December 18 2022.

The objectives of the survey were to collect Hamilton residents' feedback and opinions on the following topics:

- Perception of the quality of life in Hamilton
- Views toward the City's vision and priorities
- Views toward tax direction and service level
- Assessment of the quality and usage of City services
- Assessment of the interaction with the City
- Preference for service delivery and communication channels
- Views toward community engagement

Since 2018, the City of Hamilton has conducted a resident satisfaction survey three times, in 2018, 2019 and 2022. The 2022 survey results are compared (where applicable) with previous years' findings to identify changes and trends.

The insights gained from the survey can help the City to make decisions on budget planning, strategic planning, and continuous improvement activities.

## Survey Methodology and Administration

The Our City Survey 2022 was developed based on the Our City Survey 2019 questions. The project team consulted with the City's Senior Leadership Team to ensure City programs and services were appropriately represented in the survey. Changes to question wording were made to clarify overall survey intent while ensuring questions remained comparable to previous years.

Hamilton-based residential and cellular phones were randomly called, by a third party, using Computer Assisted Telephone Interviews (CATI), and phone respondents were invited to participate in the survey. To qualify for the survey, the respondent had to be an adult age 18 years or over, residing in Hamilton. The survey collected 1,052 phone responses. Approximately 60% of completed phone surveys were landline, and 40% were cellular. The phone surveys were conducted between November 1, 2022, and December 18, 2022, and were available in English, French and Teletypewriter Service. To ensure the phone sample reflects the actual population of the City of Hamilton, the final data has been weighted by ward and age according to the 2016 census data. The margin of error for the total sample of 1,052 is +/-3.0%, 19 out of 20 times. The margin of error will be larger for subgroups of the survey population.

An online version of the survey was also available on Engage Hamilton, in both English and French, where all Hamilton residents could participate through personal devices or public computers, between November 1, 2022 and December 18, 2022. A web banner with a link to the survey page was placed on the most frequently visited websites on [www.hamilton.ca](http://www.hamilton.ca). The online survey collected 2,500 survey responses. No margin of error can be applied using this survey methodology. The sample from the online survey are self-selected, and the results are affected by self-selection bias. The online data is not representative of Hamilton's demographics.

Paper surveys were made available at Hamilton libraries, recreation centres and municipal service centres. No completed paper surveys were submitted.

The results of the phone survey and online survey cannot be directly compared due to the differences in survey methodology, sample size, and respondent profile.

Digital/online ads, city newsletter ads, local newspaper ads, digital banners (City Hall, Gage Park, Farmers Market), social media and promotional posters were used to raise awareness about the survey and encourage participation from residents.

## Report Notes - Phone

- The phone survey results are compared to previous years' results to identify trends and patterns, where applicable.
- Significant differences across age groups are noted where they exist. Age groups are defined as the following: younger adults (18 – 34), middle-aged adults (35 – 55), and older adults (55+).
- The phone survey results cannot be directly compared to online survey results due to the differences in survey methodology, sample size, and respondent profile.
- Respondents did not always respond to every question or may have responded: “have not used the service / don’t know”. The survey also included skip patterns, so respondents were not asked questions that did not apply to them. These records have been removed from the analysis. The universe of respondents (n) may vary for each question.
- For some questions, respondents could select multiple responses, in which case the totals could exceed 100%.
- Data shown may not add up to 100% due to rounding.
- Data for subgroups of the total respondent universe have larger margins of error.

## Executive Summary – Phone

It is important to note that significant, ongoing events at the time the survey was conducted - such as the ongoing COVID-19 pandemic and reputational issues present in the media may have influenced some of the survey responses. Amid the challenges facing the community over the past years, the survey continues to find positive assessments in most areas, although the overall results of the 2022 Our City Survey are lower compared to previous years.

Most respondents (78%) are satisfied with their life in Hamilton and reported (84%) good health.

Most respondents agree that Hamilton is a great place to live (75%), work (70%), play (69%), and learn (83%). There is a growing trend that the perception of quality of life has worsened in the past two years. One of the many variables that impacted the quality of life is the COVID-19 pandemic, where many respondents described that it has worsened their mental health (38%), financial situation (35%) and physical health (27%).

Most respondents did not view the City as on the right track toward its vision of being “the best place to raise a child and age successfully”.

42% of respondents agree that Hamilton is on the right track toward its vision. One third (33%) of respondents identified addressing social issues as the top priority to reach the city’s vision. The next top mentioned common themes are related to “parks, activities & recreation” (8%), “invest in/clean up the City” (7%), “City’s work principles and values”(6%) and “safety and policing”(6%).

Most respondents (70%) prefer to maintain tax and keep the current service level. This has not changed since the 2018 survey.

Close to half of the respondents (46%) reported that they are satisfied with what the City of Hamilton is doing in providing and supporting services for the community.

The 5 services most often rated as good, very good or excellent are: Fire Department, Libraries and Bookmobiles, Paramedic Services, Cemeteries, and Parks and Open Space.

The 5 services most often rated as poor are: Social Housing, Roads and Sidewalks, Services for Seniors Including Long-term Care, Traffic Flow and Roadway Safety, Social Services and Wastewater Management.

42% of respondents reported they have contacted the City of Hamilton in the past year, those who have contacted the City reported a positive customer service experience.

74% of respondents indicated that their experience with contacting the City of Hamilton was positive, and they felt that the city staff were courteous and knowledgeable, their question was answered and received a timely response.

There have been some shifts in the preferred way of interacting with the City. Most respondents preferred the City of Hamilton website, phone, and email services over in-person services for all types of interactions.

One third of the respondents agree that the City of Hamilton engages residents (34%) and uses residents' input (32%) in the decision-making process for City programs, services, and initiative. Fewer respondents disagreed that the City engages residents and uses input from residents in decision-making compared to 2019.

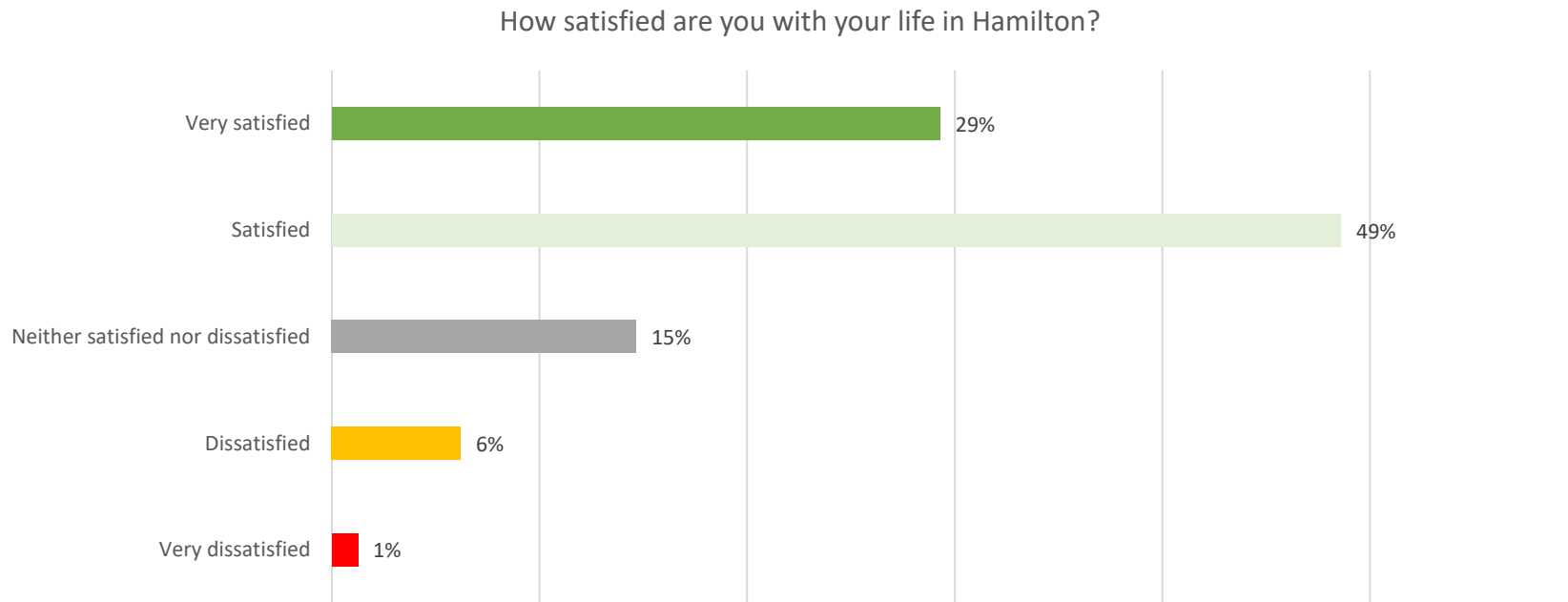
## Detailed Findings – Quality of Life



### Satisfaction with Life in Hamilton

Close to 8 out of 10 (78%) respondents are satisfied or very satisfied with their life in Hamilton. This is a decrease from previous years' results where satisfaction was at 87% in 2019 and 92% in 2018.

Perception of the satisfaction with life in Hamilton varied by age group. Older adults and middle-aged adults are more likely to be satisfied with life in Hamilton. Overall satisfaction (combined "very satisfied/satisfied" responses) for older adults is 86%, middle-aged adults is 77%, and younger adults is 66%.



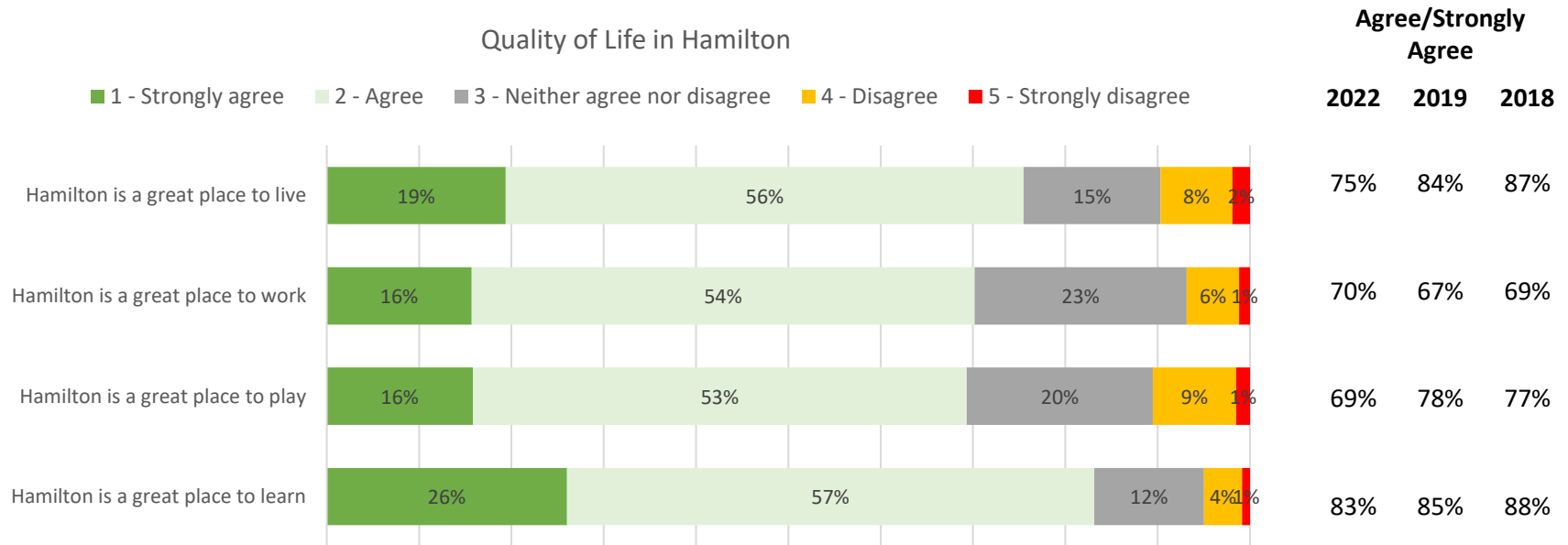
Q21 Overall, how satisfied are you with your life in Hamilton?

Modified from: Overall, how satisfied are you with your life these days?

### Overall Quality of Life

Most of respondents agree or strongly agree that Hamilton is a great place to live (75%), work (70%), play (69%) and learn (83%). The perception of Hamilton as a place to live and play are significantly lower than the previous' results.

Agreement with Hamilton as a great place to live varied by age. Older and middle-aged adults more likely to agree that Hamilton is a great place to live. (includes older adults of 80% and middle-aged adults of 77% vs younger adults of 65%)



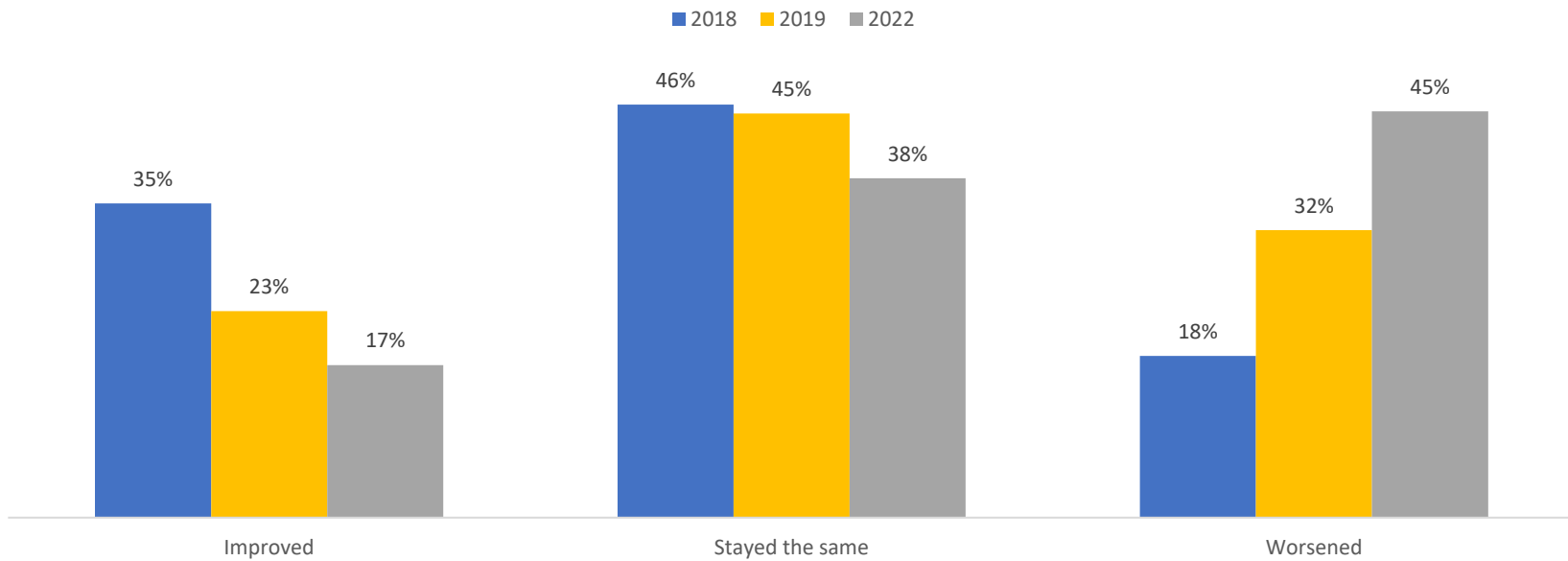
Q1 Please indicate your level of agreement with the following statements. a) Hamilton is a great place to live b) Hamilton is a great place to work c) Hamilton is a great place to play d) Hamilton is a great place to learn

## Changes in The Quality of Life in Hamilton

There is an increasing trend that the perception of quality of life in Hamilton has worsened in the past two years. 45% of the respondents viewed the quality of life in Hamilton has worsened in the past two years.

Perception of changes in the quality of life in Hamilton varied by age group. Younger adults (25%) are more likely than middle-aged (17%) and older adults (11%) to perceive an improvement.

In the past two years, would you say the quality of life in the City of Hamilton has ...

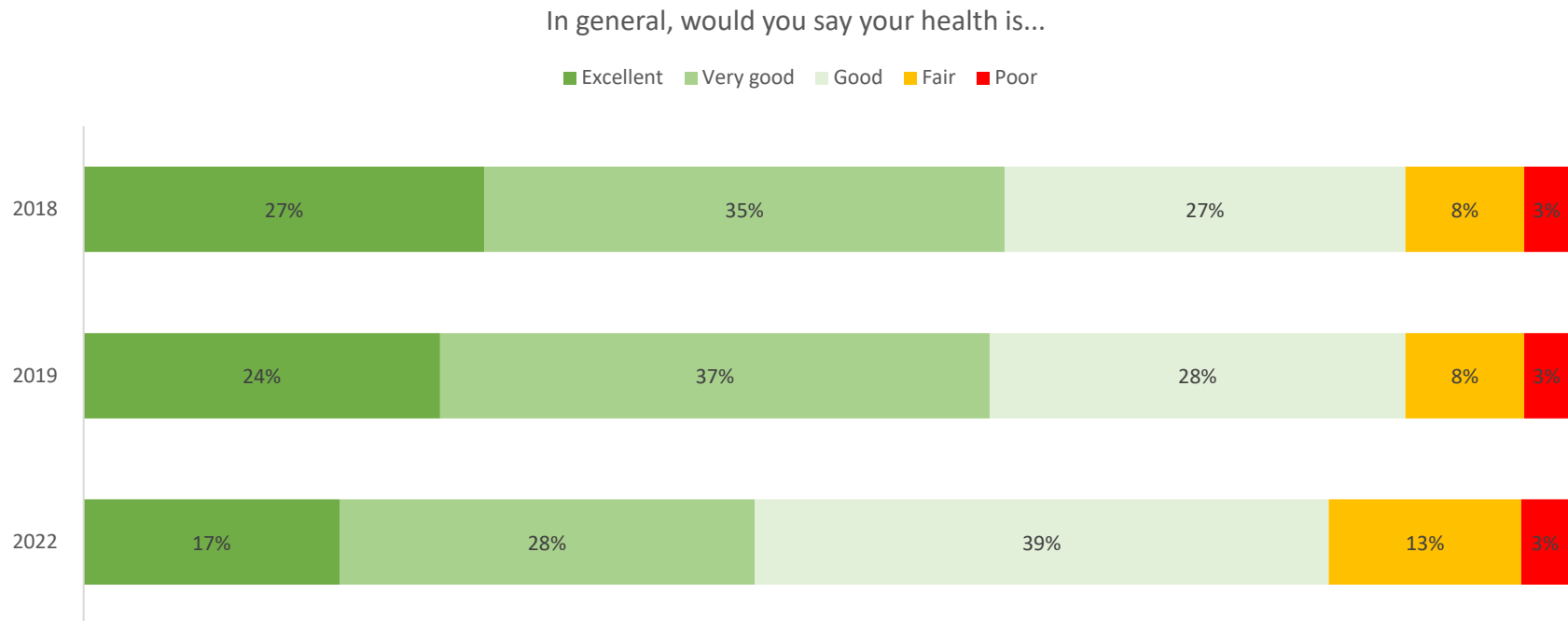


Q2 In the past two years, would you say the quality of life in Hamilton has...

## Health

84% of respondents reported they are in good, very good or excellent health. This is a decrease from 2018 and 2019 were approximately 89% of respondents indicated that their health is excellent, very good or good.

Majority of respondents in all age groups perceived their health as excellent, very good or good.



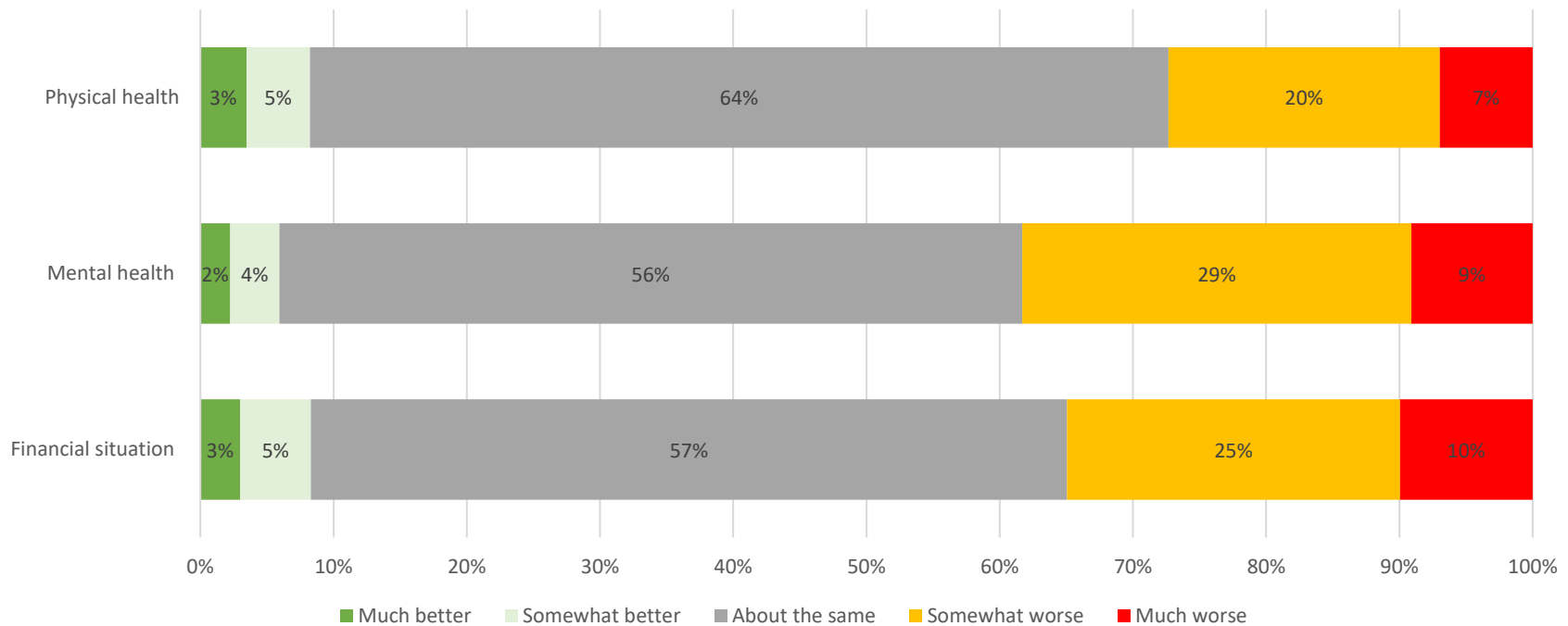
Q22 In general, would you say your health is

### COVID-19 Pandemic Impacts

Most respondents reported the COVID-19 pandemic has not had a significant change on their financial situation (57%), physical health (64%), and mental health (56%). More respondents described the COVID-19 pandemic had worsened their mental health (38%) and financial situation (35%) than those who described it as having worsened their physical health (27%).

Younger and middle-aged adults are more likely than older adults to report their mental health has worsened. 40% of younger adults and 46% of middle-aged adults viewed their mental health had worsened compared to 30% of older adults.

How would you describe the change the COVID-19 pandemic has had on your ...



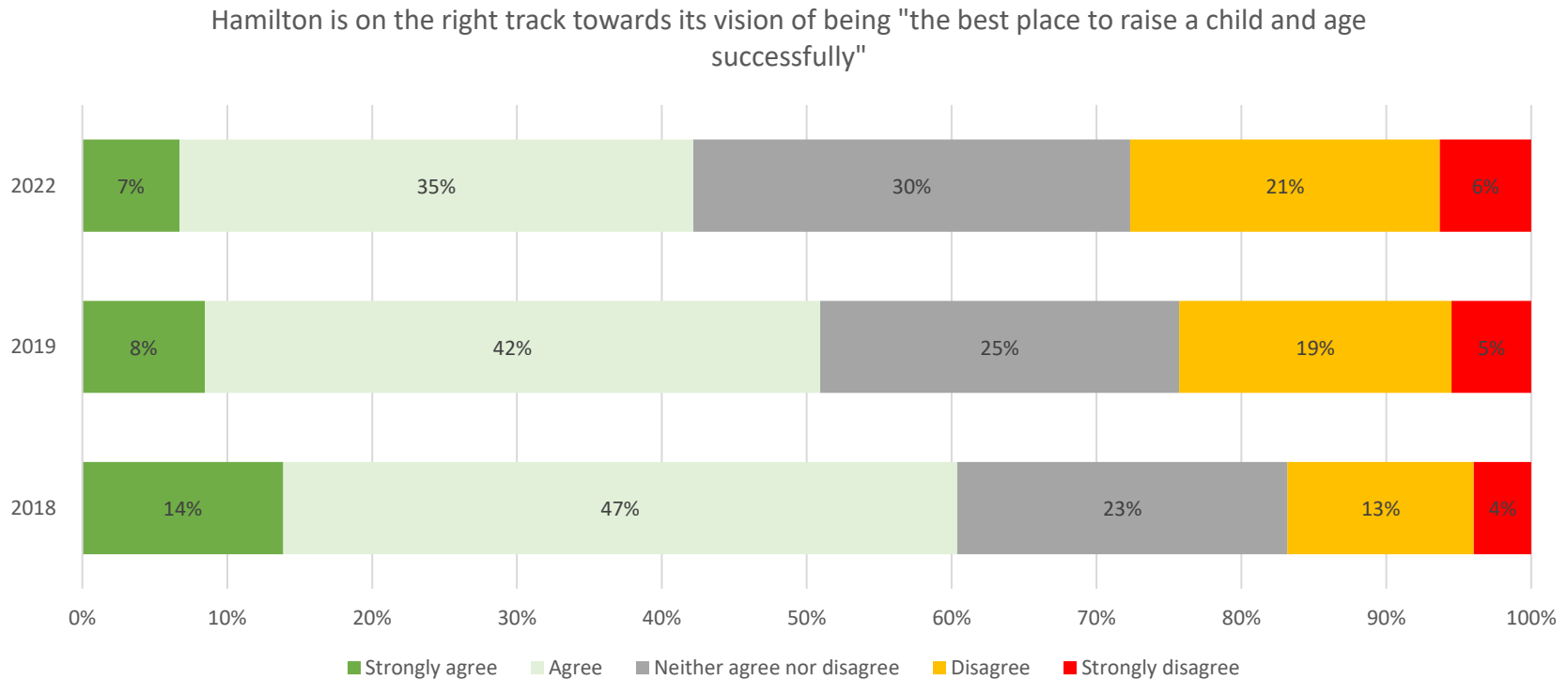
Q17 How would you describe the change the COVID-19 pandemic has had on you're a) financial situation b) physical health c) mental health. New in 2022

# Detailed Findings -Views Toward the City's Vision and Priorities

### Views Toward the City’s Vision

Less than half (42%) of respondents agree that Hamilton is on the right track towards its vision of being “the best place to raise a child and age successfully”. There is a downward trend in the agreement with Hamilton is on the right track towards its vision, from 2019 (51%), and 2018 (61%).

Agreement with Hamilton is on the right track towards its vision varied by age. Older and middle-aged adults are more likely to agree that Hamilton is on the right track. (includes older adults of 47% and middle-aged adults of 41% vs younger adults of 36%)



Q1e Please indicate your level of agreement with the following statements. Hamilton is on the right track towards its vision of being " the best place to raise a child and age successfully."

### Views toward the City’s priorities

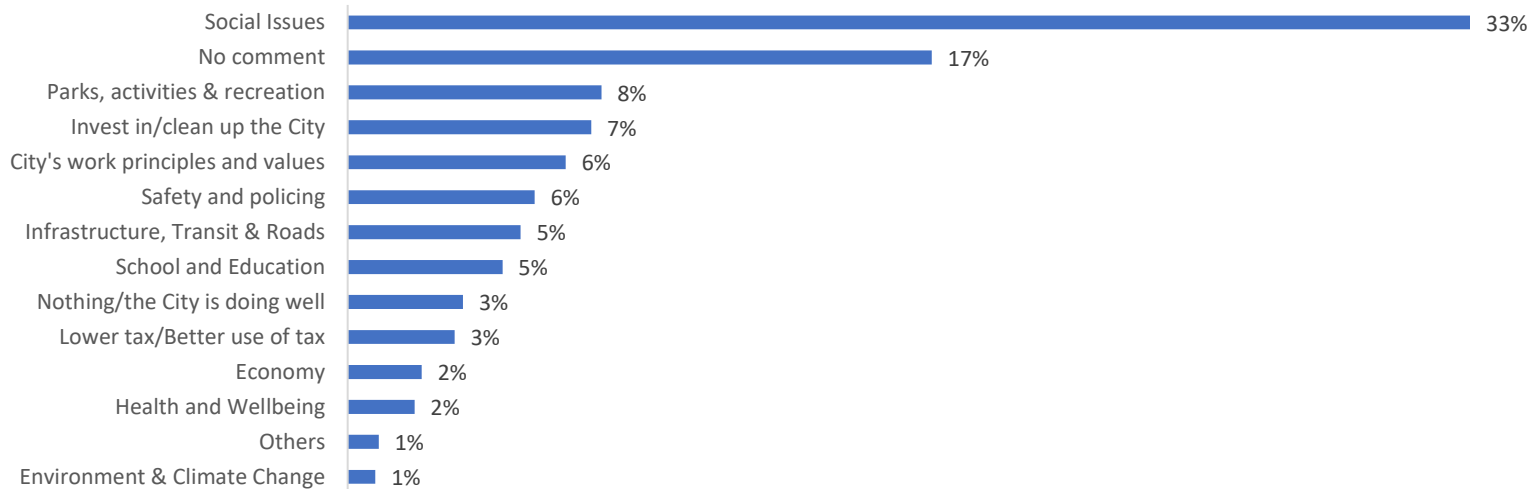
One third (33%) of respondents identified addressing **social issues** as the top priority to reach the city’s vision. Social issues mainly comprised of comments related to “housing and rental affordability” (10%), “homeless and poverty” (9%), “daycare and children services” (7%), “youth services” (3%) and “senior services” (2%).

**Parks, activities, and recreation** is the next priority, totals to 8%. Comments related to parks, activities and recreation include “activities & recreation” (5%) and “parks & green space” (3%).

**Invest in/clean up the City** is third most mentioned common themes, totals to 7%. Comments related to invest in/clean up the City include “revitalize downtown” (4%) and “clean up the City” (3%).

The open-ended phone responses are coded into the following categories. If more than one answer is given, the first response is captured.

What is one thing you think the City of Hamilton should do to reach the vision...



Q18 What is one thing you think the City of Hamilton should do to reach the vision of being "the best place to raise a child and age successfully" (open comment question)



The following table provides a summary of the most common themes to the open-ended question.

Common Theme	Comment or concerns primary related to ...
City's Work Principals And Values	More community engagement opportunities
	Concerns related to City Council
	More transparency, accountability, and inclusivity
Economy	Better jobs
	Better economy and more businesses
	Comment related to city development and urban boundaries
Environment & Climate Change	Reduce pollution
	Protect natural area
	Improve water and air quality
	More green initiatives
Health and Wellbeing	Better healthcare, hospital services and public health
	Concern related to mental health and addictions
	Comments related to COVID-19, vaccine, masks
	Comments related to healthcare workers
Improve City services	Improve or provide more city services, such as garbage collection, snow clearing, libraries, tourism, water and sewers, social services, animal control etc.
Invest in/clean up the City	Revitalize Downtown
	Clean up the City
Infrastructure, Transit & Roads	Improve, repair, or maintain infrastructure
	Improve, repair, or maintain roads and sidewalks
	Reduce traffic congestion and traffic flow
	More transit services, expand routes and service area
Lower tax/Better use of tax	Lower taxes
	Better use of taxes
Parks, activities & recreation	More activities and recreation in the City
	More parks and green space
Safety and policing	Increase/better police services
	Improve community safety
	Reduce crimes, including sexual assaults, gun violence, drugs, etc.

	Improve crime prevention and safety awareness
	More law enforcement
School and Education	Comments related to the general education system
	Comments related school
Social Issues	Improve accessibility
	Improve living affordability
	Improve housing and living affordability
	Reduce homelessness and poverty
	More/better daycare and children services and reduce fees
	More/better senior services
	More/better youth services

## Detailed Findings - Preference Towards Tax Direction and Service Level

### Preference Towards Tax Direction and Service Level

Most respondents (70%) prefer to maintain tax and keep the current service level. This is consistent with the results of both the 2018 and 2019 survey. This is the most preferred option by all age groups.

In delivering services to you and the community, the City typically pays for them through taxes or user fees. Based on this, do you think the City should:

■ taxes - Decrease and fewer services    ■ taxes - Maintain and current service levels    ■ taxes - Increase and improve services



Q5 In delivering services to you and the community, the City of Hamilton typically pays for them through taxes or user fees. Based on this, do you think the City of Hamilton should.

# Detailed Findings - Assessment of The Quality and Usage of The City's Services

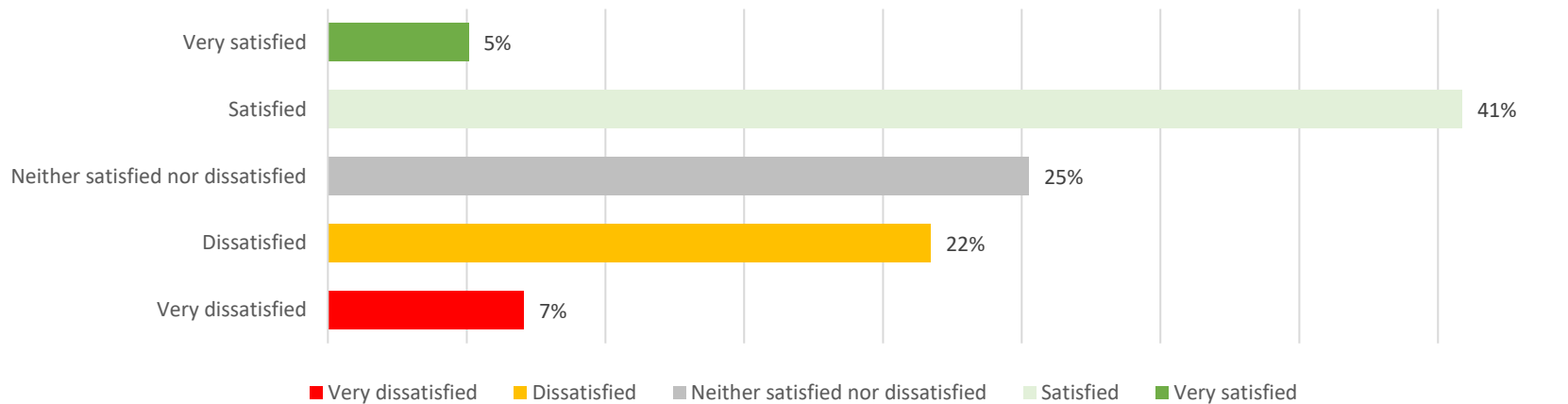
### Satisfaction with the City Services for the Community

Nearly half (46%) of the respondents are satisfied or very satisfied with what the City of Hamilton is doing in providing and supporting services for the community. The result is lower than in previous years where satisfaction was at 62% in 2019, and 66% in 2018.

Note that the wording of this question has been changed in 2022 to reflect the purpose of the question which is to get a high level look at how residents feel about services being provided across the community rather than the overall rating of services. Therefore, the results may not be directly comparable to previous years.

There are more respondents who are satisfied or very satisfied (46%) with the City’s services than those who are dissatisfied or very dissatisfied (29%) by all age groups.

How satisfied are you with what the City of Hamilton is doing in providing and supporting services for the community?



Q3 Overall, how satisfied are you with what the City of Hamilton is doing in providing and supporting services for the community?

Modified from: Overall, how satisfied are you with the services provided by the City of Hamilton?

## Usage of the City’s Service

Respondents were asked to rate 29 services that the City provides to residents, including Police and Libraries. While survey question was revised in 2022 and focused on the respondents who have used the service in the past year, the survey methodology cannot verify whether the respondent used the service. If the respondents have not used the service in the past year, they were asked to select the “Have not used this service/Don’t know” option, and those responses were excluded from the rating.

The services with the least respondents who selected the “Have not used this service/Don’t know” option are: Snow Plowing and Salting of Roads, Roads and Sidewalks, Waste Management, Traffic Flow and Roadway Safety, and Drinking Water. The services with the most respondents who selected the “Have not used this service/Don’t know” option are Child Care Services, Building Permits, Services for Youth, and Hamilton Street Railway.

<b>Services</b>	<b>2022</b>	<b>2019</b>	<b>2018</b>
Building Permits	52%	58%	48%
Child Care Services	49%	52%	42%
Services for Youth	48%	NA	NA
Hamilton Street Railway (HSR) Buses	47%	43%	30%
Fire Department	36%	12%	7%
Cemeteries	35%	25%	30%
Animal Services	33%	23%	21%
Services for Seniors Including Long-term Care	30%	25%	24%
Community Housing	30%	34%	NA
Legislative Services and Information Management	30%	31%	27%
Tourism	27%	19%	19%
Recreation	24%	17%	11%

Paramedic Services	24%	11%	7%
Social Services	23%	26%	20%
Libraries and Bookmobiles	22%	17%	11%
Snow Plowing of City-owned Facilities	22%	13%	NA
Police Services	22%	7%	4%
By-law Enforcement	21%	14%	11%
Emergency Management	20%	12%	11%
Arts, Culture and Heritage	17%	13%	9%
Stormwater Management	15%	15%	12%
Wastewater Management	13%	14%	13%
Public Health	7%	9%	8%
Parks and Open Space	5%	4%	3%
Drinking Water	4%	6%	3%
Roads and Sidewalks	3%	0%	1%
Waste Management	3%	2%	2%
Snow Plowing and Salting of Roads	2%	1%	0%
Traffic Flow and Roadway Safety	2%	2%	1%

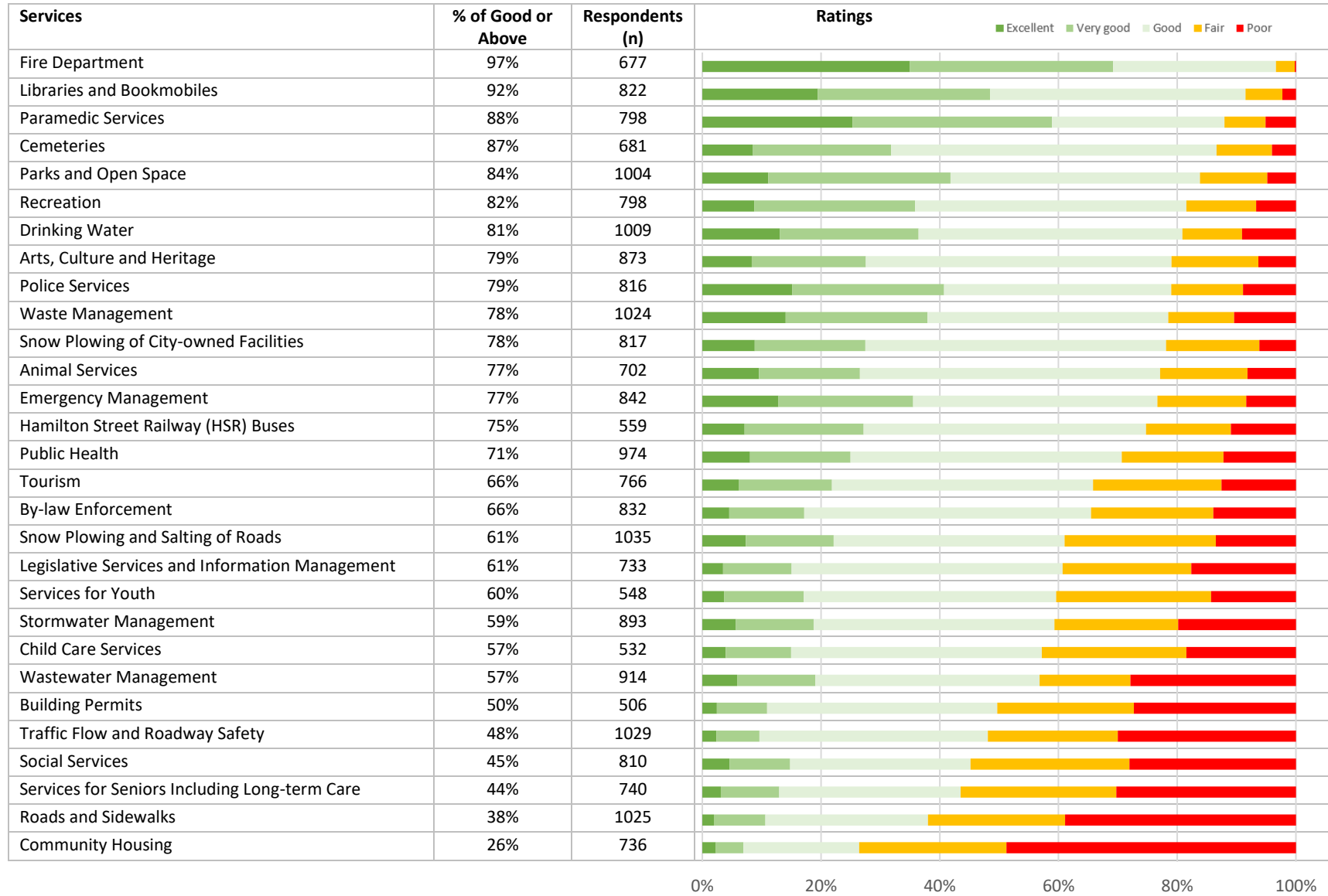
Q4 The following question will focus on different services in our community. These services could be provided solely by the City of Hamilton, or in partnership with other levels of government or agencies in the community. How would you describe each of the following services? Note: If you have not used the service in the past year, please say "don't know".

Modified from: The following question will focus on the different services the City of Hamilton provides to its residents. How would you rate each of the following services provided by the City of Hamilton?



## Rating of the City's Services

29 service-specific questions were included in the survey. The ratings should not be compared between service areas.



23 out of the 29 service areas are rated as good or above by most respondents (based on the respondents who have used the service in the past 12 months). It's important to note that there may be gaps between the ratings by residents and service standards and the actual performance.

Services	% of Excellent/Very Good/Good			
	2018	2019	2022	Trend
Fire Department	97%	97%	97%	
Libraries and Bookmobiles	91%	92%	92%	
Paramedic Services	88%	91%	88%	
Cemeteries	83%	89%	87%	
Parks and Open Space	87%	87%	84%	
Recreation	86%	84%	82%	
Drinking Water	80%	80%	81%	
Arts, Culture and Heritage	79%	83%	79%	
Police Services	82%	81%	79%	
Waste Management	80%	79%	78%	
Snow Plowing of City-owned Facilities	n/a	70%	78%	
Animal Services	79%	80%	77%	
Emergency Management	77%	79%	77%	
Hamilton Street Railway (HSR) Buses	60%	66%	75%	
Public Health	79%	74%	71%	
Tourism	71%	67%	66%	
By-law Enforcement	61%	63%	66%	
Snow Plowing and Salting of Roads	60%	59%	61%	
Legislative Services and Information Management	69%	67%	61%	
Services for Youth	n/a	n/a	60%	NA
Stormwater Management	69%	58%	59%	
Child Care Services	65%	57%	57%	
Wastewater Management	75%	60%	57%	
Building Permits	56%	52%	50%	
Traffic Flow and Roadway Safety	54%	47%	48%	
Social Services	65%	52%	45%	
Services for Seniors Including Long-term Care	67%	44%	44%	
Roads and Sidewalks	34%	37%	38%	
Community Housing	n/a	29%	26%	

The following are the services most often rated as good, very good or excellent. The list remains the same as 2019.

- Fire Department (97%)
- Libraries and Bookmobiles (92%)
- Paramedic Services (88%)
- Cemeteries (87%)
- Parks and Open Space (84%)

The following are the services most often rated as poor. The list has not changed significantly since 2018, Social Services is new to the list.

- Community Housing (49%)
- Roads and Sidewalks (39%)
- Services for Seniors Including Long-term Care (30%)
- Traffic Flow and Roadway Safety (30%)
- Social Services (28%) / Wastewater Management (28%)

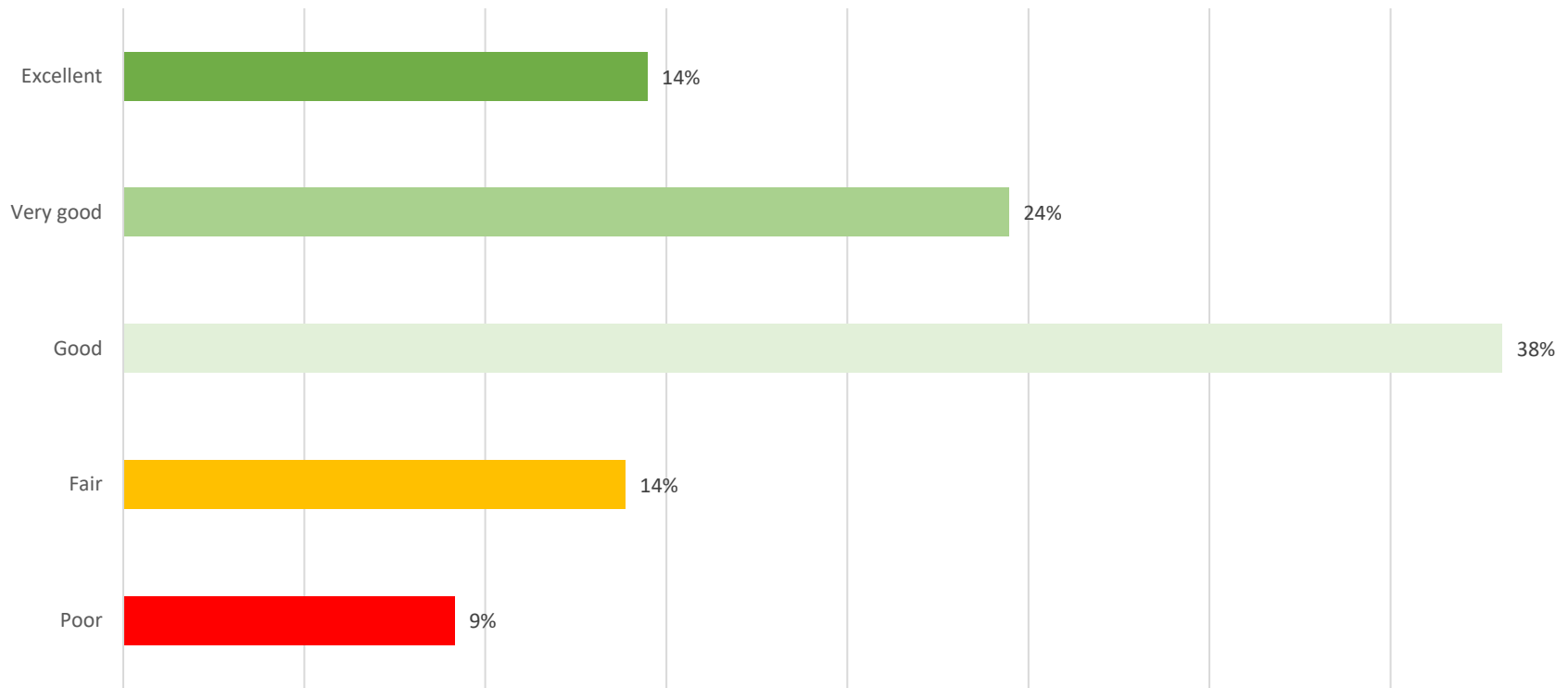
The rating for most service areas did not change significantly compared to the 2019 results. The services that had the greatest changes (+/- 3%) are:

Services	% of Excellent/Very Good/Good		
	2019	2022	Change
Hamilton Street Railway (HSR) Buses	66%	75%	+9%
Snow Plowing of City-owned Facilities	70%	78%	+8%
Animal Services	80%	77%	-3%
Paramedic Services	91%	88%	-3%
Parks and Open Space	87%	84%	-3%
Wastewater Management	60%	57%	-3%
Public Health	74%	71%	-3%
Arts, Culture and Heritage	83%	79%	-4%
Legislative Services and Information Management	67%	61%	-6%
Social Services	52%	45%	-7%

### Rating of The City's Response to the COVID-19 Pandemic

More than 3 out of 4 (77%) respondents rated the City's response to the COVID-19 pandemic as good, very good or excellent. The City's response to the COVID-19 pandemic includes maintaining city operations, communications, enforcement of provincial and municipal restrictions, etc.

How would you rate the City's response to the COVID-19 pandemic



Q16 How would you rate the City's response to the COVID-19 pandemic including maintaining city operations, communications, enforcement of provincial and municipal restrictions, etc. New in 2022

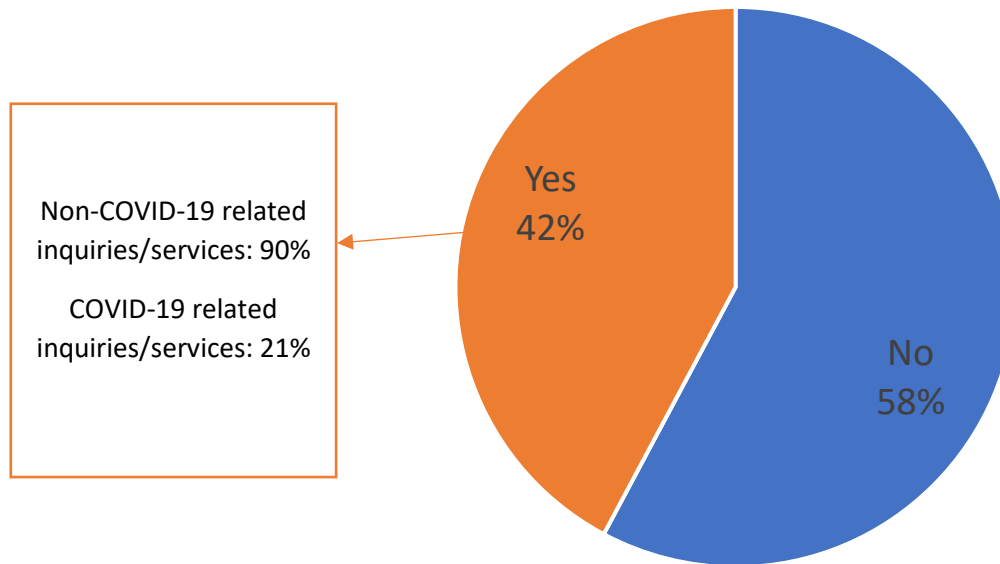
# Detailed Findings - Interactions with The City

### Contacting the City

42% of respondents have contacted the City of Hamilton in the past year for information or to conduct service transactions, out of which, 90% of respondents reported it was for non-COVID-19 related inquiries/services and 21% of respondents reported it was for COVID-19 related inquiries/services.

The percentage of respondents that have contacted the City is less than previous years, where 2019 was 48% and 2018 was 47%.

In the past year, have you contacted the City of Hamilton for information or to conduct any service transactions?



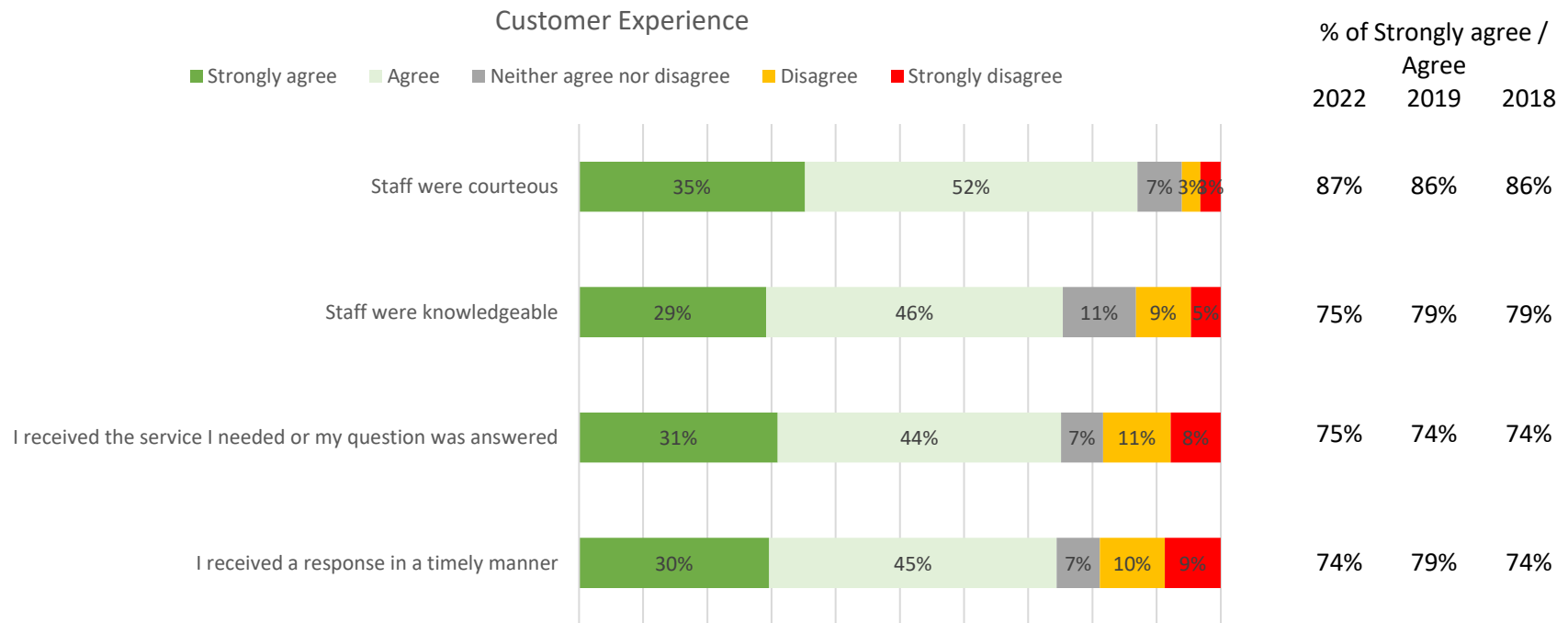
Q9 In the past year, have you contacted the City of Hamilton for information or to conduct any service transactions?

Q10 What have you contacted the City of Hamilton for in the past year? New in 2022

## Customer Experience

74% of respondents reported that their experience with contacting the City of Hamilton was positive. This is consistent with 2019 survey results at 73%, and 2018 is higher at 83%.

Most respondents felt that city staff were courteous (87%) and knowledgeable (75%), their question was answered (75%) and they received a timely response (74%).



Q11 Thinking about your contact with the City of Hamilton in the past year, please tell us how strongly you agree with each of the following statements. a) Overall, my experience contacting the City of Hamilton was positive. b) I received a response in a timely manner. c) Staff were knowledgeable. d) Staff were courteous. e) I received the service I needed / my question was answered.

## Detailed Findings – Preferred Service Delivery and Communication Channels



## Preference of Service Delivery Channels

### Getting information

The most preferred way of getting information from the City (36%) is through the City of Hamilton website (hamilton.ca). This is the top preference for younger (38%) and middle-aged adults (44%). The preferred channel to get information for older adults (40%) is through phone and the City of Hamilton website (hamilton.ca). The most preferred way to get information was by phone in the 2018 and 2019 surveys.

	Younger Adults	Middle-aged Adults	Older Adults	Total
In Person	9%	7%	13%	10%
Phone	15%	22%	40%	27%
Email	25%	14%	15%	17%
City of Hamilton website (hamilton.ca)	38%	44%	27%	36%
Text Message/SMS	4%	2%	1%	2%
Social Media	8%	4%	2%	4%
Video Call	0%	2%	0%	1%
Online digital assistant (i.e. chatbot)	1%	5%	2%	3%

### Making a complaint/providing feedback or compliment

The most preferred way of making a complaint/providing feedback or compliment (39%) is through phone. This is the top preference for middle-aged (37%) and older adults (51%). The preferred channel for younger adults (51%) is through email and phone. Phone was the most preferred way to make a complaint in the 2018 and 2019 survey.

	Younger Adults	Middle-aged Adults	Older Adults	Total
In Person	10%	9%	13%	11%
Phone	25%	37%	51%	39%
Email	34%	20%	20%	24%
City of Hamilton website (hamilton.ca)	23%	27%	13%	20%
Text Message/SMS	0%	3%	1%	2%
Social Media	4%	1%	1%	2%
Video Call	1%	0%	0%	1%
Online digital assistant (i.e. chatbot)	2%	3%	2%	2%

**Registering for Programs and Services**

The most preferred way to register for programs and services (52%) is through the City of Hamilton website (hamilton.ca). This is the top preference for all age groups and has not changed since 2018.

	Younger Adults	Middle-aged Adults	Older Adults	Total
In Person	14%	18%	19%	18%
Phone	16%	11%	28%	19%
Email	13%	8%	13%	11%
City of Hamilton website (hamilton.ca)	57%	63%	39%	52%

**Applying for Licenses and Permits**

The most preferred way to apply for licenses and permits (44%) is through the City of Hamilton website (hamilton.ca), followed by In Person (35%). City of Hamilton website (hamilton.ca) is the top preference for younger (50%) and middle-aged adults (51%). The preferred way for older adults is in-person (41%) and the City of Hamilton website (hamilton.ca) (36%). The most preferred way to apply for licenses and permits was in person in 2018 and 2019.

	Younger Adults	Middle-aged Adults	Older Adults	Total
In Person	30%	32%	41%	35%
Phone	8%	12%	15%	12%
Email	12%	5%	8%	8%
City of Hamilton website (hamilton.ca)	50%	51%	36%	44%

**Booking / Renting City of Hamilton Facilities or Parks**

The most preferred way to book/rent City of Hamilton facilities or parks (49%) is through the City of Hamilton website (hamilton.ca). This is the top preference for all age groups and has not changed since 2018.

	Younger Adults	Middle-aged Adults	Older Adults	Total
In Person	10%	15%	22%	16%
Phone	22%	20%	31%	25%

Email	15%	6%	10%	10%
City of Hamilton website (hamilton.ca)	54%	59%	37%	49%

**Making Payment for Programs, Services, Permits, Licenses, Fines Etc.**

The most preferred way to make payment for programs, services, permits, licenses, fines etc. (54%) is through the City of Hamilton website (hamilton.ca). This is the top preference for all age groups.

	Younger Adults	Middle-aged Adults	Older Adults	Total
In person	12%	27%	37%	27%
Phone	13%	8%	14%	12%
Email	7%	6%	8%	7%
City of Hamilton website (hamilton.ca)	69%	58%	42%	54%

**Paying Property Tax**

The most preferred way of paying for property tax is through a bank (56%). This is the top preference for all age groups and has not changed since 2018.

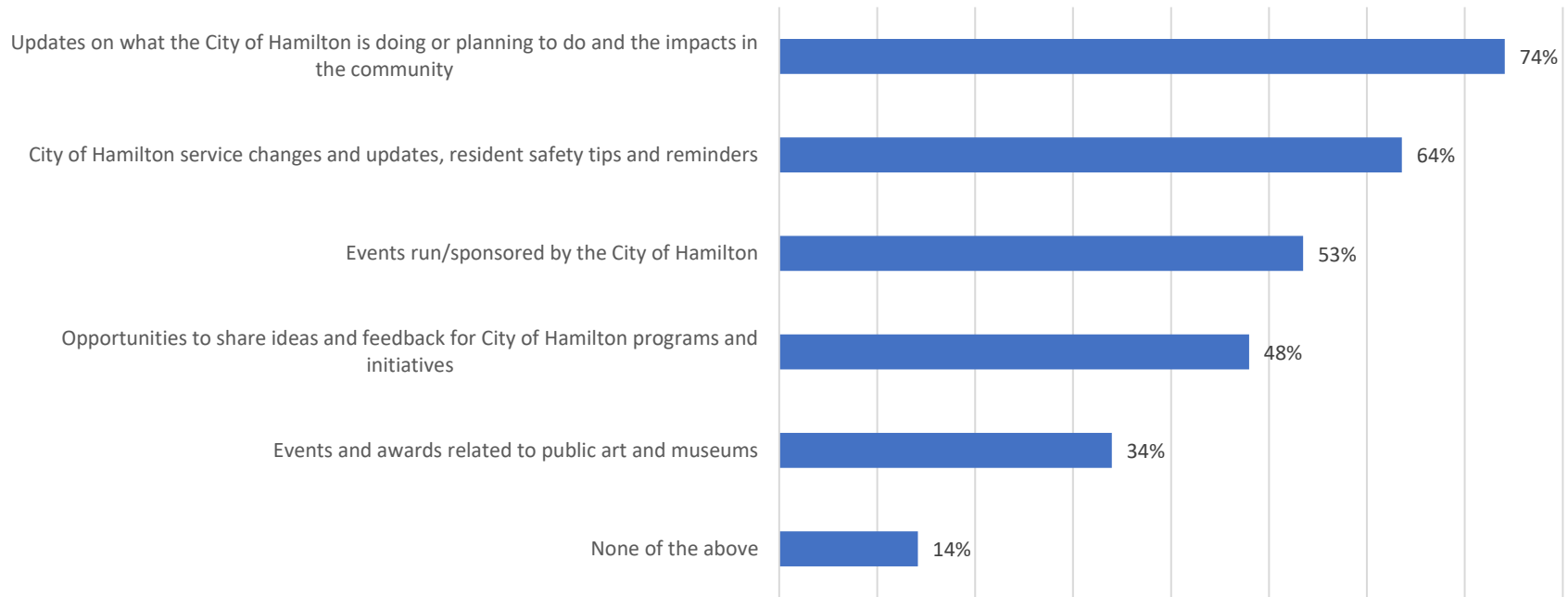
	Younger Adults	Middle-aged Adults	Older Adults	Total
In-person at a City counter	7%	6%	6%	6%
By phone directly with the City	9%	3%	1%	4%
Through your bank (at a teller, ATM, online/phone banking)	53%	63%	51%	56%
Postal mail	1%	1%	2%	2%
Pre-authorized debit payment plan	30%	27%	39%	33%

Q8 The following question will focus on different ways of connecting with and conducting business with the City of Hamilton. If you needed to, what would be your preferred way of conducting each of the following types of interactions? Note that not all response options are currently available or used. Modified from: What is your preferred way of conducting each of the following types of interactions with the City of Hamilton?

### Topic Areas to Receive Information on From the City

Topic areas where most respondents reported that they would like to receive information on from the City of Hamilton includes “Updates on what the City of Hamilton is doing or planning to do and the impacts in the community” (74%), “City of Hamilton service changes and updates, resident safety tips and reminders” (64%) and “Events run/sponsored by the City of Hamilton” (53%).

Which of the following topic areas would you like to receive information on from the City of Hamilton?

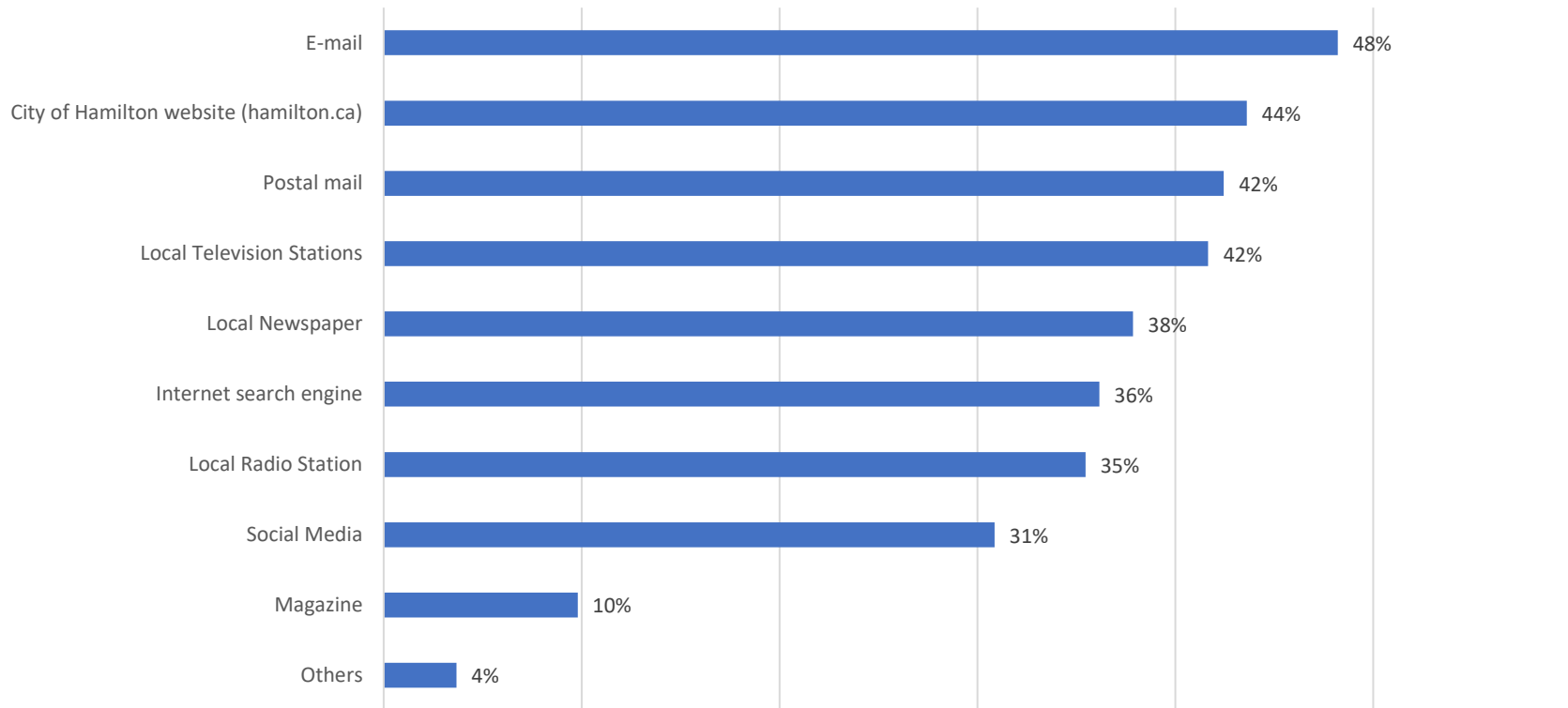


Q12 Which of the following topic areas would you like to receive information on from the City of Hamilton? New for 2022

## Preference of Communication Channels

The most preferred way to get information about the City of Hamilton's programs, initiatives, news, and events is through email (48%) and City of Hamilton website (hamilton.ca) (44%).

How do you would/like to get information about the City of Hamilton's programs, initiatives, news and events?

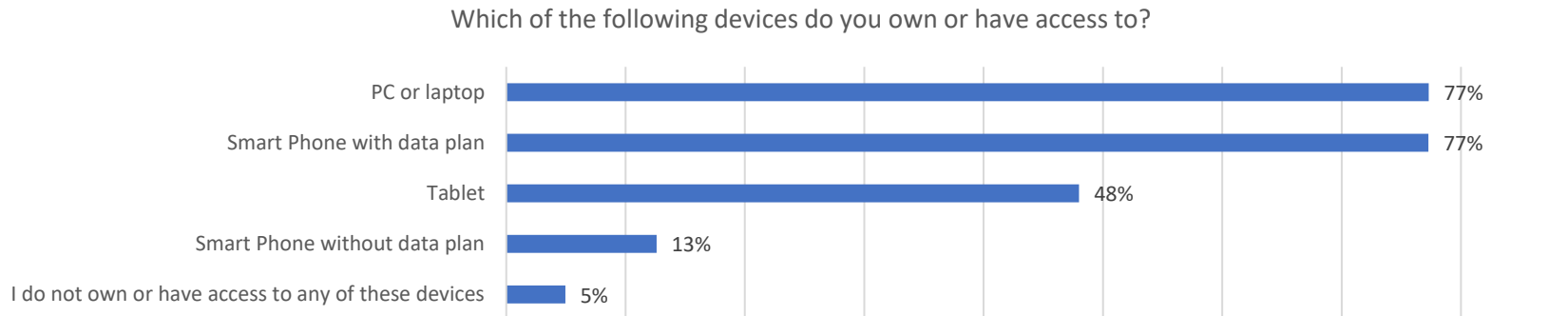
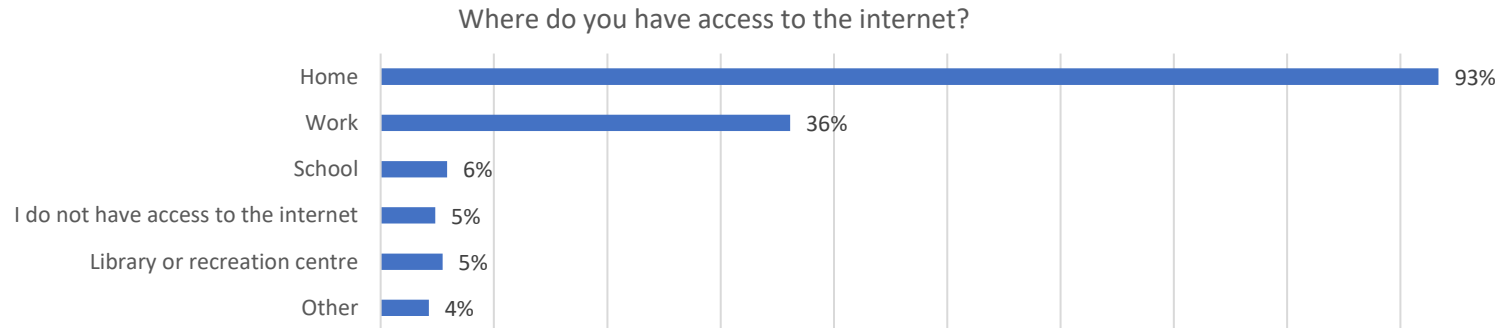


Q13 How would/do you like to get information about the City of Hamilton's programs, initiatives, news, and events?

## Access to Internet and Digital Devices

Most of the respondents (93%) have access to the internet at home and a small portion (5%) of respondents do not have access to the internet.

Most of the respondents own or have access to PC or laptops (77%) and Smart Phones with data plan (77%). Only a small portion (5%) of respondents do not own or have access to any digital devices.



Q14 Where do you access the internet? New for 2022

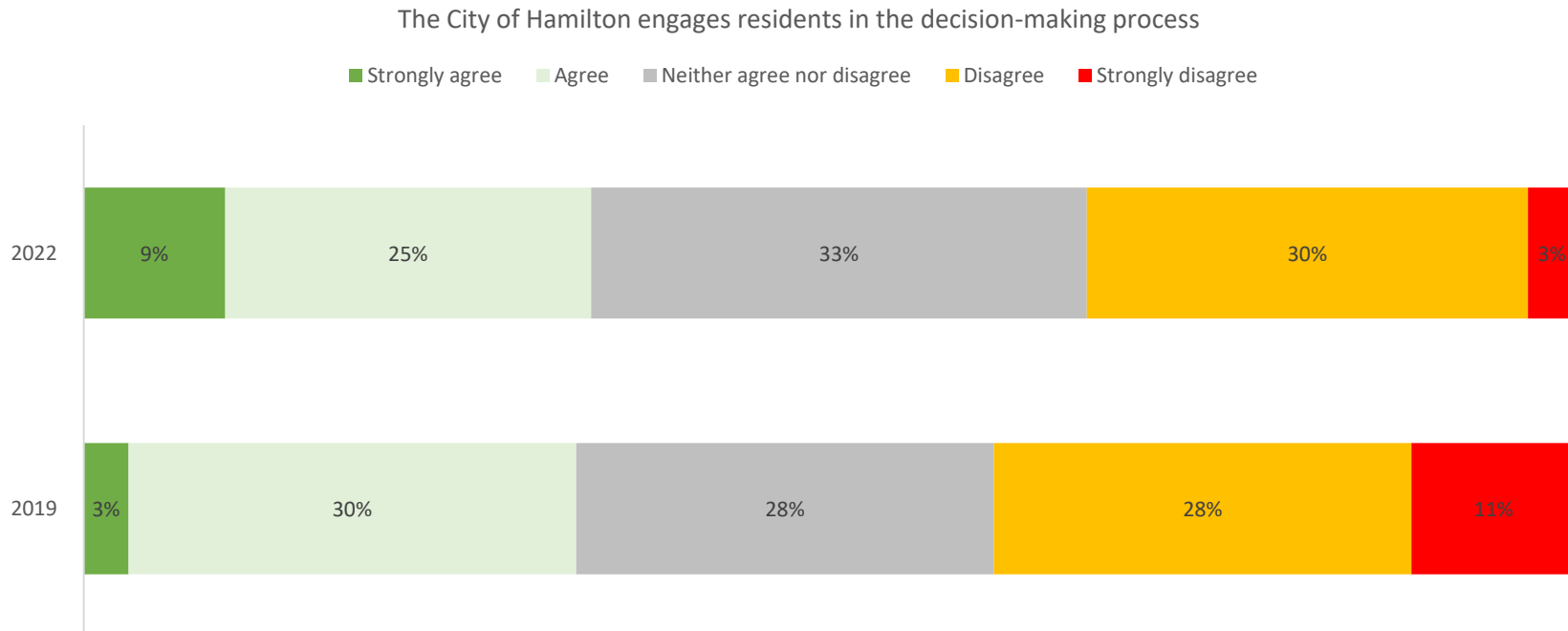
Q15 Which of the following devices do you own or have access to? New for 2022

# Detailed Findings – Community Engagement

## Perception of Resident Engagement by the City

One third of the respondents (34%) agree/strongly agree that the City of Hamilton engages residents in the decision-making process for City programs, services, and initiative.

There are fewer respondents (33%) disagreed that the City of Hamilton engages residents compared to 2019 (39%). Only 3% of respondents strongly disagree that the City of Hamilton engages residents in the decision-making process, this is a significant decrease from 2019. This question was not asked in 2018.



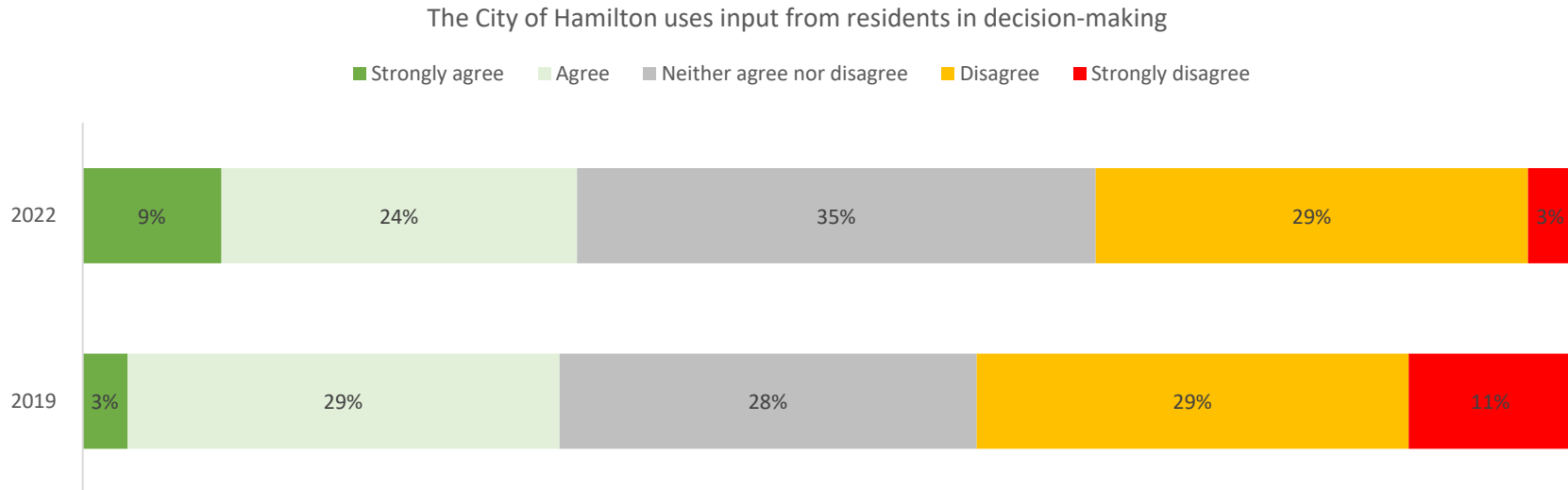
Q6 Please indicate your level of agreement with the following statements. a) The City of Hamilton engages residents in the decision-making process for City programs, services, and initiatives. b) The City of Hamilton uses input from residents in decision-making about City programs, services, and initiative



### Perception of the City uses Input from Residents in Decision-making

One third of the respondents (32%) agree that the City of Hamilton uses input from residents in decision-making about City programs, services, and initiative. There is no significant change from 2019 (32%).

Fewer respondents disagreed (32%) that the City uses input from residents in decision-making compared to 2019 (40%). Only 3% of respondents strongly disagree that the City of Hamilton uses inputs from residents in decision-making, this is a significant decrease from 2019. This question was not asked in 2018.

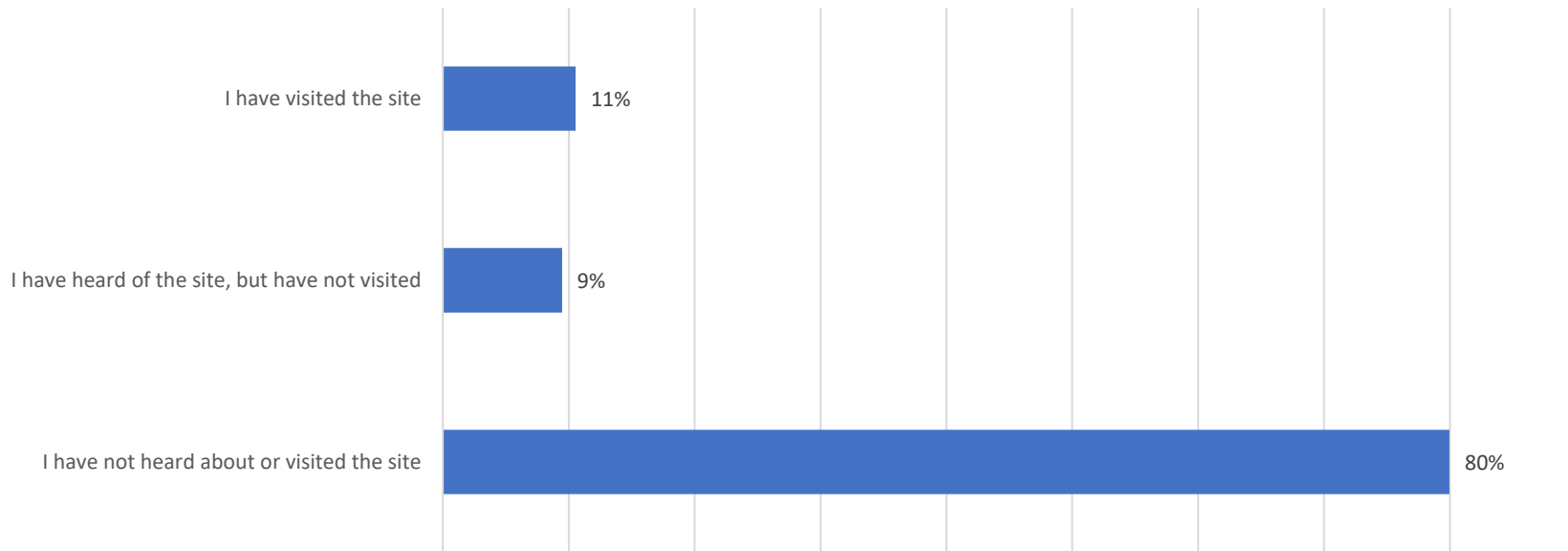


Q6 Please indicate your level of agreement with the following statements. a) The City of Hamilton engages residents in the decision-making process for City programs, services, and initiatives. b) The City of Hamilton uses input from residents in decision-making about City programs, services, and initiative

### City of Hamilton's Online Engagement Platform

8 out of 10 (80%) respondents have not heard about or visited the City of Hamilton's online engagement platform. 1 in 10 (10%) respondents have visited the site.

Are you aware of or have visited the City of Hamilton's online engagement platform

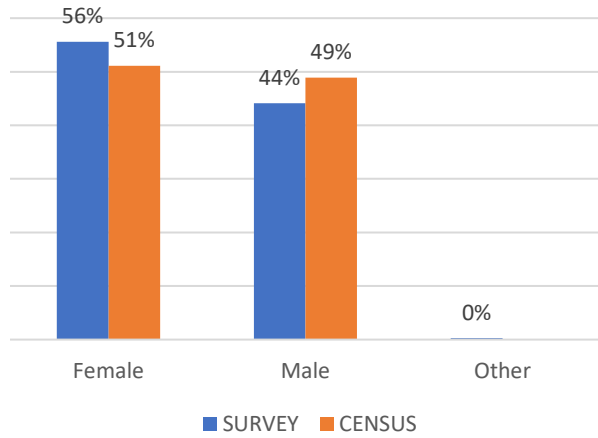


Q7 Are you aware of or have you visited the City of Hamilton's online engagement platform [engage.hamilton.ca](https://engage.hamilton.ca)?

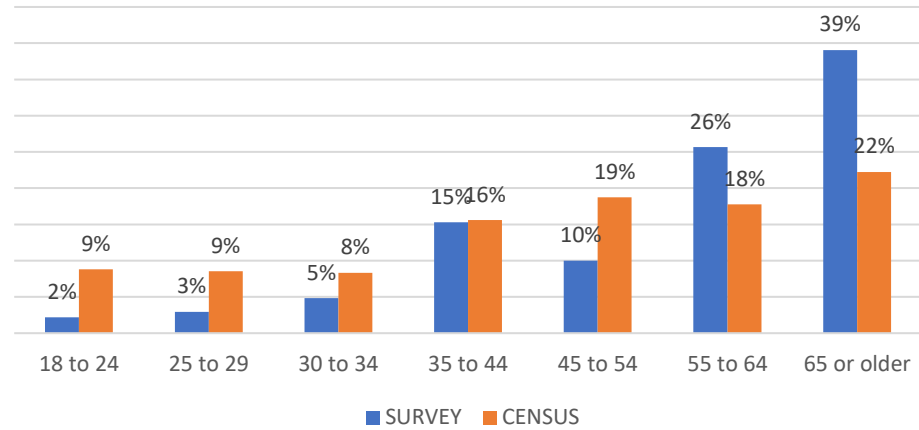
New for 2022

# Weighted Sample Characteristics

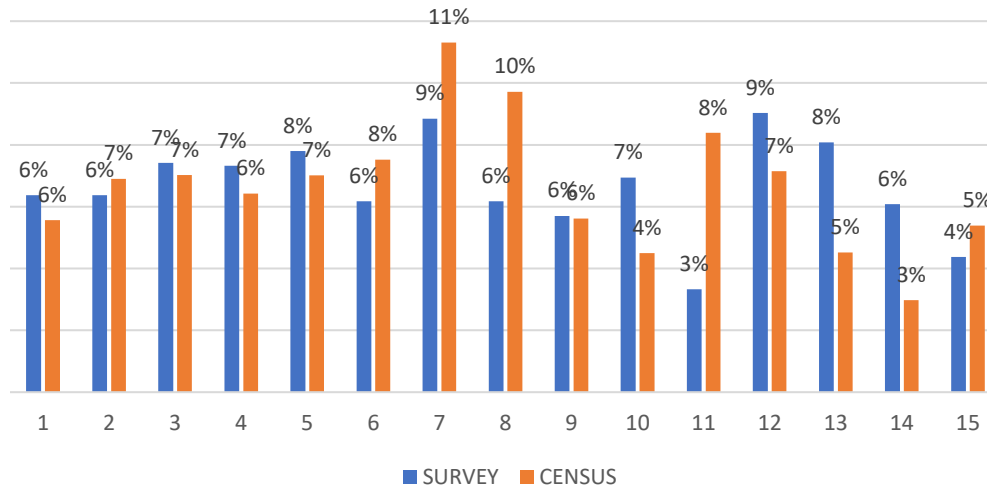
**Gender**



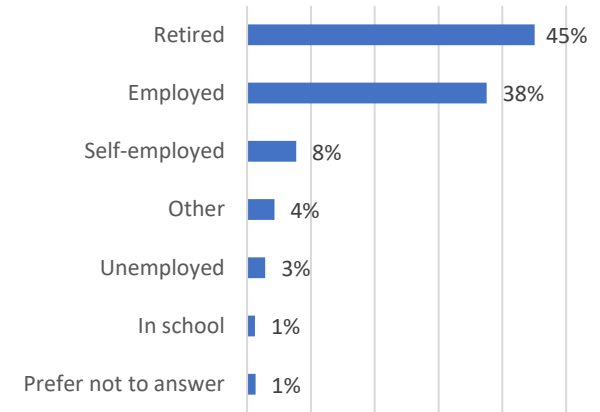
**Age**



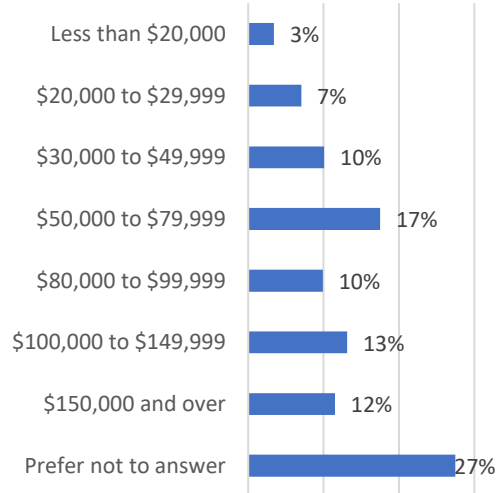
**Ward**



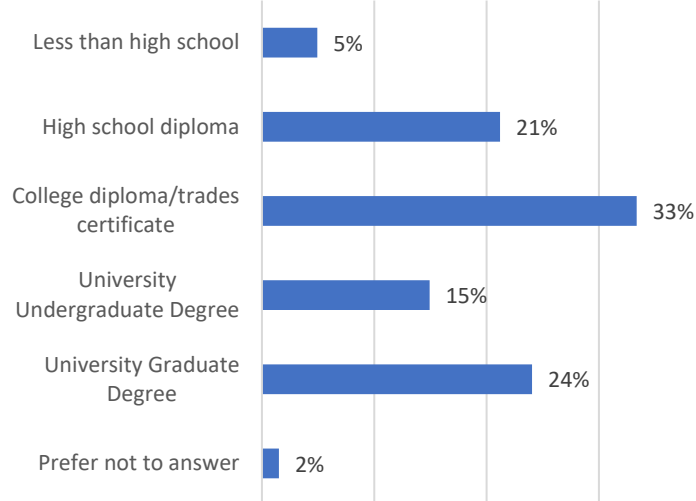
**Employment Status**



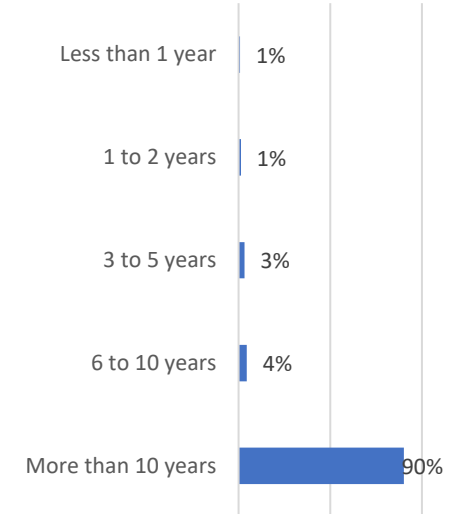
**Household Income**



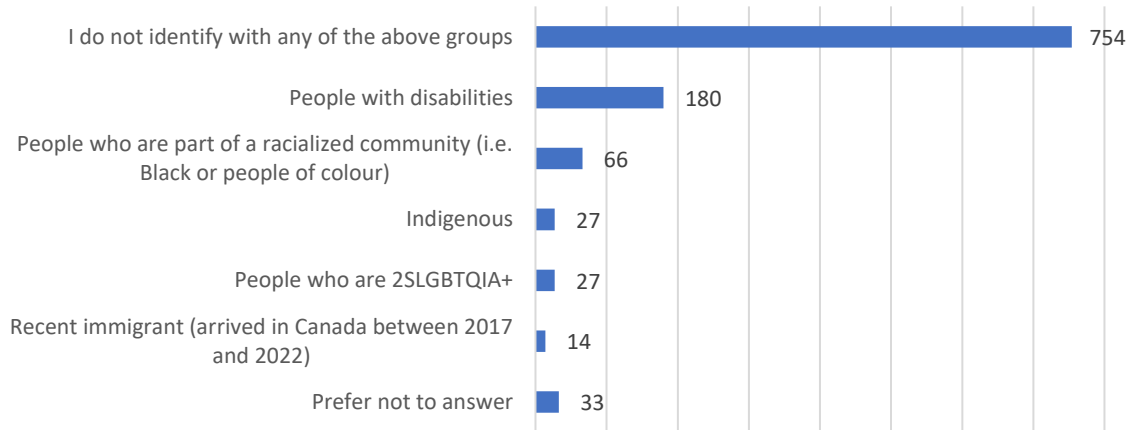
**Education**



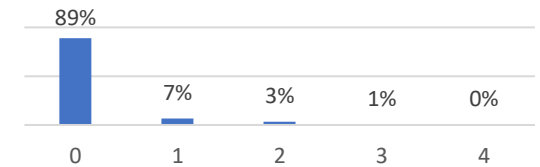
**Tenure in Hamilton**



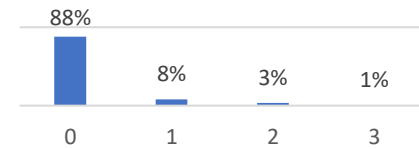
**Member of Groups**



**Number of Children in Household**



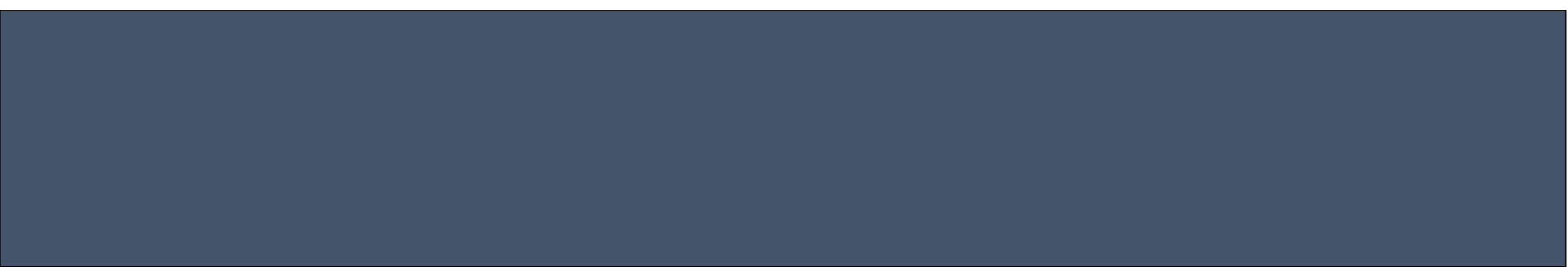
**Number of Youth in Household**



# CITY OF HAMILTON

## 2022 OUR CITY SURVEY REPORT (ONLINE RESULTS)

May 3<sup>rd</sup>, 2023



## Contents

<b>Background and Objectives .....</b>	<b>4</b>
<b>Survey Methodology and Administration .....</b>	<b>5</b>
<b>Report Notes - Online.....</b>	<b>6</b>
<b>Executive Summary – Online .....</b>	<b>6</b>
<b>Detailed Findings – Quality of Life.....</b>	<b>8</b>
<b>Satisfaction with Life in Hamilton.....</b>	<b>9</b>
<b>Overall Quality of Life .....</b>	<b>10</b>
<b>Changes in The Quality of Life in Hamilton .....</b>	<b>11</b>
<b>Health.....</b>	<b>12</b>
<b>COVID-19 Pandemic Impacts.....</b>	<b>13</b>
<b>Detailed Findings -Views Toward the City’s Vision and Priorities.....</b>	<b>14</b>
<b>Views Toward the City’s Vision .....</b>	<b>15</b>
<b>Views Toward the City’s Priorities .....</b>	<b>16</b>
<b>Detailed Findings - Preference Towards Tax Direction and Service Level.....</b>	<b>19</b>
<b>Preference Towards Tax Direction and Service Level.....</b>	<b>20</b>
<b>Detailed Findings - Assessment of The Quality and Usage of The City’s Services .....</b>	<b>21</b>
<b>Overall Satisfaction With the City Of Hamilton’s Services .....</b>	<b>22</b>
<b>Usage of the City’s service .....</b>	<b>23</b>
<b>Rating of Services .....</b>	<b>24</b>
<b>Rating of The City’s Response to the COVID-19 Pandemic .....</b>	<b>26</b>
<b>Detailed Findings - Interactions with The City.....</b>	<b>27</b>
<b>Contacting the City .....</b>	<b>28</b>

**Customer Experience .....29**

**Detailed Findings – Preferred Service Delivery and Communication Channels .....30**

**Preference of Service Delivery Channels.....31**

**Preference of Service Delivery Channels.....32**

**Topic Areas to Receive Information on From the City.....34**

**Preference of Communication Channels.....35**

**Access to Internet and Digital Devices .....36**

**Detailed Findings – Community Engagement.....37**

**Perception of Resident Engagement by the City.....38**

**Perception of the City uses Input from Residents in Decision-making .....39**

**City of Hamilton’s Online Engagement Platform .....40**

**Respondent Profile .....41**



## Background and Objectives

In alignment with the 2018 – 2022 Term of the Council's priority to enhance trust and confidence in city government and improve its ability to undertake evidence-based engagement practices consistently, the Our City Survey 2022 was launched between November 1<sup>st</sup> 2022 and December 18 2022.

The objectives of the survey were to collect Hamilton residents' feedback and opinions on the following topics:

- Perception of the quality of life in Hamilton
- Views toward the City's vision and priorities
- Views toward tax direction and service level
- Assessment of the quality and usage of City services
- Assessment of the interaction with the City
- Preference for service delivery and communication channels
- Views toward community engagement

Since 2018, the City of Hamilton has conducted a resident satisfaction survey three times, in 2018, 2019 and 2022. The 2022 survey results are compared (where applicable) with previous years' findings to identify changes and trends.

The insights gained from the survey can help the City to make decisions on budget planning, strategic planning, and continuous improvement activities.

## Survey Methodology and Administration

The Our City Survey 2022 was developed based on the Our City Survey 2019 questions. The project team consulted with the City's Senior Leadership Team to ensure City programs and services were appropriately represented in the survey. Changes to question wording were made to clarify overall survey intent while ensuring questions remained comparable to previous years.

Hamilton-based residential and cellular phones were randomly called, by a third party, using Computer Assisted Telephone Interviews (CATI), and phone respondents were invited to participate in the survey. To qualify for the survey, the respondent had to be an adult age 18 years or over, residing in Hamilton. The survey collected 1,052 phone responses. Approximately 60% of completed phone surveys were landline, and 40% were cellular. The phone surveys were conducted between November 1, 2022, and December 18, 2022, and were available in English, French and Teletypewriter Service. To ensure the phone sample reflects the actual population of the City of Hamilton, the final data has been weighted by ward and age according to the 2016 census data. The margin of error for the total sample of 1,052 is +/-3.0%, 19 out of 20 times. The margin of error will be larger for subgroups of the survey population.

An online version of the survey was also available on Engage Hamilton, in both English and French, where all Hamilton residents could participate through personal devices or public computers, between November 1, 2022 and December 18, 2022. A web banner with a link to the survey page was placed on the most frequently visited websites on [www.hamilton.ca](http://www.hamilton.ca). The online survey collected 2,500 survey responses. No margin of error can be applied using this survey methodology. The sample from the online survey are self-selected, and the results are affected by self-selection bias. The online data is not representative of Hamilton's demographics.

Paper surveys were made available at Hamilton libraries, recreation centres and municipal service centres. No completed paper surveys were submitted.

The results of the phone survey and online survey cannot be directly compared due to the differences in survey methodology, sample size, and respondent profile.

Digital/online ads, city newsletter ads, local newspaper ads, digital banners (City Hall, Gage Park, Farmers Market), social media and promotional posters were used to raise awareness about the survey and encourage participation from residents.

## Report Notes - Online

- The phone survey results cannot be directly compared to online survey results due to the differences in survey methodology, sample size, and respondent profile.
- Respondents did not always respond to every question or may have responded: “have not used the service / don’t know”. The survey also included skip patterns, so respondents were not asked questions that did not apply to them. These records have been removed from the analysis. The universe of respondents (n) may vary for each question.
- For some questions, respondents could select multiple responses, in which case the totals could exceed 100%.
- Data shown may not add up to 100% due to rounding.

## Executive Summary – Online

It is important to note that significant, ongoing events at the time the survey was conducted - such as the ongoing COVID-19 pandemic and reputational issues present in the media may have influenced some of the survey responses. Amid the challenges facing the community over the past years, the survey continues to find positive assessments in many areas, although the overall results of the 2022 Our City Survey are lower compared to previous years.

Most respondents (59%) are satisfied with their life in Hamilton and reported (82%) good health.

Most respondents agree that Hamilton is a great place to live (59%), play (54%), and learn (62%). Less than half (44%) of respondents agree or strongly agree that Hamilton is a great place to work. The majority of respondents (59%) viewed the quality of life in Hamilton as worsened in the past two years. One of the many variables that impacted the quality of life is the COVID-19 pandemic, where many respondents described that it has worsened their mental health (58%), physical health (44%) and financial situation (43%).

Less than a quarter (22%) of respondents agree that Hamilton is on the right track towards its vision of being “the best place to raise a child and age successfully”.

One fifth (19%) of respondents identified addressing social issues as the top priority to reach the city’s vision. The next top mentioned common themes are related to “City work principles and values” (11%), “Infrastructure, Transit and Roads” (10%), “Safety and Policing” (8%) and “Parks, Activities and Recreation” (8%).

Most respondents (53%) prefer to maintain tax and keep the current service level.

Nearly a quarter of the respondents (23%) reported that they are satisfied or very satisfied with what the City of Hamilton is doing in providing and supporting services for the community.

The 5 services most often rated as good, very good or excellent are: Libraries and Bookmobiles, Fire Department, Drinking Water, Paramedic Services and Parks and Open Space.

The 5 services most often rated as poor are: Social Housing, Social Services, Roads and Sidewalks, Traffic Flow and Roadway Safety and Building Permits.

62% of respondents reported they have contacted the City of Hamilton in the past year, those who have contacted the City reported a positive customer service experience.

34% of respondents indicated that their experience with contacting the City of Hamilton was positive. Nearly half (45%) felt that the city staff were courteous, more than a third (36%) felt City staff were knowledgeable, and 37% had their question both answered and received a timely response.

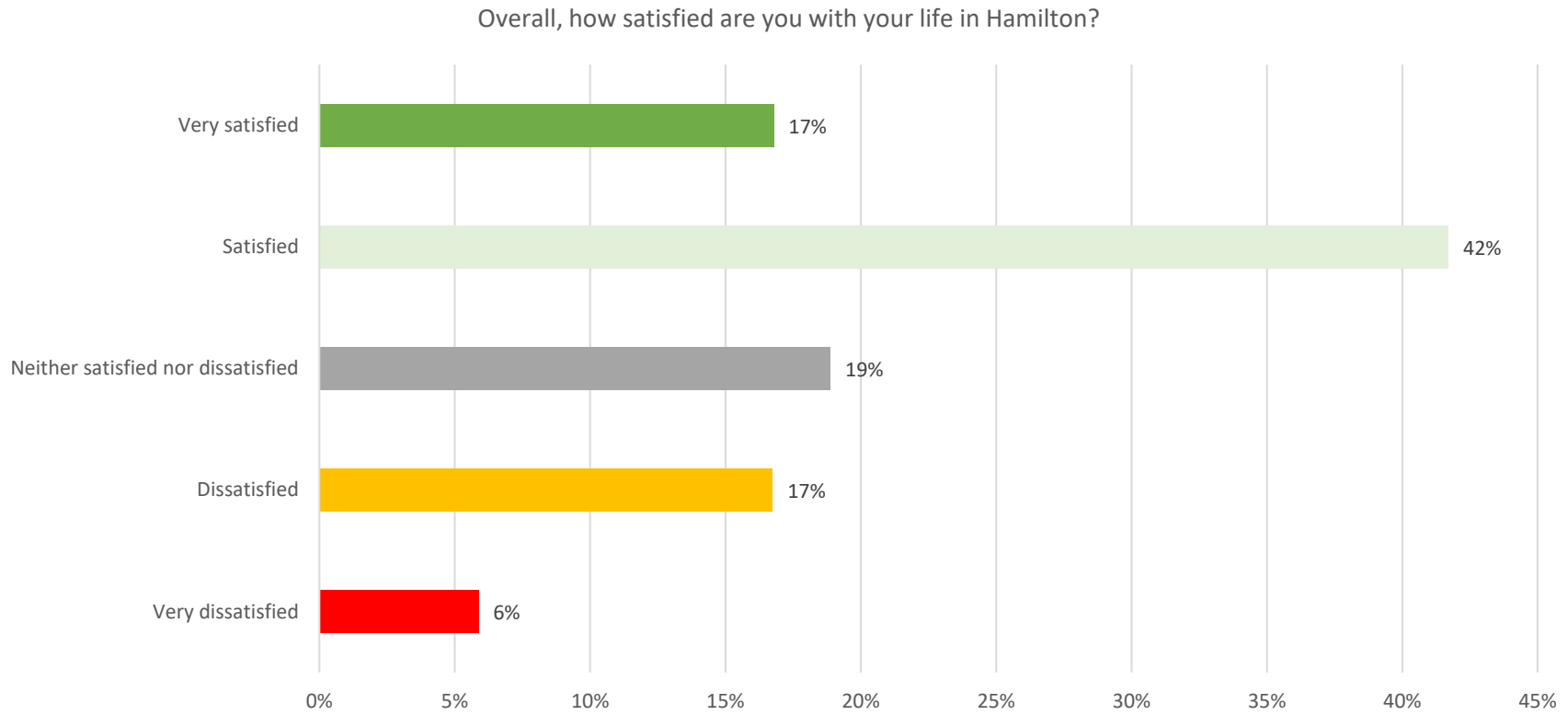
Most respondents preferred the City of Hamilton website, phone, and email services over in-person services for all types of interactions.

Nearly a quarter (23%) of the respondents agree that the City of Hamilton engages residents and nearly one fifth agree residents’ input (19%) is used in the decision-making process for City programs, services, and initiative.

## Detailed Findings – Quality of Life

## Satisfaction with Life in Hamilton

59% of respondents are satisfied or very satisfied with their life in Hamilton.

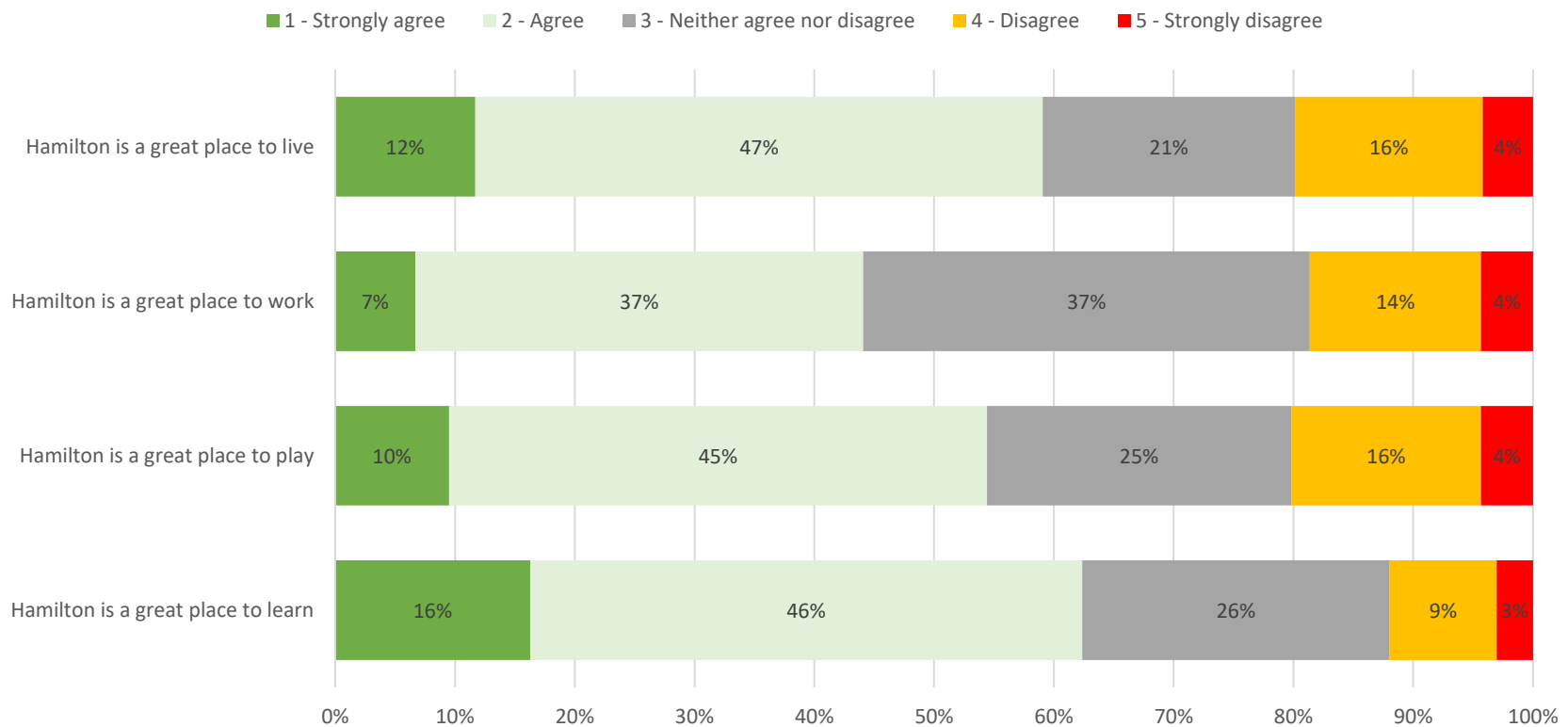


Q21 Overall, how satisfied are you with your life in Hamilton? Modified from: Overall, how satisfied are you with your life these days?

## Overall Quality of Life

Most of respondents agree or strongly agree that Hamilton is a great place to live (59%), play (54%) and learn (62%). Less than half (44%) of respondents agree or strongly agree that Hamilton is a great place to work.

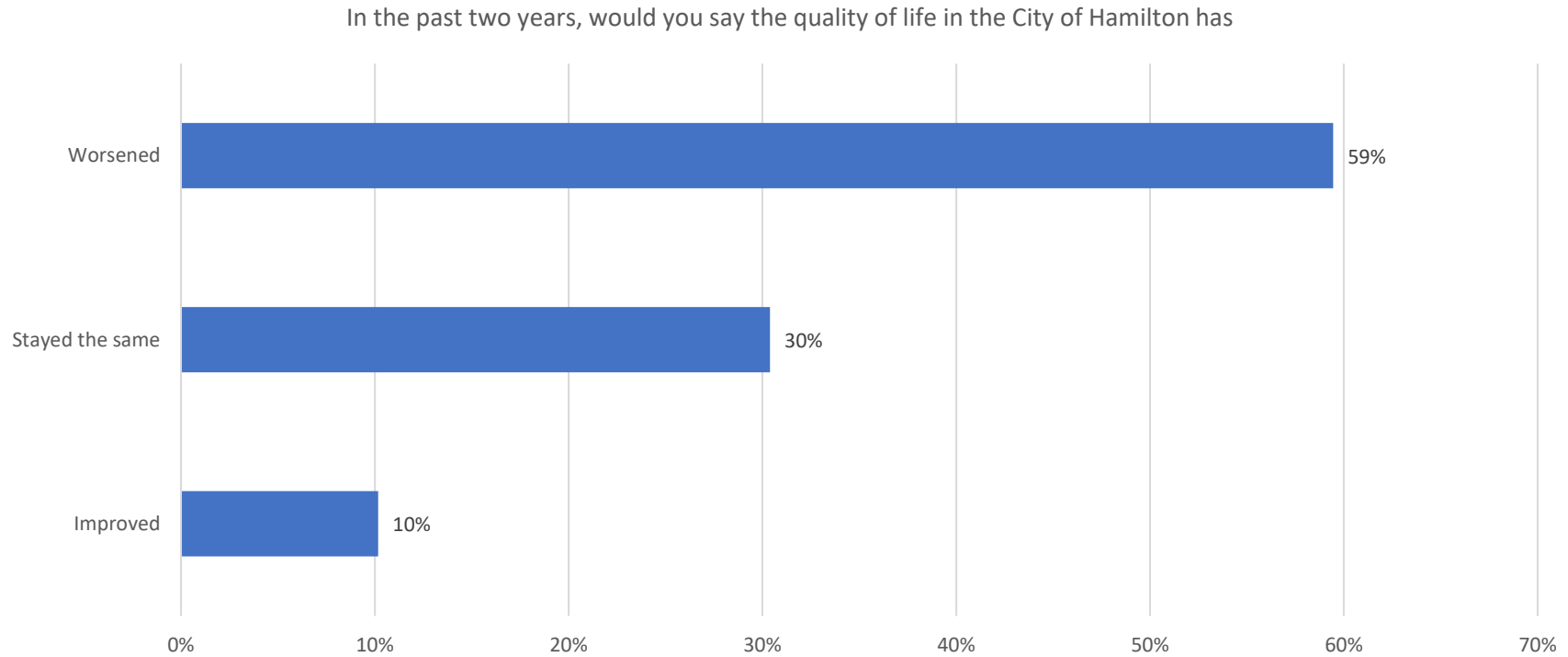
### Quality of Life in Hamilton



Q1 Please indicate your level of agreement with the following statements. a) Hamilton is a great place to live b) Hamilton is a great place to work c) Hamilton is a great place to play d) Hamilton is a great place to learn

## Changes in The Quality of Life in Hamilton

59% of the respondents viewed the quality of life in Hamilton has worsened in the past two years.

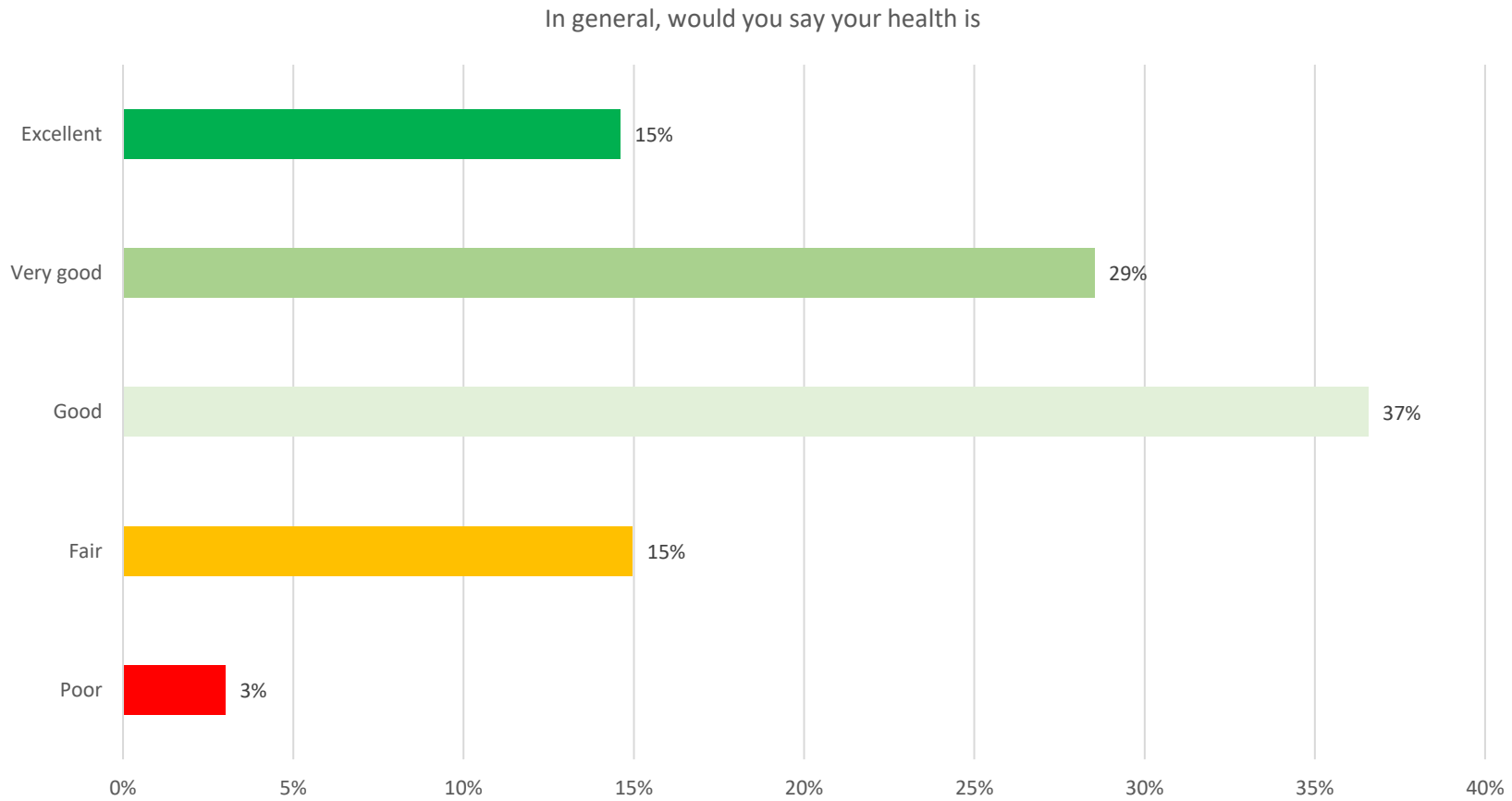


Q2 In the past two years, would you say the quality of life in Hamilton has...



## Health

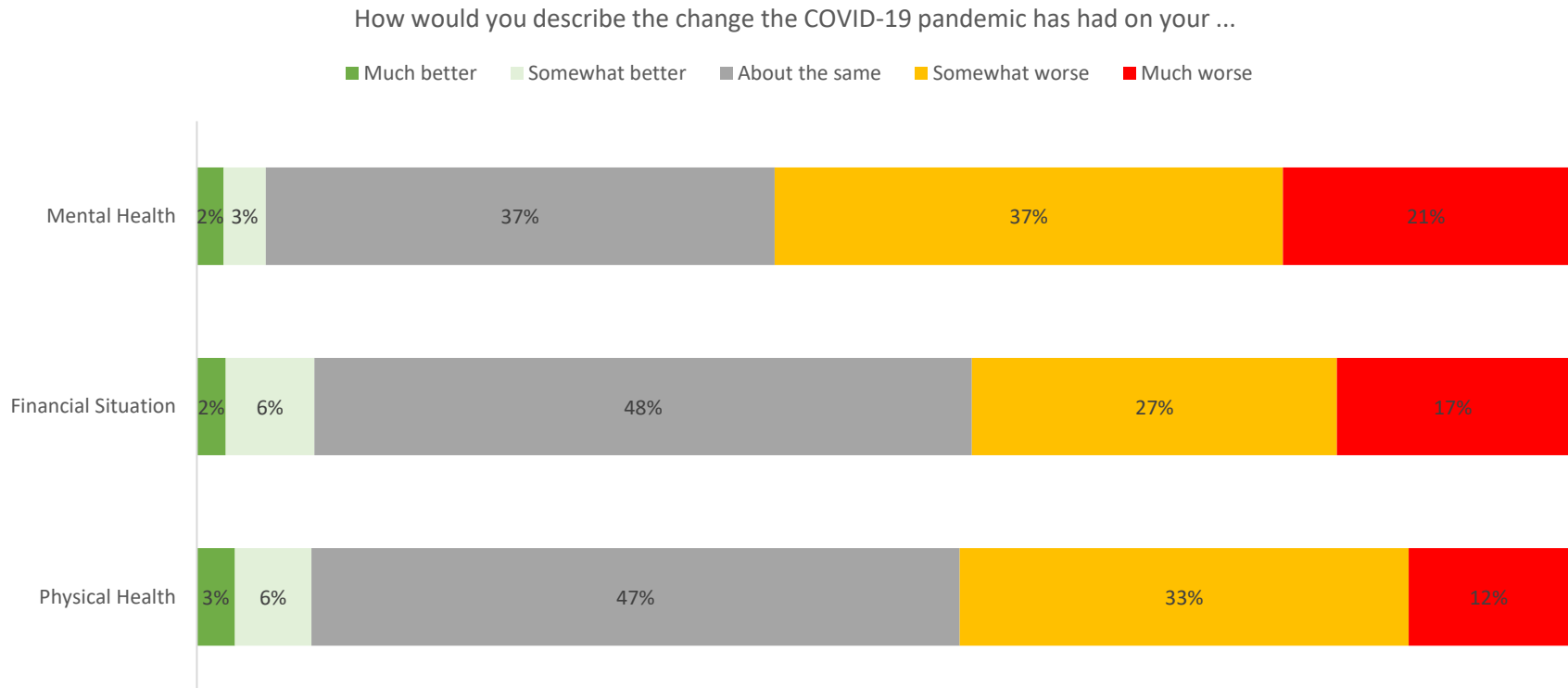
82% of respondents reported they are in good, very good or excellent health.



Q22 In general, would you say your health is

### COVID-19 Pandemic Impacts

Close to half of the respondents reported the COVID-19 pandemic has not had a significant change on their financial situation (57%) and physical health (56%). More respondents described the COVID-19 pandemic had worsened their mental health (58%) than those who described it has had worsened their physical health (44%) and financial situation (43%)

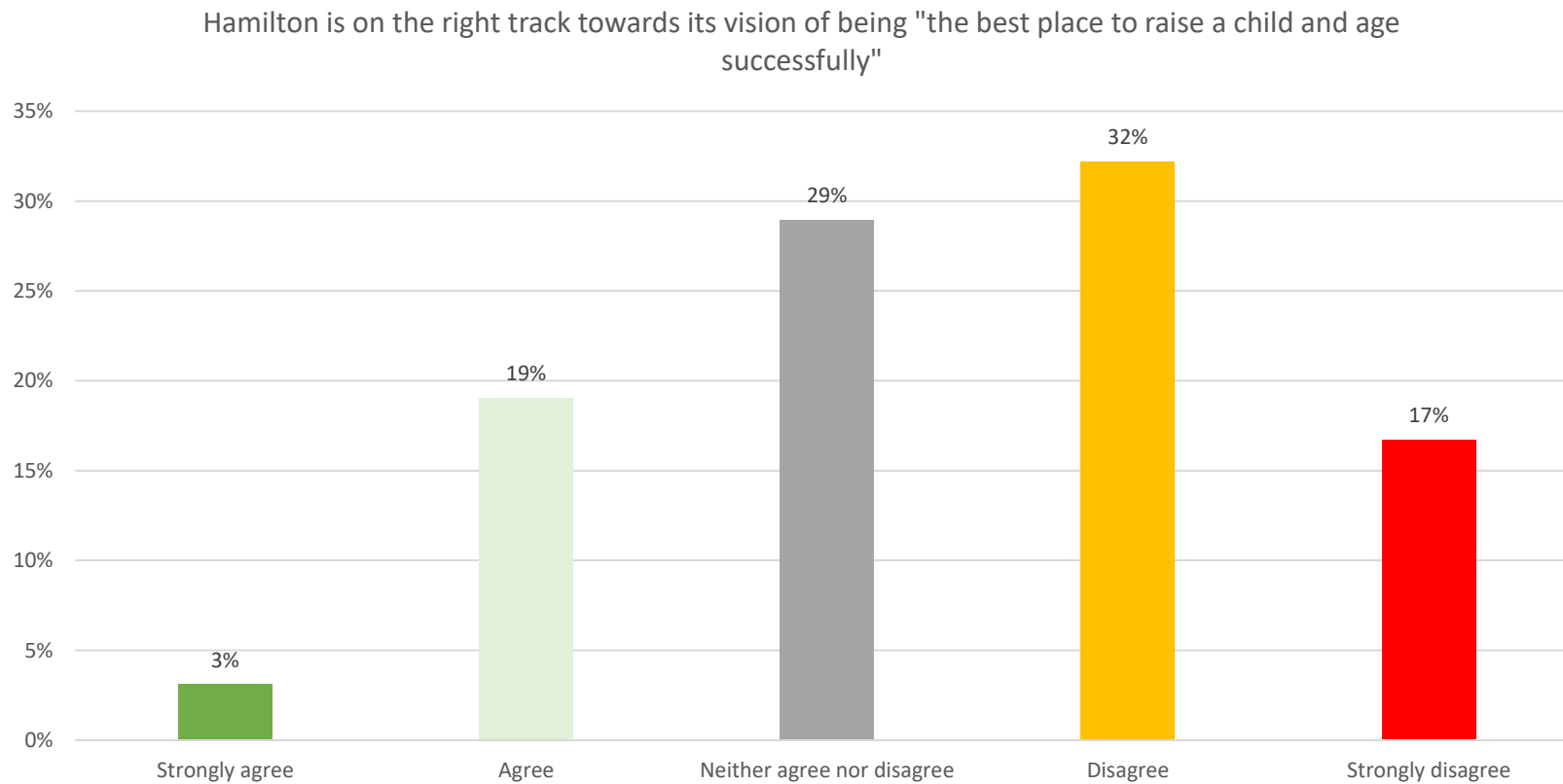


Q17 How would you describe the change the COVID-19 pandemic has had on you're a) financial situation b) physical health c) mental health. New in 2022

# Detailed Findings -Views Toward the City's Vision and Priorities

## Views Toward the City's Vision

Less than a quarter (22%) of respondents agree that Hamilton is on the right track towards its vision of being "the best place to raise a child and age successfully".



Q1e Please indicate your level of agreement with the following statements. Hamilton is on the right track towards its vision of being " the best place to raise a child and age successfully."

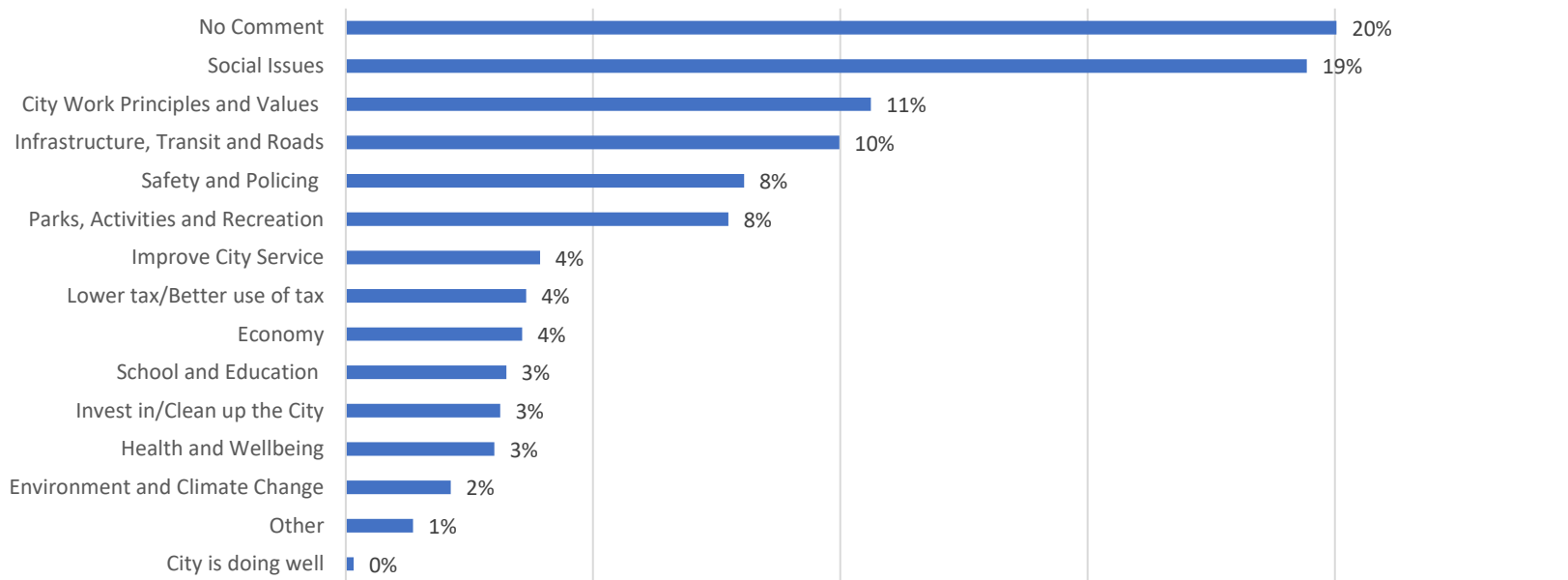
## Views Toward the City’s Priorities

19% of respondents identified addressing **social issues** as the top priority to reach the city’s vision.

**City Work Principles and Values** is the next priority, and **Infrastructure, Transit and Roads** is third most mentioned common themes.

The open-ended phone responses are coded into the following categories. If more than one answer is given, the first response is captured.

What is one thing you think the City of Hamilton should do to reach the vision of being "the best place to raise a child and age successfully"



Q18 What is one thing you think the City of Hamilton should do to reach the vision of being "the best place to raise a child and age successfully" (open comment question)

The following table provides a summary of the most common themes to the open-ended question.

Common Theme	Comment or concerns primary related to ...
City Work Principles and Values	More community engagement opportunities
	Concerns related to City Council
	More transparency, accountability, and inclusivity
Economy	Better jobs
	Better economy and more businesses
	Comment related to city development and urban boundaries
Environment & Climate Change	Reduce pollution
	Protect natural area
	Improve water and air quality
	More green initiatives
Health and Wellbeing	Better healthcare, hospital services and public health
	Concern related to mental health and addictions
	Comments related to COVID-19, vaccine, masks
	Comments related to healthcare workers
Improve City services	Improve or provide more city services, such as garbage collection, snow clearing, libraries, tourism, water and sewers, social services, animal control etc.
Invest in/clean up the City	Revitalize Downtown
	Clean up the City
Infrastructure, Transit & Roads	Improve, repair, or maintain infrastructure
	Improve, repair, or maintain roads and sidewalks
	Reduce traffic congestion and traffic flow
	More transit services, expand routes and service area
Lower tax/Better use of tax	Lower taxes
	Better use of taxes
Parks, activities & recreation	More activities and recreation in the City
	More parks and green space
Safety and policing	Increase/better police services
	Improve community safety
	Reduce crimes, including sexual assaults, gun violence, drugs, etc.

	Improve crime prevention and safety awareness
	More law enforcement
School and Education	Comments related to the general education system
	Comments related school
Social Issues	Improve accessibility
	Improve living affordability
	Improve housing and living affordability
	Reduce homelessness and poverty
	More/better daycare and children services and reduce fees
	More/better senior services
	More/better youth services

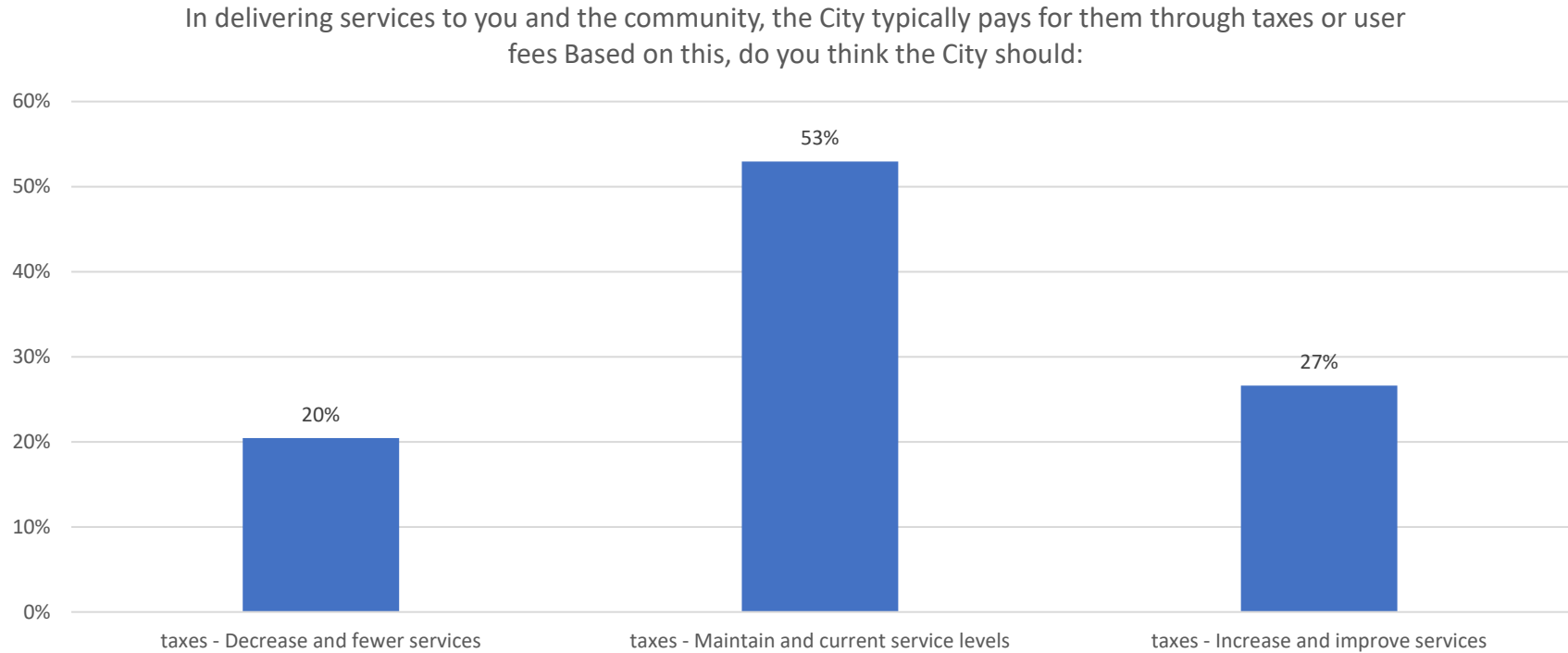
Q18 What is one thing you think the City of Hamilton should do to reach the vision of being "the best place to raise a child and age successfully"

## Detailed Findings - Preference Towards Tax Direction and Service Level



## Preference Towards Tax Direction and Service Level

Most respondents (53%) prefer to maintain tax and keep the current service level.

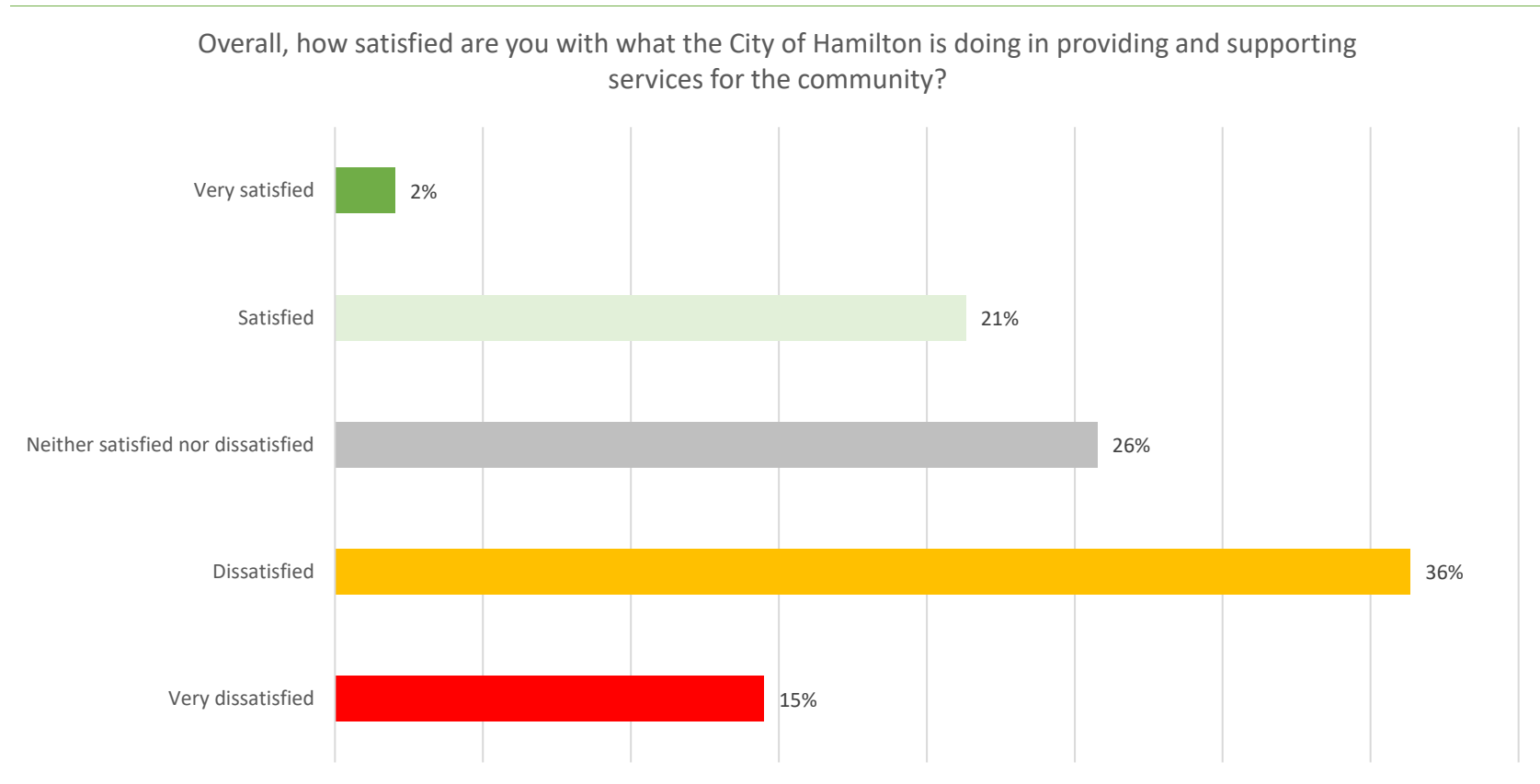


Q5 In delivering services to you and the community, the City of Hamilton typically pays for them through taxes or user fees. Based on this, do you think the City of Hamilton should.

# Detailed Findings - Assessment of The Quality and Usage of The City's Services

## Overall Satisfaction With the City Of Hamilton's Services

23% of the respondents are satisfied or very satisfied with what the City of Hamilton is doing in providing and supporting services for the community.

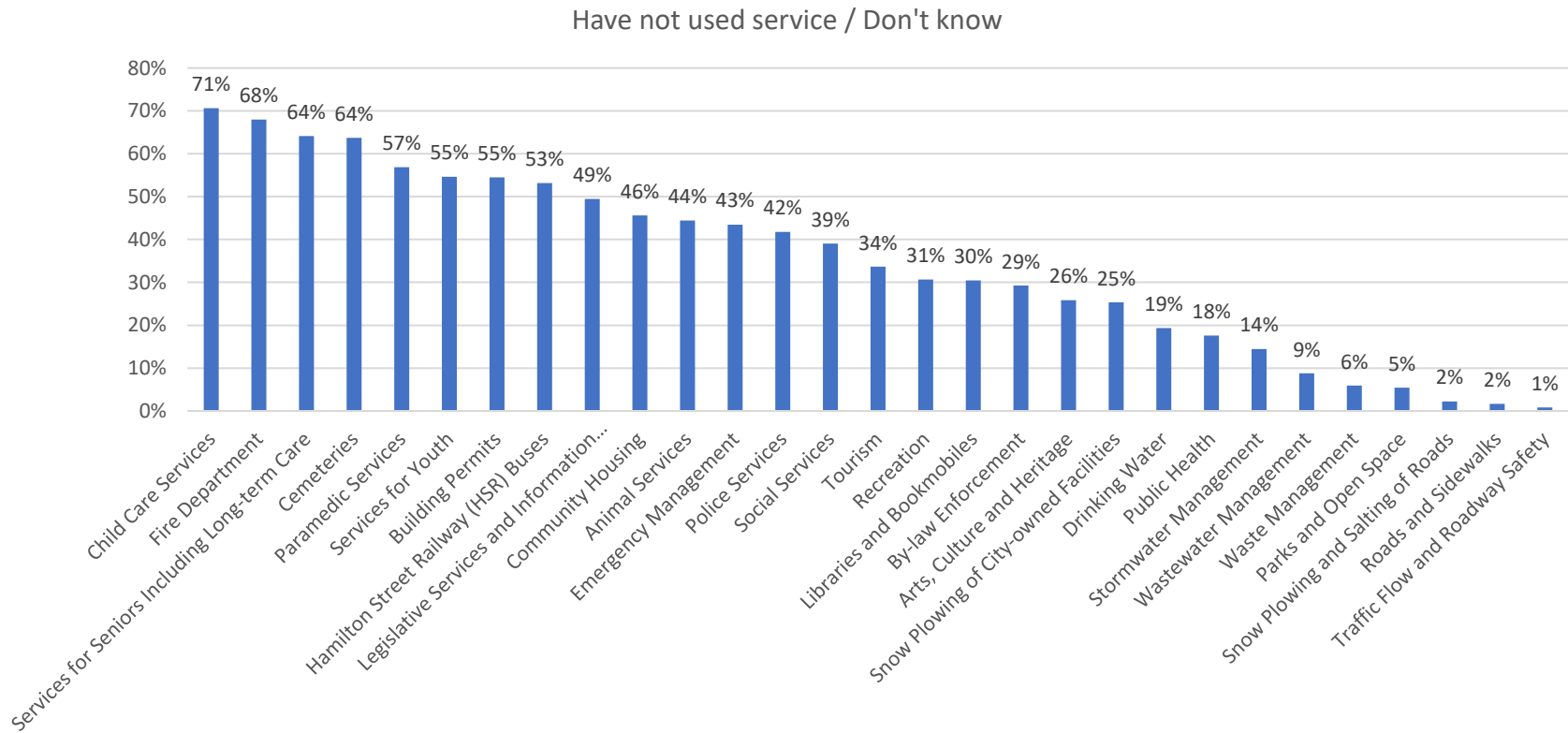


Q3 Overall, how satisfied are you with what the City of Hamilton is doing in providing and supporting services for the community? Modified from: Overall, how satisfied are you with the services provided by the City of Hamilton?

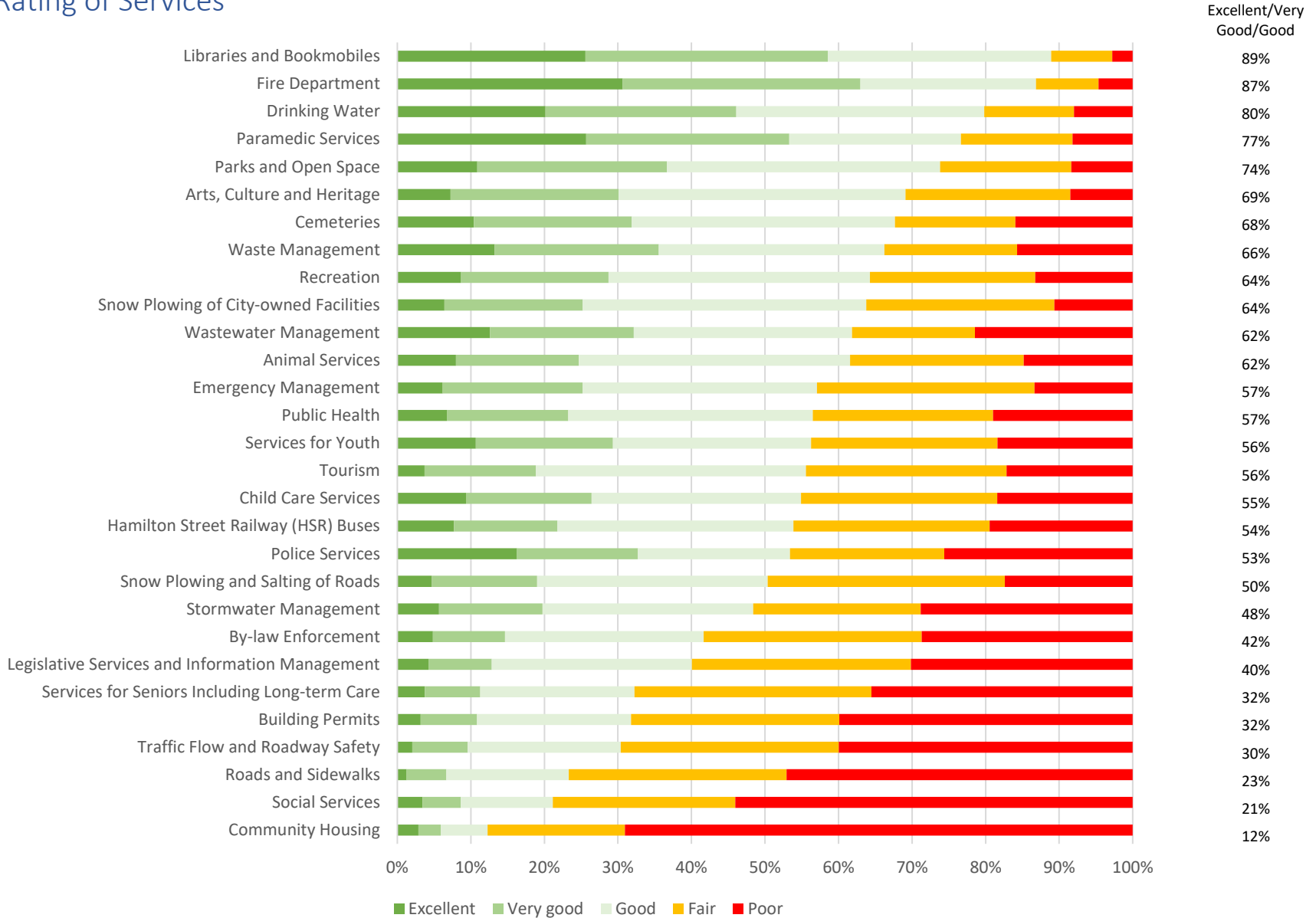
## Usage of the City's service

Respondents were asked to rate 29 services the City provides to residents. If the respondents have not used the service in the past year, they were asked to select the "don't know" response. Respondents were excluded from the rating of services if they answered that they "have not used/did not know" about the service.

The services with the most respondents who selected the "have not used/did not know" option are: Child care services (71%), Fire department (68%), Services for Seniors (64%) and Cemeteries (64%).



## Rating of Services



The following are the services most often rated as good, very good or excellent.

- Libraries and Bookmobiles 89%
- Fire Department 87%
- Drinking Water 80%
- Paramedic Services 77%
- Parks and Open Space 74%

The following are the services most often rated as poor.

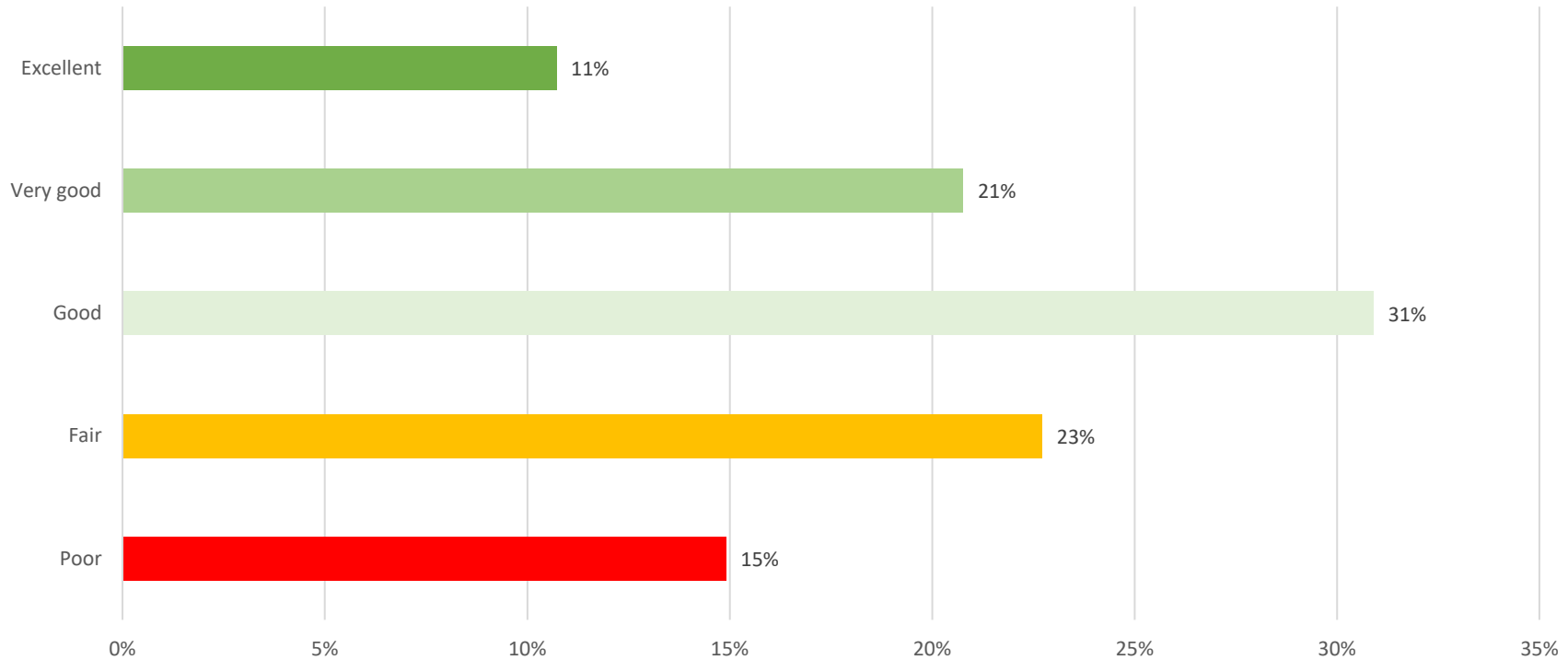
- Community Housing 69%
- Social Services 54%
- Roads and Sidewalks 47%
- Traffic Flow and Roadway Safety 40%
- Building Permits 40%

Q4 The following question will focus on different services in our community. These services could be provided solely by the City of Hamilton, or in partnership with other levels of government or agencies in the community. How would you describe each of the following services? Note: If you have not used the service in the past year, please say "don't know". Modified from: The following question will focus on the different services the City of Hamilton provides to its residents. How would you rate each of the following services provided by the City of Hamilton?

### Rating of The City's Response to the COVID-19 Pandemic

6 out of 10 (62%) respondents rated the City's response to the COVID-19 pandemic as excellent, very good or good. The City's response to the COVID-19 pandemic includes maintaining city operations, communications, enforcement of provincial and municipal restrictions, etc.

How would you rate the City's response to the COVID-19 pandemic



Q16 How would you rate the City's response to the COVID-19 pandemic including maintaining city operations, communications, enforcement of provincial and municipal restrictions, etc.

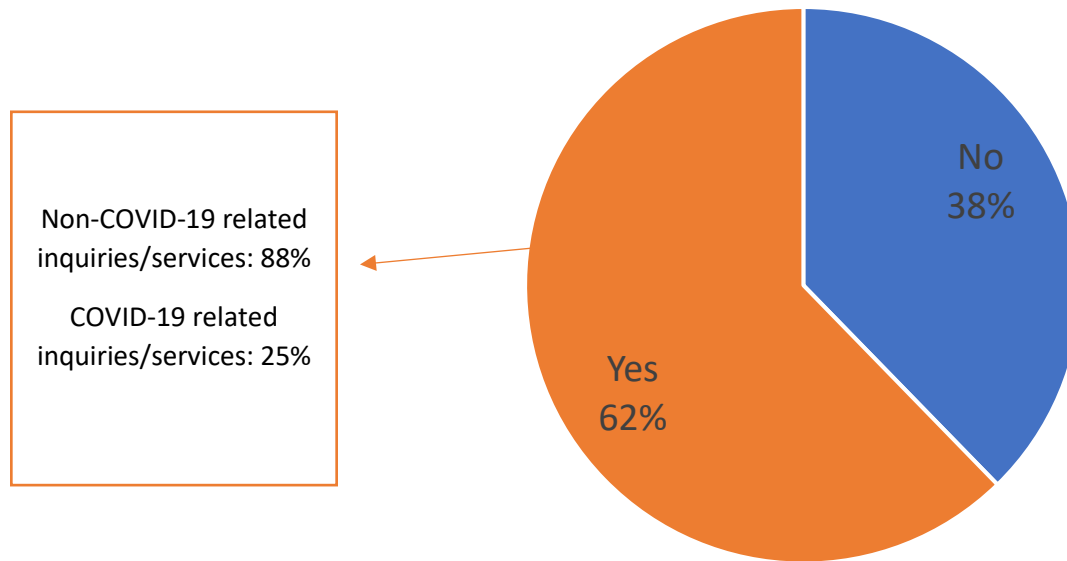
# Detailed Findings - Interactions with The City



## Contacting the City

62% of respondents have contacted the City of Hamilton in the past year for information or to conduct service transactions, out of which, 88% of respondents reported it was for non-COVID-19 related inquiries/services and 25% of respondents reported it was for COVID-19 related inquiries/services.

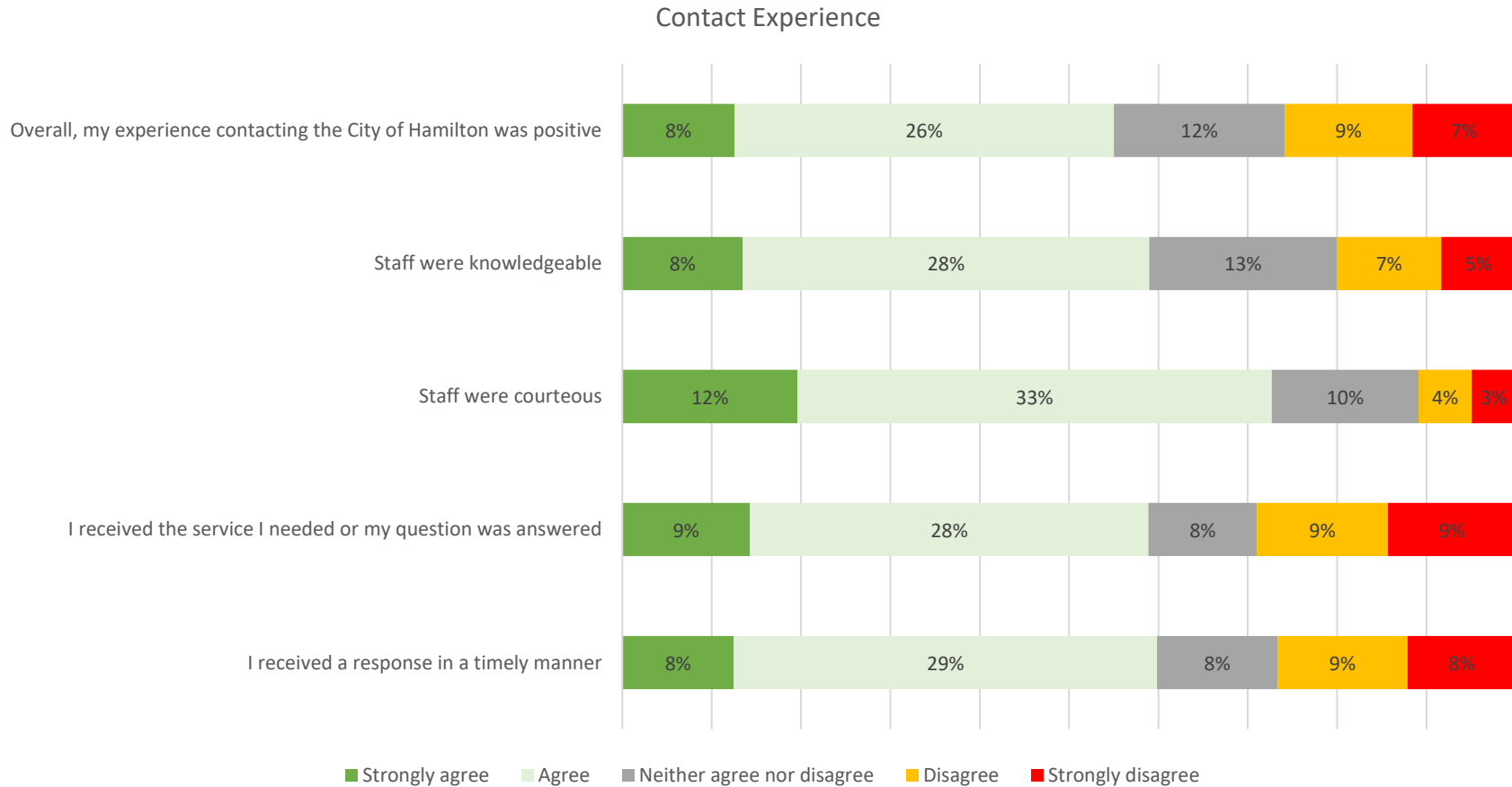
In the past year, have you contacted the City of Hamilton for information or to conduct any service transactions?



Q9 In the past year, have you contacted the City of Hamilton for information or to conduct any service transactions?

## Customer Experience

34% of respondents reported that their experience with contacting the City of Hamilton was positive. Most respondents felt that city staff were courteous (45%) and knowledgeable (36%), their question was answered (37%) and they received a timely response (37%).



Q10 What have you contacted the City of Hamilton for in the past year? New in 2022 Q11 Thinking about your contact with the City of Hamilton in the past year, please tell us how strongly you agree with each of the following statements. a) Overall, my experience contacting the City of Hamilton was positive. b) I received a response in a timely manner. c) Staff were knowledgeable. d) Staff were courteous. e) I received the service I needed / my question was answered.

## Detailed Findings – Preferred Service Delivery and Communication Channels

## Preference of Service Delivery Channels

### Getting Information

The most preferred way of getting information from the City is through the City of Hamilton website (39%). This is the top preference for all age groups.

	Younger Adults	Middle-aged Adults	Older Adults	Total
City of Hamilton website (hamilton.ca)	42%	41%	36%	39%
Email	30%	31%	34%	33%
In person	2%	4%	7%	5%
Online digital assistant (i.e. chatbot)	2%	1%	1%	1%
Phone	5%	9%	14%	10%
Social media	14%	9%	4%	7%
Text Message/SMS	4%	5%	3%	4%
Video call	0%	0%	0%	0%

### Making A Complaint / Providing Feedback or Compliment

The most preferred way of making a complaint/providing feedback or compliment is through email (40%). This is the top preference for all age groups.

	Younger Adults	Middle-aged Adults	Older Adults	Total
City of Hamilton website (hamilton.ca)	31%	27%	17%	24%
Email	37%	39%	41%	40%
In person	4%	5%	10%	7%
Online digital assistant (i.e. chatbot)	5%	2%	1%	2%
Phone	17%	21%	27%	23%
Social media	3%	1%	1%	1%
Text Message/SMS	2%	3%	3%	3%
Video call	1%	1%	1%	1%

## Preference of Service Delivery Channels

### Registering for Programs and Services

The most preferred way to register for programs and services (67%) is through the City of Hamilton website (hamilton.ca).

	Younger Adults	Middle-aged Adults	Older Adults	Total
City of Hamilton website (hamilton.ca)	74%	74%	56%	67%
Email	17%	16%	27%	21%
In person	4%	5%	10%	7%
Phone	4%	5%	7%	6%

### Applying for Licenses and Permits

The most preferred way to apply for licenses and permits (64%) is through the City of Hamilton website (hamilton.ca).

	Younger Adults	Middle-aged Adults	Older Adults	Total
City of Hamilton website (hamilton.ca)	74%	72%	53%	64%
Email	11%	14%	23%	17%
In person	11%	11%	19%	15%
Phone	4%	3%	4%	4%

### Booking / Renting City of Hamilton Facilities or Parks

The most preferred way to book/rent City of Hamilton facilities or parks is through the City of Hamilton website (65%). This is the top preference for all age groups.

	Younger Adults	Middle-aged Adults	Older Adults	Total
City of Hamilton website (hamilton.ca)	74%	73%	54%	65%
Email	12%	15%	25%	19%
In person	4%	4%	9%	6%
Phone	10%	8%	12%	10%

**Making Payment for Programs, Services, Permits, Licenses, Fines Etc.**

The most preferred way to make payment for programs, services, permits, licenses, fines etc. (82%) is through the City of Hamilton website (hamilton.ca). This is the top preference for all age groups.

	Younger Adults	Middle-aged Adults	Older Adults	Total
City of Hamilton website (hamilton.ca)	82%	79%	59%	71%
Email	8%	10%	23%	15%
In person	7%	8%	15%	11%
Phone	3%	2%	3%	3%

**Paying Property Taxes**

The most preferred way property tax is through a bank (56%). This is the top preference for all age groups and has not changed since 2018.

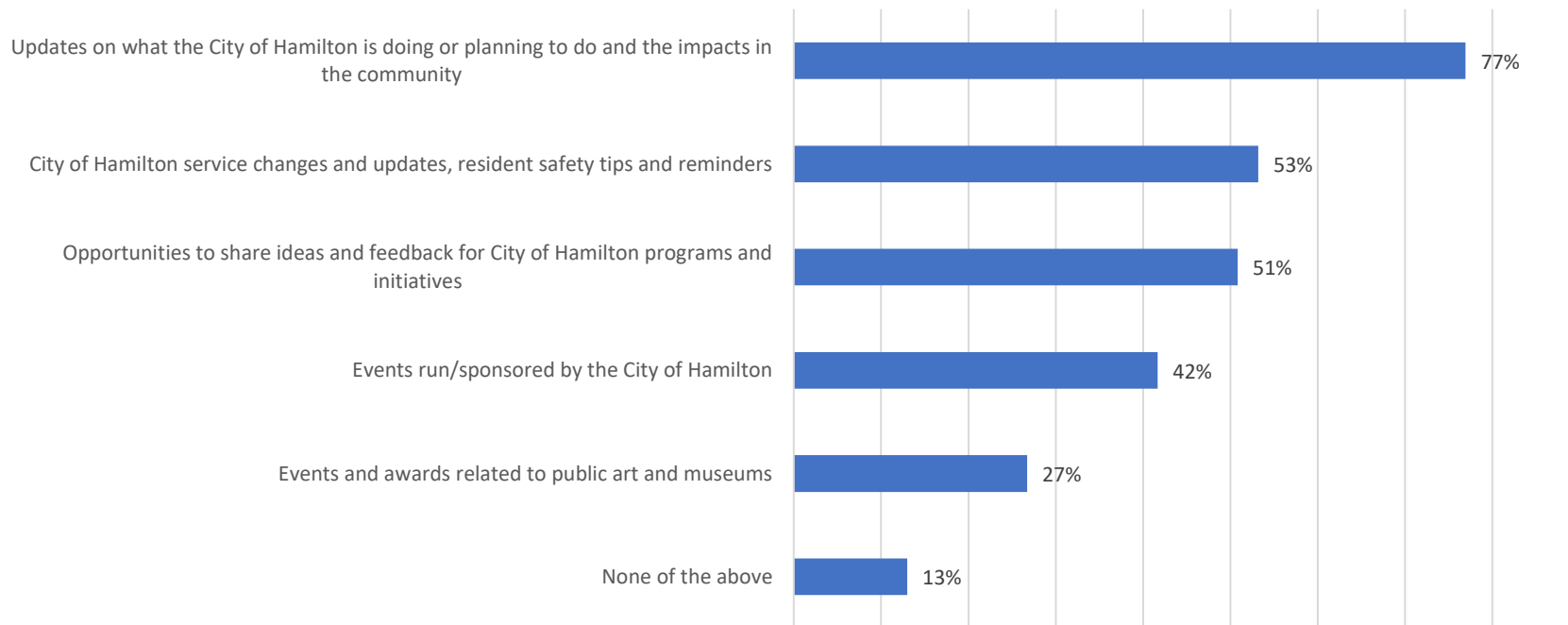
	Younger Adults	Middle-aged Adults	Older Adults	Total
By phone directly with the City	3%	1%	1%	1%
In-person at a City counter	2%	3%	2%	3%
Postal mail	1%	1%	2%	2%
Pre-authorized debit payment plan	42%	41%	42%	42%
Through your bank (at a teller, ATM, online/phone banking)	51%	53%	52%	53%

Q8 The following question will focus on different ways of connecting with and conducting business with the City of Hamilton. If you needed to, what would be your preferred way of conducting each of the following types of interactions? Note that not all response options are currently available or used. Modified from: What is your preferred way of conducting each of the following types of interactions with the City of Hamilton?

### Topic Areas to Receive Information on From the City

Topic areas where most respondents reported that they would like to receive information on from the City of Hamilton includes “updates on what the City of Hamilton is doing or planning to do and the impacts in the community” (77%), “City of Hamilton service changes and updates, resident safety tips and reminders” (53%) and “opportunities to share ideas and feedback for City of Hamilton programs and initiatives” (51%).

Which of the following topic areas would you like to receive information on from the City of Hamilton?

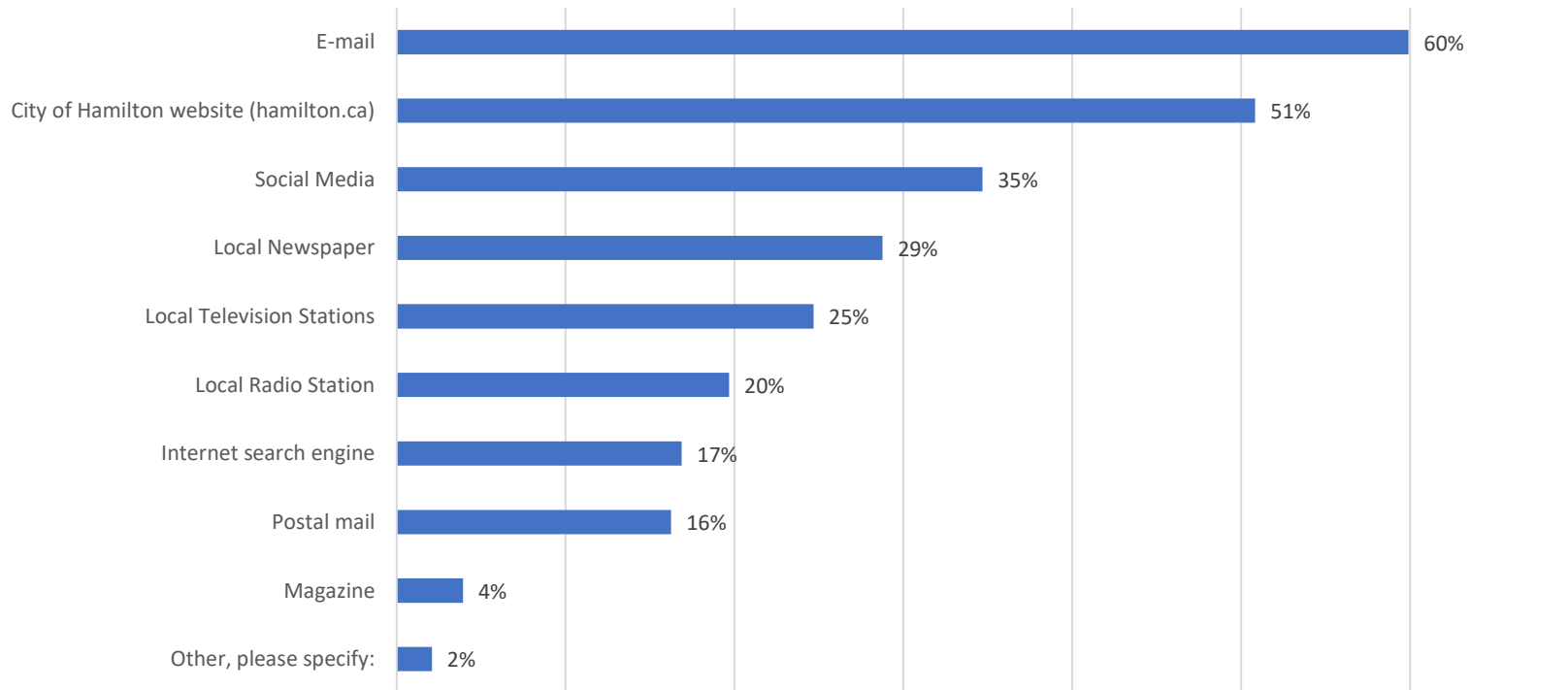


Q12 Which of the following topic areas would you like to receive information on from the City of Hamilton? New for 2022

## Preference of Communication Channels

The most preferred way to get information about the City of Hamilton’s programs, initiatives, news, and events is through email (60%) and City of Hamilton website (hamilton.ca) (51%).

How do you would/like to get information about the City of Hamilton's programs, initiatives, news and events?



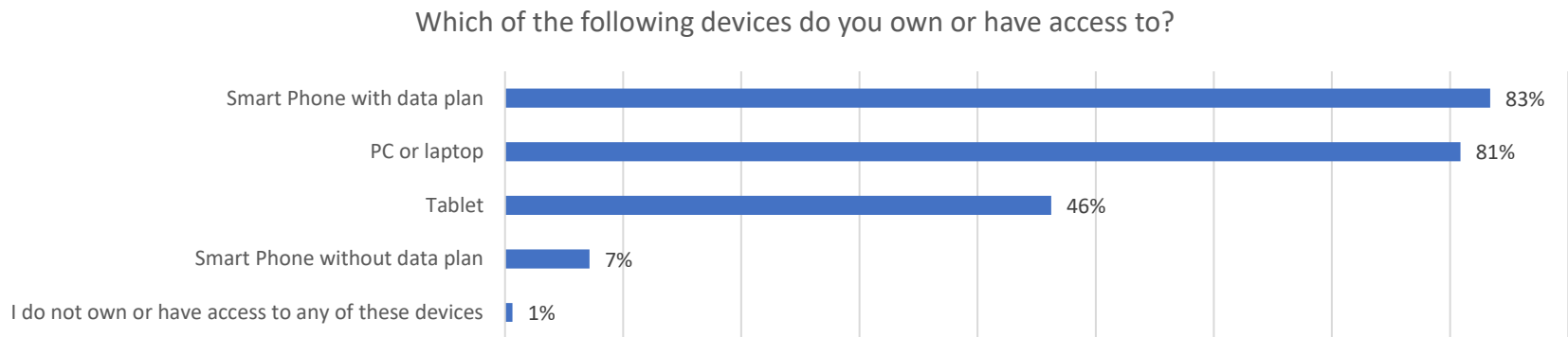
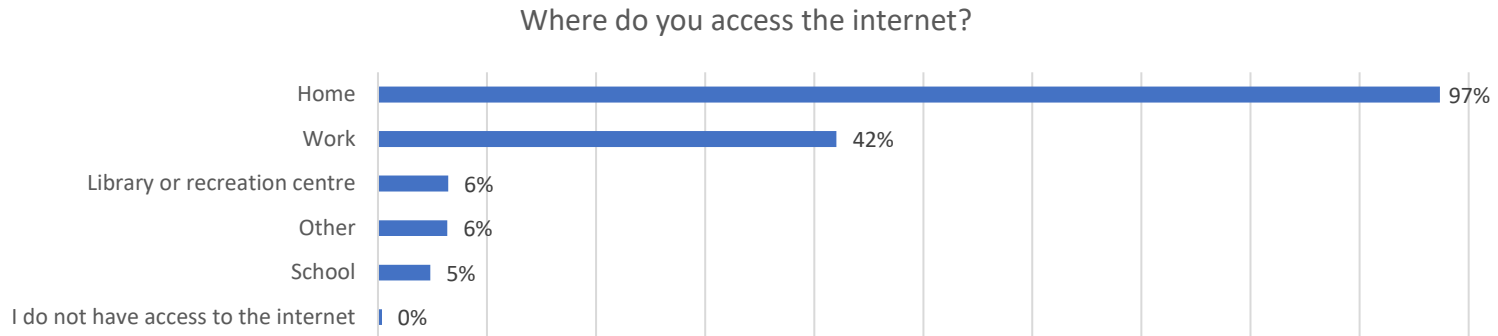
Q13 Which of the following topic areas would you like to receive information on from the City of Hamilton? New for 2022 Q18 How would/do you like to get information about the City of Hamilton's programs, initiatives, news, and events?



## Access to Internet and Digital Devices

Most of the respondents (97%) have access to the internet at home and 42% have access to the internet at work.

Most of the respondents own or have access to Smart Phones with data plan (83%) and 81% have access to PC or laptops. Only a small portion (1%) of respondent do not own or have access to any digital devices.



Q14 Where do you access the internet? New for 2022

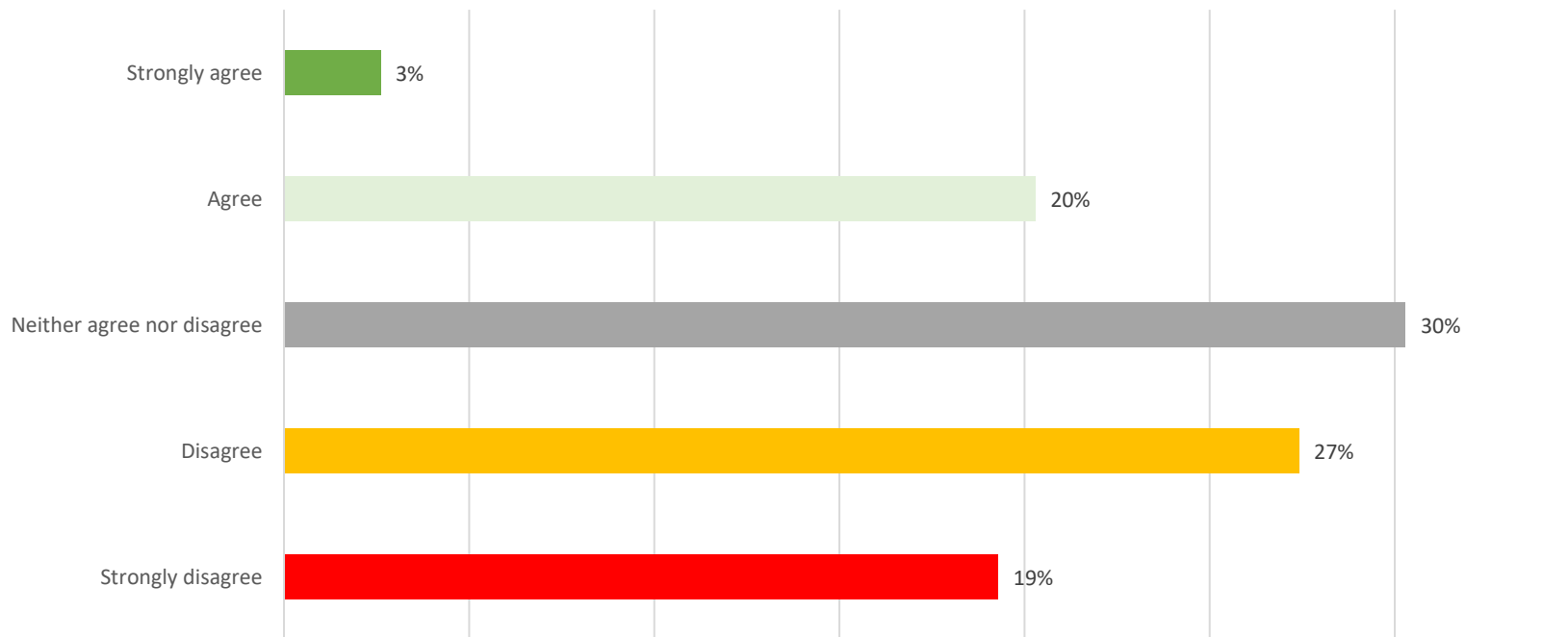
Q15 Which of the following devices do you own or have access to? New for 2022

# Detailed Findings – Community Engagement

### Perception of Resident Engagement by the City

23% of respondent agree/strongly agree that the City of Hamilton engages residents in the decision-making process for City programs, services, and initiative.

The City of Hamilton engages residents in the decision-making process for City programs, services and initiatives

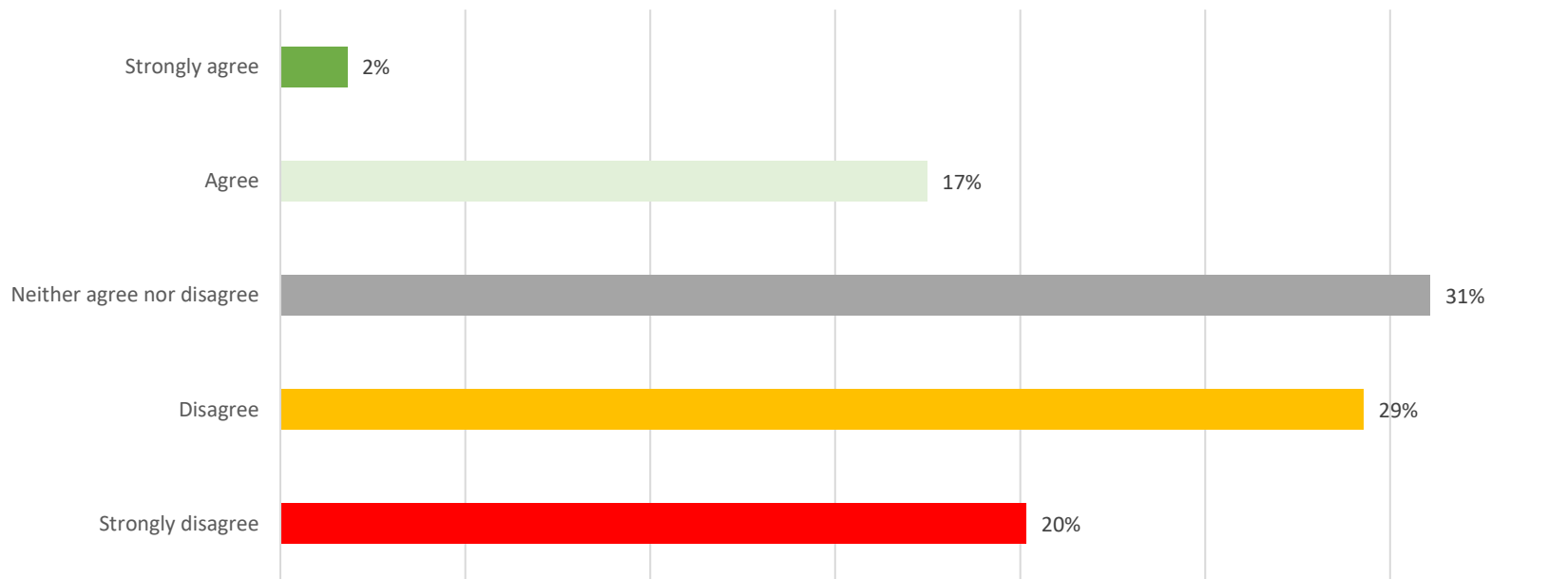


Q6 Please indicate your level of agreement with the following statements. a) The City of Hamilton engages residents in the decision-making process for City programs, services, and initiatives. b) The City of Hamilton uses input from residents in decision-making about City programs, services, and initiative

### Perception of the City uses Input from Residents in Decision-making

19% of the respondents agree that the City of Hamilton uses input from residents in decision-making about City programs, services, and initiative.

The City of Hamilton uses input from residents in decision-making about City programs, services and initiatives

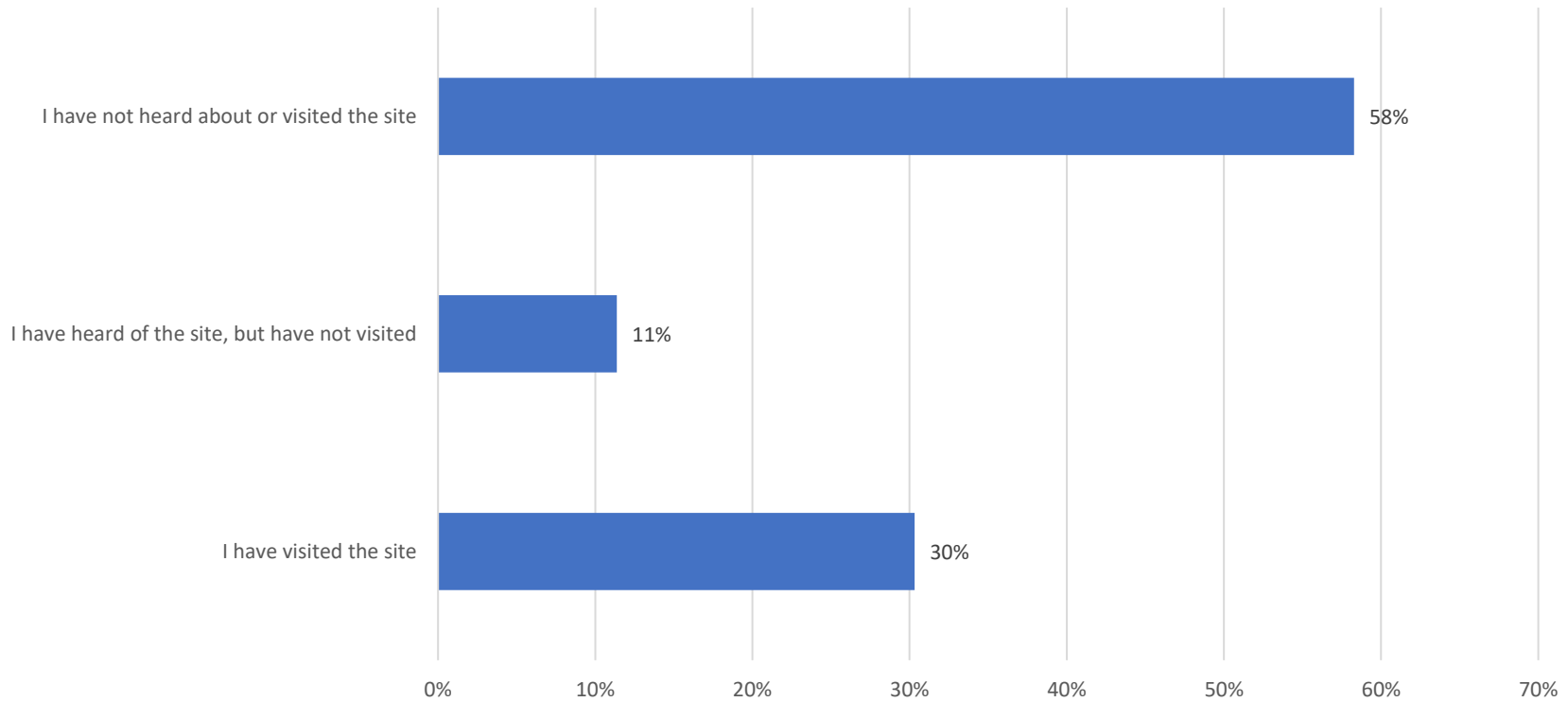


Q6 Please indicate your level of agreement with the following statements. a) The City of Hamilton engages residents in the decision-making process for City programs, services, and initiatives. b) The City of Hamilton uses input from residents in decision-making about City programs, services, and initiative

## City of Hamilton's Online Engagement Platform

Close to one third (30%) of respondents have visited the City of Hamilton's online engagement platform. Most of respondents (58%) have not heard about or visited the site.

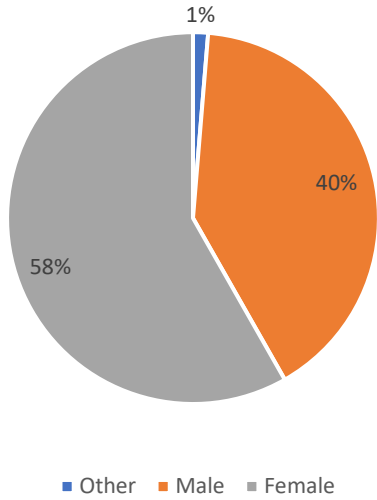
Are you aware of or have visited the City of Hamilton's online engagement platform



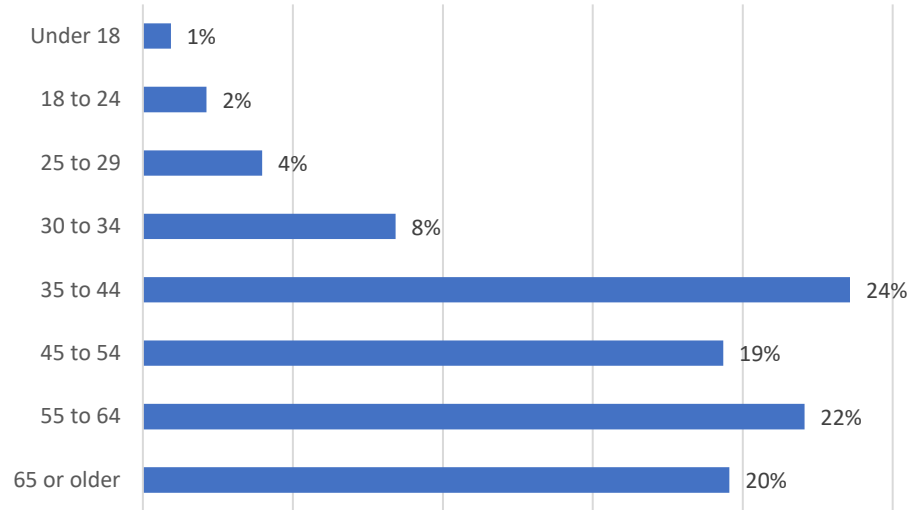
Q7 Are you aware of or have you visited the City of Hamilton's online engagement platform [engage.hamilton.ca](https://engage.hamilton.ca)? New for 2022

# Respondent Profile

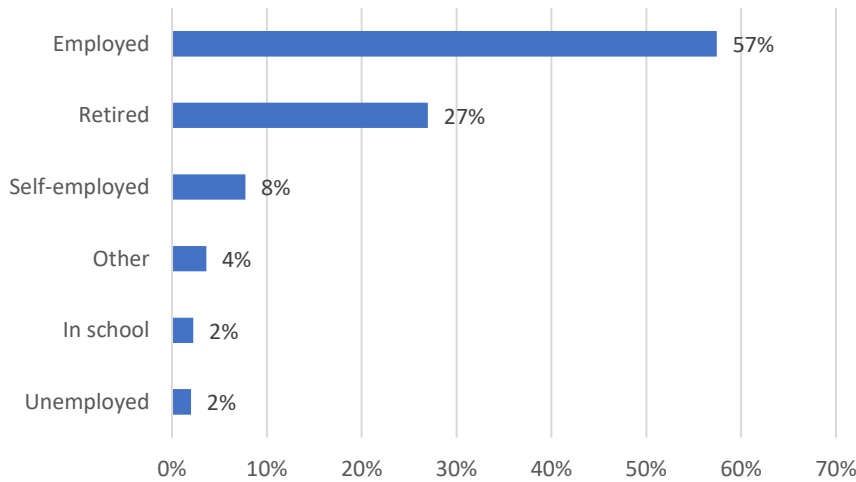
**Gender**



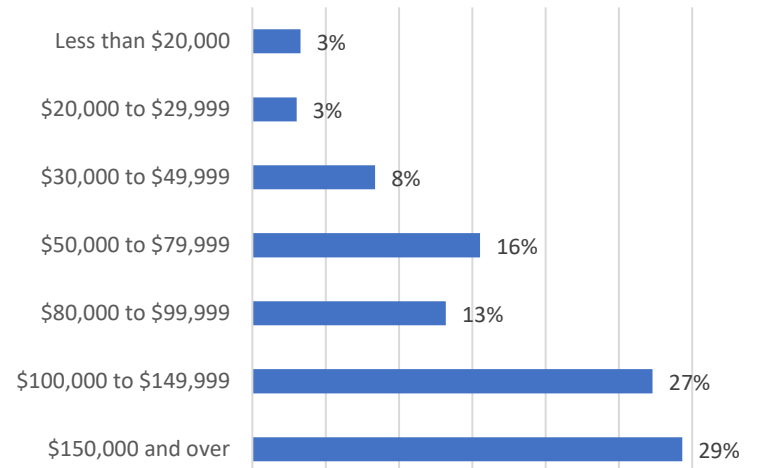
**Age**



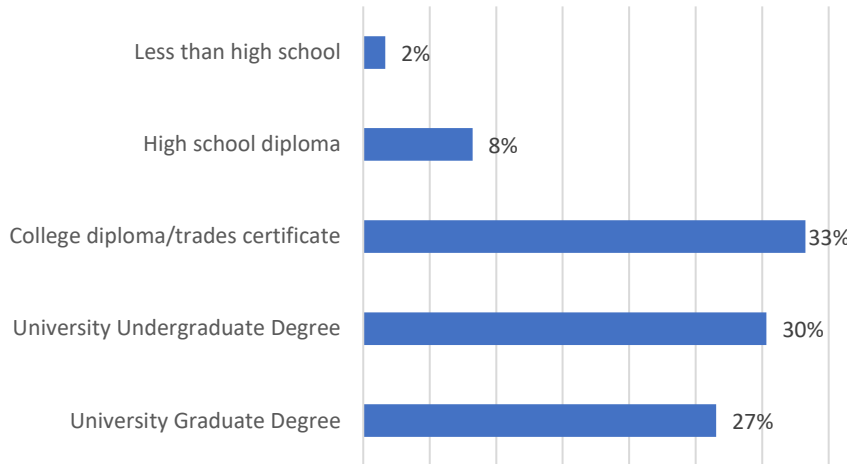
**Employment Status**



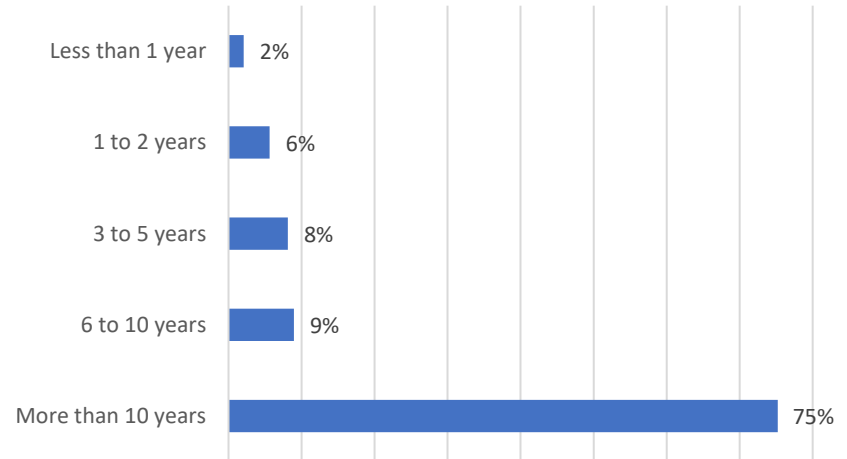
**Household Income**



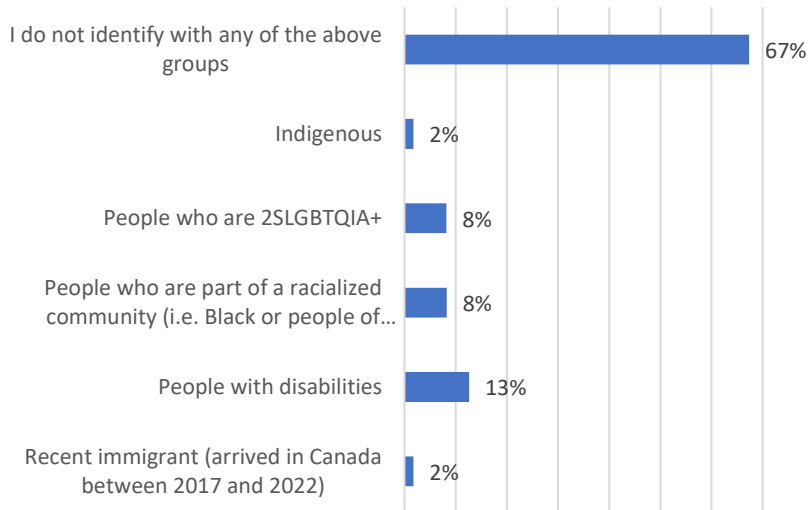
**Education**



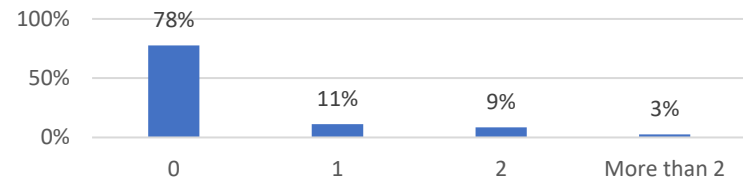
**Tenure in Hamilton**



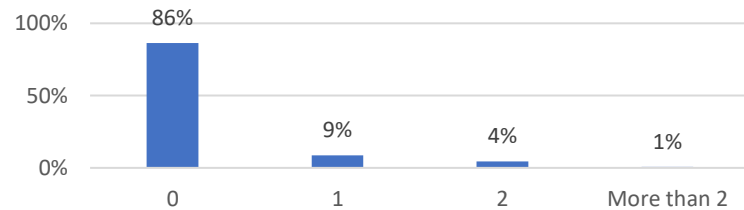
**Member of Groups**



**Number of Children in Household**



**Number of Youths in Household**







## City of Hamilton Our City Survey 2022 – Survey Questions

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S1. How do you describe yourself?

Response options (choose one):

- Male
- Female
- Transgender
- Other

S2. What is your age?

PN: Should be 18+

Response options (choose one):

- Under 18
- 18 to 24
- 25 to 29
- 30 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 or older

S3. What is your postal code?

PN: Show drop down list and check quotas by Ward

\_\_\_\_\_



## City of Hamilton Our City Survey 2022 – Survey Questions

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Q1 Please indicate your level of agreement with the following statements.

- a) Hamilton is a great place to live
- b) Hamilton is a great place to work
- c) Hamilton is a great place to play
- d) Hamilton is a great place to learn
- e) Hamilton is on the right track towards its vision of being " the best place to raise a child and age successfully."

Response options (select one):

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Q2 In the past two years, would you say the quality of life in Hamilton has...

Response options (select one):

- Improved
- Stayed the same
- Worsened

Q3 Overall, how satisfied are you with what the City of Hamilton is doing in providing and supporting services for the community?

Response options (select one):

- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied



## City of Hamilton Our City Survey 2022 – Survey Questions

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- Q4 The following question will focus on different services in our community. These services could be provided solely by the City of Hamilton, or in partnership with other levels of government or agencies in the community. How would you describe each of the following services? Note: If you have not used the service in the past year, please say “don’t know”.
- a) Fire Department - Emergency response, fire safety inspections, fire safety education
  - b) Paramedic Services - Emergency medical/trauma care, health education, community paramedic program
  - c) Police Services - Police services, safety, law enforcement
  - d) Emergency Management - Handling city wide emergencies such as power outages, ice storms, floods, etc.
  - e) Roads and Sidewalks - Maintenance and condition
  - f) Snow Plowing and Salting of Roads
  - g) Snow Plowing and Salting of City-owned facilities – City-owned facilities include: arenas, recreation centres, libraries, and town halls
  - h) Traffic Flow and Roadway Safety - Traffic signal timing, street lighting, traffic signage, traffic calming measures, pavement makings, roadway safety issue identification
  - i) Hamilton Street Railway (HSR) Buses - Customer-focused service that is safe, reliable and inclusive
  - j) Recreation - Registered, drop in and rental programming in recreation facilities including pools, arenas, seniors centres, community halls and sports fields/parks
  - k) Parks and Open Space - Maintenance of parks, play structures, spray pads and access to parks and natural open spaces
  - l) Libraries and Bookmobiles – Hamilton Public Library branches and Bookmobiles
  - m) Tourism - Visitor services; marketing, attracting, promoting and hosting conventions, sports tourism attractions and major events, i.e. Juno Awards
  - n) Arts, Culture and Heritage - Public art, museums, cultural programming, heritage properties maintenance
  - o) Public Health - Food safety inspections; pools and beaches inspections; rabies, West Nile, Lyme Disease, response to outbreaks; vaccinations and dental screening in schools; prenatal and parenting programs; alcohol, drugs, and gambling programs; help with quitting smoking and protection from second-hand smoke; air quality and extreme weather monitoring



## City of Hamilton Our City Survey 2022 – Survey Questions

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- p) Social Services - Ontario Works, homelessness prevention, home management services, health related benefits for low-income residents
- q) Community Housing – Subsidized housing, access to Housing waitlist and housing initiatives such as portable housing benefits and rent supplements.
- r) Child Care Services - EarlyON Child and Family Centres, child care supports for operators and families, Red Hill Family Centre.
- s) Services for Youth - Working with Youth and Youth Serving Agencies to support life goals such as education and employment, Learning Earning and Parenting Program (LEAP), Xperience Annex
- t) Services for Seniors including Long-Term Care - Long Term Care provided at Macassa Lodge and Wentworth Lodge and other senior services provided at / or by the Lodges – Meals on Wheels and Adult Day Program
- u) Legislative Services and Information Management - Providing City by-law information; marriage licenses and death registrations; Council/committee agendas, reports and minutes; citizen appointments to sub-committees; delegation requests; accessing information under MFIPPA (Municipal Freedom of Information and Protection of Privacy Act); Commissioning of Government documents; waiver of immunization; foreign pensions; property assessment information
- v) Animal Services - Dog Licensing, rabies response and wildlife, animal shelter, pound services including lost and found, dog parks and animal investigations
- w) By-law Enforcement - Enforcement of parking by-laws, business licensing, property standards investigations, noise complaints, long weeds and grass by-laws, school crossings, smoking by-laws
- x) Building Permits - Building permit applications to erect, install, extend, alter or repair, demolish all or part of a building
- y) Cemetery - City managed grounds maintenance, burial services, customer service
- z) Drinking Water - Production and supply of clean, safe and reliable drinking water
- aa) Waste Water Management - Collection and treatment of waste water that leaves a building through a drain (e.g. from flushing toilets, doing laundry, washing dishes, etc.)
- bb) Storm Water Management - Collection and treatment of stormwater to support flood prevention, water quality and erosion control
- cc) Waste Management - Pick up of garbage, blue box, green bin, leaf and yard, bulk waste



## City of Hamilton Our City Survey 2022 – Survey Questions

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Response options for Q4(a)-Q4(bb) (select one):

- Excellent
- Very Good
- Good
- Fair
- Poor
- Have not used this service / Don't Know

Q5 In delivering services to you and the community, the City of Hamilton typically pays for them through taxes or user fees. Based on this, do you think the City of Hamilton should:

Response options (select one):

- decrease taxes and deliver fewer services
- maintain taxes and current service levels
- increase taxes to improve services

Q6 Please indicate your level of agreement with the following statements.

- a) The City of Hamilton engages residents in the decision-making process for City programs, services and initiatives
- b) The City of Hamilton uses input from residents in decision-making about City programs, services and initiative

Response options (select one):

- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly agree



## City of Hamilton Our City Survey 2022 – Survey Questions

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Q7 Are you aware of or have you visited the City of Hamilton’s online engagement platform [engage.hamilton.ca](https://engage.hamilton.ca)?

Response options (select one):

- I have visited the site
- I have heard of the site, but have not visited
- I have not heard about or visited the site

Q8 The following question will focus on different ways of connecting with and conducting business with the City of Hamilton. If you needed to, what would be your preferred way of conducting each of the following types of interactions? Note that not all response options are currently available or used.

a) Getting information

Response options (select one):

- In person
- Email
- Phone
- Video call
- City of Hamilton website ([hamilton.ca](https://hamilton.ca))
- Social media
- Text Message/SMS
- Online digital assistant (i.e. chatbot)



## City of Hamilton Our City Survey 2022 – Survey Questions

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- b) Making a complaint / providing feedback or compliment

Response options (select one):

- In person
- Email
- Phone
- Video call
- City of Hamilton website (hamilton.ca)
- Social media
- Text Message/SMS
- Online digital assistant (i.e. chatbot)

- c) Registering for programs and services  
d) Applying for licenses and permits  
e) Booking / renting City of Hamilton facilities or parks  
f) Making payment for programs, services, permits, licenses, fines etc

Response options for Q8(c) to Q8(f) (select one):

- In person
- Email
- Phone
- City of Hamilton website (hamilton.ca)

- g) Paying property taxes

Response options (select one)

- In-person at a City counter
- By phone directly with the City
- Through your bank (at a teller, ATM, online/phone banking)
- Postal mail
- Pre-authorized debit payment plan

- Q9 In the past year, have you contacted the City of Hamilton for information or to conduct any service transactions?

Response options (select one):

- Yes (proceed to Q10)
- No (skip to Q12)



## City of Hamilton Our City Survey 2022 – Survey Questions

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Q10 What have you contacted the City of Hamilton for in the past year?

Response options (select all that apply)

- COVID-19 related inquiries/services
- Non-COVID-19 related inquiries/services

Q11 Thinking about your contact with the City of Hamilton in the past year, please tell us how strongly you agree with each of the following statements.

- a) Overall, my experience contacting the City of Hamilton was positive.
- b) I received a response in a timely manner.
- c) Staff were knowledgeable.
- d) Staff were courteous.
- e) I received the service I needed / my question was answered.

Response options (select one):

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Q12 Which of the following topic areas would you like to receive information on from the City of Hamilton?

Response options (select all that apply)

- Events and awards related to public art and museums
- Opportunities to share ideas and feedback for City of Hamilton programs and initiatives
- Events run/sponsored by the City of Hamilton
- City of Hamilton service changes and updates, resident safety tips and reminders
- Updates on what the City of Hamilton is doing or planning to do and the impacts in the community
- None of the above





## City of Hamilton Our City Survey 2022 – Survey Questions

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Q13 How would/do you like to get information about the City of Hamilton's programs, initiatives, news and events?

Response options (select all that apply):

- E-mail (e.g. digital newsletters)
- Postal Mail
- City of Hamilton website (hamilton.ca)
- Social media  
(e.g. Twitter, Facebook, Instagram, YouTube)
- Local Radio Station  
(e.g. FM 102.9 Bounce, FM CHML 900, Energy 95.3 Radio)
- Local Television Stations  
(e.g. CHCH, Cable 14)
- Local Newspaper  
(e.g. The Hamilton Spectator, Dundas Star News, Flamborough Review, Hamilton Mountain News, Stoney Creek News, Glanbrook Gazette, Bay Observer, Sagem.ca)
- Magazine  
(e.g. View, Snapd Hamilton, Hamilton Recreation Guide)
- Internet search engine  
(e.g. Google, Bing)
- Other - please specify

Q14 Where do you access the internet?

Response options (select all that apply)

- Home
- School
- Work
- Library or recreation centre
- Other
- I do not have access to the internet

Q15 Which of the following devices do you own or have access to?

Response options (select all that apply)



## City of Hamilton Our City Survey 2022 – Survey Questions

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- Smart Phone with data plan
- Smart Phone without data plan
- Tablet
- PC or laptop
- I do not own or have access to any of these devices

Q16 How would you rate the City's response to the COVID-19 pandemic including maintaining city operations, communications, enforcement of provincial and municipal restrictions, etc

Response options (select one):

- Excellent
- Very Good
- Good
- Fair
- Poor
- Have not used this service / Don't Know

Q17 How would you describe the change the COVID-19 pandemic has had on your ...

- a) financial situation
- b) physical health
- c) mental health

Response options (select one)

- Much worse
- Somewhat worse
- About the same
- Somewhat better
- Much better
- Prefer not to answer

Q18 What is one thing you think the City of Hamilton should do to reach the vision of being "the best place to raise a child and age successfully"?

Text/comment box



## City of Hamilton Our City Survey 2022 – Survey Questions

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If you're comfortable, please tell us a little about you and your household.

Q19 Do you identify as a member of the following groups?

Response options (select all that apply)

- People with disabilities
- People who are part of a racialized community (i.e. Black or people of colour)
- Indigenous
- People who are 2SLGBTQIA+
- Recent immigrant (arrived in Canada between 2017 and 2022)
- I do not identify with any of the above groups
- Prefer not to answer

Q20 How long have you lived in the city of Hamilton?

Response options (select one):

- Less than 1 year
- 1 to 2 years
- 3 to 5 years
- 6 to 10 years
- More than 10 years
- Prefer not to answer

Q21 Overall, how satisfied are you with your life in Hamilton?

Response options (select one):

- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied

Q22 In general, would you say your health is

Response options (select one):

- Excellent
- Very Good
- Good
- Fair



## City of Hamilton Our City Survey 2022 – Survey Questions

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- Poor
- Prefer not to answer

Q23 What is your highest level of education?

Response options (select one):

- Less than high school
- High school diploma
- College diploma/trades certificate
- University undergraduate degree
- University graduate degree
- Prefer not to answer

Q24 Including yourself, how many people living in your household fall into each of the following categories?

- a) Adult (age 18 or older)
- b) Youth (age 12 to 17)
- c) Child (under age 12)
- d) Prefer not to answer

Q25 What is your total household income before taxes?

Response options (select one):

- Less than \$20,000
- \$20,000 to \$29,999
- \$30,000 to \$49,999
- \$50,000 to \$79,999
- \$80,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 and over
- Prefer not to answer



## City of Hamilton Our City Survey 2022 – Survey Questions

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Q26 Which of the following best describes your situation?

Response options (select one):

- Employed
- Self-employed
- Unemployed
- Retired
- In school
- Other
- Prefer not to answer

# our City Survey

# RESULTS

2022

(phone only)

## Life in Hamilton



### Hamilton is a great place to...

(% that agree or strongly agree)

Live



75%↓

Work



70%

Play



69%↓

Learn



83%

## Quality of life

55%↓

say quality of life has **improved** or **stayed the same** in the past 2 years.

78%↓

**very satisfied/satisfied** with their life in Hamilton

## Quality of City Services



46%↓

are **very satisfied/satisfied** overall with City services

74%

agree their experience with contacting the City was **positive**

## Reach the City's Vision

42%↓

agree that Hamilton is on the **right track** toward its vision of being "the best place to raise a child and age successfully".

## Resident Engagement



(% that agree/strongly agree)

34%



The City of Hamilton **engages** residents in the decision-making process for City programs, services and initiatives.

32%



The City of Hamilton **uses residents' input** in the decision-making process for City programs, services and initiatives.

## Top 3 Common Themes

Addressing social issues

Parks, activities & recreation

Invest in / Clean up the City



# OUR CITY SURVEY 2022 RESULTS

General Issues Committee – Report CM23011

May 3<sup>rd</sup>, 2023

Presenters:

Aimee Tan, Senior Project Manager, Strategy, Performance & Data Integration

Lisa Zinkewich, Manager, Corporate Initiatives

City Manager's Office

Digital, Innovation, Strategic Partnerships & Corporate Initiatives

# Our City Survey Background & Objectives

- Third iteration (2018, 2019 & 2022)
- Survey frequency change approved by Council in 2020
- Collect feedback and opinions on the following topics:
  - Perception of the quality of life in Hamilton
  - Views toward the City's vision and priorities
  - Assessment of quality and usage of City services
  - Assessment of quality of the interaction with the City
  - Preference for service delivery and communication channels
  - Views toward community engagement



# 2022 Survey Promotion

Awareness about the Our City Survey was raised through multiple digital and print mediums



**our City Survey**  
Your Thoughts. Our Action.

**We want to hear from you.**

Your feedback will help the City of Hamilton understand how we can improve city services and programs that matter to you.

Survey closes December 9, 2022.

We have partnered with Metroline Research Group to conduct the telephone survey. The survey is also available online.

Your responses will be completely confidential by phone or online.

For more information, visit [engage.hamilton.ca/OurCitySurvey](https://engage.hamilton.ca/OurCitySurvey)



**Hamilton**



**WE WANT TO HEAR FROM YOU!**

**our City Survey**  
Your Thoughts. Our Action.



[engage.hamilton.ca](https://engage.hamilton.ca)



# 2022 Survey Methodology & Outcome

- Live November 1 - December 18, 2022

## Phone survey

- Administered by a third party via randomized calls
- 1,052 surveys completed
- Results weighted by ward and age according to the 2016 census data, to ensure that the sample reflects the population of the City of Hamilton

## Online surveys

- Available on Engage Hamilton through an open link
- 2,500 surveys completed

## Paper surveys

- No responses submitted

# 2022 Survey Challenges & Limitations

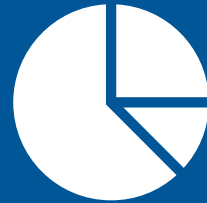
- City wide margin of error of +/-2.5%, 19 times out of 20 was not met
  - Achieved margin of error of +/-3.0%
- Ward level margin of error +/- 10%, 19 times out of 20 was not met
  - Ward level analysis not undertaken due to inability to meet margin of error
- Assumption that differences between city services and services provided by other agencies and levels of government is understood
- Online & phone results cannot be directly compared due to differences in methodology, sample size and respondent profile



**our City Survey**  
Your Thoughts. Our Action.

# 2022 Results

(phone only – random sample)

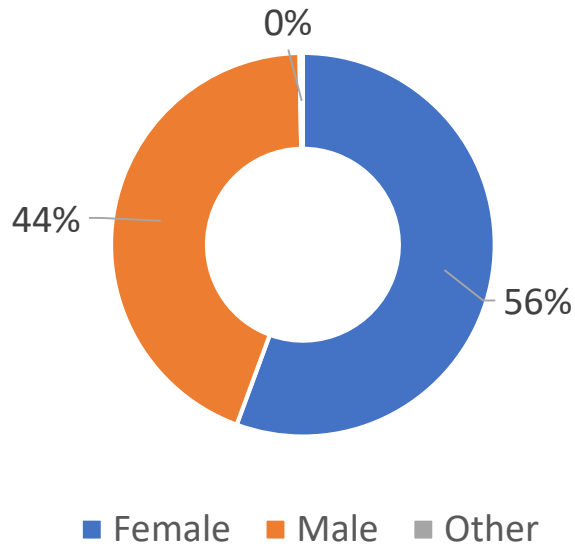


# Respondent Profile

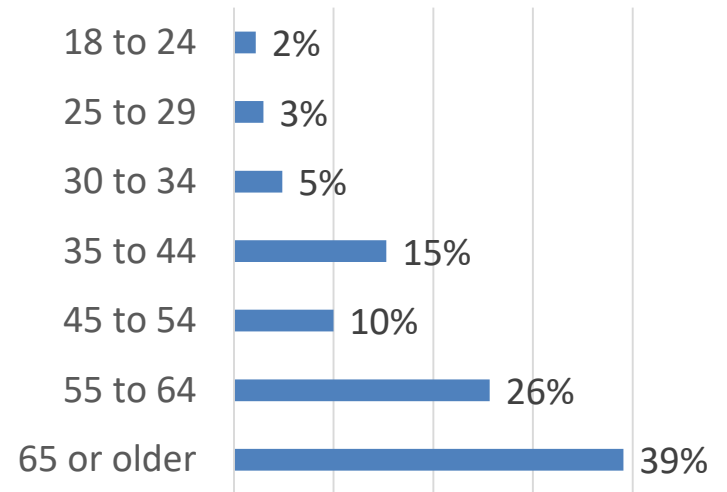
(phone only – random sample)

# Respondent Profile

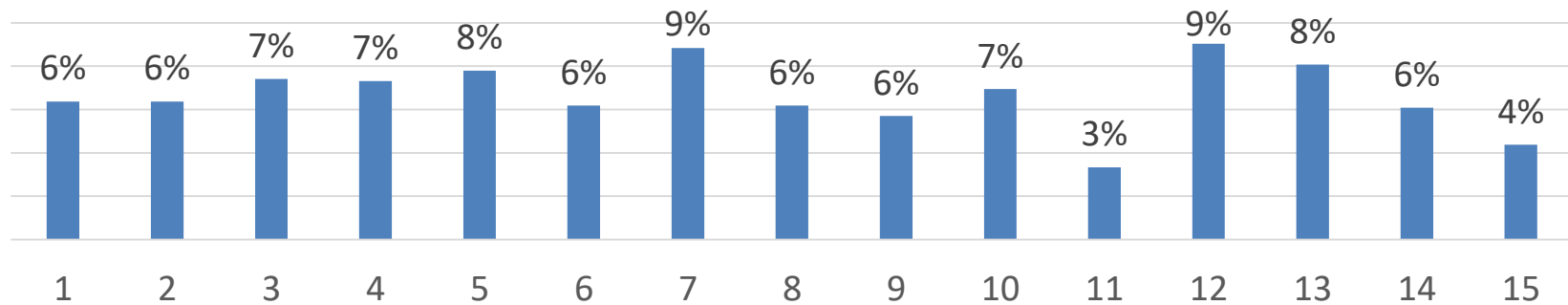
## Gender



## Age



## Ward





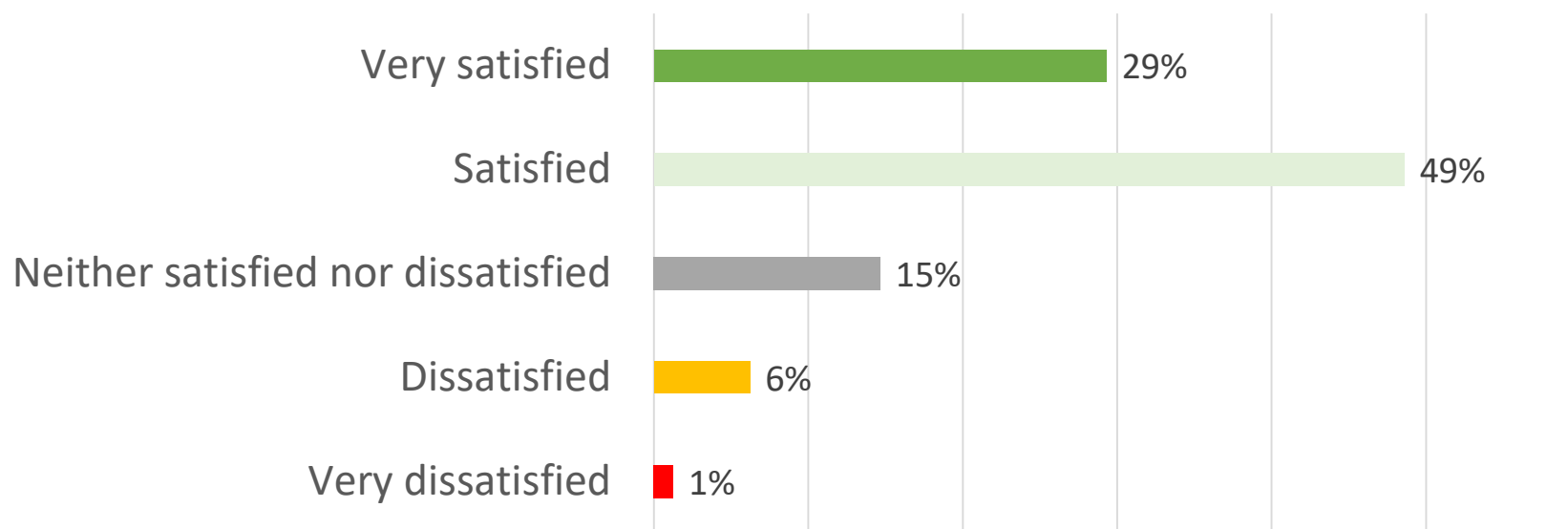
# Quality of Life

(phone only – random sample)

# Satisfaction with Life in Hamilton

**8 out of 10 (78%) residents are satisfied or very satisfied with their life in Hamilton**

How satisfied are you with your life in Hamilton?



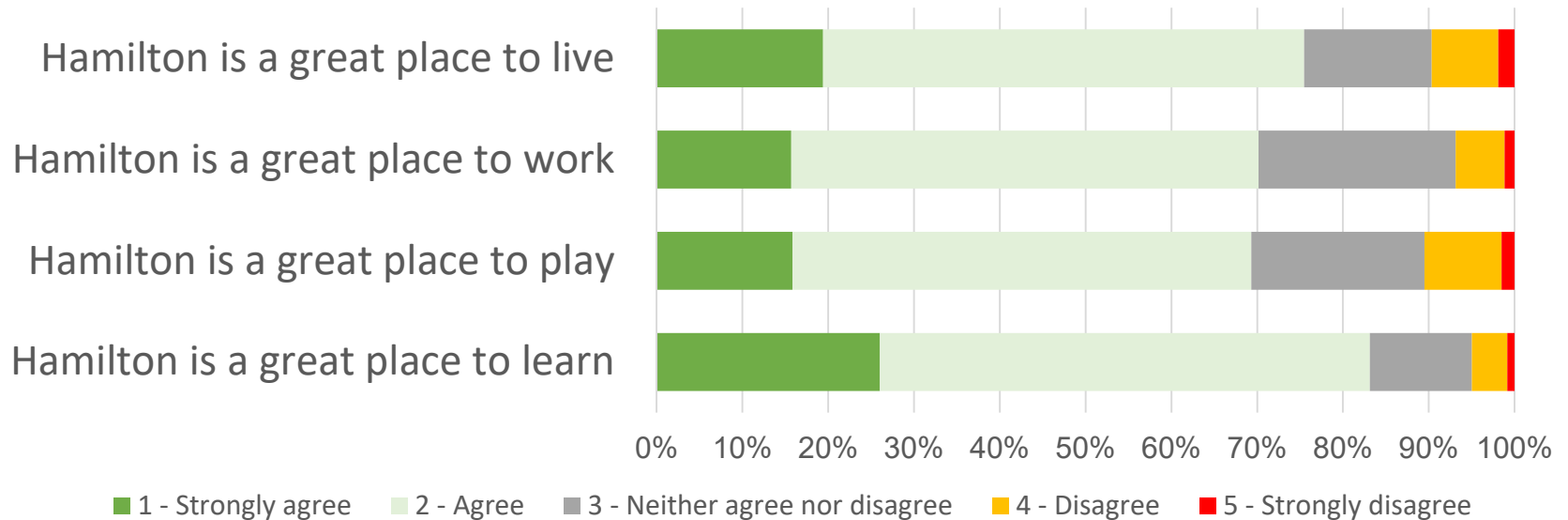
Q21: Overall, how satisfied are you with your life in Hamilton?  
2019 wording: Overall, how satisfied are you with your life?



# Quality of Life in Hamilton

**Most respondents agree/strongly agree that Hamilton is a great place to live (75%), work (70%), play (69%) and learn (83%)**

Quality of Life in Hamilton

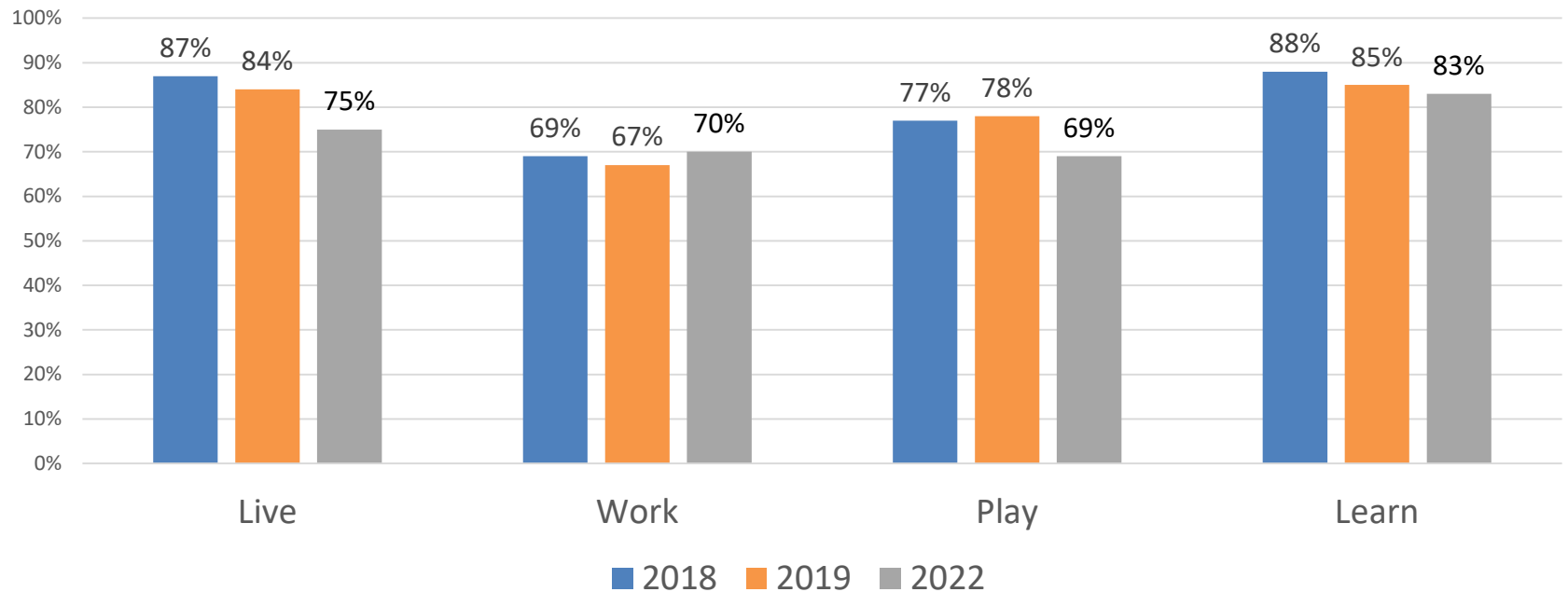


Q1: Please indicate your level of agreement with the following statements. a) Hamilton is a great place to live b) Hamilton is a great place to work c) Hamilton is a great place to play d) Hamilton is a great place to learn.

# Quality of Life in Hamilton

## Hamilton as a place to live and play is less favorable than previous results

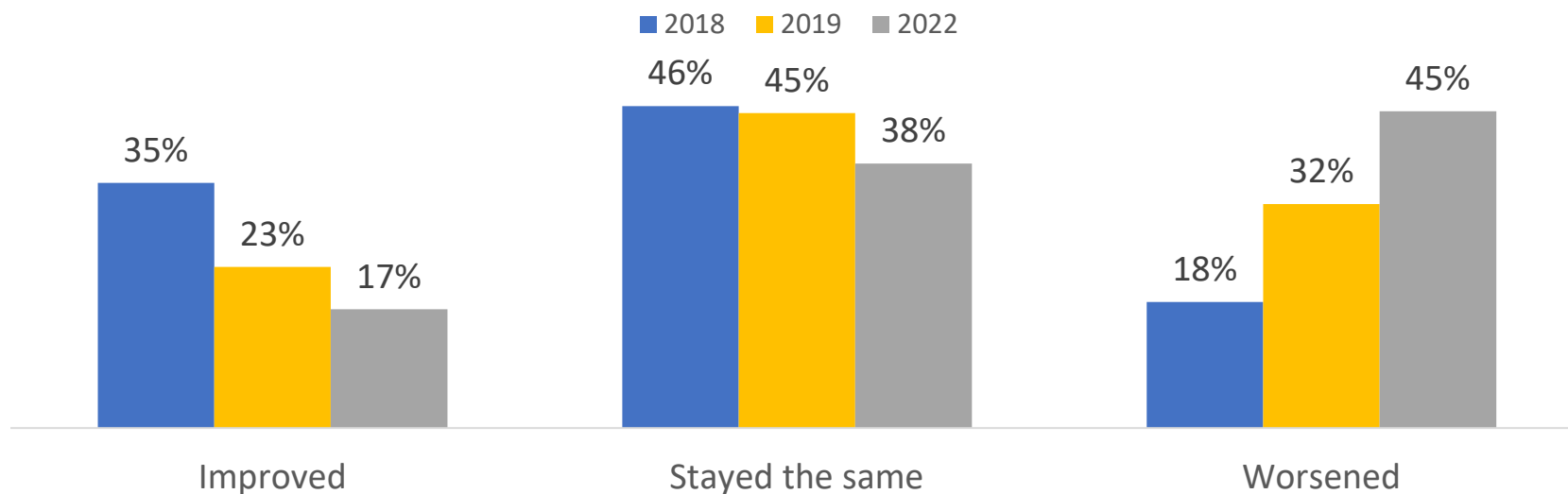
% of Respondents who Agree/Strongly Agree that Hamilton is a Great Place to...



# Change in Quality of Life Past Two Years

**45% of the respondents viewed the quality of life in Hamilton has worsened in the past two years**

In the past two years, would you say the quality of life in the City of Hamilton has ...



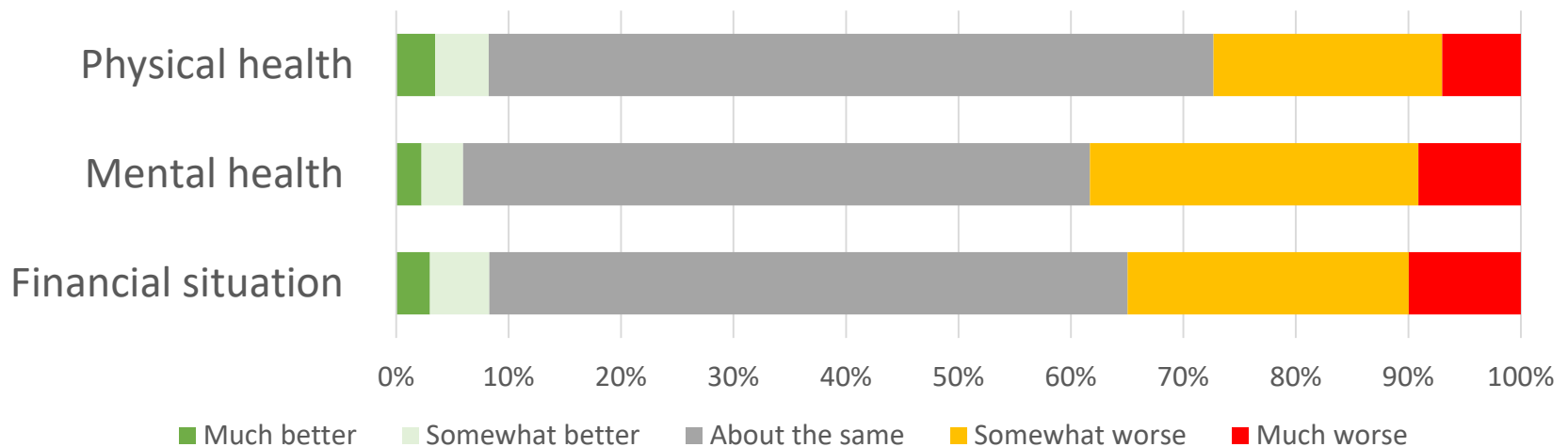
Q2 In the past two years, would you say the quality of life in Hamilton has...

13

# COVID-19 Pandemic Impacts

**Most respondents reported the pandemic has not had a significant change in their financial situation (57%), physical health (64%), and mental health (56%)**

How would you describe the change the COVID-19 pandemic has had on your ...



Q17 How would you describe the change the COVID-19 pandemic has had on you're a) financial situation b) physical health c) mental health. New in 2022



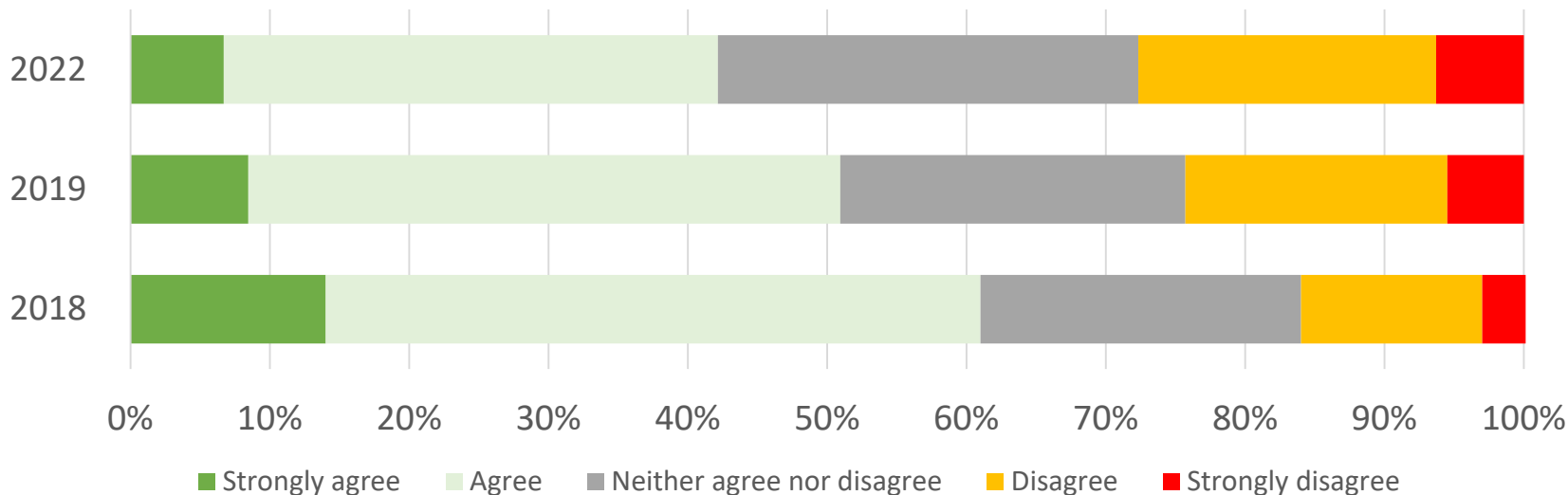
# Views Toward the City's Vision and Priorities

(phone only – random sample)

# Views Toward The City's Vision

**Less than half (42%) of respondents agree that Hamilton is on the right track toward its vision of being “the best place to raise a child and age successfully”**

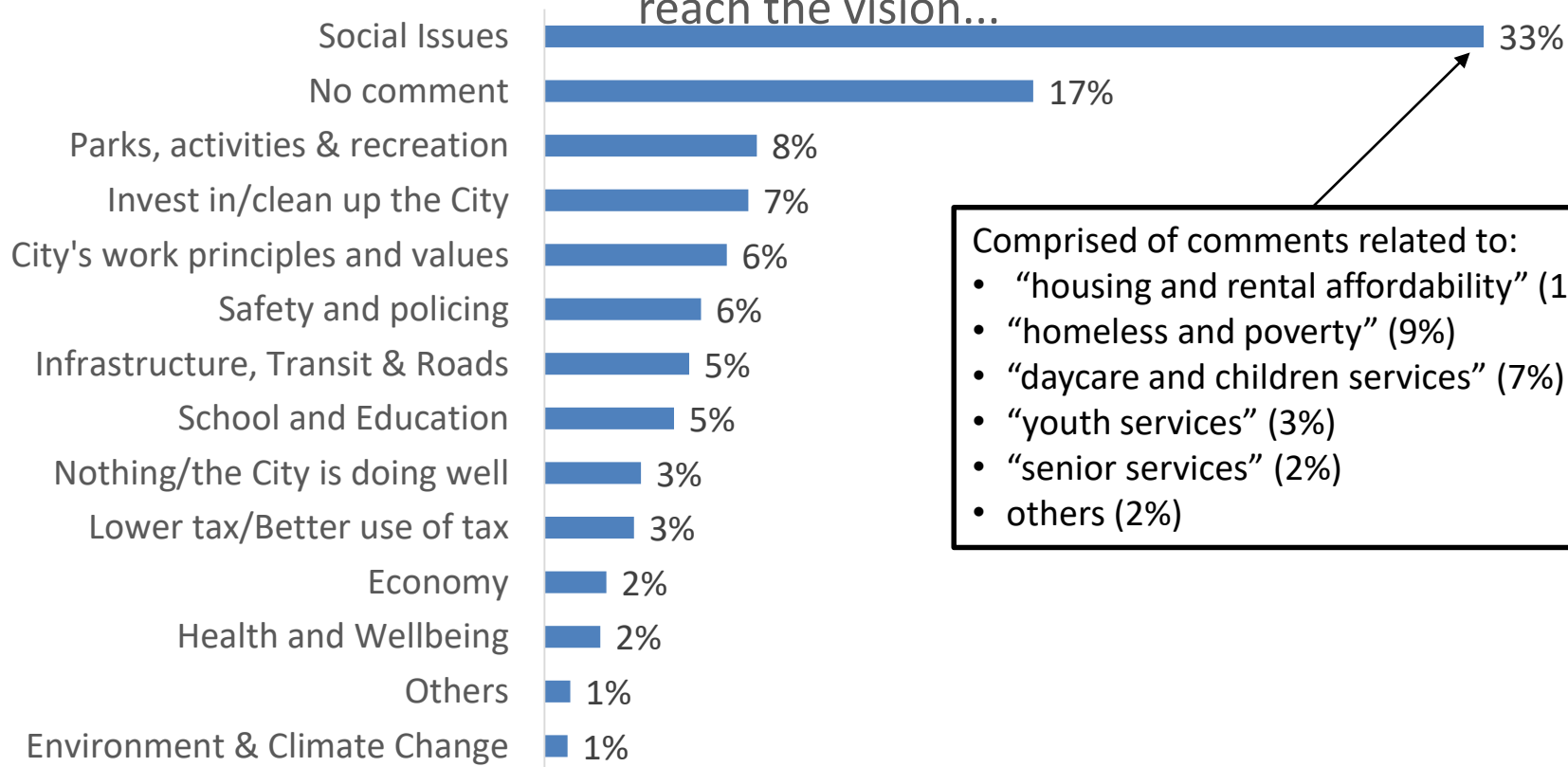
Hamilton is on the right track towards its vision of being "the best place to raise a child and age successfully"



Q1: Please indicate your level of agreement with the following statements. e) Hamilton is on the right track towards its vision of being "the best place to raise a child and age successfully".

# Top-of-mind Priorities (open-ended question themes)

What is one thing you think the City of Hamilton should do to reach the vision...



Q18 What is one thing you think the City of Hamilton should do to reach the vision of being "the best place to raise a child and age successfully"?

17



# Assessment of The Quality and Usage of The City's Services

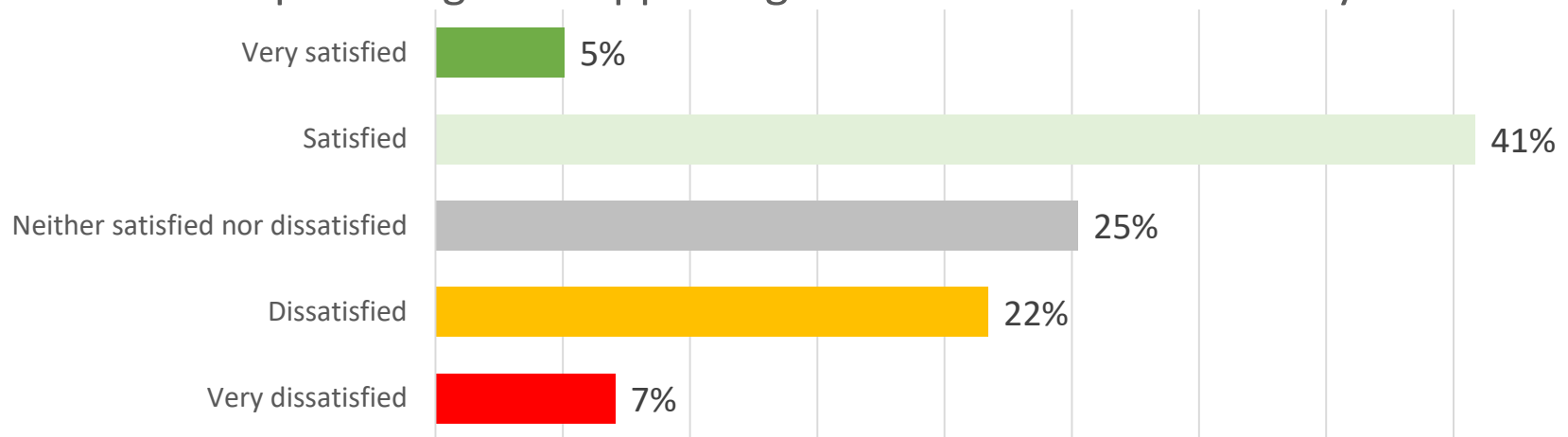
(phone only – random sample)



# Satisfaction with City Services for the Community

**Nearly half (46%) of the respondents are satisfied or very satisfied with what the City of Hamilton is doing in providing and supporting services for the community**

How satisfied are you with what the City of Hamilton is doing in providing and supporting services for the community?



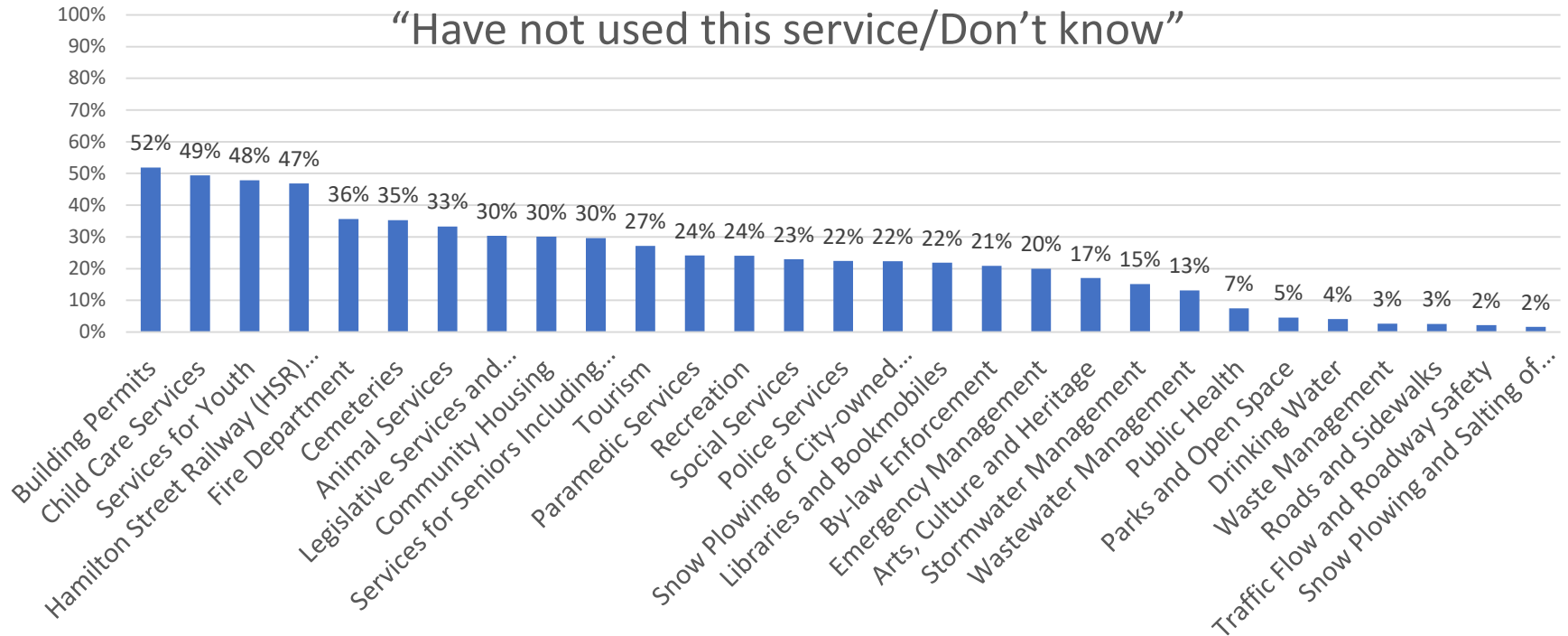
Q3. Overall, how satisfied are you with what the City of Hamilton is doing in providing and supporting services for the community?  
2019: Overall, how satisfied are you with the services provided by the City of Hamilton?

19

# Usage of City Programs And Services

% of Respondents Selected

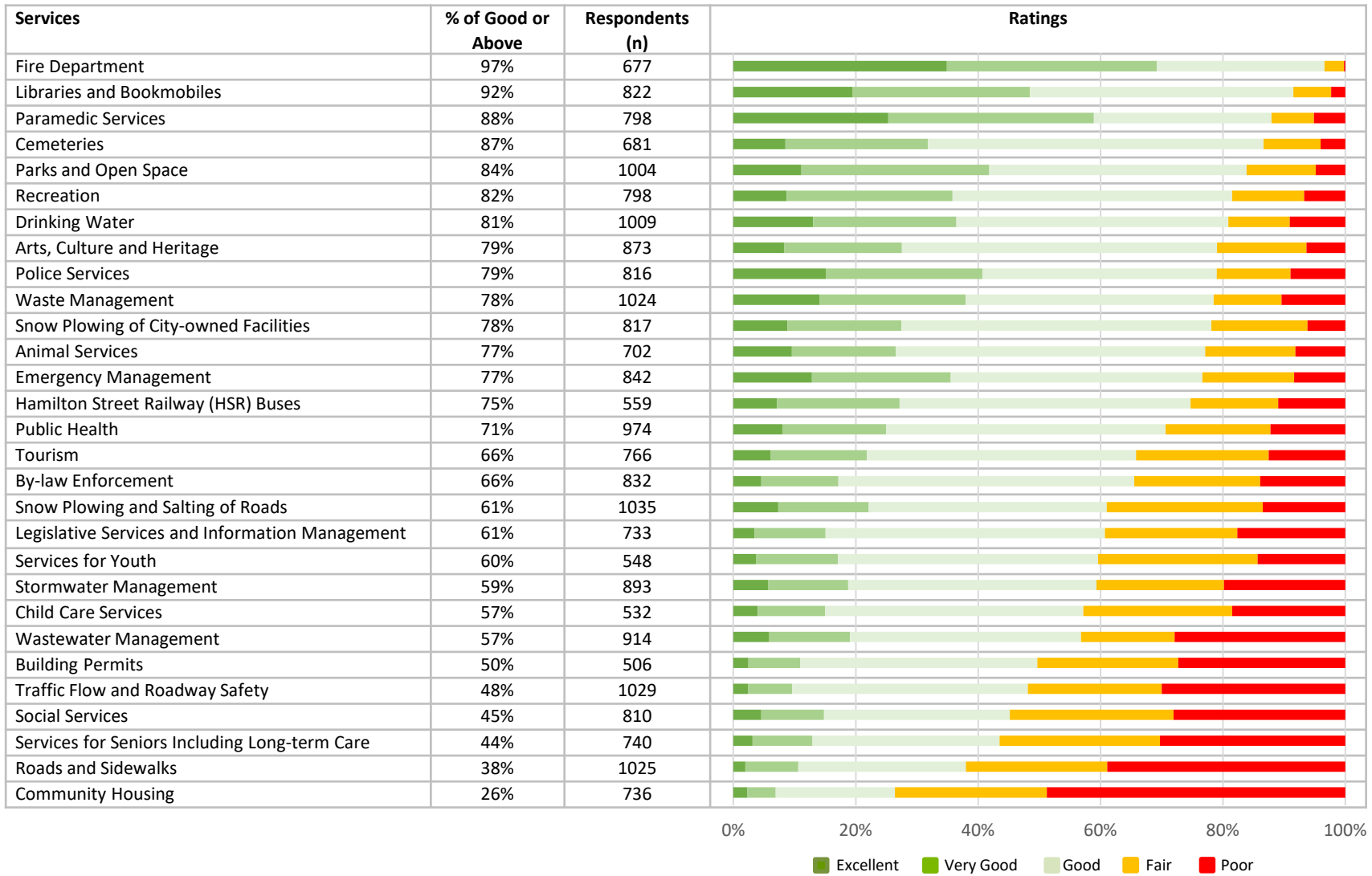
“Have not used this service/Don’t know”



Q4: The following question will focus on different services in our community. These services could be provided solely by the City of Hamilton, or in partnership with other levels of government or agencies in the community. How would you describe each of the following services? Note: If you have not used the service in the past year, please say “don’t know”.

2019: The following questions will focus on the different services the City of Hamilton provides to its residents. How would you rate each of the following services provided by the City of Hamilton?

# Rating of City Services



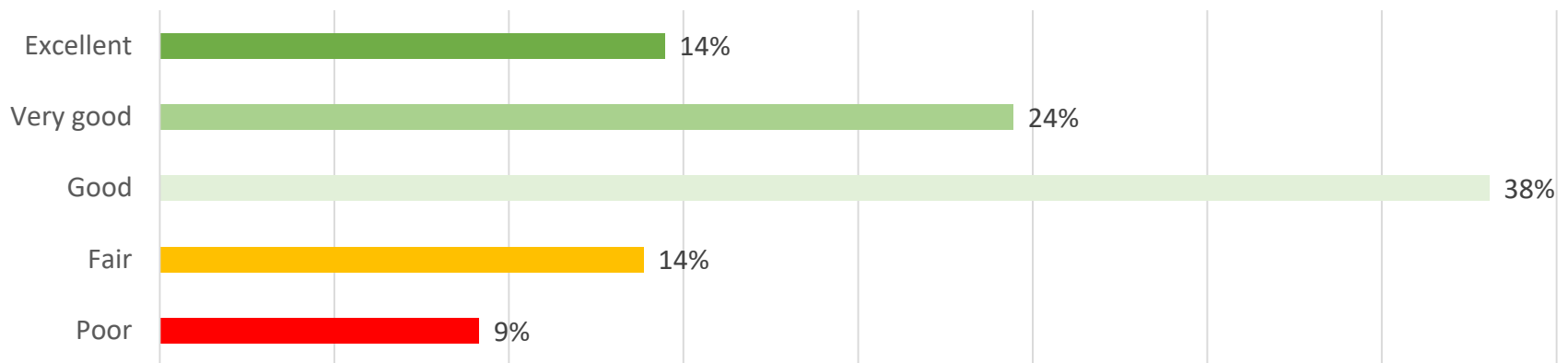
# Services with Most Change

	<b>2022</b>	<b>2019</b>	<b>Change</b>
Hamilton Street Railway (HSR) Buses	75%	66%	+ 9%
Snow Plowing of City-owned Facilities	78%	70%	+ 8%
Social Services	45%	52%	- 7%
Legislative Services and Information Management	61%	67%	- 6%

# Satisfaction with The City's COVID-19 Response

**More than 3 out of 4 (77%) respondents rated the City's response to the COVID-19 pandemic as excellent, very good or good**

How would you rate the City's response to the COVID-19 pandemic



Q16 How would you rate the City's response to the COVID-19 pandemic including maintaining city operations, communications, enforcement of provincial and municipal restrictions, etc. New in 2022

23



# Interaction with the City

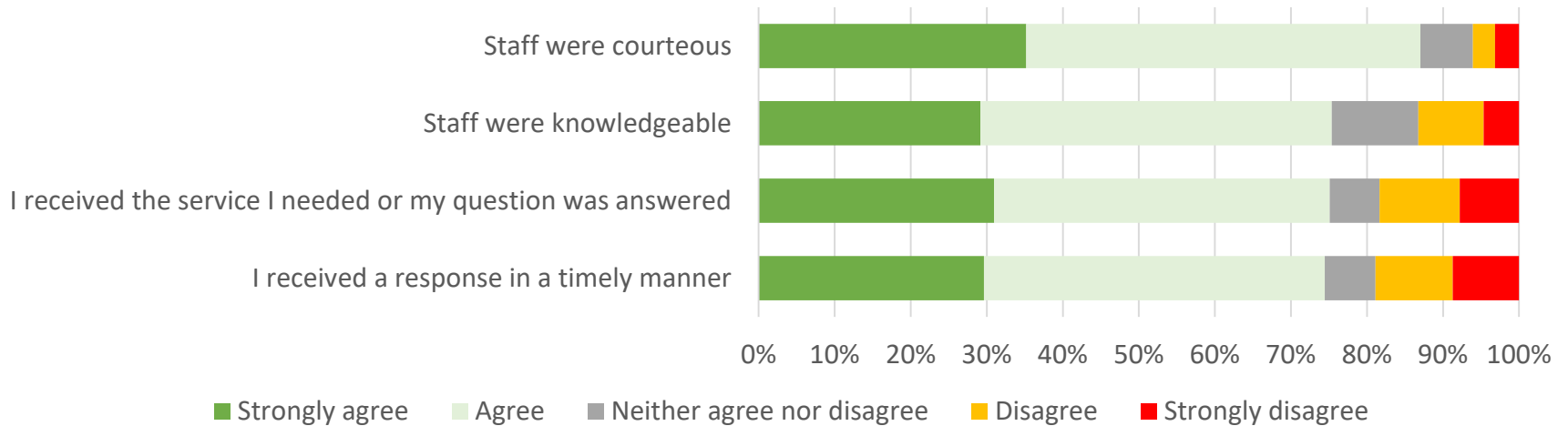
(phone only – random sample)

# Customer Experience

**74% of respondents reported that their experience contacting the City of Hamilton was positive.**

Most respondents felt that city staff were courteous (87%) and knowledgeable (75%), their question was answered (75%) and they received a timely response (74%).

Customer Experience



25

Q11 Thinking about your contact with the City of Hamilton in the past year, please tell us how strongly you agree with each of the following statements. a) Overall, my experience contacting the City of Hamilton was positive. b) I received a response in a timely manner. c) Staff were knowledgeable. d) Staff were courteous. e) I received the service I needed / my question was answered.



# Service Delivery and Communication Preference

(phone & online)



# Preference: Connecting with / Conducting Business with the City

	Top Preferences Phone Survey	Top Preferences Online Survey
Making A Complaint / Providing Feedback or Compliment	Phone	Email
Paying Property Taxes	Bank (teller, ATM, online/phone banking)  City of Hamilton website (hamilton.ca)	
Getting Information		
Registering for Programs and Services		
Applying for Licenses and Permits		
Booking / Renting City of Hamilton Facilities or Parks		
Making Payment for Programs, Services, Permits, Licenses, Fines Etc.		

Q8 The following question will focus on different ways of connecting with and conducting business with the City of Hamilton. If you needed to, what would be your preferred way of conducting each of the following types of interactions? Note that not all response options are currently available or used.

2019: What is your preferred way of conducting each of the following types of interactions with the City of Hamilton?

Q13: How would/do you like to get information about the City of Hamilton's programs, initiatives, news and events?

27

# Preference: Receive Information from the City

	Phone Survey	Online Survey
Updates on what the City of Hamilton is doing or planning to do and the impacts in the community	74%	77%
City of Hamilton service changes and updates, resident safety tips and reminders	64%	53%
Events run/sponsored by the City of Hamilton	53%	42%
Opportunities to share ideas and feedback for City of Hamilton programs and initiatives	48%	51%
Events and awards related to public art and museums	34%	27%
None of the above	14%	13%

Q12: Which of the following topic areas would you like to receive information on from the City of Hamilton? New for 2022

# Preference: Information About the City of Hamilton

	Phone Survey	Online Survey
E-mail	48%	60%
City of Hamilton website (hamilton.ca)	44%	51%
Postal Mail	42%	16%
Local Television Stations	42%	25%
Local Newspaper	38%	29%
Internet search engine	36%	17%
Local Radio Station	35%	20%
Social Media	31%	35%
Magazine	10%	4%
Other	4%	2%

Q13 How would/do you like to get information about the City of Hamilton's programs, initiatives, news and events?

29



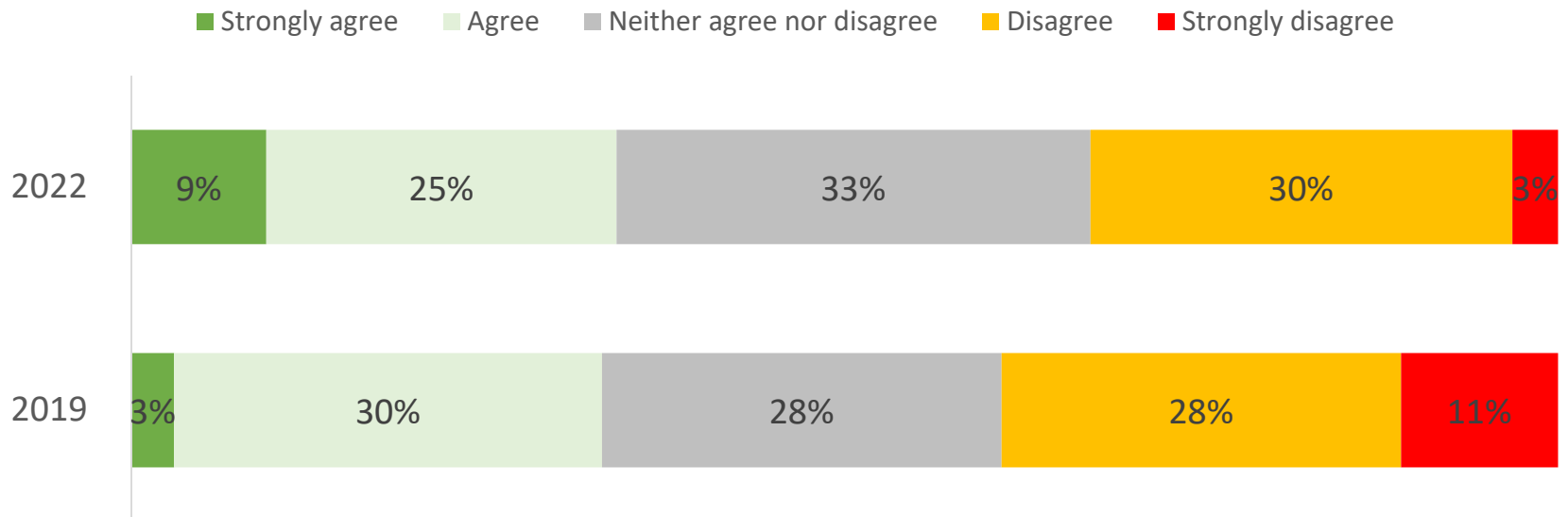
# Public Engagement

(phone only – random sample)

# Public Engagement

One-third of the respondents (34%) agree/strongly agree that the City of Hamilton **engages** residents in decision-making

The City of Hamilton engages residents in the decision-making process

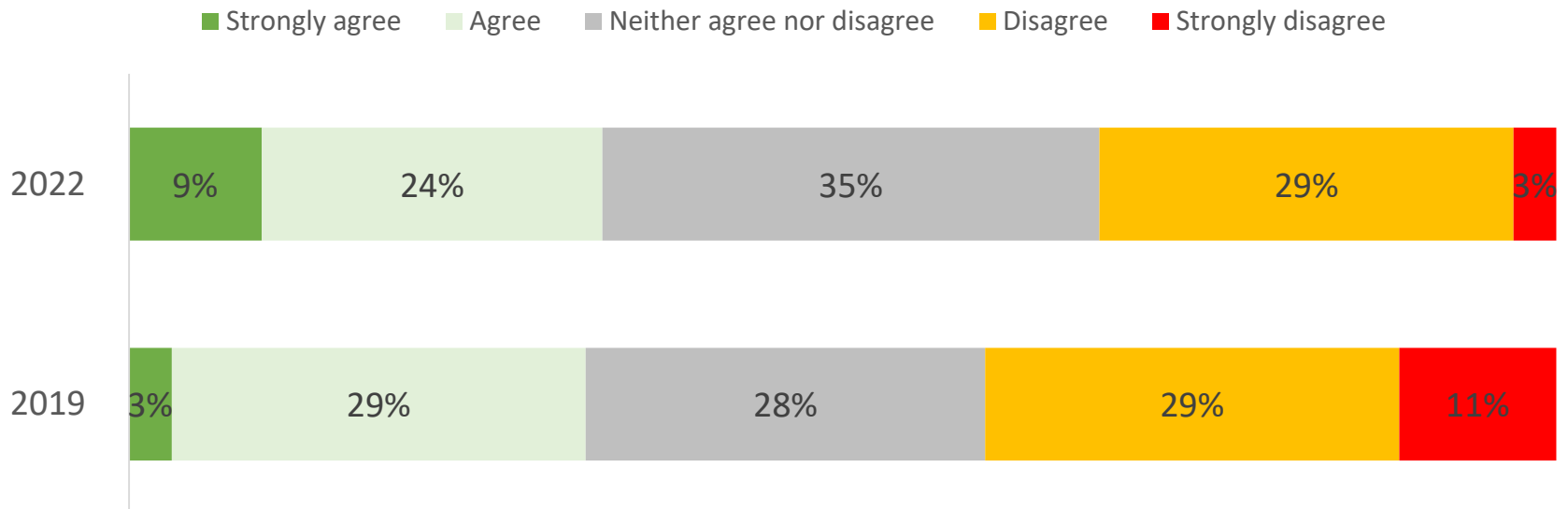


Q6: Please indicate your level of agreement with the following statements. a) The City of Hamilton engages residents in the decision-making process for City programs, services and initiatives

# Uses Input from Residents in Decision-making

One third of the respondents (32%) agree that the City of Hamilton **uses** input from residents in decision-making

The City of Hamilton uses input from residents in decision-making



Q6: Please indicate your level of agreement with the following statements. b) The City of Hamilton uses input from residents in decision-making about City programs, services and initiative

# Report Recommendations


- That Report CM23011, respecting the Our City Survey 2022 results, be received
- That staff are directed to report back with recommendations on the next steps for the evolution of the Our City Survey, including best practices, recommendations on methodology, resourcing and data integration opportunities, prior to initiation of the 2024 budget process

# Thank-You





**CITY OF HAMILTON**  
**PLANNING AND ECONOMIC DEVELOPMENT DEPARTMENT**  
**Office of Climate Change Initiatives**

<b>TO:</b>	Mayor and Members General Issues Committee
<b>COMMITTEE DATE:</b>	May 3, 2023
<b>SUBJECT/REPORT NO:</b>	Better Homes Hamilton - Home Energy Retrofit Program (PED23106) (City Wide)
<b>WARD(S) AFFECTED:</b>	City Wide
<b>PREPARED BY:</b>	Trevor Imhoff (905) 546-2424 Ext. 1308
<b>SUBMITTED BY:</b>	Lynda Lukasik Director, Office of Climate Change Initiatives Planning and Economic Development Department
<b>SIGNATURE:</b>	

### RECOMMENDATION

- (a) That the “Better Homes Hamilton” program, based on the terms outlined in Appendix “A” to Report PED23106, and subject to minor revisions authorized by the General Manager of Planning and Economic Development, be approved as the ‘Incubation Stage’ of Hamilton’s first home energy retrofit program;
- (b) That the “Better Homes Hamilton Detailed Study Design” attached as Appendix “B” to Report PED23106 be received;
- (c) That Planning and Economic Development Staff be directed to launch the ‘Incubation Stage’ of the Better Homes Hamilton program with a target to retrofit up to 50 homes before the end of 2024;
- (d) That staff be directed to establish a loan receivable on the City’s balance sheet, not exceeding \$1,000,000 to record the corresponding liabilities regarding the long-term financing for the ‘Incubation Stage’ of the Better Homes Hamilton program;

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OUR Vision: To be the best place to raise a child and age successfully.

OUR Mission: To provide high quality cost conscious public services that contribute to a healthy, safe and prosperous community, in a sustainable manner.

OUR Culture: Collective Ownership, Steadfast Integrity, Courageous Change, Sensational Service, Engaged Empowered Employees.

**SUBJECT: Better Homes Hamilton - Home Energy Retrofit Program (PED23106)  
(City Wide) - Page 2 of 9**

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- (e) That the costs for program administration, including loan loss provisions for the 'Incubation Stage' of the Better Homes Hamilton program as described in Report PED23106 and in Appendix "A" to Report PED23106 be funded through the Climate Change Reserve Account 108062 with an upset limit of \$275,000 over two years;
- (f) That staff be directed to prepare and bring forward for Council approval a municipal by-law authorizing the Better Homes Hamilton program including the details on eligibility and providing authority to launch the energy efficiency works on private residential property as local improvements under the program;
- (g) That Staff be directed to report back to the General Issues Committee within 2 years of implementation of the 'Incubation Stage' of the Better Homes Hamilton Program with results and feasibility for scaling the program in terms of number of homes and expansion into the high-rise, commercial and/or industrial sectors.

### **EXECUTIVE SUMMARY**

Staff are presenting the result of the program design for the Home Energy Retrofit Opportunity (HERO) program, which staff are proposing to be re-named to the Better Homes Hamilton (BHH) program to better reflect market and sector branding alignment with existing similar programs. The development of a flexible building retrofit program within the City of Hamilton was directed at the General Issues Committee (GIC 21-011) meeting on May 19, 2021. City staff were successful in obtaining 80% of the funding for the development of the program from the Federation of Canadian Municipalities (FCM) in December 2021.

Appendix "A" to Report PED23106 provides an overview and key terms of the program. Appendix "B" to Report PED23106 provides the detailed information on the development and outcomes of the Better Homes Hamilton (BHH) program including research/stakeholder consultation completed, applicant eligibility, eligible building retrofits, and recommended implementation. Staff are seeking Council approval on this program design, including the recommendation to proceed with an 'Incubation Stage' of the BHH program that includes providing up to \$1.0 M in 0% interest loans to 50 properties across Hamilton. This report includes a budget request of \$275 K for fixed administration costs that includes such things as marketing/promotion, software, web development, staffing support contingencies and a loan loss reserve, to be funded from the Climate Change Reserve.

The BHH program was developed by City staff in the Office of Climate Change Initiatives (OCCI) and retaining the expertise of the Centre for Climate Change Management (CCCM) at Mohawk College. Extensive internal and external engagement

**SUBJECT: Better Homes Hamilton - Home Energy Retrofit Program (PED23106)  
(City Wide) - Page 3 of 9**

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took place to inform the development of the BHH program and staff recommendations in Report PED23106 that included:

- Consultation with 40+ organizations from private business/industry, non-government organizations, academia and other municipalities and experts who have implemented or been involved in this type of program;
- Completion of an online and random phone survey including citizens from every ward across Hamilton; and,
- A building archetype analysis that includes an assessment of energy and greenhouse gas (GHG) emissions from the residential building sector.

More information on the stakeholder engagement and results can be found in Appendix “B” to Report PED23106.

The BHH program directly works to achieve actions in Hamilton’s Climate Action Strategy. Specifically, ‘Low-Carbon Transformation #2: Transforming Our Buildings’ highlights the need to develop and scale a building retrofit program. If approved Hamilton will join other municipalities who have implemented this type of program including the cities of Ottawa, Toronto, Kingston, and Town of Halton Hills. Several cities including Burlington and Guelph are also moving forward with planned building retrofit programs in the near future.

**Alternatives for Consideration – See Page 9**

**FINANCIAL – STAFFING – LEGAL IMPLICATIONS**

**Financial:** The total estimated cost of the ‘Incubation Stage’ of the Better Homes Hamilton (BHH) Program is \$1.275 M. The loan portion of the funding of up to \$1.0 M is proposed to be established as a loan receivable on the City’s balance sheet. Loans for up to 50 eligible homeowners to a maximum loan of \$20 K per homeowner will be paid back as per the loan terms recommended in Report PED23106 and Appendix “A” to Report PED23106. Program administration costs are estimated at \$275,000 to run the BHH incubation stage of the program, including such things as a loan loss provision of \$50,000, as well as marketing/promotion, software, web development, and staffing support contingencies. These costs are recommended to be funded from the Climate Change Reserve Account 108062.

**Staffing:** There are no additional staffing implications for the implementation of the 50-home incubation stage of the BHH program. Staff in the Office of Climate Change Initiatives will lead the implementation of this initiative, with additional in-kind support from staff in Corporate and Finance Services.

**SUBJECT: Better Homes Hamilton - Home Energy Retrofit Program (PED23106)  
(City Wide) - Page 4 of 9**

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Legal: Legal staff will support the work from Planning and Economic Development staff on the development of a Local Improvement Charge (LIC) by-law to implement the Better Homes Hamilton program.

## **HISTORICAL BACKGROUND**

Many non-government organizations across Hamilton, including Environment Hamilton have strongly advocated for a municipal building retrofit program dating back to before 2016.

Several reports, policy papers, and strategic recommendations from organizations across Hamilton have been developed that support the recommendations to move forward on the development of a municipal building retrofit program. This includes:

- Bay Area Climate Change Council, 2019;
- Just Recovery Hamilton, 2020;
- Mayor’s Task Force for Economic Recovery, 2020;
- Economic Development Action Plan 2021-2025; and,
- Hamilton’s Climate Action Strategy – ReCharge Hamilton Our Community + Emissions Plan (CEEP), 2022.

For further background see Report CM21008/HSC21016 that was approved by General Issues Committee (GIC 21-011) at its meeting on May 19, 2021 to move forward on the development of a building retrofit program.

## **POLICY IMPLICATIONS AND LEGISLATED REQUIREMENTS**

In 2012 Ontario amended its Local Improvement Charge (LIC) financing regulations to allow municipalities to undertake works on private properties and enter into a voluntary contract with a property owner to recuperate the capital costs through the imposition of a special charge added to the property’s tax assessment. Further detail and reference included in Appendix “B” to Report PED23106.

In order for the City of Hamilton to implement the Better Homes Hamilton (BHH) program it is required that City Council approve a By-law that authorizes the undertaking of energy efficiency works on private residential property as local improvements under the BHH program. There are several By-law templates from municipalities who have gone forward with such a program including City of Toronto, City of Kingston, Town of Halton Hills, and City of Ottawa. The Clean Air Partnership has also provided a useful toolkit with By-law templates for use as included in Appendix “B” to Report PED23106. Recommendation (f) of this report would direct staff to prepare and bring forward a by-law for Council’s approval.

**SUBJECT: Better Homes Hamilton - Home Energy Retrofit Program (PED23106)  
(City Wide) - Page 5 of 9**

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**RELEVANT CONSULTATION**

Detailed information on the engagement activities, relevant consultations and results of those can be found in Appendix “B” to Report PED23106.

The Centre for Climate Change Management (CCCM) at Mohawk College retained an expert team in order to complete extensive public engagement and research. Below is a brief summary of the main engagement components and sectors that were engaged in order to make evidence-informed decisions on the development of the BHH program:

- 40+ stakeholders and organizations were consulted throughout the development of the BHH program that included businesses, program delivery centres, utilities, other municipalities, researchers, and other experts within the building retrofit sector. This also included meeting with activists and non-government organizations, including tenant-focused organizations and non-profits; and,
- A homeowner survey was conducted by Deloitte in October 2022 that included both an online option and telephone (both cell and landline) survey that reached approximately 395 people across all wards in Hamilton;

Further detailed research was also conducted by Lightspark Software Inc throughout 2022 and early into 2023 on the mapping of housing and energy data to help inform the development of the BHH program. This research is further summarized in the below section of Report PED23106 and detailed in Appendix “B” to Report PED23106.

**ANALYSIS AND RATIONALE FOR RECOMMENDATION**

Hamilton City Council passed a Climate Emergency Declaration at its meeting on March 27, 2019 titled ‘Accelerating and Prioritizing Climate Action in Response to the Climate Emergency’. This directed staff to investigate additional actions to be taken to incorporate into existing plans and policies to achieve net zero carbon emissions before 2050.

The development of Hamilton’s Climate Action Strategy (HCAS) which includes 5 Low-Carbon Transformations was approved by City Council at its meeting on August 12, 2022. The HCAS includes ‘ReCharge Hamilton – Our Community Energy and Emissions Plan (CEEP) which provides a technical modelled scenario for the entire city and community to achieve net-zero greenhouse gas (GHG) emissions by 2050. Low-Carbon Transformation #2: Transforming Our Buildings includes actions that support the retrofitting of existing buildings to be more energy efficient and to encourage fuel switching.

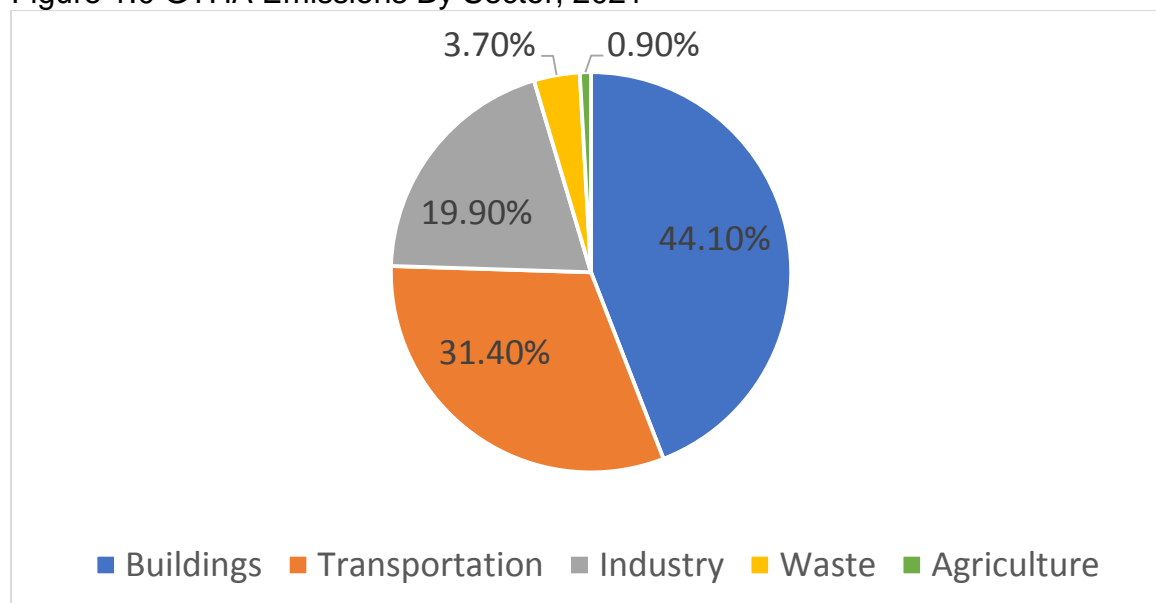
Although specifically in Hamilton industrial emissions continue to represent the largest sources of GHG emissions, emissions related to the commercial and residential sector represent the third largest in Hamilton and are estimated at 1.4 million tonnes of carbon

**SUBJECT: Better Homes Hamilton - Home Energy Retrofit Program (PED23106)  
(City Wide) - Page 6 of 9**

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dioxide equivalent (CO<sub>2</sub>e). Across the Greater Toronto Hamilton Area (GTHA) the Atmospheric Fund (TAF) estimates that buildings represent the largest sources of emissions at 44.1%.<sup>1</sup> Figure 1.0 below is adapted from TAF's 2021 GTHA Carbon Emissions Inventory.

Figure 1.0 GTHA Emissions By Sector, 2021



(<sup>1</sup>Figure adapted from the Atmospheric Fund Report 2021 GTHA Carbon Emissions Inventory. Retrieved from <https://carbon.taf.ca/summary> )

Through the development of the Better Homes Hamilton (BHH) program both qualitative and quantitative data provides the evidence for implementing such a program.

The extensive research and engagement completed by the Centre for Climate Change Management at Mohawk College, including a homeowner survey that was completed by Deloitte in October 2022 indicated a clear desire for a municipally-led building retrofit program. The major findings from the homeowner survey included:

- 58% of homeowners indicated that they were at least somewhat likely to undertake home efficiency upgrades in the next two years;
- 89% of respondents agreed that the Home Energy Retrofit program would be beneficial to homeowners in Hamilton; and,
- 82% would likely access an energy coaching program if it existed.

The archetype analysis completed by Lightspark Software Inc and further research completed from the CCCM at Mohawk College indicates the following information and associated benefits for participation in the BHH program:

- 75% of the building types reported in Hamilton would be eligible for the BHH program based on 2021 Housing Census Data;

**SUBJECT: Better Homes Hamilton - Home Energy Retrofit Program (PED23106)  
(City Wide) - Page 7 of 9**

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- \$2,118 is what the average Hamilton-Niagara household pays in utility expenses (electricity and space heating);
- 1950s single-detached home with natural gas furnace is the most common residential archetype (54.8%) that annually emits 4.89 tonnes of carbon dioxide equivalent (tCO<sub>2e</sub>); and,
- \$1,804.80 in potential savings for the average participant of the BHH program between 2023-2030 using a conservative retrofit scenario of a 60% reduction in GHG emissions.

For more information on the associated data and benefits see Appendix “B” to Report PED23106.

It is being recommended in Report PED23106 that an ‘Incubation Stage’ of the BHH program be implemented with a target of 50 homes to be retrofitted before the end of 2024. Staff believe this is necessary due to the complexity and administration required for this type of loan program. These types of smaller scale, pilot projects are a common approach from municipalities who have begun implementation of this type of building retrofit program. Pilot projects were also implemented first at the following municipalities:

- City of Ottawa Better Homes Ottawa program;
- City of Kingston Better Homes Kingston program; and,
- Town of Halton Hills Retrofit Halton program.

There are also several other local municipalities advancing building retrofit programs such as City of Burlington, City of Guelph, City of Oakville, which are also considering a phased approach to implementation.

The purpose of the ‘Incubation Stage’ or phased in approach will be to identify and work through any issues and barriers to participation. It will allow staff to identify strategies for opening eligibility and scaling into other building sectors such as high-rise, commercial and industrial sectors. It will also provide the experience to determine how best to scale this program and investigate varying delivery options that may include third-party, regional approach/collaboration and what role the City of Hamilton can and should continue to play in a scaled-up version of the BHH program.

By approving staff to proceed with the BHH program the City can help provide a low-interest financing option for homeowners to create more high performance and healthy homes that also significantly reduce GHG emissions.

The BHH program is intended to utilize provincial Local Improvement Charges (LIC) legislation that allows municipalities, through a mutual agreement, to place special charges on private property for the purposes of completed works related to energy

**SUBJECT: Better Homes Hamilton - Home Energy Retrofit Program (PED23106)  
(City Wide) - Page 8 of 9**

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efficiency. This provides homeowners a low interest financing option, that some may not otherwise qualify for through traditional financing/loan options.

Homeowners that are current and up-to-date on their property taxes would be eligible for the BHH program. Eligible residential properties for the 'Incubation Stage' of the program will include:

- Single-detached;
- Semi-detached; and,
- Row house (townhouse);

Eligible applicants include both owner-occupied and rental properties. However only one loan amount per applicant per property is allowed. Tenant protections will be embedded into the program including that any retrofits requiring tenant displacement would not be allowed under the loan terms. Furthermore, tenants whereby landlords are applying for the BHH program will be contacted and resource information will be mailed-out so that the tenants can better understand their rights.

Successful applicants would be able to receive up to a maximum of \$20 K per property which would be placed as a lien on the property and paid back through regular property tax payments over 10 to 15 years. The recommended starting interest rate of the loan for this pilot is 0%. Eligible retrofit elements that a homeowner can have covered by the loan include:

- Permits and/or energy assessments;
- Building envelope upgrades including insulation and air-sealing;
- Mechanical upgrades to air source heat pumps (ASHP) including cold-climate (ccASHP), hybrid ASHP, and ductless mini-splits;
- Smart thermostats and controllers;
- Breaker panel upgrades\*; and
- Ductwork repair\*

\*Note: upgrades to breaker panel and/or ductwork repair expenses only eligible when required to support ASHP installation.

Through the building archetype analysis and homeowner research it is anticipated this program can support both urban and rural properties. Targeted outreach and marketing using energy poverty mapping from the Canadian Urban Sustainability Practitioners (CUSP), combined with additional information and education to renters will be used to target the most at need and avoid unintended consequences such as renovictions and increased rent payments.

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**SUBJECT: Better Homes Hamilton - Home Energy Retrofit Program (PED23106)  
(City Wide) - Page 9 of 9**

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**ALTERNATIVES FOR CONSIDERATION**

Council may choose not to approve the Better Homes Hamilton (BHH) program design or may choose to revise the program design components.

**ALIGNMENT TO THE 2016 – 2025 STRATEGIC PLAN**

**Community Engagement and Participation**

Hamilton has an open, transparent and accessible approach to City government that engages with and empowers all citizens to be involved in their community

**Economic Prosperity and Growth**

Hamilton has a prosperous and diverse local economy where people have opportunities to grow and develop.

**Healthy and Safe Communities**

Hamilton is a safe and supportive City where people are active, healthy, and have a high quality of life.

**Clean and Green**

Hamilton is environmentally sustainable with a healthy balance of natural and urban spaces.

**Built Environment and Infrastructure**

Hamilton is supported by state-of-the-art infrastructure, transportation options, buildings and public spaces that create a dynamic City.

**APPENDICES AND SCHEDULES ATTACHED**

Appendix “A” to Report PED23106 – Better Homes Hamilton Program Overview

Appendix “B” to Report PED23106 – Better Homes Hamilton Detailed Study Design

## Appendix A: Better Homes Hamilton Program Overview

### Introduction

The Better Homes Hamilton (BHH) program is being recommended as one solution for the City of Hamilton to support homeowners in improving energy efficiency and reducing greenhouse gas (GHG) emissions from residential buildings across Hamilton. The BHH program intends to utilize provincial Local Improvement Charge (LIC) legislation that allows municipalities, through mutual agreement, to place special charges as liens against a property for the purposes of completed works related to energy efficiency.

### Purpose

- Support the greatest number of homeowners across Hamilton in undertaking upgrades which substantially reduce greenhouse gas (GHG) emissions while improving home energy efficiency;
- Reduce barriers to entry through a combination of access to: competitive financing, an “energy coach” concierge service, and guidance in how to maximize rebates and/or grants from existing energy efficiency and income-qualifying programs;
- Target and prioritize homes within areas identified as experiencing energy poverty as identified through social and energy databases (i.e. Canadian Urban Sustainability Practitioners Energy Poverty Mapping Tool); and
- Work to achieve Hamilton’s Climate Action Strategy Low Carbon Transformation #2: Transforming Our Buildings approved by Council in August 2022.

### Program Elements

The BHH Program is intended to provide access to low-interest, fixed-rate loans to serve as the capital required to complete upgrades which result in a reduction in residential building GHG emissions, as well as increase home comfort and energy efficiency. The key elements of the program include:

#### *Financing*

- Loan Amount: Up to a maximum of \$20,000.00 per property.
- Interest Rate: 0% introductory rate through ‘Incubation Stage’ for the length of the repayment term.
- Repayment Term: 10 to 15 years (dependent on loan amount and agreement) paid through regular property tax payments.

#### *Participant Eligibility*

- Homeowner of a single-detached, semi-detached or townhome within Hamilton (both owner-occupied and landlord eligible).

**Appendix “A” to Report PED23106**  
**Page 2 of 3**

- Homeowner pays taxes and is current on tax payments (i.e. property taxes not in arrears).
- Homeowner is required to inform mortgage lender of participation if the property is under a mortgage.

Important Note – Any retrofits that require tenant displacement would **not** be eligible for the BHH program.

*Eligible Retrofits*

- Assessments and Permits: Including pre and post energy assessments and building permits.
- Building Envelope: Including air-sealing/draft proofing, insulation (attic, basement and walls).
- Mechanical Systems: Air Source Heat Pumps (ASHP) including cold-climate (ccASHP) and hybrid ASHP and supporting smart thermostat/controller.
- Supporting Infrastructure: Including breaker panel upgrades and ductwork only when required to support installation of ASHP.

**Recommended ‘Incubation Stage’ 2 Year Budget**

<b>Target</b>	50 participants from a diverse sampling across various housing types, demographics and income levels
<b>Total Value of Loans</b>	\$1,000,000.00
<b>Interest Rate</b>	0% introductory rate
<b>Loan Term</b>	10 to 15 years (based on loan value, repayment calculation and property owner agreement)
<b>Administrative Costs</b>	\$275,000.00 for fixed administrative costs for such things as: <ul style="list-style-type: none"> <li>• Marketing, promotion, education;</li> <li>• Software applications for tracking and analysis;</li> <li>• Loan loss reserve</li> <li>• Supporting administrative services</li> <li>• Web development</li> </ul>
<b>Estimated Total Cost</b>	<b>\$1,275,000.00</b>

**Expected Benefits**

The BHH is anticipated to result in several benefits both to participating homeowners and in the fight against climate change. These benefits include:

- Reducing household greenhouse gas (GHG) emissions on average by 60% or 2.9 tonnes carbon dioxide equivalent (tCO<sub>2e</sub>) per participating household annually, based on most common housing archetype in Hamilton.

**Appendix “A” to Report PED23106****Page 3 of 3**

- Potential for \$1,804.8 in cumulative savings based on scenario upgrade occurring in 2023 and savings between 2023 and 2030 from avoided carbon pricing.
- Improvement of indoor air quality and home comfort through reduction of fossil fuel burning and improving building envelope performance.
- Providing low barrier access to upfront capital for building and energy efficiency improvements for those that may not otherwise qualify for traditional financing.

**Equity Considerations**

Through the extensive research and engagement completed tenant’s rights and important equity considerations have been embedded into the BHH program. Unintended consequences such as ‘renovictions’ were discussed and considered. Furthermore, a strategy to help to identify and ensure the BHH program targets those populations and areas that need this type of support the most was completed. Important equity considerations of the BHH program will include:

- Ensuring that any retrofits that lead to the displacement of tenants will not be eligible;
- Additional resources and information through the ‘Energy Concierge’ service of the BHH program include a mail-out to any tenants whereby the landlord has applied for that specific property; and
- Assessment of social and energy databases including the Canadian Urban Sustainability Practitioners (CUSP) Energy Poverty and Equity Explorer Tool and the building archetype and energy assessment using 2021 census and MPAC building data.

May 2023

# Better Homes Hamilton Detailed Study Design



Better Homes  
**HAMILTON**



Hamilton

Prepared by: Nico Strabac, Project Lead  
Centre for Climate Change Management (CCCM)

Mohawk College of Applied Arts & Technology  
135 Fennell Ave W.  
Hamilton ON  
L9C 0E5

Prepared by The Centre for Climate Change Management

The Centre for Climate Change Management (CCCM) is an applied research institute focused on supporting the transition to a thriving, low-carbon economy.

Our research focuses on working collaboratively with industry, government and community to develop and implement climate change solutions. Given the urgency of the climate crisis, we focus on "deep mitigation" strategies: opportunities to significantly reduce the greenhouse gas emissions that cause climate change.

The CCCM also acts as a hub for climate action on campus and in the Hamilton-Burlington community. We have a "coalitions-in-residence program" for collective action initiatives such as the Bay Area Climate Change Council and the centre is home to the college's Sustainability Office.



**CENTRE FOR  
CLIMATE CHANGE  
MANAGEMENT  
AT MOHAWK COLLEGE**

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## Contents

I.	Acknowledgements .....	i
II.	Abbreviations .....	iii
III.	Executive Summary .....	iv
IV.	Considerations and Next Steps .....	x
1	Introduction .....	1
2	Research .....	5
3	Stakeholder Consultation .....	24
4	Program Design .....	29
5	Implementation .....	54
6	Additional Recommendations .....	66
7	Conclusion .....	69
	Appendix A: Stakeholder Engagement Summary .....	
	Appendix B: Municipal Retrofit Program Scan .....	
	Appendix C: Homeowner Survey .....	
	Appendix D: Lightspark Building Archetype Report .....	
	Appendix E: Business Case .....	
	Appendix F: Implementation Plan .....	
	Appendix G: Contractor Registry Framework .....	
	Appendix H: Sample Branding, Marketing and Web Design Materials .....	
	Appendix I: Sample Local Improvement Charge Bylaws .....	

## I. ACKNOWLEDGEMENTS

The Centre for Climate Change Management would like to acknowledge the inputs of a variety of stakeholders – in addition to those listed below- which informed the development of this report. Thanks to the City of Hamilton’s Office of Climate Change Initiatives for their leadership and ongoing support. The CCCM would like to acknowledge the work of various non-governmental organizations, especially Environment Hamilton, for their longstanding advocacy for a home energy retrofit opportunity (HERO) program within the City of Hamilton, and Green Venture for their expertise and experience in the building energy audit and retrofit sector. Last the CCCM recognizes the City of Hamilton for their leadership in initiating the creation of Hamilton’s Climate Action Strategy, specifically the Community Energy & Emissions Plan which calls for a residential building retrofit program and sets benchmarks under Low Carbon Transformation 2: Transforming our Buildings.

Special thanks to the to the following parties for inputs and supports:

- City departments which provided key ongoing feedback and guidance
  - Corporate and Finance Services including Taxation and Legal; and
  - Building Division in Planning and Economic
- The Office of Climate Change Initiatives (OCCI)
  - Dr. Lynda Lukasik, Director, OCCI
  - Trevor Imhoff, Senior Project Manager, OCCI
- Thanks to the Bay Area Climate Change Council (BACCC) for ongoing supports, including amplifying the communications of the Homeowner Survey
- Thanks to the Bay Area Climate Change Implementation Team (BACCIT)
  - Zoë Green (Bay Area Climate Change Council)
  - Lauren McAusland (Bay Area Climate Change Council)
  - Richard Koroscil (Bay Area Climate Change Council)
  - Kate Flynn (Mohawk College Centre for Climate Change Management)
  - Ian Borsuk (Environment Hamilton)
  - Moises Albanes (Green Venture)
  - Giuliana Casimirri (Green Venture)
  - Sean Ferris (Habitat for Humanity)
  - Monica Curtis (EnerQuality)
  - Margaret Reid (Royal LePage)
  - John Loukidelis (Citizen Representative)
  - Lynn Robichaud (City of Burlington)



We would like to acknowledge the homeowners and community stakeholders who provided valuable feedback to support and inform this report.

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This project was carried out with funding provided from the Green Municipal Fund, a fund financed by the Government of Canada and administered by the Federation of Canadian Municipalities. Notwithstanding this support, the views expressed are the personal views of the authors, and the Federation of Canadian Municipalities and the Government of Canada accept no responsibility for them

## II. ABBREVIATIONS

### **Abbreviations**

- ASHP: Air Source Heat Pump
- BACCC: Bay Area Climate Change Council
- BACCIT: Bay Area Climate Change Implementation Team
- BHH: Better Homes Hamilton
- CCCM: Centre for Climate Change Management at Mohawk College
- CEEP: Community Energy + Emissions Plan
- CUSP: Canadian Urban Sustainability Practitioners
- FCM: Federation of Canadian Municipalities
- FSA: Forward Sortation Area
- GHG: Greenhouse Gas
- HCAS: Hamilton's Climate Action Strategy
- HERO: Home Energy Retrofit Opportunity
- LIC: Local Improvement Charge
- LLR: Loan Loss Reserve
- ME: Monitoring and Evaluation
- MtCO<sub>2</sub>e: Megatonnes of Carbon Dioxide Equivalent
- NRCan: Natural Resources Canada
- OCCI: Office of Climate Change Initiatives at the City of Hamilton
- PACE: Property Assessed Clean Energy
- PDA: Program Delivery Agent
- QC: Qualified Contractor
- RDC: Retrofit Delivery Centre
- TAF: The Atmospheric Fund
- tCO<sub>2</sub>e: Tonnes of Carbon Dioxide Equivalent

### III. EXECUTIVE SUMMARY

The Centre for Climate Change Management (CCCM) has been contracted by the City of Hamilton to lead the design of a Home Energy Retrofit Opportunity (HERO) program. Through a marketing and branding exercise henceforth the program recommended for the City of Hamilton is called the Better Homes Hamilton (BHH) program. Direction to undertake this project was provided by City Council during the [General Issues Committee](#) meeting on May 19<sup>th</sup>, 2021. Funding to support the project was acquired via successful application to a [study design grant](#) from The Green Municipal Fund, a program from The Federation of Canadian Municipalities.

#### **Purpose of the Better Homes Hamilton Program**

- Support the greatest number of homeowners across Hamilton in undertaking upgrades which substantially reduce greenhouse gas (GHG) emissions while improving home energy efficiency;
- Reduce barriers through a combination of access to: competitive financing, an "energy coach" service, and guidance in how to maximize rebates and/or grants from existing energy efficiency and income-qualifying programs; and,
- Work to achieve Low Carbon Transformation 2: Transforming our Buildings within the Community Energy & Emissions Plan (CEEP) as part of Hamilton's Climate Action Strategy (HCAS).

#### **Program Elements**

The Better Homes Hamilton program will provide access to low-interest, fixed-rate loans to eligible Hamilton homeowners to serve as the capital required to complete upgrades. This will result in a reduction in household GHG emissions, as well as an increase in home comfort and energy efficiency.

The BHH program proposes to utilize a Local Improvement Charge (LIC) framework which enables the municipality to issue loans against the title of the property as a "special charge" lien, and to collect repayment via regularly scheduled property tax bills.

#### **Financing**

- LIC Loan: Maximum of \$20,000 per applicant
- Interest rate: 4.5% (with 0% introductory rate recommended)
- Repayment term: 15 years
- Stackable with existing government and utility incentive programs including:

- Government of Canada [Greener Homes Grant](#)
- Government of Canada: [Greener Homes Loan](#)
- Government of Canada: [Oil to Heat Pump Affordability Grant \(OHPA Grant\)](#)
- Enbridge Gas: [Home Efficiency Rebate Plus \(HER+\) Program](#)
- Enbridge Gas [Smart Thermostat Rebate](#).

And income-qualifying incentive programs such as:

- Enbridge Gas: [Home Winterproofing Program](#)
- SaveON Energy: [Energy Affordability Program](#).

### **Participant Eligibility**

- Homeowner of a single-detached, semi-detached or townhome within Hamilton (landlords qualify)
- Participant's Property Tax Account is paid by the owner(s) and is in good standing (i.e., not in arrears) and does not have any other liens against the title
- All homeowners on the Title consent to participation in the BHH program
- Participants inform lenders of participation if the property is under mortgage or receive consent from lenders if property taxes paid by mortgage lender.

### **Eligible Expenses**

Eligible expenses under the BHH program were selected which: substantially reduce GHG emissions from residential units, reduce barrier to entry for participants, and are stackable with existing incentive and rebate programs. Expenses are broken into 4 categories:

#### ***1) Assessments & Permitting***

- Full cost of NRCan pre and post retrofit EnerGuide audit completed by a Registered Energy Auditor
- Cost of blower door test
- Cost of City of Hamilton building permits

#### ***2) Building Envelope***

- Air-sealing/draft-proofing
- Insulation: attic, basement, exterior wall, foundation

### **3) Mechanical Upgrades**

- Air source heat pump (ASHP) installation
  - Cold-climate ASHP
  - Hybrid configuration ASHP
  - Ductless mini-splits
- Smart thermostats
- Smart controllers

### **4) Supporting Infrastructure Upgrades**

- Electric breaker panel upgrade (200amp) \*
- Ductwork repair\*<sup>1</sup>

### **Contractor Eligibility**

In order to have a quote accepted, the Contractor must be able to verify the following criteria:

- Proof of a Hamilton business license
- Quote must show Registered HST#
- Proof of purchased liability insurance that covers all employees
- WSIB compliance

Depending on scope of workorder, proof of applicable licenses:

- Electrical Contractor Licence (ESA)
- 313A or 313D license
- G2 gas ticket
- OBT2 ticket
- Sheet Metal Mechanic license

### **Participant Supports & Quality Assurance**

- **“Energy Coach” Service** – the BHH program provides all participants with access to a trusted City representative who provides guidance relating to the most impactful upgrades per applicant, assists participants in understanding EnerGuide audit reports (if undertaken), reviews contractor quotes, and provides guidance on applying to external rebates (Enbridge HER+, Greener Homes Grant, Enbridge Winterproofing Program).

<sup>1</sup> Supporting infrastructure upgrades are eligible when required to support installation of ASHPs. See Section 4.5.4 for more information

- **Contractor Registry & Eligibility Criteria** - as a reminder, in order to submit a quote for a work order, all contractors must show applicable licensing, certifications and proof of WSIB compliance. Stakeholder consultation has indicated that gathering quotes for desired retrofits is a time consuming, and often intimidating task for participants. To support participants in gathering quotes, and reduce barriers, the CCCM recommends a Contractor Registry be listed on the BHH Program webpage. This Contractor Registry will be monitored by the Senior Project Manager and will contain contractors which have shown proof of applicable training and better business practices (i.e. testimonials, sustainability plans, EDI commitments). This Contractor Registry aims to provide participants of the BHH program with a list of trusted businesses as a starting point for the quotation process. To be clear, the Senior Project Manager will not require participants to collect quotes from contractors listed on the Registry. The City of Hamilton cannot recommend the any one contractor over another, and the City will not be held liable for any work completed by contractors within the registry.
- **Tenant Protections:** Since landlords are eligible to participate in the BHH program, it is advised that the BHH application contain a field which identifies if the property in question is a rental unit. If so a physical mailer should be sent to the address which outlines the BHH program and reiterates tenant rights. The OCCI should work with the City Solicitor to embed wording into the Property Owner agreement which include tenant protections from renoviction and prohibits the landlord from downloading the cost of loan repayments onto tenants.

### **Implementation – Pilot Program/Incubation Stage**

The CCCM recommends the City undertake a “ Incubation Stage” in the form of a two-year Pilot Program before proceeding with a full-scale program launch in order to:

- Provide staff the opportunity to gain experience offering the BHH program and establish inter-departmental workflows
- Gain insights into the impact of retrofits across a variety of housing types
- Gather feedback and/or testimonials from participants which may be used to inform communications ahead of full-scale program launch;
- Increase program visibility and drive demand toward full-scale launch by establishing a waitlist of interested parties, and,

- Investigate multiple options for scalability to increase total number of retrofits and different building sectors (e.g. multi-unit, commercial/industrial).

The CCCM recommends that funding and resources for the pilot project be broken down between total loans and operating/staffing expenses and be provided approval to access an upper limit of \$1.5M from the existing Climate Change Reserve.

Expense Category	Cost
Total LIC Loan Budget	\$1,000,000 (50 homes x \$20,000)
Loan Loss Reserve (5)	\$50,000
Staffing Impacts – in-kind <ul style="list-style-type: none"> <li>• 1.0 FTE Sr. Project Manager over 2 years from OCCI</li> <li>• 0.5 FTE total over 2 years from Legal, Taxation, Treasurer, Finance</li> </ul>	\$317,000 1 FTE (2 years salary)  In-kind supports
Marketing & Digital Communications	\$60,000
Web Development	\$10,000
RETScreen Software	\$5,000
Pilot Program Budget	\$1,442,000

The CCCM recommends the Pilot Project have the following characteristics.

Program Element	Description
Timeframe	2 years
Target	50 homes sourcing from a variety of eligible building archetypes and demographic groups
Financial Model	Local Improvement Charge
Funding Amount	\$20,000 per applicant
Interest Rate	0% introductory rate
Repayment Term	15 years
Administrative Fee	\$0 introductory rate
Eligible Building Types	Single-detached, semi-detached, townhome, row home,
Participant Eligibility	<ul style="list-style-type: none"> <li>• Homeowner within Hamilton</li> </ul>

	<ul style="list-style-type: none"> <li>• Current on Property Tax payments</li> <li>• No other liens against title</li> </ul>
Contactor Eligibility	All criteria and licenses satisfied as outlined in section 4.6
Eligible Expenses	All upgrades outlined under section 4.5 including: <ul style="list-style-type: none"> <li>• Permits and assessments</li> <li>• Building envelope (air sealing, insulation)</li> <li>• Mechanical systems (ASHP, smart thermostat, smart controllers)</li> <li>• Supporting Infrastructure Upgrades (breaker panel upgrade, ductwork repair)</li> </ul>

Key characteristics of the Incubation Stage of the program:

- **Interest rate:** recommending a 0% interest rate to incentivize early adopters;
- **Term:** recommending a 15-year term on the loan. This term is informed by industry estimates of the average working lifespan of the most expensive eligible expense (e.g. air source heat pump); and
- **Staffing:** recommend the Project Manager has the requisite building science and/or construction/retrofit skillset to support participants as an “Energy Coach”.

### Program Scaling

Upon completion of the Pilot Program, the City of Hamilton is encouraged to apply to FCM’s [Capital Program: Loan or credit enhancement funding.](#) Under this funding program the City would be eligible to receive<sup>2\*</sup>:

- Funding to support 80% of program costs up to \$10M; and
- A grant for 50% of the approved funding amount.

This funding scenario has been used to build a business case (Appendix E). The CCCM projects that with an additional investment of \$1.7M over four years (20% of program cost per FCM requirements), the BHH program could scale to retrofit 410 homes at \$20,000 per home.

The City of Hamilton should investigate partnerships with financial institutions or private investments as potential opportunities to scale and to refinance the BHH program in conjunction with or following FCM funding.

<sup>2</sup> As of March 2023



## IV. CONSIDERATIONS AND NEXT STEPS

Based on the research completed for this report, the CCCM recommends the City of Hamilton should consider the following next steps:



# 1 INTRODUCTION

## 1.1 Background

In March 2019, the City of Hamilton declared a climate emergency, recognizing that climate change poses threats to the health and safety of Hamiltonians, the natural environment and city infrastructure. In recognition of these threats, Hamilton City Council set a goal of achieving net-zero greenhouse gas (GHG) emissions by 2050.

In May 2021, City Council directed staff to design a Home Energy Retrofit Opportunity (HERO) program with the goal of reducing GHG emissions from residential buildings. A HERO program, which is referred to throughout and in context to this report is used to generally describe a program that provides incentives and supports to homeowners to increase energy efficiency and reduce GHG emissions from burning fossil fuels for space and water heating. Recognizing the need for an evidence-based program, Council directed staff to enter into an agreement with the CCCM, an applied research institute at Mohawk College, to design the prospective HERO program. Additional funding to support the project was acquired via successful application to a [study design grant](#) from The Green Municipal Fund, a program from the Federation of Canadian Municipalities.

## 1.2 Purpose of Work

The purpose of this study is to provide a detailed recommendation report on the design and implementation of the Better Homes Hamilton program for consideration by the City of Hamilton. The CCCM endeavoured to keep equity front-of-mind while using evidence-based decision making to design a program which empowers the greatest number of Hamiltonians to undertake upgrades which result in an increase in home energy efficiency while decreasing household GHG emissions. The CCCM sought to design a program that is stackable with other energy efficiency incentive programs, and design a financial model which removes barriers to entry so that more Hamilton homeowners may access federal, and utility-based incentives and rebates.

## 1.3 Alignment with Hamilton's Climate Action Strategy

In August 2022, the City of Hamilton approved Hamilton's Climate Action Strategy (HCAS) which outlines key actions, goals, and benchmarks required to achieve the target of net-zero GHG emissions by 2050. HCAS is comprised of two key documents:

- [Hamilton's Climate Change Impact Adaptation Plan](#) and;
- [ReCharge Hamilton: Our Community Energy + Emissions Plan](#) (CEEP)

In the CEEP, 8% of city-wide GHG emissions are attributed to residential buildings and was estimated at 691,884 tCO<sub>2</sub>e in the 2016 base year. Under Low Carbon Transformation 2: Transforming Our Buildings, the CEEP has set a target of retrofitting 100% of existing homes to achieve 50% energy efficiency savings relative to 2016 by 2050. This action is expected to reduce city-wide GHG emissions by 2.8%.

The CEEP identifies several co-benefits of a Low-Carbon future including:

- Potential reduction in household energy bills by 80% below 2016 levels by 2050
- Decrease in household energy poverty (defined as spending >6% after-tax income on energy expenses<sup>3</sup>)
- Projected 1600 new jobs created by 2050 to support a holistic building retrofit program, and
- Increase social equity by providing low-income and equity deserving groups a stable and affordable way to access both financing and guidance to complete home energy upgrades.

When designing the BHH program, the CCCM frequently referred back to the objectives and targets laid out within the CEEP as a guiding principle.

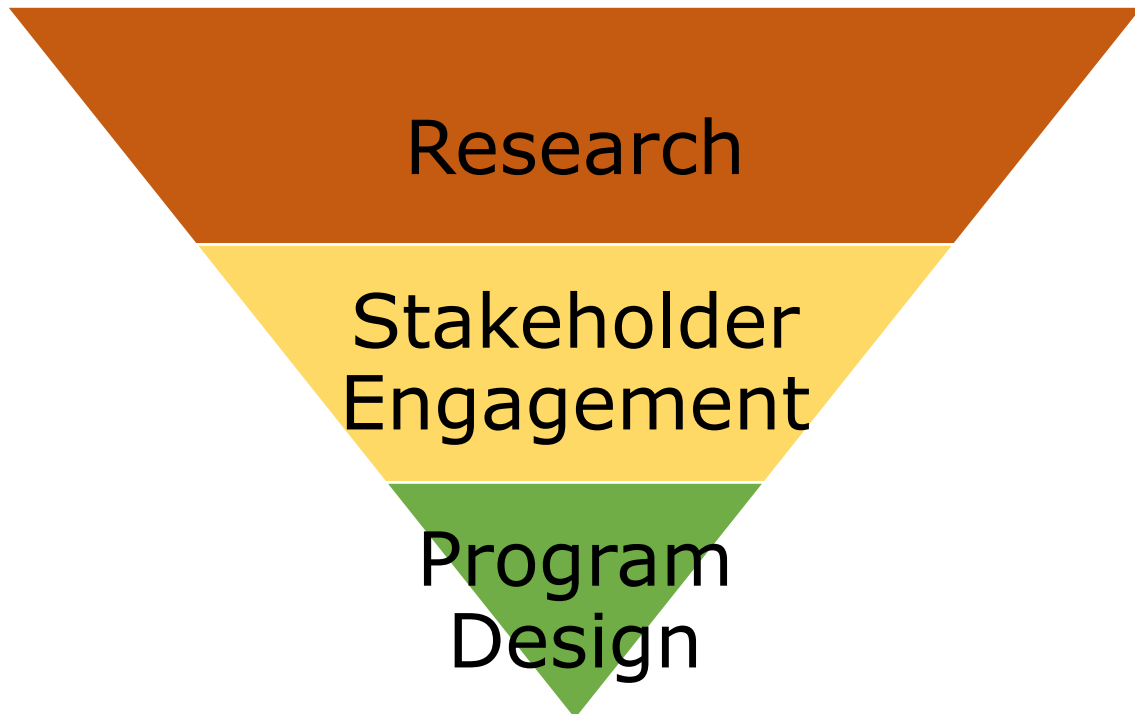
## 1.4 Methodology

The BHH program design was crafted using an evidence-based decision-making framework. The CCCM started by first asking a number of research questions including:

- What are the features of a successful HERO program?
- How can a building retrofit program be designed in a manner which encourages uptake from the greatest number of Hamiltonians? How can an equity lens be applied to this work?
- What features do Hamiltonians want in a HERO program? What are the needs within the community?
- What existing energy efficiency retrofit incentives/rebates are available to homeowners today? How do people interact with these incentive programs?
- What is the capacity of the retrofit workforce within the Hamilton region?

<sup>3</sup> As defined by The Canadian Urban Sustainability Practitioners (CUSP) report, [Energy Poverty in Canada: a CUSP Backgrounder](#)

- What is the experience of other municipalities offering HERO programs? How are their programs structured?



**Figure 1 Research approach in evidence-based program design**

- **Research:** In-line with the CCCM's primary function as an applied research centre, a significant effort was made to understand:
  - The status and operation of other HERO programs across Canada, the United States and Europe.
  - The legislative, capital, and human resource requirements to offer a HERO program within the province of Ontario.
  - Baseline GHG emissions data within Hamilton drawing from existing municipal reporting.
  - Demographic landscape within Hamilton, examining building types, census data, income levels, and the state of energy poverty across the City.
  - Building data and energy consumption mapping was completed by Lightspark Software Inc. (which can be viewed in full in Appendix D).
  - Homeowner perceptions of retrofit programs were collected via an engagement survey completed by Deloitte. (A complete breakdown can be found within Appendix C.)

- Examined the parameters of existing incentives and rebate programs offered by government and utility providers.
- **Stakeholder Engagement:** The CCCM gathered feedback from over 40 stakeholders. Stakeholder engagement was conducted primarily through fact-finding interviews and meetings administered by the CCCM. Stakeholder input allowed the CCCM to pressure test program design elements, challenge the research team's conceptions, and understand the experience of those working with, advocating for, and administering HERO programs. Stakeholders such as contractors, energy auditors and HERO program administrators were instrumental in the development of an understanding of the logistics required to complete building retrofits. Other stakeholders such as eNGOs, tenant advocacy groups, citizen activists and working groups such as the Bay Area Climate Change Implementation Team (BACCIT) helped to inform the guiding principles of program design. The CCCM consulted a variety of stakeholders including:
  - Applicable municipal departments
  - Utility providers
  - Environmental non-governmental organizations (eNGOs)
  - Municipalities offering HERO programs
  - Contractors
  - Industry and contractor associations, and
  - Tenant rights organizations.
- **Program Design:**
  - All program elements including the financial model, eligible expenses, consumer support services and staffing requirements were informed by research on other municipalities' HERO programs, and where possible, through in-depth consultations with HERO staff administrators.
  - Best practices were collected from various HERO programs across North America and Europe.
- **Implementation Design:**
  - The CCCM gathered insights from other HERO programs that have successfully launched in order to craft recommendations relating to both a Pilot Program and Program Launch with options for future program scaling.

## 2 RESEARCH

### **Major Findings: Research**

- Hamiltonians have expressed a clear desire for a municipally-led building retrofit program that will help them
  - 1) reduce utility expenses and;
  - 2) partake in an impactful climate solution
- The average Hamiltonian pays \$2,118 in annual utility expenses (electricity and space heating).
- 25% of Hamiltonians live in a state of energy poverty defined by spend >6% of after-tax income on utility expenses, with 41% paying more than the national average expense of 3% after-tax income spend on utility expenses.
- Based on census data, 75% of Hamilton's residential building stock would be eligible to partake in the BHH program as designed.
- Single-detached homes account for 56% of residential dwellings in Hamilton, representing over 125,130 individual dwellings. This indicates an ample target market to support demand for a building retrofit program
- Per Lightspark Inc analysis, the most common single-detached building archetype emits 4.89 tCO<sub>2</sub>e per year.
- Conservative estimates show that participants who reduce GHG emissions by 60% can potentially save >\$1,800 in carbon tax expenses between 2022-2030, and >\$300 per year past 2030.
- There are robust and ample incentive programs offered by government and utility providers to reduce the cost of completing upgrades.
- A Local Improvement Charge (LIC) program framework is best suited to reduce barriers to participation. LIC programs offer fixed rate, low-interest financing to participants, which is repaid via regular property tax payments. This recoverable loan structure limits risk to the municipality while providing stability for participants.

The following section outlines the research completed by the CCCM which informed the BHH program design and implementation planning.

The CCCM began by first examining key Hamilton housing information by examining utility data, 2021 census data, and reported GHG emissions. To further our understanding of the building stock, the CCCM commissioned Lightspark Inc to complete a Building Archetype and Energy Mapping study which can be found in full within Appendix D.

In order to better inform program design, the CCCM reviewed HERO and energy efficiency incentive programs from across Canada, as well as the United States and Europe (see Appendix B for more detail). In municipalities where HERO programs are already offered, the CCCM met with staff in charge of the HERO program and interviewed them extensively about best practices, challenges and opportunities to improve programs.

To best understand how to complement and increase participation in existing programs, the CCCM examined currently offered rebate and incentive programs such as the federal Green Home Programs, the Enbridge HER+ program, as well as income qualifying programs such as Enbridge Gas Home Winterproofing Program, and SaveON Energy's Energy Affordability Program. Researchers took extra care to better understand how to reduce barriers to entry into these programs, how to help Hamiltonians gain access to existing rebates, and how to incentivize Hamiltonians to undertake renovations that will significantly reduce GHG emissions and improve home comfort.

## 2.1 Hamilton Baseline Data

In order to craft a HERO program which addresses the needs of Hamilton residents, an understanding of the City's demographic characteristics, utility consumption, GHG emissions profile and building stock was established. Research indicated single-detached houses represent the most common building type, which indicates that a HERO program targeting single-detached homes would have a significant impact on GHG emissions.

### 2.1.1 Housing Data 2021 Census

In order to understand the size of the Hamilton building stock, and the breakdown of building types that would be eligible to participate, 2021 Census data was examined.

The CCCM found that in 2021, Hamilton had a population of 569,353 residents occupying 222,810 dwellings categorized by the following structure types.

- Single-detached house\* - 125,130
- Semi-detached house\* - 6,770
- Row house\* - 27,455

- Apartment or flat in a duplex\* – 7,380
- Apartment in a building that has fewer than 5 storeys – 19,045
- Apartment in a building that has 5 or more storeys – 36,465
- Other single-attached house – 415
- Movable dwelling – 145

\* Housing types that are eligible under the BHH program design

Of the building types reported, **75% would be eligible to participate in the BHH program as designed.** Moreover, the CCCM has determined that owners of **single-detached homes are the largest target audience** of the BHH program as single-detached buildings represent **56%** of the City's building stock.

The CCCM commissioned Lightspark Software Inc. to complete a building archetype analysis of single-detached homes within Hamilton to better understand their distribution across the city, utility consumption and GHG emission profiles. Section 2.4 expands upon Lightspark's major findings, while a full copy of Lightspark's report can be found in Appendix D.

### *2.1.2 Hamilton Emissions Profile (CEEP)*

Next, the CCCM was interested in understanding how the City of Hamilton reported GHG emissions from residential buildings. The Community Energy & Emissions Plan (CEEP) reports that City-wide GHG emissions totalled 8.70 MtCO<sub>2</sub>e in 2016. The vast majority of emissions (64%) can be attributed to industry operations, while Hamilton's residential building stock accounts for 8% or 6.92 ktCO<sub>2</sub>e.

When considering the fact that eligible building types represent 75% of the residential building stock within the City, the BHH program offers a pathway to significantly reducing GHG emissions from the residential building sector.

### *2.1.3 Hamilton's Forward Sortation Areas*

Hamilton has 16 Forward Sortation Areas (FSA) which describe the first 3 figures of the postal code. It is recommended that City Staff overlay the findings of Lightspark's Building Archetype Analysis with the distribution of eligible building types to inform program communications. That way, the City can target homeowners who would benefit the most from HERO services to reduce both their GHG emissions and energy costs

A full building archetype analysis can be found in Appendix D.



## 2.2 Hamilton Homeowner Average Utility Consumption

Having understood the types of buildings within Hamilton, and the potential market size for a HERO program, the CCCM next looked to understand the average cost of utility expenditures (electricity and heating fuel) for Hamilton homeowners. Due to the difficulty of data collection, granular utility data at the municipal level is typically not captured. The [Financial Accountability Office of Ontario](#) has used aggregated datasets to estimate that in 2019, the average Ontario home spent \$2,128 on utilities while the average home in the Hamilton-Niagara region spends \$2,118.

Table 1 illustrates a breakdown of these average utility costs by comparing average utility expenditures for Ontario, Hamilton region and Lightspark’s utility analysis of the most common single-detached building type:

Lightspark estimates that 54.8% of the single-detached building stock aligns with the following characteristics:

- Late 1950’s construction (1957)
- Approximately 170m<sup>2</sup> of floor area
- Primary heating source: condensed natural gas furnace (96% efficient)
- Hot water system: conventional natural gas water heater
- Carbon emissions: 4.89 tCO<sub>2e</sub>/year
- Annual utility cost \$2,226

The full LightSpark Software Inc. analysis on building archetype, energy and carbon emissions can be found within Appendix D.

**Table 1 Average annual utility spend in Ontario and Hamilton region**

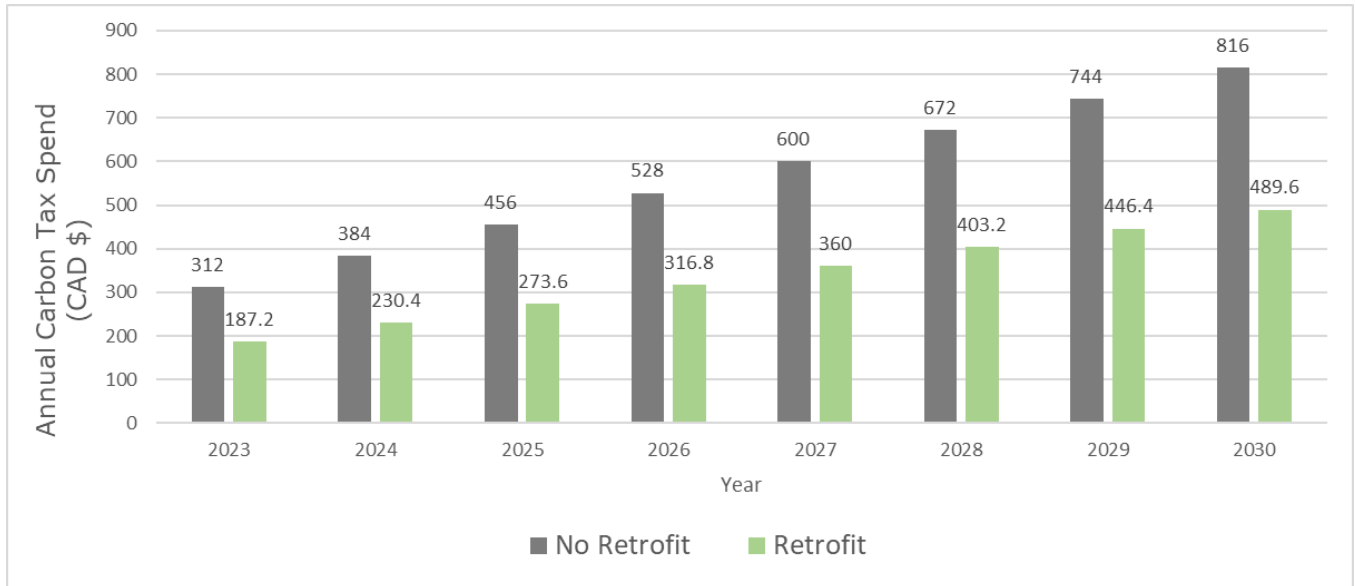
Utility	Ontario Average (\$)	% Total	Hamilton Average (\$) 2019	% Total	Hamilton Average (\$) 2022	% Total
<b>Electricity</b>	1,190	56	1,143	54	1,202	54
<b>Natural Gas</b>	811	38	839	39.6	1,023	46
<b>Other</b>	122	6	136	6.4	-	
<b>TOTAL</b>	2,128	100	2,118	99.6	2,226	100

## 2.3 Projected Carbon Tax Impacts

Beginning in April 2022, the Government of Canada set a price of \$50 per tonne of CO<sub>2</sub> equivalent, set to increase \$15 per tonne per year to a max of \$170/tCO<sub>2e</sub> in 2030. This tax takes a blanket approach which covers all combustible fuel sources which emit GHGs, including home heating fuels (natural gas, oil, propane, etc.).

Therefore, carbon pricing will impact every Hamiltonian, and is expected to contribute to an increase cost to operate home heating equipment using fossil fuels.

Figure 1 outlines the difference in carbon pricing under a business-as-usual scenario versus a retrofit scenario wherein home GHG emissions are reduced by 60%.



**Figure 2 Projected carbon tax spend of average Hamilton home emitting 4.8 tCO<sub>2e</sub> under business-as-usual vs upgraded scenario.**

### 2.3.1 Carbon pricing under business-as-usual scenario versus a retrofit scenario

Under the business-as-usual scenario, the average homeowner in Hamilton living within the most common building type (1950s single-detached home) operating a 96% efficient natural gas furnace, emitting 4.89 tCO<sub>2e</sub>/year will pay \$312 in carbon taxes in 2023, scaling to \$816 per year in carbon taxes by 2030.

Conversely, that same homeowner undertaking efficiency upgrades which reduced residential GHG emissions by a conservative projection of 60% will pay \$187.2 in carbon taxes in 2023, scaling to \$489.6 by 2030 and beyond.

Based on this conservative retrofit scenario of a 60% GHG reduction through home energy retrofits, the CCCM estimates that by participating in the BHH program, the average participant can save **\$1,804.8 between 2023-2030**

in carbon tax savings, and **\$326.4 annually past 2030** compared to a business-as-usual scenario.

**Table 2 2022-2030 carbon tax spending comparison**

<b>Carbon Spending</b>	<b>No Upgrade (CAD \$)</b>	<b>Upgrade Completed (CAD \$)</b>
2023	312	187.2
2030	816	489.6
<b>Cumulative 2022-2030</b>	<b>\$4,512</b>	<b>\$2,707.2</b>
<b>Savings</b>	<b>\$1,804.8 (60%)</b>	

Carbon tax savings help to justify the upfront capital cost of retrofit upgrades, especially when combined with rebates and incentives.

## 2.4 Lightspark Building Archetype Analysis

Lightspark Software Inc was commissioned by the CCCM to provide a comprehensive building archetype and energy mapping analysis, and to validate the CCCM’s findings and analysis from the 2021 census data. This analysis provides critical insights into the types of >3 storey buildings Hamiltonians live in, categorizing homes into 7 archetypes (see Table 3) based on several variables including; year of construction, floorspace, average air-tightness, primary heating & cooling equipment, average utility consumption, and average GHG emissions profile. This analysis was completed by overlaying the following datasets:

- Energuide Audit Data;
- Utility consumption data;
- Canadian Census Data (2016);
- MPAC datasets;
- Property Tax reports;
- Building footprints;

Lightspark overlaid these datasets to establish an understanding of housing types and utility consumption by Forward Sortation Area (FSA).

The full report can be viewed in Appendix D

### 2.4.1 Building Archetypes

Lightspark determined there are 121,844 single-family dwellings within Hamilton which have been sorted into 7 archetypes based on the available *Energuide Audit Data*. Given the limitations of the audit dataset, it should be noted that this is not a comprehensive list of building types across the City.

However, Table 3 provides a reasonable overview of the eligible building types.

**Table 3 Building archetypes of single-family units within Hamilton**  
**Breakdown of Archetypes - Comparison**

Archetype	Year of Construction	Floor Area (m2)	Primary Heat Source	Primary Fuel Type	Hot Water System	Hot Water System Fuel Type	Energy Intensity (GJ/m2)	Carbon Intensity (GJ/m2)	Dwelling Count
A	1952	184.8	Induced Draft Fan Furnace	Natural Gas	Conventional Tank (Pilot)	Natural Gas	0.92	0.04	2018
B	1957	169.1	Condensing Furnace	Natural Gas	Conventional Tank (Pilot)	Natural Gas	0.75	0.03	66810
C	1940	199.1	Furnace With Flame Retention Head	Oil	Conventional Tank	Electricity	1.03	0.05	594
D	1919	327.3	Boiler With Continuous Pilot	Natural Gas	Conventional Tank	Natural Gas	1.04	0.05	982
E	1949	238.2	Baseboard/Hydronic /Plenum(Duct) Htrs.	Electricity	Conventional Tank	Electricity	0.54	0.01	477
F	1931	190.0	Condensing Furnace	Natural Gas	Conventional Tank	Natural Gas	1.08	0.05	19862
G	1986	288.4	Condensing Furnace	Natural Gas	Conventional Tank (Pilot)	Natural Gas	0.51	0.02	31101

From Lightspark’s analysis, it has been determined that the most abundant single-family building archetypes found within Hamilton are:

- Type B (54.8%): 1957 construction with condensed natural gas furnace
- Type G (25.5%): 1986 construction with condensed natural gas furnace
- Type F (16.3%): 1931 construction with condensed natural gas furnace

It should be noted that while fewer in number the following archetypes would highly benefit from energy-efficiency upgrades due to the high cost to operate the primary space heating equipment:

- Type C (0.5%) - 1940 construction with an oil-burning furnace
- Type E (0.4%) – 1949 construction with electric baseboard heating

**Table 4 Single-dwelling Archetypes Ranked by Carbon Intensity**

Archetype	t CO2-e	GJ / year	Energy Cost (\$/year)	Dwelling Count
<b>C</b>	10.78	204.26	\$6,900	594
<b>D</b>	15.34	338.96	\$4,652	982
<b>E</b>	1.47	128.23	\$4,331	477
<b>F</b>	8.73	204.58	\$3,112	19,862
<b>A</b>	7.02	169.76	\$2,723	2,018
<b>G</b>	5.85	145.86	\$2,457	31,101
<b>B</b>	4.89	126.75	\$2,234	66,810

Table 4 outlines the GHG emissions associated with each building archetype. While archetypes C and D represent high GHG emitting buildings, archetypes B, G and F capture the largest portion of single-detached dwelling and thus should be considered the primary target market.

A fulsome breakdown of archetype characteristics, as well as spatial distribution by FSA can be found within Appendix D.

## 2.5 Energy Poverty in Hamilton

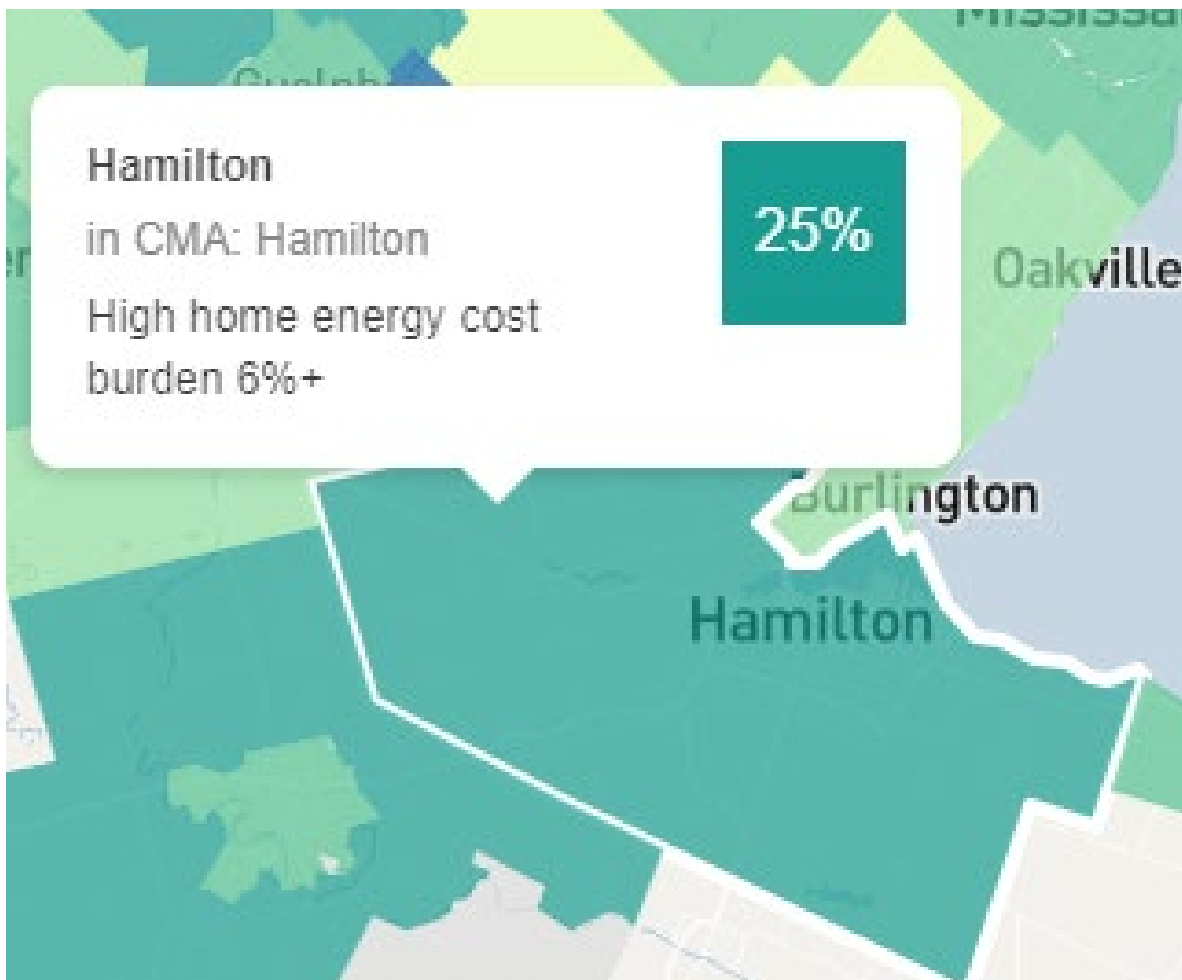
As discussed in section 2.2, one of the main goals of the research was to better understand Hamilton homeowner’s utility bills and how a HERO program might stabilize and/or reduce the cost of household energy consumption. This is especially important for residents who qualify as low income, as well as those on fixed incomes who are especially vulnerable to increasing energy costs.

Energy poverty refers to the experience of households that struggle to heat and cool their homes without undue financial burden. [The Canadian Urban Sustainability Practitioners \(CUSP\)](#) defines those paying greater than 6% of

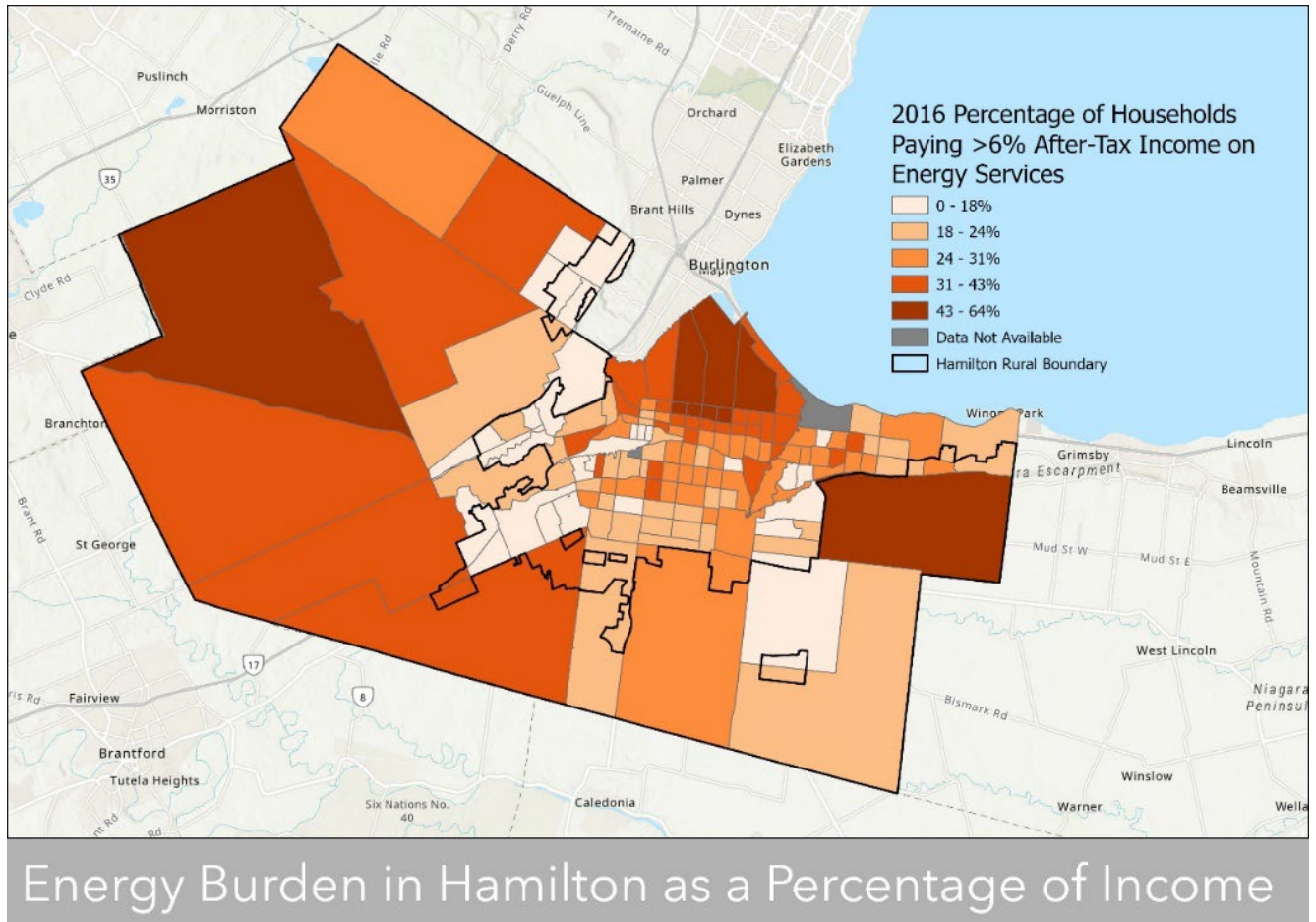
after-tax income on energy expenses as being in a state of high energy burden. For the sake of this report, this threshold will be used to describe a state of energy poverty.

CUSP has created the [Energy Poverty Mapping Tool](#) which cross references census and utility data to determine average spend on energy expenses down to the census tract level.

In addition to this resource, the CCCM commissioned an 8-week student research project to examine the state of energy poverty within the City of Hamilton.



**Figure 3 CUSP energy poverty mapping tool**



**Figure 4 Percentage of homes paying >6% after-tax income on energy expenses**

### 2.5.1 Major Findings: Energy Poverty Research

- 41% of Hamiltonians pay more than the national average for utilities
- Energy poverty occurs in both rural and urban regions of the City
- 25% of Hamiltonians are in a state of energy poverty (>6% after-tax income spend on energy expenses)
- 10% of Hamiltonians experience “high energy burden” (>10% after-tax income spend on energy expenses)
- 4.7% of Hamiltonians are a “extreme energy burden” scenario (>15% after-tax income spend on energy expenses)

These findings demonstrate that nearly half of Hamiltonians are paying more than the national average on their energy bills and that 1 in 4 experience high energy burden. Home retrofits that improve energy efficiency could help to alleviate this burden.

## 2.6 Homeowner Survey

Having developed an understanding of the need for utility bill relief, and climate action within the City, the CCCM commissioned Deloitte to complete a homeowner survey.

The goals of this survey were to:

- Better understand attitudes and perceptions surrounding the completion of home energy efficiency upgrades;
- Identify potential incentives that may motivate homeowners to undertake energy retrofits;
- Evaluate pricing scenarios which would be most attractive to homeowners considering upgrades; and
- Pressure-test a program model to see if residents would be interested in participating in the program.

A full summary of results can be found in Appendix C.

### 2.6.1 Homeowner Survey Methodology

The survey collected a total sample of 395 completed interviews of which 204 were carried out over the phone (mix of cell and landline), and 195 were completed via an online survey.

To reach a larger community audience, the CCCM asked the Bay Area Climate Change Council (BACCC) to support survey promotion. Online surveys were distributed with the help of BACCC's social media channels, as well as on the Engage Hamilton platform. Several NGOs and community organizations amplified BACCC's messaging across various social media channels and newsletters.

Questions were identical between surveys and phone interviews that were representatively sampled across all postal codes in order to access homeowners who may not have access to the internet, or miss digital communications.

The survey was open from October 7<sup>th</sup>-31<sup>st</sup>, 2022.

### 2.6.2 Major Findings: Homeowner Survey

- The majority of homeowners (58%) indicated that they were *somewhat likely* to undertake home efficiency upgrades in the next two years.



- **Utility bill savings** and **environmental friendliness** were the top two motivations for home energy upgrades or renovations.
- Respondents felt that **upfront costs of different upgrade options** and **environmental benefits** were the most important pieces of information when considering moving forward with home energy efficiency upgrades.
- The vast majority of respondents (**89%**) **agreed** that the Home Energy Retrofit program would be **beneficial** to homeowners in Hamilton, and **82% would likely access** a retrofit program if "**energy coaching services**" were provided.

## 2.7 Retrofit Program Landscape

Having gained a better understanding of the need for a home energy retrofit program within the City of Hamilton, the CCCM examined the structure of existing programs across Canada with the goals of:

- Understanding best practices;
- Examining various program models, and how this impacted program accessibility;  
and,
- Understanding the uptake and efficacy of various upgrades.

### 2.7.1 Retrofit Program Design Profiles

HERO and other retrofit programs typically incentivize participation through one of three pathways:

- Local Improvement Charge (LIC)
  - A loan issued by the municipality which is then placed as a lien against the property in first position and is repaid via Property Tax payments.
- Grant/Rebate
  - A proactive or retroactive disbursement of funds which typically do not cover the entire cost of upgrade.
- Tax Incentive
  - A retroactive tax break for participants. Can often present a significant barrier to entry due to high capital cost to complete upgrades, and typically services those with the means to absorb the capital cost of upgrades.

### 2.7.2 Retrofit Program Scan

The CCCM compiled a comprehensive Program Scan which can be found in Appendix B: Municipal Program Scan.

The CCCM consulted the following resources when compiling Appendix B:

- BACCC's [Home Retrofit Policy Analysis](#) (2019)
- [A Toolkit for Affordability Driven Home Energy Efficiency Retrofits Through Local Improvement Charge Programs](#) by Volta Research (Published Jan 15, 2023)
- [Accelerating Home Energy Efficiency Retrofits Through Local Improvement Charge Programs: A Toolkit for Municipalities](#) by Clean Air Partnership (2020)

There are 5 provinces (Alberta, Nova Scotia, Ontario, Prince Edward Island, and Saskatchewan) and 1 territory (Yukon) that have Local Improvement Charge (LIC) /Property Assessed Clean Energy (PACE) enabling legislation. British Columbia is running Pilot Programs but does not have legislation.

There are currently 4 municipalities in Ontario offering LIC programs.

- City of Toronto's Home Efficiency Loan Program (HELP)
- City of Kingston's Home Energy Retrofit Program (KHERP)
- City of Ottawa's Better Homes Ottawa
- Town of Halton Hills's Retrofit Halton Hills (Pilot)

In addition, Durham Region offers the Durham Greener Homes program which partners with local credit unions to finance loan structures.

Enbridge Gas launched the Clean Home Heating Initiative with funding from the Government of Ontario which provides residents of Sault Ste. Marie, St. Catharines, Peterborough, and London up to \$4,500 in rebates towards the installation of a hybrid air-source heat pump home heating system.

## 2.8 Available Incentive Programs

There are a number of incentive programs designed to assist homeowners with reducing the cost of completing home efficiency upgrades. A comprehensive list of current offerings is provided below (current as of April 2023).

- Enbridge Gas: [Home Efficiency Rebate Plus \(HER+\) Program](#)
  - Co-delivery agent of Federal Greener Homes Program
  - Open to all qualifying Ontarians
  - Additional benefits for Enbridge gas customers

- Receive up to \$10,000 in rebates for qualifying upgrades
- Government of Canada: [Greener Homes Grant](#)
  - Open to all eligible Canadians
  - Primary federal grant available
  - Receive up to \$5,600 in rebates for qualifying upgrades
- Government of Canada: [Greener Homes Loan](#)
  - Complimentary program to Greener Homes grant
  - \$40,000 unsecured loan at 0% interest repayable in 10 years
- Government of Canada: [Oil to Heat Pump Affordability Grant \(OHPA Grant\)](#)
  - Pre-registration open,
  - \$5,000 grant for those fuel-switching from oil furnace to heat pump
  - Stacks with incentives above including Greener Homes Grant and HER+ above
- Enbridge Gas [Smart Thermostat Rebate](#)
  - \$75 discount code that can be applied at check-out for eligible smart thermostats.
  - Available to all Enbridge customers

### **Income-qualifying Support Programs**

The following programs are available to Hamilton homeowners who qualify as low income, including many seniors on fixed incomes.

- Enbridge Gas: [Home Winterproofing Program](#)
  - Free insulation, draft proofing and smart thermostats for income qualifying Enbridge gas customers.
- SaveON Energy: [Energy Affordability Program](#)
  - Free energy saving kits to income-qualifying Ontarians.

### **2.9 Further research on Local Improvement Charge**

Having examined various program models, the CCCM spent additional time analysing the most common HERO program financing model; a Local Improvement Charge (LIC) framework. Analyses completed by groups such as The Atmospheric Fund, [Clean Air Partnership](#), [Dunsky Energy Consulting](#),

the [Pembina Institute](#), and the Bay Area Climate Change Council (BACCC) were consulted.

The Pembina Institute outlines the following principles of LIC programs that make them attractive structures to drive maximum participation:

- Participation is **voluntary**.
- Financing **covers most or all of upgrade costs**.
- **Long financing** terms (up to 30 years) enable the opportunity for homeowners to repay the loan in smaller increments over time.
- Financing **can be combined or "stacked"** with other incentive programs.
- Financing is **permanently fixed to the property** so that the loan is tied to the property in which the renovation is taking place.
- LIC is held as a lien on the property that is **transferred to the new owner in the event of a property sale**. During property sale, a title search should be completed which shows the LIC loan affixed to the property. The new owner may elect to adopt the loan payments, or to enter into negotiations with the seller to pay the outstanding balance ahead of finalizing the sale. The seller may choose to recoup the cost of paying out the LIC loan balance by incorporating the value of the outstanding balance into the asking price.

### *2.9.1 Benefits of a Local Improvement Charge Framework*

LICs are seen as a low-risk way to encourage investment in measures with long term paybacks or community benefits by giving homeowners access to capital to overcome the high cost of upgrades, access rebates which otherwise may have been unattainable using personal finances, and complete improvements that lead to an increase in home energy efficiency - often resulting in utility bill savings. Moreover, due to their status as a special charge on the tax roll, LIC assessments stay with the property when it is sold, rather than with the former owner, thus helping to overcome one of the main barriers homeowners face when considering potentially large capital investments in their home.

**Table 5 Comparison of incentives across retrofit program frameworks**

		LIC	Grant/Rebate	Tax Incentive
<b>Environment &amp; Funding</b>	GHG reduction potential	Highest	Lowest	Medium
	FCM funding available?	Yes	No	No
<b>City Supports</b>	Count towards municipal debt?	No	NA	NA
	Repayment to City?	Yes	No	No
	Impact per dollar spent?	High - Very High	Low - Moderate	Low - Moderate
	City personnel required?	Yes	Yes	Yes
	Agreement with City required?	Yes	Yes	Yes
<b>Homeowner Needs</b>	Homeowners required to pay upfront?	No	Typically	Yes
	Supports Low Income homeowners?	Yes	Only 100% Funded Grant	Yes (To a Certain Extent)
	Available to greatest number of Hamiltonians?	Yes	No (Typically Capped)	No
	Do repayments stay with the home?	Yes	N/A	No
	Resell concerns?	Potential	No	No
<b>Other</b>	Requires FTEs to administer	Yes	Yes	Yes
	Requires marketing to run program	Yes	Yes	Yes
	Requires municipal bylaw	Yes	Yes	Yes

LICs are the preferred option over other municipal funding options for the following reasons:

**Lowest cost to the municipality**

- **Rebates and grants are non-repayable.** This makes this model expensive and likely unsustainable for municipalities. Rebate programs have been shown to provide incentives to only a small group of people,

namely those who can afford the upfront capital costs required to purchase equipment/upgrades which are required to unlock rebates. A loan-based program reduces the barrier to entry of requiring participants to absorb the cost of upgrades with person capital.

- **Municipal tax incentives reduce overall tax revenue**, making this model expensive for the municipality.
- **LIC loans are recoverable** and therefore **do not count toward a municipality's debt**.
- **LIC loans are low risk** for the municipality: if loan repayments go in arrears, the overdue amount can be recovered from the property using a special priority lien that takes precedence over other liens on the property, including mortgage liens.
- Municipalities have **access to fixed cost**, long term financing that they can make available to homeowners through LICs.
- **LICs can encourage private investors** in home upgrades by bundling portfolios of upgrades to achieve the scale of cashflow required by many private investors and by providing quality assurance.

#### **LICs have a proven history of success**

- This model of building retrofit programs has been proven successful in a number of different jurisdictions, including Toronto, Kingston, Ottawa, Melbourne, and San Francisco
- The Ontario Municipal Act, 2001 (O. Reg. 586/06) allows LIC loans to facilitate the implementation of home upgrade programs by financing energy efficiency and renewable energy measures voluntarily carried out by individual property owners on their buildings.

#### **Makes upgrades affordable to a larger population of homeowners**

- **Does not require** homeowners to possess **upfront capital**, thereby allowing low income individuals to upgrade their homes.
- Provides access to **favourable loan terms**, otherwise unavailable to some homeowners.
- **Low income households**, with few collateral assets or limited access to credit, may qualify for financing.
- Allows homeowners facing energy poverty to access capital to purchase technology that can improve utility costs.
- **Loan stays with the property**, and is not tied to an individual, ensuring homeowner does not continue to payback a loan for a home they are no longer living in.
- Reduces homeowner risk in case of moving.
- **Used to complement other programs to see additional savings**.
- Increases equity by allowing a greater number of individuals to access the money to make energy efficiency improvements.
- Can be designed to be cost-neutral through administrative and interest fees from participants.

- Improvements may increase property value.
- Potential for lower utility bills through program participation.
- Other aesthetic and comfort benefits.

#### **Other**

- Long term, low fixed-rate financing.
- More GHG emissions reduced through ability to support greater potential number of homeowners versus grants and rebates, which usually have capped funding.
- Most other municipal retrofit programs utilize an LIC model, meaning there is potential for contractors to work across the region in similar programs. An LIC model leaves the door open for collaboration in the future with neighbouring municipalities offering similar programs.

### *2.9.2 Requirements to support a LIC program*

#### *2.9.2.1 Supporting Bylaws*

Though Ontario amended *O. Reg 586/06* to allow for the creation of LIC programs within Municipalities, the City must enact a bylaw to allow for energy-related home upgrades on private residential property.

The Clean Air Partnerships [LIC toolkit](#) outlines within Appendix B1 a sample municipal-bylaws required to enable an LIC program. Furthermore, section 3 of Pembina Institute's [Property Assessed Clean Energy in Canada: Design considerations for PACE programs and enabling legislation](#) outlines key aspects of provincial or territorial legislation, but context for inclusions for municipal by-laws may be useful as well. The Clean Air Partnership toolkit outlines additional language that should be included, such as permitting municipal borrowing or bond issue, establishing priority lien status, and creating annual LIC roll.

#### *2.9.2.2 Staffing & Participant Process*

An LIC program requires several administrative steps in order to disburse loans to participants. This effort does come with staffing commitments and will require inter-departmental cooperation. Generally the steps to apply an LIC loan to a property are as follows:

1. Homeowner applies to the LIC program which is reviewed by a Program Coordinator, and Taxation.
2. Once the Taxation confirms the applicant's address and that they are current on property taxes – a follow up call is warranted.
3. Guidance is provided, participant collects quotes for required work and likely completed an energy assessment from an NRCAN Registered Energy Auditor (although not required).

4. Quotes are submitted and a funding request is generated.
5. A notice to proceed is issued to the participant.
6. Work is completed, invoices are submitted.
7. The approved funds are released for participant to repay contractors.
8. Taxation applies the balance as a "special charge" priority lien on the applicable property.
9. Participant begins repayment of loan through regular property tax payments.

### *2.9.2.3 Loan Loss Reserve*

Loan loss reserves (LLRs) are considered a credit enhancement tool where a **reserve fund is set up and can be drawn from if homeowners cannot make an LIC loan payment.**

Total LLR recommended amounts are a **certain percentage of the overall loan portfolio** (ex. 10%-20%). It should be noted that within FCM's Capital Program 5% of the total loan is required for an LLR, but the total amount should reflect the loan risk. For example, if a municipality has a total debt of \$1,000,000 from a home upgrade program, their LLR may have approximately \$100,000 in it for municipalities to draw from. The larger the number of loans in the portfolio, the smaller percentage of the loan balance is typically needed. Governments are particularly well-suited to offering an LLR given their ability to aggregate large loan portfolios.

As summarized by Pembina Institute, government entities often set up third-party LLRs for clean energy financing to help advance their energy priorities or catalyze private investment in clean energy projects. Third-party LLRs can offset some of the risks for private investors and mortgage holders by providing bridge payments for any losses incurred on PACE investments (for lenders), or on properties with LIC assessments (for mortgage holders) in the case of default.

LLRs are also able to reduce cost of capital and increase access to capital. Additionally, risks to government and mitigation approaches during periods of high default rates, LLRs can be drawn down significantly, even to the point that claims from lenders exceed the fund balance. Governments should be obligated only to maintain the LLR balance up to a portion of the initial loan values and should not be obligated to rebalance the funds after drawdowns are made. This strategy requires funds being set aside and potentially provided by the municipality.

It should be noted that research shows across over 52,000 homes within US PACE/LIC programs, there has been a 1% or less default rate. Similar



experiences have been shown in municipalities offering LIC programs within Ontario.

### 3 STAKEHOLDER CONSULTATION

#### **Major Findings: Stakeholder Engagement**

- A HERO program has long been advocated for by long-serving environmental groups within the City.
- Homeowners have an increasingly strong expectation for a HERO program which helps them reduce utility expenses and take climate action.
- Contractors are broadly supportive of HERO programs, although they will require advanced notice to prepare and would benefit from messaging which can be deployed to explain the program to customers.
- Although energy audits are required to access utility and government incentive programs, they are seen by many as a barrier to entry which can lengthen workorders sometimes by as much as 6+ weeks. Moreover, the cost of Pre and Post retrofit energy audits can often approach \$1,000, while participants can only expect rebates of \$600.
- A comprehensive HERO program should make efforts to cover the full range of expenses a homeowner may encounter in order to reduce barrier to entry.
- A HERO program that offers whole-home solutions and high loan cap (>\$40,000) may result in a participant profile that skews towards-and incentivizes the participation of a more affluent demographic.
- Special considerations should be made for low-income participants and equity-deserving groups.
- Tenant protections, such as informational mailers, should be put in place to mitigate against renovictions HERO programs perform best when there are minimal barriers to entry, and coaching services are offered to assist participants in project planning and accessing incentives/rebates.

The CCCM engaged with 40+ stakeholders through a combination of interviews and presentations over the course of program development. Stakeholder engagement was completed to:

- Gain insights into the experience of municipalities offering retrofit programs taking lessons learned relating to challenges, barriers to participation and best practices;

- Engage with those actively working within the energy retrofit sector to understand the conditions in the field;
- Develop an understanding of the challenges homeowners and contractors face in accessing incentive programs; logistical constraints surrounding retrofits and customer experience/perceptions;
- Tap into the expertise of eNGOs, tenant rights groups, social advocacy groups and relevant committees to better understand the needs of Hamiltonians, better understand the unique challenges of equity-seeking groups, and to inform the guiding principals used to direct program design;
- Understand the efficacy of various upgrades by engaging with service organizations, energy auditors and retrofit program providers;
- Understand the workforce capacity and expertise of contractors within the retrofit sector across the Greater Hamilton area;  
and,
- Establish connections with contractors and industry organizations in order to socialize the draft BHH program elements, and share relevant program development timeline.

A comprehensive Stakeholder Findings Report can be found within Appendix A.

### 3.1 Residential Retrofit Sector Trends

Overall, residential retrofits are seen by all stakeholders as a valuable and necessary pathway to achieving Hamilton’s climate action goal of net-zero GHG emissions by 2050. Of note, the majority of stakeholders responded favourably to the BHH program elements as described.

General feedback relating to stakeholder perceptions of HERO programs has been aggregated and expressed in Table 6.

**Table 6 HERO program feedback across select stakeholder groups**

Focus Area	Trend(s)
<b>Homeowners</b>	<ul style="list-style-type: none"> <li>• High interest in a municipal retrofit program which incentivizes upgrades which increase home energy efficiency.</li> <li>• Primary drivers of participation are 1) utility bill reduction and 2) environmental benefits.</li> <li>• There is an increasing expectation that municipalities should incentivize building retrofits AND provide project management support/guidance.</li> </ul>

	<ul style="list-style-type: none"> <li>• Homeowners experience anxiety/stress when asked to independently navigate project management.</li> <li>• There is generally high knowledge among homeowners about high-visibility incentive programs such as Greener Homes and Enbridge HER+.</li> <li>• Conversely, homeowners struggle to navigate the administrative processes required to access rebates/incentives from Greener Homes, HER+.</li> <li>• Increasing interest from homeowners to reduce their carbon footprint, though upgrade cost and perceived value is more important.</li> <li>• Identify the high cost of equipment and upgrades required to achieve performance thresholds as a significant barrier to undertaking retrofits.</li> <li>• Express frustration that Greener Homes Grant and Enbridge HER+ rebates typically do not cover the full cost of NRCan energy assessments.</li> </ul>
<p><b>Contractors</b></p>	<ul style="list-style-type: none"> <li>• Generally supportive of HERO programs as they drive demand for services.</li> <li>• Increasing demand for contractor services, allowing for contractors to pick and choose jobs, delaying smaller jobs.</li> <li>• Significant under the table work.</li> <li>• Few contractors brand their work to highlight potential positive environmental impacts.</li> <li>• Contractors are aware of incentive programs such as Greener Homes and HER+ but have difficulty explaining rebates to customers.</li> <li>• Contractors state the requirement for NRCan energy assessment to access incentive programs slows process and is perceived as a barrier to completing workorder.</li> <li>• Most HVAC contractors installing ASHPs receive installation training directly from the supplier.</li> <li>• Insulation contractors often do not offer stand-alone draft-proofing/air-sealing as a service due to the low profit margin. Most prefer to include as part of a larger work order.</li> <li>• Some larger insulation contractors have the ability to conduct blower-door testing, and thermal scanning of the home to inform recommendation of insulation measures.</li> <li>• HVAC contractors indicate a panel upgrade may be required to accommodate ASHP install, especially if the existing electrical demand of the home is high.</li> <li>• There continues to be a high demand for skilled labourers.</li> </ul>

<p><b>Energy Auditors &amp; Service Organizations</b></p>	<ul style="list-style-type: none"> <li>• Service Organizations continue to experience high demand for energy audit services from homeowners wishing to access provincial and utility incentive programs.</li> <li>• Energy Auditors have expressed high demand often results in less than adequate time spent sitting with homeowners digesting the energy audit results.</li> <li>• The rebates offered by the Greener Homes Grant and Enbridge’s HER+ program are insufficient to cover the full cost of pre- and post-retrofit assessments.</li> </ul>
<p><b>Building Retrofit Program Administrators</b></p>	<ul style="list-style-type: none"> <li>• All municipalities offering HERO programs experience strong support and participation.</li> <li>• Municipalities typically experience organic program growth with word of mouth and targeted ads being drivers of participant interest.</li> <li>• HERO programs offering large loans cannot guarantee a return on investment within the repayment period.</li> <li>• Programs typically offer pilot programs which incentivize early adopters by offering 0% interest loans</li> <li>• Programs that offer performance target-based rebates find that homeowners of financial means typically are able to access these “deep retrofits” more readily.</li> <li>• Typically, “deep retrofits” may require an investment of more than \$40,000.</li> <li>• Municipalities offering HERO programs with whole home solutions (water conservation, energy efficiency, on-site renewables, building envelope, space &amp; water heating) find participants are drawn to aesthetic upgrades &amp; on-site renewables which may not substantially reduce GHG emissions.</li> <li>• HERO programs that offer windows and doors as an eligible expense see a large portion of homeowners spending tens of thousands of dollars to upgrade windows. This has been described as an ineffective upgrade when considering GHG emissions reduction potential.</li> <li>• HERO programs that require NRCan energy assessments note some participants view this requirement as a barrier to entry.</li> <li>• HERO programs that are administered directly by the municipality require significant resourcing and municipal staff support. Several municipalities have elected to outsource administration of the HERO program to a local non-profit or registered service organization.</li> <li>• Participants who install ASHPs typically experience 80% GHG reduction when the ASHP is the primary heating</li> </ul>

	<p>source, and 60-70% reduction when a hybrid ASHP configuration is installed.</p> <ul style="list-style-type: none"> <li>• Participants who only upgrade insulation and building envelope typically experience 30% GHG reduction.</li> <li>• HERO programs are administratively burdensome to offer, typically requiring 3-8 hours per application.</li> <li>• Work orders average 3-12 months in length, and can be significantly longer if energy auditors are in high demand.</li> <li>• Programs which offer coaching services/ touchpoints with participants experience higher participant satisfaction.</li> <li>• Income qualifying participants should first be directed to free incentive programs such as Enbridge's Home Winterproofing Program.</li> </ul>
<b>Industry &amp; Manufacturer Organizations</b>	<ul style="list-style-type: none"> <li>• Broadly supportive of HERO programs.</li> <li>• Offer training in new technologies (ASHPs), as well as building standards such as Passive House and Net Zero Renovators.</li> <li>• Typically communicate with membership via quarterly meetings and newsletters.</li> </ul>
<b>Environmental NGOs</b>	<ul style="list-style-type: none"> <li>• Broadly supportive of HERO programs as a viable climate solution.</li> <li>• Advise supports for low-income, equity-deserving groups be put in place.</li> <li>• Recommend spending municipal dollars on measures which substantially reduce GHG emissions from residential units today.</li> </ul>
<b>Tenant Rights Advocates</b>	<ul style="list-style-type: none"> <li>• Caution against renoviction tactics which may be employed by landlords.</li> <li>• Recommend program documents prohibit landlords from passing cost of LIC loan repayment onto renters.</li> <li>• Recommend a program information package be physically mailed to address once an application is approved to appraise tenants of scope of work.</li> </ul>
<b>General Feedback</b>	<ul style="list-style-type: none"> <li>• Huge increases in home upgrades since COVID.</li> <li>• Federal 'Greener Homes' and Enbridge HER+ incentive program has driven further upgrade interest.</li> </ul>

## 4 PROGRAM DESIGN

The following section provides a detailed overview of the program design for the Better Homes Hamilton (BHH) program. All elements of the BHH program were designed using an evidence-based decision making process informed by research and stakeholder engagement. At several key milestones, the program design framework was pressure-tested with knowledgeable stakeholders including:

- Relevant City of Hamilton departments,
- The Bay Area Climate Change Implementation Team (BACCIT) on Home Energy Retrofits,
- Contractors (from independent operators to national corporations), NRCan service organizations, and NRCan registered energy auditors and,
- Five municipalities offering or designing HERO programs.

### 4.1 Guiding Principles

The CCCM was contracted to design a program which has minimal barriers to entry which allows the greatest number of Hamiltonians to participate and substantially reduce household GHG emissions.

With this mandate in mind, the CCCM proceeded to design the BHH program using the following guiding principles:

- To design a program that is scalable and enables the greatest number of Hamiltonians to participate while keeping accessibility and equity front-of-mind;
- To develop a program with "user-friendly" processes free of administrative barriers-wherever possible which assists homeowners in achieving substantial reduction of GHG emissions from their residence while improving home energy efficiency;
- To employ a community-based approach to gathering feedback drawing upon the expertise of relevant NGOs, trades and industry associations, working groups/committees, and regional contractors;
- To proceed with program design by using an evidence-based decision making process informed by primary research and through consultation with other municipalities offering similar programs;
- To identify consumer protections safeguards which mitigate against unintended adverse consequences of participation;
- To design a program that is stackable with existing utility and government incentive programs in order to reduce barriers to entry; and,

- To develop the program in a manner which supports the targets outlined in Low Carbon Transformation 2: Transforming Our Buildings within the CEEP.

## 4.2 Program Overview and Participant Pathway

At its core, the BHH program is a loan-based program which incentivizes homeowners within Hamilton to undertake upgrades which result in increased residential energy efficiency and decreased GHG emissions.

The BHH program is an LIC program offering low-interest, fixed rate loans which may serve as the capital required to finance upgrades, and access rebates offered within rebate programs such as The Greener Homes Grant, Enbridge HER+, and the Oil to Heat Pump Affordability Grant.

### Participant Pathway

The following describes the typical step-wise pathway a participant of the BHH program can expect from application to project closure:

- Participants will apply to the BHH program via an online portal, or in person submission.
- Participants will be required to identify if the property identified within the application is a rental unit. If the property contains rental units, upon successful completion of the application, a physical mailer should be sent out according to the consumer protections recommended in Section 4.7.
- The Project Manager will compile the list of applicants and work with supporting services to determine eligibility.
- If applicants meet the eligibility criteria the Project Manager will schedule a pre-consultation meeting to go over the eligible retrofits for the BHH program, as well as the other incentive rebates programs. At this time, if participants are interested in accessing external rebates and incentive programs (Enbridge HER+, Greener Homes Grant, OHPA Grant, Greener Homes Loan, Enbridge Winterproofing), they will be advised to undertake an energy audit by an NRCAN Registered Energy Auditor (REA). It should be noted that a REA assessment is *not required* to enter into the BHH program. After pre-consultation with in-house Energy Coach to determine their goals, participants will gather quotes for the desired upgrades. These quotes, along with the pre-energy audit (if applicable) will be reviewed by the Energy Coach and a Funding Request will be generated.
- The participant will sign a Property Owner Agreement which allows the City of Hamilton to affix the approved funding amount in the form of a LIC loan appearing as a "special charge" on their property tax roll. This

may include an additional approval for a building permit, if applicable and will be determined prior to the Property Owner Agreement being completed. A notice to proceed will be issued and work can begin.

- At this time, if a down payment is required for work to be started, the Project Manager may disburse 30% of the approved funds. Once all work is completed, the participant will submit all invoices.
- Upon the completion of the workorder, if the participant wishes to access external rebate programs, an NRCan post-retrofit EnerGuide assessment is required. This is to be submitted to the Project Manager.
- Once all invoices and energy assessment documents are submitted to the Project Manager, the balance of the approved funds are released to the participant via cheque or EFT transfer to payout the invoices.
- At this time, the participant enters repayment with standard, equal special charges being applied to the Tax Roll and collected via regular property tax payments. The City reserves the right to conduct site-assessments to verify the work is completed.

### 4.3 Financial Model

As mentioned in section 2.8 Recommended Financial Model, the CCCM is recommending the City employ a Local Improvement Charge (LIC) framework. To recap, features of an LIC model include:

- Allows a municipality to issue low-interest, fixed rate loans to finance energy-efficiency measures on private, residential properties;
- Enables participants to repay in small, scheduled increments a long term (10-30 years);
- Enables participants repay loan via regularly scheduled property tax;
- Facilitates applying loan to the property as a first position lien; and
- Enables a loan to be held against the property rather than the participant so that, if the property is sold, the loan is transferred to the new owner or can be included in the sale negotiation. Secondly, again since the loan is held against the property, low-credit scores are not a barrier to participation.

LIC models are a low-risk and scalable financial model for municipal deployment due to the following reasons:

- LIC loans are recoverable over the term of the loan agreement;
- LIC programs typically experience a low default rate. Research referenced in Section 2.8 shows a less than 1% default rate across existing programs;
- A Loan Loss Reserve representing 5% of the total loan amount should be held back to absorb any potential defaults;



- In the event of a default, since the LIC appears as a “special charge” priority lien, City may recuperate losses following the standard mechanism for properties that are in tax arrears;
- Loans are stackable with existing rebate programs, allowing participants the ability to repay large portions of the loan quickly – hastening municipal recovery of funds; and
- Programs with LIC frameworks are eligible to receive funding from FCM to scale the program across multiple years.

The CCCM recommends each participant within the base BHH program be granted funding under the following framework:

**Table 7 Base BHH Program Elements**

Maximum Funding Amount	\$20,000 per application
Loan Repayment Terms	15 years
Interest Rate	4.5% (subject to change)
Initial Disbursement	30% of approved funds
Administrative Fee	\$200 (subject to change)

#### *4.3.1 Financial Model Rationale*

The financial model was informed heavily by research – primarily the experience and findings shared by other municipalities offering HERO programs. The following section explores the thought process which went into determining each program element.

#### **Maximum Funding Amount**

The CCCM settled on a maximum loan amount of \$20,000 based on the following research findings:

- The CCCM was contracted to design a program that would result in maximum GHG emissions reduction per dollar spent. Programs that offer loans in excess of \$30,000 have found that consumers often gravitate to upgrades which improve the aesthetic of the residence, but do not substantially reduce GHG emissions (i.e. windows and doors rather than an ASHP).
- Programs that offer larger loans cannot guarantee a positive return on investment within the term of the loan.
- \$20,000 was determined to be a sufficient budget for a homeowner to either:

- Substantially insulate their home across the majority of the building envelope OR;
- Install an ASHP with budget to still complete attic insulation and/or air-sealing OR;
- Install an ASHP and upgrade their electrical panel to future-ready their home for further electrification.
- It should be noted that if participants wish to access a deeper funding pool, the Canada [Greener Homes Loan](#) program offers a competitive loan structure which compliments the BHH program with up to an additional \$40,000 loan from the federal government.

### **Loan Repayment Term**

A 15-year term is recommended as it matches the average lifespan (and often warranty) of the most expensive eligible upgrade: an ASHP. Across Canada 15-20-year terms are common among HERO programs. In addition, it offers a competitive advantage against the Canada [Greener Homes Loan](#) program which requires participants repay the entirety of the loan within 10 years.

### **Interest Rate**

A 4.5% fixed interest rate is recommended as this figure is consistent with interest rates in other municipalities. This rate may need to be revised by the City to reflect any "opportunity cost/cost of borrowing" depending on the source of funding if interest rates increase drastically.

It should be noted, the object of this interest rate is not to make money on the loan, but rather to cover the cost of borrowing and support long-term program sustainability.

The interest rate may be informed by the mechanism of funding when scaling the program after the initial pilot. For example, FCM's [Community Efficiency Financing Application Guide](#) structures the interest rate of their loan as *Interest Rate at time of disbursement + 2.5%*. Similarly, a financial institution may dictate the rate or "cost of borrowing."

In summary, City Staff will have to re-evaluate the interest rate regularly to ensure that allows for a sustainable interest rate for both the City and for HERO program participants and proceed accordingly.

## **Initial Disbursement – 30%**

LIC programs are administratively intensive with several key documents requiring approval before funds can be released. Notably, in order to disburse the balance of approved funds to a homeowner – all invoices need to be submitted to the Project Manager, and a Work Order Completed form filed.

This process may result in contractors who completed work at the start of the retrofit process waiting months for payment. Under this circumstance, homeowners may experience pressure from contractors to settle invoices with capital that they may not have on hand.

Several HERO programs allow the Project Manager to discretionally release up to 30% of the approved funding before all invoices are compiled and submitted. This may alleviate contractor wait times, or satisfy contractors who require a down payment to begin work.

It should be noted that this mechanism offers little risk to the municipality as the homeowner is still liable for any funds disbursed according to the Property Owner Agreement signed document.

## **Administrative Fee**

Based on conversations with other municipalities offering HERO programs, it is estimated that each participant may require three-eight hours of staff time. Some HERO programs require a base administrative fee to be applied. This may be either added to the loan, or collected separately. Administrative fees serve to cover a portion of staff time, but also deter participants from letting applications or files go idle. A standard fee is approximately \$200.

It should be stated that this may be interpreted as a barrier to entry. In some examples, HERO programs add an administrative interest rate (1-2%) on top of the program rate to cover staff time. The CCCM believes that an administrative interest rate applied to the entire life of the loan results in a disproportionate collection of fees with respect to the efforts of staff.

The CCCM advises no administrative fee be added if possible.

## **4.4 Participant Eligibility Criteria**

The BHH program is designed to allow the greatest number of homeowners within Hamilton to participate. In order for the LIC mechanism to work,

loans must be distributed to those who have residences of eligible building types with active Property Tax accounts.

The BHH program is open to applicants who satisfy the following criteria:

- Homeowner within Hamilton with an active Property Tax account in good standing (i.e. account not in arrears, no other liens on title);
- The applicable property may be the primary residence OR a rental property;
- The Property Tax account is in good standing (i.e. current, not in arrears) and has no other liens against the title;
- If the property is under a mortgage, the applicant must **notify** the mortgage holder via a provided form;
- If multiple owners appear on the Property Tax account, authorization from all parties must be collected in order to proceed with the BHH program;
- and,
- Eligible building types include existing low-rise residential properties including:
  - Single-detached
  - Semi-detached
  - Townhome
  - Row home

All eligibility requirements are informed by the LIC framework and FCM funding guides.

As an additional eligibility criterion, the City of Hamilton may wish to ask participants to prove good-financial standing by demonstrating they have not claimed bankruptcy or experienced any mortgage defaults in the last 5 years.

#### 4.5 Eligible Expenses

Eligible expenses under the BHH program were chosen based on the following criteria:

- Substantially reduce GHG emissions immediately from residential units;
- Increase home energy efficiency – likely translating to lower utility costs for residents (especially when future considering carbon tax increases);
- Improve resident quality of life by decreasing noise, bettering indoor air quality and providing increased thermal comfort; and
- Reduce barriers to entry, including covering the cost of permits and assessments.

All eligible expenses were informed by research and stakeholder consultation. Eligible expenses can be broken down into four main categories:

- 1) Permits and Assessments
- 2) Building Envelope
- 3) Mechanical Systems
- 4) Supporting Infrastructure Upgrades

#### *4.5.1 Permits and Assessments*

Currently, incentive programs such as The Greener Homes Grant, and Enbridge HER+ offer \$600 for the cost of EnerGuide home evaluations, and no incentives for building permits. Often, the EnerGuide rebates do not cover the full cost of assessments. It is not uncommon for participants of HERO programs to be surprised by additional expenses they did not expect. For someone living on a fixed or low income, this could be a significant barrier to entry. For this reason, the CCCM recommends all assessments and permits relating to retrofit activities be eligible expenses.

##### **1) EnerGuide Assessments (Approximate Cost: \$1,000)**

The cost of pre and post retrofit assessments can often approach \$,1000, exceeding the \$600 rebate available to participants through the HER+ and Greener Homes Program. In order to remove the financial barrier to entry he entire cost of the assessments may be eligible to be claimed under the BHH program.

##### **2) Blower Door Test: (Approximate Cost: \$600)**

If a participant does not partake in an EnerGuide audit, but wishes to have an insulation company complete a blower door assessment, this cost may be claimed under the BHH program.

##### **3) Building Permits: (Approximate Cost: \$285)**

Building permits are required by the City of Hamilton for substantial work which alters the structure. Changing a heating system requires a standard permit totalling \$285. If the contractor does not include the permit in the scope of work, a participant may claim this permit as an eligible expense.

#### *4.5.2 Building Envelope*

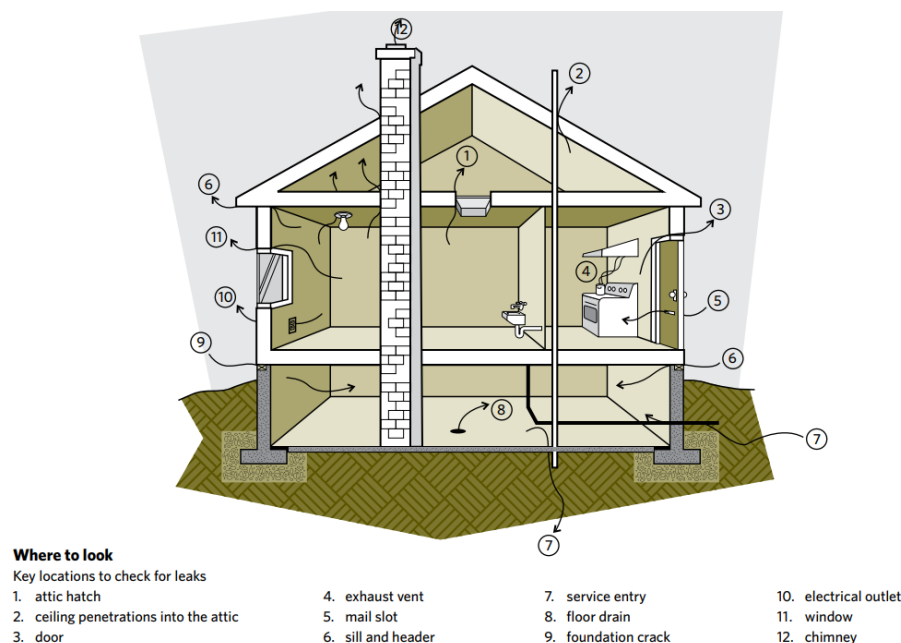
Upgrading the building envelope is the first step to any successful retrofit. The building envelope describes the external structure of a home including: the roof, external walls, and foundation. Often building envelope upgrades have a high ROI since they the measures undertaken remain functional for the lifetime of the structure, and provide incremental year-over-year savings on utility bills. The CCCM recommends two categories of building envelope upgrades: air-sealing and insulation.

### 1) Air-sealing: (Approximate Cost: \$500-\$1,000)

Drafty homes can often lose up to 30% of heat during winter months due to small cracks and crevices found throughout the structure. Common areas where heat escapes from homes are chimneys, electrical outlets, windows, doors, exhaust vents and basement floor joists.

Insulation companies have various diagnostic tests to determine where a home is drafty including smoke sticks, and a more comprehensive blower door test. Often, insulation companies will offer basic and comprehensive air-sealing packages, which may result in a significant reduction of air leakage depending on the state of the building envelope. A basic package may include weather stripping windows, while a comprehensive package may include sealing hard-to-reach areas such as attic exhaust vents.

More information about air-sealing can be found within NRCan's landmark report [Keeping the Heat In](#).



**Figure 5: Comprehensive air leakage control in your home. Source: NRCan's Keeping the Heat in**

The [Enbridge Gas HER+](#) program offers rebates up to \$1,300 on air-sealing measures.

## **2) Insulation measures (Approximate Cost \$2,000 – \$12,000)**

The CCCM recommends allowing the participant to choose what insulation measures are best for the home through consultation with the contractor, Energy Coach and likely a Registered Energy Auditor. Common insulation measures include:

- Attic insulation (~\$2,000-\$4,000)
- Floor Joists (~\$1,000-\$2,000)
- Basement insulation (~\$8,000)
- Exterior wall insulation (~\$8,000-\$12,000)

It should be noted that only insulation materials, labour and activities which support insulation install are eligible expenses. For example, a basement wall insulation workorder that requires supporting materials to ensure warranty-approved installation such as framing/strapping, a moisture barrier or any other supporting materials may be invoiced and considered eligible expenses. However, homeowners may not claim materials used to "finish" the basement such as drywall, paint or aesthetic elements.

The [Enbridge Gas HER+](#) program offers rebates up to \$10,000 on eligible insulation measures.

### *4.5.3 Mechanical Upgrades*

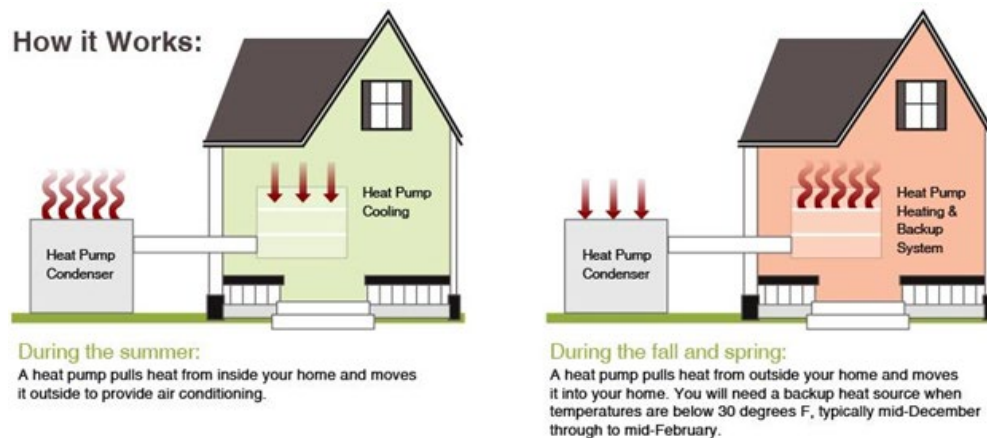
Mechanical upgrades describe retrofits which increase the efficiency of space heating and cooling systems. According to NRCAN, space heating accounts for [62% of energy use within residential structures](#), with 48% being attributed to natural gas as the primary heating fuel. Mechanical system upgrades which either install more efficient heating and cooling systems, or increase the efficiency of existing systems represent the quickest way to substantially reduce GHG emissions from a household.

Mechanical upgrades can be broken down into the following categories:

- Air source heat pumps (ASHP);
  - Including cold-climate (ccASHP), hybrid ASHPs and ductless mini-splits.
- Smart thermostats;  
and,
- Smart controllers.

## 1) Air Source Heat Pumps (ASHPs) (\$3,000-\$20,000)

Air source heat pumps are devices which do not create heat, but rather transfer heat which is found within the air from one location to the other. For this reason, ASHPs typically have a 3:1 heat output to energy expense ratio. This ratio is called the coefficient of performance, or COP. ASHP technology utilizes the same heat transfer principles which are found within standard air-conditioning units, refrigerators and car climate controls. Within an external condenser unit, air containing heat is passed over a coil with refrigerant, which captures the heat and transfers it to the distribution point. ASHPs have the added benefit of being reversible, meaning in the winter they operate in a space-heating role, while in the summer they function as an air-conditioner.



**Figure 6 Overview of how heat pump work to move energy between indoors and outdoors, which results in heating and cooling. Image credit<sup>4</sup>**

ASHPs come in 3 major types:

- i. Full Conversion: ccASHP (\$14,000 - >\$20,000)
  - These configurations completely replace the primary heating and cooling system in the house.
  - This configuration works with houses that have central-air and ductwork.
  - Typically, can operate efficiently up to -20C, under this point back-up electric resistance heating supplements heating demand.
  - Results in substantial GHG reductions.
  - Utility savings vary as it operates on electricity, which is currently more expensive than natural gas. Carbon pricing

<sup>4</sup> Image credit: <https://www.ecicomfort.com/blog/what-is-a-hydronic-heat-pump>



is expected to bring this figure to parity. Significant savings when compared to propane and oil-furnaces.

- ii. Hybrid Configuration ASHP (\$7,000->\$15,000)
  - This configuration replaces the air-conditioning unit in the house and supplements the existing heating system
  - This configuration works with houses that have central-air and ductwork.
  - Ideal configuration for a participant with an aging air-conditioner but has a furnace which has not yet reached the end of its operational life.
  - Results in substantial GHG savings as the heat pump can accommodate heating during fall and spring, and depending on the model often well into winter.
  - When paired with a smart thermostat, the hybrid-ASHP can achieve utility savings under current utility price and market conditions.
  
- iii. Ductless Mini-split (\$3,000-\$7,000 per interior head)
  - These configurations are ideal for homes without ductwork or central air conditioning.
  - Interior heads deliver heating and cooling to zones from a centralized outdoors condenser unit.

In order to ensure equipment efficiency measures are met, and that the equipment selected by participants will be eligible to receive rebates from the [Greener Homes Grant](#) / [Enbridge HER+ program](#), at this time the CCCM recommends that only ASHPs which appear on [NRCan's eligible ASHP inventory](#) be considered as eligible expenses under the BHH program.

Having said that, this requirement should be reviewed periodically as stakeholder consultation has indicated the NRCan eligible ASHP inventory is slowly updated and excludes a number of currently available ASHP models.

## **2) Smart Thermostats and Smart Controllers (\$50-\$500)**

Smart thermostats and smart controllers are excellent tools to reduce utility costs. These devices are upgrade versions of traditional thermostats and can achieve significant utility savings even in the absence of other upgrades. Smart temperature controls allow homeowners to program setback points which increase or reduce home heating and cooling load according to time of day, occupancy and – in more expensive models – according to real-time weather conditions.

- i) Smart Thermostats
  - Common in the marketplace, typically accompany ASHP install.
  - Can significantly reduce utilities expenditures even on a conventional furnace.
  - Typically linked to Wifi and can be controlled remotely.
  - Important in a hybrid ASHP configuration as the homeowner can program setback points where the furnace or backup heating will kick on.
  
- ii) Smart Controller
  - Simply a smarter version of a smart thermostat.
  - Usually more expensive, often require a software subscription to access premium features.
  - Offers more real-time data collection and customization of setback points.
  - Some smart controllers can run models which compare real-time electricity prices vs natural gas prices to choose the cheaper fuel source. Conversely, ECO modes also exist in some models which prioritize GHG reduction over commodity pricing.

Smart thermostats and controllers up to \$500 may be considered eligible for the BHH program. The [Enbridge Gas HER+](#) program offers a point-of-sale rebate up to \$125 for all Enbridge Gas customers.

#### *4.5.4 Supporting Infrastructure Upgrades*

Participants may be taken by surprise by unanticipated costs required to accommodate electrification and HVAC install in the home. In order to reduce out-of-pocket expense, the CCCM is recommending the BHH cover up to \$3,000 towards the cost of either:

##### **1) Breaker Panel Upgrade\***

Based on conversations with contractors, there is a significant number of homes in Hamilton operating on a 60amp electrical/breaker panel. If a home already has a significant electrical demand, a breaker panel upgrade up to 200amp may be required to support an ASHP installation. This upgrade serves to future-ready the home for further electrification such as electric or ASHP water heaters, and Level 2 electric vehicle charging. Upon a contractor recommendation and/or quote this may be considered an eligible expense.

## 2) Ductwork Repair\*

Often, ductwork needs to be repaired or repositioned in order to accommodate an ASHP installation. Moreover, leaky ductwork can significantly reduce the efficiency of an ASHP, wasting utilities and causing premature wear and tear on the equipment. Upon a contractor recommendation and/or quote ductwork repair may be considered an eligible expense.

\*Note: Breaker panel upgrades and ductwork repair are eligible expenses only under scenarios where they are required to support ASHP installation, as evidenced by contractor quotes – which are reviewed by the energy coach. It is important to note that the primary mandate of the BHH program is to incentivize upgrades which increase energy efficiency of homes while reducing GHG emissions today. Breaker panel upgrades and ductwork repair will not accomplish these mandates alone, and thus must be paired with an eligible upgrade to be considered an eligible expense under the BHH funding model. A maximum of \$3,000 total may be allocated to support these activities. This is not an additional \$3,000, but inclusive of the \$20,000 max loan amount.

### 4.6 Contractor Eligibility

To help protect BHH participants, it is recommended that the City provide a list of contractors that have been vetted that adhere to certain basic safety and insurance standards. Being a public entity, City of Hamilton cannot recommend or require participants to select specific contractors for workorders, however, the City can help homeowners find contractors that adhere to several standards.

In addition to the list of contractors, in order to have a quote accepted by the BHH program, all contractors must provide to the homeowners along with their quotes, which the homeowner will provide to the City:

- Proof of a Hamilton business license
- Quote must show Registered HST#
- Proof of purchased liability insurance that covers all employees
- WSIB compliance

#### 4.6.1 Insulation

There are no specific licences for insulation contractors within Ontario.

#### 4.6.2 Electrical

If installing electrical equipment, proof of an Electrical Contractor Licence (ESA) is required.

#### 4.6.3 HVAC

Heating, Ventilation and Air Conditioning (HVAC) is not a license but a trade comprising multiple skilled strands. Often a contractor will be required to work on multiple types of systems which require independent certification.

For those contractors working with **refrigerants** (heat pump installs, air conditioner removal) proof of a **313A** or 313D license is required.

For those working in **ventilation**, a **Sheet Metal Mechanic** license is required per Skilled Trades Ontario standards.

Those working with **gas and oil burning furnaces** must adhere to the regulatory standards of the Technical Standards & Safety Authority (TSSA) which states:

- A minimum certification of **G2 gas ticket** is required to complete work on residential heating systems.
- If working on oil burning furnaces, a minimum of **level 2 Oil Burning Technician (OBT2)** certification must be shown.

### 4.7 Consumer Protections

Having explained the major BHH program design elements and the contractor eligibility criteria, the CCCM recommends several additional consumer protections be set in place to ensure participants are well-informed throughout the retrofit process.

#### 4.7.1 Financial Transparency:

The Energy Coach and/or Project Manager will be able to preemptively map out a repayment plan based on the approved funding amount. Participants should be informed of the total loan amount, the total interest paid across the lifetime of the loan, and the amount which will appear on the "special charge" via regular property tax invoices. Participants should also be reminded that they are able to pay-off the total loan at any time. If a participant has an especially long workplan, the Project Manager may wish to advise they investigate bridge financing to cover the cost of invoices (assuming the 30% initial disbursement of funds is insufficient).

If a participant feels they cannot afford the loan repayments, they should be directed to complimentary programming such as the [Canada Greener Homes Loan](#).

If a participant is income-qualifying, they should be directed towards income-qualifying support programs such as:

- Enbridge Gas [Home Winterproofing Program](#)
- SaveON Energy [Energy Affordability Program](#)

These programs provide **free** upgrades designed to reduce utility expenses and increase home comfort such as:

- Attic, wall and basement insulation;
- Draft proofing;
- Smart thermostats;
- Home energy saving kits;
- Water conservation kits; and
- High efficiency window air conditioner units

#### *4.7.2 Project Management Advice*

Participants may struggle with project management – especially when it comes to understanding the work that is required. The Energy Coach will be a touchpoint where participants can gain insights into how to properly plan a retrofit project and will review quotes submitted by the homeowner to ensure eligibility.

#### *4.7.3 Contractor Registry*

While the City of Hamilton cannot explicitly recommend contractors, the City can point participants towards contractors who have shown exemplary business practices and the training that goes above and beyond the minimum licensing standards. For example, not all HVAC contractors who have a 313A ticket have experience installing ASHPs to manufacturer standards.

The CCCM recommends creating a Contractor Registry using the format outlined in Appendix G: Contractor Registry. In order for a company to be on the BHH contractor registry, the following must be shown:

For all contractors:

- Proof of good business practice as evidenced by 3 customer testimonials;

- Optional but highly encouraged: Proof of EDI commitments; and,
- Optional but highly encouraged: Proof of sustainability commitments, and/or a corporate sustainability plan.

For insulation contractors:

- Completion of NAIMA Canada's [National Insulation and Air Sealing Training Program](#) OR equivalent training.

For HVAC contractors installing ASHPs:

- Proof of manufacturer training on models carried by contractor; and,
- Proof of completion of
  - [HRAI: The Heat Pump Advantage](#)
  - [HRAI: Residential Heat Loss & Heat Gain Calculations](#)
  - OR equivalent training.

#### *4.7.4 Tenant Protections*

Since the BHH program does not exclude landlords from participating, the CCCM gathered insights from tenant advocacy groups to inform recommendations which protect tenants from unforeseen consequences. The CCCM recommends the following protections:

- That the BHH program application form require the applicant to identify if the property being considered is a rental unit;
- If the property is identified as a rental unit, that a physical mailer be sent out to the property which provides tenants with the following information:
  - A program overview explaining how the BHH program works;
  - The contact information of the BHH Project Manager;
  - Information about what an LIC program is, and how it is the responsibility of the landlord to repay this loan via property tax bills; and,
  - Information about the scope of work and their rights as tenants.

That the OCCI work with the City Solicitor to input wording with the Property Owner Agreement which;

- Discourages and mitigates against the risk of renovictions to tenants;
- Clearly states that the financial burden of LIC repayments may not be placed on the tenant through rent increases;
  - The Better Homes Kingston Program embeds the following wording into the Property Owner Agreement:

"If applicable, the Property Owner shall not apply for an above-guideline rent increase pursuant to the *Residential Tenancies Act, 2006*, S.O. 2006, c. 17 to assist the Property Owner in paying the Special Charge (Actual) or any other cost associated with the Work."

- Requires the landlord to abide by and comply with all laws and regulations relating to tenants rights during a renovation;  
and,
- Requires the landlord to complete work in a timely manner with limited disruption to tenants.

Research suggests that if implemented, these consumer protections will result in an equitable and accessible program with limited unintended consequences for renters.

#### 4.8 Program Delivery

Based on research, and examination of other HERO program delivery models, program delivery takes one of two forms:

- **Municipal delivery** – in which the City manages and administers the program;  
and,
- **3<sup>rd</sup> party delivery** – in which the City outsources the program administration to a delivery agent with the requisite skillset. Note: while this model may be able to outsource tasks such as: application intake, marketing, energy coach services and budget management, there will still need to be on-going supports within the City in the form of legal review of POAs, treasurer sign off on POAs, application of LIC loan to tax roll, financial support to set up cheque requisitions/EFT accounts etc.

**Table 8 Delivery model comparison from municipal perspective**

Delivery Model	Pros	Cons
Municipal Led	<ul style="list-style-type: none"> <li>• Municipality has complete control of the program.</li> <li>• Municipality may stop or start the program at any time for any reason.</li> <li>• Ability to amend the program as needed.</li> <li>• Municipalities are seen as a trusted actor within the community.</li> </ul>	<ul style="list-style-type: none"> <li>• Staffing cost and staffing inputs</li> <li>• Municipality must generate their own document. tracking systems</li> <li>• Upon program scaling, the municipality must hire or staff-up to accommodate increased demand.</li> </ul>
3 <sup>rd</sup> Party Offering	<ul style="list-style-type: none"> <li>• Less administratively burdensome on the municipality to outsource.</li> <li>• 3<sup>rd</sup> Party delivery agent brings staff with expertise in the retrofit space.</li> <li>• 3<sup>rd</sup> Party may have experience offering energy audits or administering retrofit programs.</li> <li>• May have their own marketing and professional networks which may be leveraged.</li> </ul>	<ul style="list-style-type: none"> <li>• Requires municipality to undergo lengthy RFP process.</li> <li>• Some risk to municipality reputation if program is not administered well.</li> <li>• Still requires point of contact within municipality to process program documents (staff time).</li> </ul>



The CCCM highly recommends administering the program in-house for the time being in order to:

- Establish trust within the community;
- Establish inter-departmental workflows;  
and,
- Complete at least one program review/gap-analysis to better understand any insufficient program elements.

Following the proposed 'Incubation Stage' and upon scaling, the municipality may wish to issue a competitive RFP to a 3<sup>rd</sup> Party for program delivery. It is advised that any 3<sup>rd</sup> party delivery agent have the following:

- Experience offering HERO/retrofit programs;
- Experience working with, or offering EnerGuide Energy Audits;
- Being an NRCan registered Service Organization is an asset;
- Have adequate staff in place to administer the program;  
and,
- Good-standing and trust within the community.

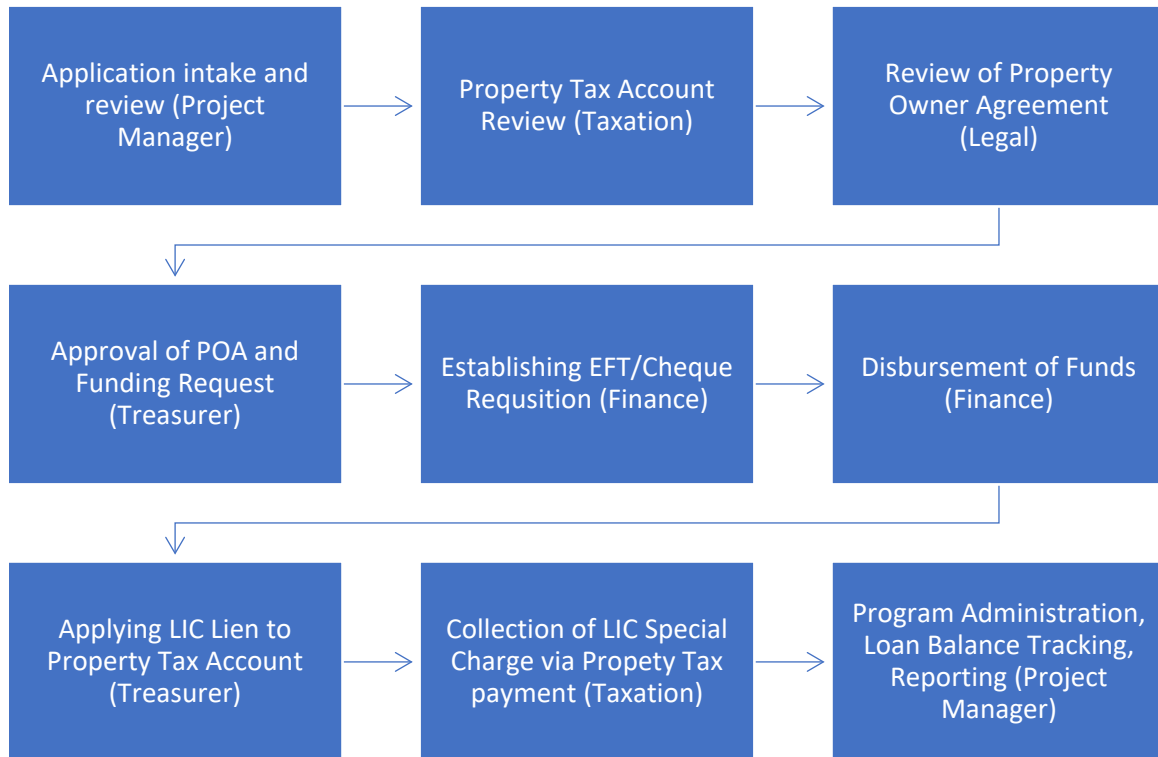
#### *4.8.1 Inter-departmental Workflows*

The establishment of inter-departmental workflows is crucial for the successful implementation of the BHH program. It should be immediately noted that the general workflow described below will have to be established regardless of the delivery model (in-house vs 3<sup>rd</sup> party).

In addition, the CCCM can only make recommendations based on the process used at other municipalities offering HERO programs. OCCI staff will have to work with departments across the City of Hamilton to establish a workflow which is both functional and actionable.

In general, supports will be required from the following departments:

- *Legal*: to review Property Owner Agreements (POA) before sending off for approval.
- *Taxation*: to review Property Tax account standing and collect repayment.
- *City Treasurer*: to sign off and approve the POA and apply the LIC special charge to Title.
- *Finance*: to establish a cheque requisition/ EFT and to distribute approved loan amounts to participants, setup internal financial tracking system, and setup the loan loss reserve (if applicable).



**Figure 7 General BHH program interdepartmental workflow**

In order to establish and codify responsibilities, the CCCM recommends the OCCI enter into service-level agreements with the departments mentioned above. These agreements should place emphasis to codify on-going in-kind staffing supports, as well as utilize a batch workflow process whereby each department is responsible for completing their contribution to the workflow on a regular basis.

#### 4.9 Monitoring and Evaluation

Monitoring and evaluation is a critical component to any HERO program design. Since NRCan EnerGuide audits are not a mandatory component of the program, the CCCM encourages the BHH Project Manager to utilize software such as RETScreen and complete analysis of participant utility bills both pre and post retrofit. Recommended monitoring techniques are expanded upon below in Table 9.

**Table 9 Recommended Monitoring Techniques**

<b>Monitoring Technique</b>	<b>Description</b>
NRCan Energy Audit	Similar to the initial energy audit, an NRCan energy advisor will complete a second in-person home visit to take additional information and update the EnerGuide Score. While not required for this program, it is expected that most – if not all – participants will take part in an EnerGuide audit in order to access external rebates.
RETScreen	RETScreen is a clean energy management software which enables users to assess the viability of energy-efficiency upgrades as well as measure the actual and ongoing energy performance of buildings. This software could be used as a method of on-going monitoring of post-retrofit performance.
Access to Utility Bills	Recommended that participants show 12 months of utility bills pre-retrofit and be asked to provide municipal staff with access to utility consumption data five years post-retrofit.
Building Permit Inspection	If building permit is required, a building inspector will complete final inspection. Those results should be sent to the BHH Project Manager for tracking purposes.

Evaluation of program impacts can be interpreted in two ways, impact to the participant and impact on the municipality.

With respect to bringing participants along for the journey, an annual summary could be provided to program participants to further demonstrate upgrade impacts such as:

- **GHGs saved** for the past **year** and **cumulatively**;
- **Changes** in **energy consumption**.
- **Carbon tax savings**.
- Contribution to **local jobs created**.
- Information on **financial payback period**.

The summary would help quantify the value of the program and could be completed for each home or the total program. This process could be completed through *RETScreen* via utility bills for comparison to the initial baseline. Ideally, the use of [Green Button](#) would make this process significantly easier. These ongoing touch points also provide a platform for updating past participants on changes to program offerings etc.

With respect to evaluating the program's efficacy, the CCCM recommends the OCCI task the Project Manager with designing a monitoring framework which tracks:

- Total GHG emissions saved;
- Total energy reduction in GJ (electricity, fuel oils, propane, natural gas);
- Total amount and value of loans issued;
- Total number of participants;
- Total number of low-income participants;
- Track the number of applications which were denied, or program drop-outs. Record the reason why the application did not proceed;
- Total estimated hours spent by Energy Coach providing guidance to participants;
- Spatially map the participants across the City, while ensuring privacy, to determine if any FSAs/regions are under serviced;
- Record and gather participant testimonial relating to: "customer experience" working with Program staff, retrofit experience, home comfort and utility savings;
- and,
- Map impacts against Guiding Principles namely the mandate to reduce GHGs across the greatest number of participants possible.

#### 4.10 Scalability and Funding

Funding for the program at scale is yet to be secured. A comprehensive comparative analysis can be found within Appendix E: Business Case, which compares the cost of administering the BHH program relying solely on municipal funds vs a scenario whereby the City is successful in obtaining funds from FCM's [Capital Program: Loan or credit enhancement for local home-energy upgrade financing program](#).

In brief, the program budget depends entirely on 3 variables:

- The total budget for LIC loans;
- The number of homes targeted per year;
- and,
- The staffing and operational costs required to meet demand.

The CCCM has worked with the OCCI to scope out program budgets that include a 2-year Pilot Program that will serve as an incubator to justify and investigate the scalability of the BHH program. Potential scenarios of what could be possible to scale are provided below.

#### 4.10.1 *Municipal funding scenario*

If the City of Hamilton were to administer a program which reaches 410 dwellings over 4 years and offers loans of \$20,000 per participant using entirely municipal funds, the City of Hamilton would likely incur a cost of \$11.8M – of which \$8.2M is recoverable loans in a 15-year timeframe.

#### 4.10.2 *FCM supported funding scenario*

Under a scenario whereby the City is successful in an application to FCM's [Capital Program: Loan or credit enhancement funding](#) the City would be eligible to receive:

- Funding via a loan to support 80% of program costs up to \$10M; and
- A grant for 50% of the approved funding amount

With additional funding, the CCCM estimates the City of Hamilton would be required to make a **total investment** of \$3.24M to administer the BHH program supporting 410 home upgrades with a breakdown of:

- \$1.44M to administer a two year pilot program using municipal funds
- An investment of an additional \$1.8M over four years to cover 20% of the program costs per FCM funding requirements

A full budget breakdown can be found within Appendix E: Business Case.

#### 4.10.3 *Future program scaling*

It should be noted that funding from sources such as FCM is finite. In order to scale past 410 homes cumulative may require:

- Support of local financial institutions to offer preferred-rate loans which can be administered to participants rather than using municipal dollars;
- Private sector investment; and/or,
- Partnership with other municipalities offering HERO programs. A regional delivery model would cut operation and staffing costs considerably.

### 4.11 Program Expansion

Upon scaling, the City of Hamilton may wish to expand the BHH program with respect to adding eligible expenses, changing the loan amount or interest rate, and adding low-income supports. The CCCM recommends the

City of Hamilton complete program report cards and gap analysis upon the completion of the two year Pilot Program, and again after the four year BHH roll-out. At a high level the CCCM recommends the City:

- Review eligible expenses and expand eligible equipment types which reduce GHG emissions, but may not fall under the current offerings.
  - ASHP hot water heater,
  - Electric hot water heater,
  - Heat Recovery Ventilation (HRV) systems, and/or
  - Additional insulation measures.
- Review the maximum funding amount against future equipment prices. Recall, the goal of the loan is to prevent participants from going out-of-pocket to cover the cost of renovation; and
- Consider a low-income support program that is grant-based rather than loan based. There is an opportunity to offer retrofit “packages” such as insulation and air sealing, or funding ductless mini-split heat pumps.
  - Recall, heat pumps also work as air-conditioning units. [Window-heat pump technology](#) is improving. Similar to a window ac unit, installation does not damage the property making it an ideal option for tenants or those living in apartments without central AC systems. There may be a significant climate justice angle to pursue with this offering.

## 5 IMPLEMENTATION

Research has shown that HERO programs which offer a pilot program experience greater long-term program uptake. Pilot programs have additional benefits that include:

- Opportunity to train staff on the implementation of a HERO program;
- Establishment of public trust, increasing program visibility; and
- Provides an opportunity to incubate the HERO program and report back to Council on program success and recommendations for improvement.

For these reasons, the CCCM advises the City of Hamilton roll out the BHH program using a two-phase approach.

- Phase 1: a two year municipally supported Pilot/Incubation Stage and,
- Phase 2: a four year FCM supported BHH program.

### 5.1 BHH Pilot/Incubation Stage

The CCCM recommends the City of Hamilton incubate the BHH program via a two year Pilot Program administered by the Office of Climate Change Initiatives. The purpose of the Pilot Program is to:

- Allow OCCI staff the opportunity to gain experience offering a HERO program;
- Establish inter-departmental workflows which may be made more efficient ahead of full-scale program launch;
- Build momentum within the community and drive interest in the BHH program;
- Gather testimonials and data from participants across a variety of demographic groups, building types, and locations across the City;
- Give an opportunity for participants and staff to provide feedback on how to better the BHH program;
- and,
- By offering a Pilot Program in-house, OCCI staff can better speak to the administrative burden – better informing staff recommendation as to whether a 3<sup>rd</sup> party delivery model is preferred for the full BHH program.

### 5.1.1 Incubation Stage: Pilot Program Funding

The CCCM, on the recommendation of OCCI, suggests the Pilot Program be funded through existing municipal funds found within the Climate Change Reserve. The Pilot Program will be supported and administered by the OCCI.

The CCCM recommends staff requests access to an upper limit of \$1.5M from the Climate Reserve to support the Pilot Program.

**Table 10 Rough Pilot Program Budget**

Expense Category	Cost
Total LIC Loan Budget	\$1,000,000 (50 homes x \$20,000)
Loan Loss Reserve	\$50,000
Staffing Impacts – in-kind <ul style="list-style-type: none"> <li>1.0FTE Sr. Project Manager over 2 years from OCCI</li> <li>0.5 FTE total over 2 years from Legal, Taxation, Treasurer, Finance</li> </ul>	\$317,000 1 FTE (2 years salary)  In-kind supports
Marketing & Digital Communications	\$60,000
Web Development	\$10,000
RETScreen Software	\$5,000
Pilot Program Budget	\$1,442,000

\*Assumes outsourcing BHH program web development. If possible, design the program website in-house to reduce costs.

### 5.1.2 Pilot Program Framework

It is recommended that during the Incubation stage, the Pilot Program utilize the same framework as the BHH program with respect to eligibility criteria, funding amount and eligible expenses outlined in Section 4.

The CCCM recommends a manageable yet impactful target of 50 home retrofits completed over two years, with a maximum of \$20,000 in funding for each participant.

It is highly recommended the City of Hamilton offer a 0% interest loan and no administrative fee during the Pilot Project for the following reasons:

- 0% interest loans with no admin fee is a common practice among HERO programs;



- The goal of the Pilot is to incentivize early adopters to partake, while building trust and momentum within the community to adopt a full-scale BHH Program;
- 0% interest matches the most competitive external incentive the [Canada Greener Homes Loan](#). The BHH program has the competitive advantage by offering Energy Coach services, as well as using an LIC loan with a longer term, and more consumer protections; and,
- Reduced financial barriers may incentivize low and fixed- income residents to participate, offering the OCCI a valuable insight into that demographic’s experience with the program.

### 5.1.3 Pilot Program Elements

The following section outlines the suggested Pilot Program elements. All program design elements align with the base BHH program described in Section 4 with the exception of the recommendation to offer a 0% interest rate and no administrative fee.

**Table 11 BHH Pilot Program Characteristics**

Program Element	Description
Timeframe	Two years
Target	50 homes sourcing from a variety of eligible building archetypes, and demographic groups
Financial Model	Local Improvement Charge
Funding Amount	\$20,000 per applicant
Interest Rate	0%
Repayment Term	15 years
Administrative Fee	\$0
Eligible Building Types	Single-detached, semi-detached, townhome, row home,
Participant Eligibility	Homeowner within Hamilton Current on Property Tax payments No other liens against title
Contactor Eligibility	All criteria and licenses satisfied as outlined in section 4.6
Eligible Expenses	All upgrades outlined under section 4.5 including: <ul style="list-style-type: none"> <li>• Permits and assessments</li> <li>• Building envelope (air sealing, insulation)</li> <li>• Mechanical systems (ASHP, smart thermostat, smart controllers)</li> <li>• Supporting Infrastructure Upgrades (breaker panel upgrade, ductwork repair)</li> </ul>

#### *5.1.4 Pilot Program Staffing Requirements*

In order for the Pilot Program to be successful, it must be adequately staffed. The Pilot Program should have 1.0 FTE assigned to program administration, with additional support from existing OCCI staff and in-kind supports from Finance, Taxation, Legal and the Treasurer.

In order to show a fulsome cost to administer the BHH Pilot Program, within Appendix E Table 2, the CCCM has budgeted two years worth of salary for a Project Manager position using all-in salary and benefits figures provided by OCCI.

The CCCM recommends hiring the Project Manager with the requisite skillset to offer the Energy Coach role. The skillset for the Energy Coach role should include:

- A background in building science and/or five+ years working within the energy efficiency & retrofit sector;
- Ability to interpret and discuss EnerGuide assessments and blower door test results with participants;
- Ability to complete carbon accounting and calculations;
- Experience working within RETScreen would be a strong asset;
- Strong interpersonal skills;
- and,
- Proficient in Microsoft Excel.

It should be stated that research has shown that each application can occupy 3-8 hours of staff time between processing loan documents, energy coach services and disbursing funds.

#### *5.1.5 Repayment Methodology*

As mentioned previously in section 4.8.1 Interdepartmental Workflows, and OCCI will require the support of several departments including Finance and Taxation.

The CCCM advises that OCCI work with Taxation and Finance to develop a repayment structure which:

- Allows participants to make lump sum payments against the LIC loan balance, thereby allowing participants to leverage any rebates or personal capital to lower their "special charge" owed on each Property Tax bill.
- Allows participants to payout "special charges" incrementally over a 10-month or 12-month payment cycle. As it stands, Taxation applies

special charges two times per year. Large special charges in addition to regular property tax payments may lead to significant financial strain on participants.

In addition, a mechanism should be put in place which supports homeowners that have an arrangement whereby their mortgage lender incorporates property tax payments as part of their mortgage repayment plan.

The OCCI may need to allocate additional resources or acquire financial consulting services to build out the aforementioned mechanisms.

## 5.2 Marketing and Communications

Successful marketing and communications is essential to any program implementation. Agenda Marketing was contracted to craft a brand identification, logo, a website wireframe and supplementary marketing materials for the Better Homes Hamilton program.

All materials can be found within Appendix H: Marketing Materials.

### *5.2.1 Core Messaging and Brand Identification*

The Better Homes naming convention was chosen for a number of reasons:

- Aligns with other retrofit program names, giving participants a level of reassurance that others are doing this work;
- Better Homes is synonymous with an increased quality of life and improving what is usually a participant's most precious asset – their home;
- and,
- Better Homes is precise enough that it implies improvements/retrofits but general enough that the City may adapt the program structure without having to rebrand.



**Figure 8 Better Homes Hamilton program logo**

The BHH program logo strongly identifies with the largest portion of the target market – single detached homes. The green arrow and vertical mobility of the logo implies improvement and environmental friendliness.

Messaging surrounding the BHH program should focus on energy efficiency and GHG reductions rather than promising utility savings. Participant utility bills are informed by commodity price of energy, equipment efficiency and participant behaviours. The BHH program can only provide efficiency upgrades – and therefore cannot impact participant behaviours or the price of energy.

Key messages should be crafted to focus on objective facts such as:

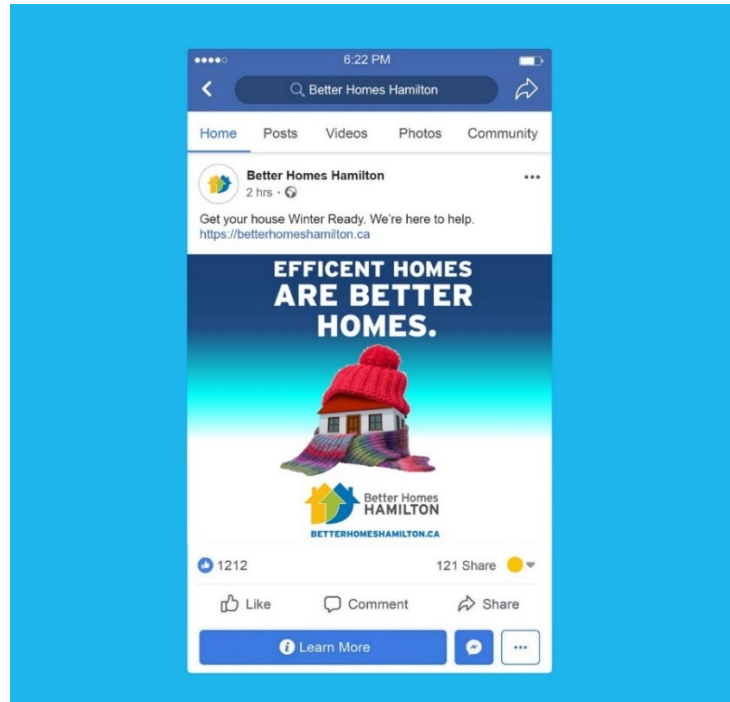
- The BHH program offers loans to complete energy-efficiency upgrades;
- The BHH program will help you reduce GHG emissions from your residence, resulting in carbon tax savings year over year;
- The BHH LIC format offers secure, fixed, low-interest loans which can be paid back over time via regular property tax payments; and,
- The BHH program offers competitive financing which can be used to access rebates which may otherwise have been unattainable from government and utility incentive programs.

### *5.2.2 Marketing Materials*

Agenda Marketing has created several marketing assets that can be deployed by the City of Hamilton in advance of the Pilot Program launch.

Two sample assets can be seen below. Figure 9 shows a mock-up social media advertisement which may be used to drive traffic towards an online

application or program website. Figure 10 shows a sample bus-shelter advertisement. It is important to remember that the BHH program communications may have to be adjusted to place emphasis on either home heating or cooling depending on the season.



**Figure 9 Sample BHH social media advertisement**



**Figure 10 Sample BHH bus shelter advertisement**

The CCCM recommends the City of Hamilton allocate resources to build out a fulsome marketing campaign to support the Pilot Program launch.

Agenda Marketing has provided a high-level analysis of marketing costs across various mediums including; digital advertising, radio advertising, and physical medium such as bus shelters, printout and billboards.

The CCCM recommends utilizing a combination of digital marketing and physical advertisements to communicate the program to a variety of demographic groups. Digital advertising such as Google Ads can be used to target postal codes with a high number of eligible buildings. Physical advertisements such as billboards and bus shelter ads may capture individuals who do not have access to social media, while building the BHH brand as a community-facing program. Last, the City may wish to deploy BHH branded lawn signs for participants to display. Often word-of-mouth from trusted sources (family members, neighbours, community leaders, etc.) is a substantial force which drives demand for municipal retrofit programs.

### *5.2.3 Tenant Information Mailer*

In addition to marketing materials, the CCCM highly recommends OCCI work with Marketing to design a physical mailer that is delivered to any property which has been designated a rental property on the BHH application form.

This tenant information mailer should contain information as described in Section 4.7.4 Tenant Protections.

All assets and budget breakdown can be seen in Agenda H: Marketing Materials.

### *5.2.4 Web Design*

Agenda Marketing has also created a wireframe based on examples of other HERO program websites collected by the CCCM.

The website is the primary consumer-facing element of the BHH program. It is of the utmost importance that the website:

- Concisely explain the benefit to participation;
  - Include an online application form;
  - Include information about the purpose of the program, how it works and what the eligible upgrades are;
- and,

- Include information on other incentive programs such as the Greener Homes Grant, Enbridge HER+, Oil to Heat Pump Affordability Program, as well as income-qualifying programs such as the Enbridge Gas Home Winterproofing Program, and the SaveON Energy: Energy Affordability Program.

The wireframe can be found within Agenda H: Marketing Materials.

### 5.3 Community Engagement Campaign

As part of the FCM Detailed Study Design workplan, the Bay Area Climate Change Council will be facilitating a community engagement campaign between May-June 2023.

The object of this campaign is to:

- Provide the public with information about the BHH program;
- Celebrate the City of Hamilton's efforts to take impactful climate action;
- Increase public perception surrounding the BHH program, and the merits of HERO programs;
- and,
- Provide a mechanism whereby Hamiltonians can submit contact information should they wish to be made aware of when the application process for the Pilot Program opens.

BACCC and the CCCM will provide a summary engagement report to the OCCI following campaign closure.

### 5.4 Contractor Engagement Campaign

As part of the FCM Detailed Study Design workplan, the CCCM will be facilitating a contractor education campaign between May-June 2023.

The purpose of this campaign is to reengage with contractors, and provide industry associations with resources to distribute to their membership. The goals of the contractor education campaign is to:

- Provide contractors with information relating to the final design of the BHH program;
- Inform contractors of rough timelines for the Incubation Stage of the BHH Pilot Program launch;
- Inform contractors about the Registered Contractor list, and how to enroll in it (see more information in Appendix G);

- Provide contractors with messaging relating to how they can speak about the BHH with customers;  
and,
- Gather contact information of contractors within the region who would like to be kept informed of BHH program progress.

The CCCM will provide a summary engagement report to the OCCI following campaign closure.

## 5.5 BHH Program Budget

The CCCM has recommended a two phase rollout which includes:

- A two year Incubation Phase in the form of a Pilot Program facilitated by the OCCI;  
and,
- A four year BHH Program with FCM support.

As discussed in Section 4.10 Scalability and Funding, the CCCM estimates that in a scenario where the City of Hamilton was successful in obtaining [FCM funding](#) to scale the program, the City would be required to make a **total investment of \$3.24M** to administer this program with a breakdown of:

- **\$1.44M to administer a pilot program** using municipal funds\*
- An **investment of an additional \$1.8M over four years to cover 20% of the program costs** per FCM funding requirements<sup>5</sup>

Business cases to support both of these recommendations can be found within Appendix E: Business Case, specifically Table 2.

A rough implementation plan, including steps required to support Pilot Launch can be found within Appendix F: Implementation Plan.

## 5.6 Pre-Launch Considerations & Implementation Planning

The following section provides an overview of **key activities** required to support program launch and implementation. The CCCM has provided a comprehensive implementation plan in Appendix F: Implementation Plan.

<sup>5</sup> \*Note: Within 15 years the City will recover \$1M from the Pilot Project investment in the form of LIC loan repayments, making the actual cost to administer this stage approximately \$400,000.



### *5.6.1 Short Term: Pre-Launch Activities*

Following City Council's approval of the BHH program design, the OCCI must lead the implementation and development of the BHH program. Key activities include:

- Hiring a Project manager with the requisite Energy Coach skillset;
- Directing the Project manager to develop and finalize program documents using the templates provided by the CCCM, and with inputs from Legal;
- OCCI to work with Legal to develop bylaws supporting the BHH program and LIC financial framework;
- OCCI to present bylaws to City Council for approval;
- Program Manager to develop a participant tracking framework which tracks the status of paperwork, approvals, and loan status;
- OCCI to enter into service level agreements with supporting departments (Legal, Finance, Taxation);
- Project Manager to develop batch workflow with applicable departments to ensure applications are reviewed and approved in a timely manner;
- Project Manager to work with City of Hamilton Web Design team to develop the program website with an application portal drawing upon the wireframe provided by Agenda Marketing;
- Project Manager to work with City of Hamilton Corporate Communications to craft a pre-launch communications campaign drawing upon the work of Agenda Marketing;
- Project Manager to develop a metrics tracking and reporting system;
- Project Manager to implement the CCCM's recommendations to generate a list of qualified contractors.

### *5.6.2 Medium Term: Incubation Stage of BHH Program*

- OCCI staff and Project Manager to implement BHH Incubation Stage of the BHH Program;
- Project Manager to gather participant testimonials as workorders are completed;
- OCCI to report back to Council at the end of the Incubation Stage;
- OCCI to examine the Pilot Program to determine if any elements need adjustment before launching the full BHH program;
- OCCI and Project Manager to investigate alternative sources of funding, and/or apply to the FCM [Capital Program: Loan or credit enhancement for local home energy upgrade financing program](#) funding.

### *5.6.3 Long Term: BHH Program Launch & Reporting*

- If funding for scaling is successfully obtained, OCCI to either hire additional staffing support, or go to RFP for a 3<sup>rd</sup> party delivery agent to administer the BHH program;
- Project Manager to work with Corporate Communications to develop and deliver a fulsome communications campaign;
- Project Manager to work with web development to update the BHH website with participant testimonials from the Pilot Program
- Touchpoints as required with Contractor Registry;
- OCCI to investigate alternate sources of funding including private investment, and/or refinancing of the program via investment from financial institutions;
- Annual reporting back to City Council or as required.

## 6 ADDITIONAL RECOMMENDATIONS

In addition to the comments made throughout the report, the CCCM recommends the following elements be considered to increase the likelihood of program success.

### 6.1 Additional Considerations

#### **Program Goals**

- Direct the Project Manager to fine-tune program goals beyond the broad sentiment of GHG reductions across the greatest number of homeowners. Research suggests that with ASHP install, >60% GHG reduction can be achieved on average, however not all homeowners may install ASHPs;
- Goals should go beyond environmental impacts to include elements of social equity, accessibility, climate justice and increased standard of living;  
and,
- Link goals to City aspirations and existing strategies.

#### **Baseline Data Creation**

- Work directly with utility providers to develop a mechanism whereby participants may grant the Project Manager access to utility bills 12 months pre-retrofit and 5 years post retrofit;  
and,
- Invest in RETScreen training for OCCI staff.

#### **Monitoring and Evaluation**

- As previously mentioned, design a mechanism whereby the OCCI staff may access participant utility information five years post retrofit; and
- Work with the Building and Permitting office to design a methodology for post-retrofit site-inspections.

#### **Program Delivery**

- Consider setting up a Program Advisory Committee with representation from all departments entering into service level agreements with OCCI to facilitate the BHH program. A Program Advisory Committee may be useful in ironing out wrinkles in batched workflows, and serve as a body to report back to;
- Limit the number of steps applicants have to take wherever possible. For example, if a permit needs to be filed, establish a methodology whereby the contractor or Project Manager may apply;

- Ensure frequent touch-points with participants, do not let applications go idle for more than 3 months; and,
- Upon scaling past the pilot, additional staffing is highly recommended to handle the volume of applications.

### **Eligible Expenses**

- Upon scaling, the City of Hamilton may elect to expand the eligible expense offerings to include items which further reduce GHGs such as:
  - Heat Pump Water Heater;
  - Electric Water Heater;
  - Heat Recover Ventilator;
  - Windows & Doors;
  - On-site solar photovoltaic;
  - On-site solar thermal;
  - and/or,
  - Accessory items such as electric pool heaters

The upgrades above are not currently eligible under the BHH program design because research indicates they do not have the same potential to reduce GHG emissions per dollar spent as the upgrades recommended in section 4.5. Having said that, upon scaling-and depending on the landscape of eligible rebates from external sources-the City may wish to expand the eligible expenses to accommodate homeowners wishing to complete more comprehensive retrofits.

### **Low Income Supports**

Ensuring equity continues to be addressed and at the forefront of consideration the CCCM recommends consideration for:

- If additional funding can be procured, the City is advised to create a pathway for income-qualifying participants to receive additional supports;
- Additional supports may take the shape of a 0% interest loan, and/or a grant-based incentive program; and,
- Inspiration can be taken from Enbridge Gas: Home Winterproofing program which provides free air-sealing, attic insulation and smart thermostats to qualifying customers.

## 6.2 Next Steps & Key Recommendations

The following are next steps and key recommendations:

- OCCI submit Recommendation for City Council approval with this report as appendix outlining the Better Homes Hamilton Program;
- OCCI to request approval from Council to access an upper limit of \$1.5M from the Climate Reserve to finance LIC loans and operation costs of a two year Pilot Program
- OCCI to hire the Project Manager with requisite Energy Coach skillset;
- OCCI staff to work with the City Solicitor and the Legal Staff to draft applicable program bylaws to support an LIC framework to be brought back to Council for approval;
- OCCI staff to work with Legal to draft all program documents;
- OCCI to enter into service-level agreements with supporting divisions/departments such as Finance, Taxation and Legal;
- Project Manager to work with Web Development to design the BHH website using the wireframe provided by Agenda Marketing (Appendix F);
- Upon completion of the Incubation Stage of the BHH Program, OCCI staff submit an application to the Federation of Canadian Municipalities application under the [Capital Program](#) funding stream to help cover program costs for the first four years of the program.

## 7 CONCLUSION

The CCCM advises the OCCI follow all steps outlined in section 6.2 to in order to successfully implement the BHH program.

The BHH represents a significant opportunity to support homeowners within Hamilton to partake in an impactful climate action – namely, completing energy efficiency upgrades to their residence which increase home comfort while decreasing GHG emissions.

The BHH program can be generally described as a municipally led incentive program which offers participants low-interest, fixed rate loans to both finance home energy improvements, and assist homeowners in bridging the capital cost required to access external rebates such as the Enbridge HER+ , and Greener Homes Grant programs.

Through a combination of competitive financing, consumer protections and energy coaching services provided by a knowledgeable OCCI staff member, the BHH program offers a tangible pathway for homeowners to reduce GHG emissions.

Thank you to all City staff, departments, and divisions who consulted on the design of the BHH program, in addition to all stakeholders who participated in consultations. Special thanks to the Bay Area Climate Change Council, and its Implementation on Home Energy Retrofits for in-depth consultation throughout the design process.

## APPENDIX A: STAKEHOLDER ENGAGEMENT SUMMARY

# Summary of Stakeholder Findings Better Homes Hamilton Program Design

December 2022



Better Homes  
**HAMILTON**



## Executive Summary

The City of Hamilton's Community Energy & Emissions Plan (CEEP) within the broader Climate Action Strategy (CAS) identifies reducing greenhouse gas (GHG) emissions from residential buildings as a key opportunity for Burlington to achieve its goal of becoming net zero by 2050. Understanding the need to move quickly on the development of a Home Energy Retrofit Opportunity (HERO) program, in May 2021, Council directed staff to undertake the process of entering into an agreement with the Centre for Climate Change Management to design a detailed HERO program, in partnership with City Staff. Recommendations on program design and delivery, including a pilot program, are anticipated to be presented to Council in May 2023.

To date, the CCCM's research progress has focused heavily on stakeholder engagement to understand:

1. **Barriers and drivers** – learning from best practices in HERO program delivery and challenges identified by other municipalities offering similar programs as well as experts in the field
2. **Market development** – supporting contractors to grow their businesses to meet the demand for retrofits
3. **Program administration** – designing a sustainable, feasible program that best meets homeowners' needs while reducing the administrative burden on the City, contractors and homeowners.

Stakeholder outreach to over 40 groups, businesses, program delivery centres, utilities, other municipalities and experts identified two main audiences that must be considered for a successful retrofit program: homeowners and contractors.

To engage in the program, homeowners must understand the value of the retrofit and have a convenient experience using the program. Contractors must be engaged in selling retrofit products to their clients and also experience little friction in buying equipment, installation, and administration. If both groups experience friction in the program – such as delays, equipment backlogs, or outsized administrative burdens – this will likely result in poor program uptake.



Additionally, a wide range of key considerations for program design were recognised to optimize success. This report discusses five key findings that will inform the program design recommendations, including that of a pilot project.

In general, stakeholders identified that the technology or retrofit options on offer are only one component of a successfully implemented program. A program which does not consider the implementation process, co-benefits, and stakeholders beyond the homeowner will see limited uptake. Other success factors include:

- Effectively communicating program benefits beyond financial and Greenhouse Gas (GHG) savings, such as improved home comfort and aesthetics;
- Providing clear, simple information to homeowners on program offerings, price points, and payment methods;
- Providing clear, simple resources to contractors relating to how they can access training for new technologies and net-zero renovation practices, how they can participate in the program and most importantly, how to talk about the retrofit program with customers;
- Initiating a local small-scale pilot on a select group of homes; this tangibly demonstrates the impact of retrofits on homes,
- Promoting relationships with contractors as the on-the-ground advocates for home retrofits;
- Enabling quality assurance mechanisms that build trust between homeowners and contractors (e.g. recommended certifications),
- Upon scaling, harmonizing HERO programs with adjacent cities (e.g. Hamilton and Burlington) to minimize confusion for homeowners, maximize business opportunities for contractors, and drive the scaling of a regional market;
- Using effective marketing programs to drive awareness amongst homeowners and local contractors;
- and,
- Ensuring the best positive experience for homeowners.

Moving forward, two communication campaigns will be completed to more fulsomely engage both **homeowners and contractors** following the CCCM's presentation to Council in May 2023. The CCCM will deliver a contractor education campaign between May and June 2023 with the goal of communicating the parameters of the Better Homes Hamilton Program (pending council approval), and conveying how contractors can join a Qualified

Contractor Registry. At the same time, the Bay Area Climate Change Council (BACCC) will deliver a community education campaign intended to both celebrate a decisive climate action taken by the City in the form of the Better Homes Hamilton Program and drumming up citizen interest in an upcoming Pilot Program.

## Introduction

In recent years, municipal home energy retrofit (HERO) programs have been recognized as a key opportunity for cities and towns to fight climate change. Approximately 16 Ontario municipalities have either identified the need for a HERO program to meet municipal climate goals, completed a business case, or plan on completing one with several offering pilot or full-scale program. The City of Toronto's Home Energy Loan Program (HELP) is Ontario's flagship HERO program and was established with the goal to help residents reduce GHG emissions substantially.

Within the CEEP, Hamilton has attributed 8% of city-wide GHG emissions to residential building. The CEEP has set a target of retrofitting 100% of existing homes to achieve 50% energy efficiency savings relative to 2016 by 2050. This action is expected to reduce city-wide GHG emissions by 2.8% (243.6 ktCO<sub>2</sub>e). In recognition of this significant opportunity for emissions mitigation, in May 2021, the City of Hamilton Council directed staff to undertake the process of entering into an agreement with the Centre for Climate Change Management to designing a detailed HERO program, in partnership with City Staff. Recommendations on program design and delivery, including a pilot program, are anticipated to be presented to Council in May 2023.

HERO programs are typically built on the premise of "the home as a system", as renovating one area of the home (ex. improving insulation) can alter the energy requirements of other areas of the house (ex. furnace size, the need for increased air exchange from the outside environment, etc.). To incentivize these renovations, financing is offered through local improvement charges (LICs). LICs allow homeowners to access low-interest loans, typically offered through municipalities. Loan payments are tied to the property, not the homeowner and are repaid alongside property tax payments; if homeowners sell their home, the loan stays with the home. The rationale is that the benefits of the renovation rest with the current owner and are financed by energy savings from the retrofit.

This report focuses on stakeholder outreach completed by the CCCM to help understand the concerns, priorities, and lessons learned from other home-upgrade retrofit programs. This holistic approach investigates how the construction and retrofit sector works as a system, how key players act within the sector, and it helps to identify barriers and constraints while focusing on the opportunities to optimize the process to increase participation and satisfaction.

## Methodology

To establish a better understanding of the parameters which would lead to a successful HERO program within the City of Hamilton, the CCCM completed 40+ stakeholder outreach interviews. Prior to this, an initial literature review of available national programs, progress reports, and primary literature was completed. This was followed by stakeholder outreach, with the goals of:

- Understanding current supply chain process of available programs and retrofit work
- Identifying the motivators and barriers on solutions relating to the development of an effective, streamlined residential home retrofit program that would significantly reduce greenhouse gas emissions from the greatest number of homes in Burlington.

To date, approximately 40 stakeholders falling within the following categories have provided feedback:

- Activists
- Bylaw and Permitting offices
- Contractors
- Developer/  
Renovators
- Educational institutions
- Energy auditors
- Environmental organizations and non-profits
- Equipment specialists
- Municipal retrofit program staff
- Incentive providers
- Industry Associations
- Lawyers
- Local associations
- Low-income homeowners
- Poverty advocacy groups
- Program Delivery Agencies

- Realtors
- Researchers
- Retailers
- Tenant-focused organizations and non-profits
- Utilities Providers

Stakeholder engagement was continuous throughout the project which included regular check-ins with:

- Monthly updates and discussions with the BACCC Implementation Team on Building Retrofits. This committee is a collection of local leading experts in home energy efficiency.
- Regular check-ins with City staff in the Office of Climate Change Initiatives.
- Circling back with key stakeholders, including industry associations, NGOs and contractors.

A homeowner survey was completed in October 2023, the results of which can be seen in Appendix C: Homeowner Survey. Major findings include:





- Homeowners within Hamilton broadly support a loan-based retrofit incentive program.
- Homeowners believe it is the responsibility of the municipality to both incentivize building retrofits as well as to provide guidance regarding the process of how to undertake retrofits, and access existing rebates offered by utility providers and government.
- Homeowners identified utility savings and environmental benefits as primary motivators for undertaking residential retrofits.
- In the absence of a municipal retrofit program, homeowners expected to finance upgrades by using personal savings and taking on additional det.

Taken together, stakeholder outreach and survey results have informed program design and implementation to ensure the design of a scalable program that drives homeowner uptake and benefits, and incentivizes a market shift to meet demand.









## Stakeholder Findings









Stakeholder discussions led to feedback on a wide variety of retrofit and supply chain topics. The following table summarizes five key findings from the research.

**Table 1:** Summary of Findings from Stakeholder Engagement

<p><b>Finding #1: A local municipal HERO program is feasible and desirable.</b></p> <p>Research showed that potential positive impacts of home retrofits for GHG reduction are of interest to the majority of stakeholders.</p> <p>However, the current complexity of the retrofit market has made uptake and participation difficult. Solving for this complexity – by creating a scalable, customer-focused HERO program – will help residents invest in their homes’ value, protect against future impacts of climate change and help Burlington become a net zero community by 2050.</p>	
	<p><b>Technology for retrofitting residential homes to significantly reduce greenhouse gases is available and affordable.</b></p>
	<p><b>There are significant co-benefits for both homeowners and local businesses.</b></p> <p>Homeowners can realize greater home comfort, the potential for reduced energy bills, and increased home value.</p> <p>The demand for retrofit services drive more jobs and increased revenue for local home renovation businesses.</p>
	<p><b>A municipal program will drive participation.</b></p> <p>A municipal program can drive consistency, trust, and complement programs offered by local utility companies, as well as the federal and provincial governments. As the market grows, non-profits and private actors will also likely enter with their own offerings.</p> <p>For example, the federal government has offered the Greener Homes Program which upon launch experienced administrative delay due to the volume of applications. Currently, Enbridge Gas is co-delivering the Greener Homes Program under the Home Efficiency Rebate Plus (HER+) program. A local program can help Hamilton residents navigate these programs and incentives, while also providing additional options for those who are unable to participate because of the program limitations.</p>
	<p><b>Inconsistent program offerings (i.e. programs only offered for 1-3 years) reduces interest and dissuades contractors from participating.</b></p> <p>Until now, a lack of consistent government financial incentives has reduced supply chain actors’ interest in retrofit technology and delivery.</p>

✓	<p>A consistent municipal program would help create and then support the development of a stable market for retrofits and help homeowners and contractors plan for the long run.</p>
<p><b>Finding #2: A municipal program should support a “phased” approach to retrofits.</b></p> <p>While desirable, a “whole home” solution – extensive retrofits that help homeowners achieve near net zero greenhouse gas emissions – are unfortunately cost and time-prohibitive for most residents. This solution would require a near-total renovation of the home, which would require a sizeable (often \$50,000 or more) loan and be disruptive to homeowners, taking months to complete.</p> <p>Instead, the CCCM will recommend a program that can provide a simple, foundational offering that will significantly improve energy efficiency and reduce greenhouse gas emissions. The homeowner can then add additional retrofit services over time to further reduce their impact and prepare their home for the challenges of climate change.</p>	
✗	<p><b>Current whole house retrofit programs typically see lower than expected participation due to the cost and time-consuming nature of extensive home renovations.</b></p>
✗	<p><b>Homeowners have difficulty accessing necessary financing to complete a “whole home retrofit.”</b></p>
✓	<p>Programs that provide \$5,000-\$20,000 loans to upgrade are able to be accessed by a greater number of people of varying income levels and/or equity in their home.</p>
✓	<p><b>With guidance, stacking eligible retrofit measures will maximize energy efficiency and reduce GHGs.</b></p> <p>Creating a simple, affordable program will enable homeowners to realize immediate energy efficiency savings and co-benefits. And then, over time, homeowners can continue to “stack” home energy projects to multiple the impact.</p> <p>The City can also include more programs, include offerings that help support climate adaptation or neighbourhood beautification over time.</p>
✓	<p><b>The “phased approach” also allows the City to offer additional programs to promote equity for low-income homeowners and tenants.</b></p> <p>Separate or complementary programs that work directly to support low-income homeowners will be needed in the future to support total equity and access to retrofits.</p> <p>Additional funding streams or incentives for equity-deserving groups may drive participation. Incentives could take the form up income-qualifying grants, preferred interest rates, etc.</p>

<b>Finding #3: Education and outreach to homeowners <i>and</i> contractors is needed.</b>	
<p>Outreach identified two stakeholder groups critical to program success, homeowners and contractors. Considerations to be addressed for both groups include education on program availability and inclusions, communication of retrofit benefits, and a simplified process. By addressing these program components, a more appealing program for these key stakeholders will work to improve participation and a positive experience.</p>	
	<p><b>Homeowners need to clearly understand the financial return on investment (ROI) and energy savings to help reinforce their decision to retrofit.</b></p> <p>Marketing efforts should focus on clear, simple communications on benefits to homeowners.</p>
	<p><b>The decentralized nature of the construction industry and inconsistency of programs</b> makes it difficult for homeowners to understand and navigate incentive programs.</p> <p>Confusing communications surrounding the eligibility requirement for rebates is a barrier.</p>
	<p><b>A lack of supporting regulations in the home renovation sector creates challenges for guaranteeing quality of work and the advertisement of low carbon technologies.</b></p>
	<p>A local HERO program, administered with quality assurance checks in place, can help drive the market for green renovations.</p>
	<p><b>While improving, there is a limited number of trained individuals to complete retrofits using low carbon technologies (e.g. air source heat pumps, air sealing).</b></p>
	<p>The City can work with local business associations and training partners to ensure that trained and certified contractors can participate in the program.</p>
	<p><b>Informed contractors can provide a wealth of knowledge regarding homeowner feedback and interest in programs, as well as advocate and educate homeowners on the programs.</b></p> <p>Marketing efforts targeted at contractors may have a greater impact than direct marketing to consumers.</p>
	<p><b>The market will need to scale to meet demand.</b></p>

	Before starting this program, the City should work to give suppliers and manufacturers 6 months lead time to stock equipment and work to educate their customers (e.g. contractors).
<b>Finding #4: A HERO program can help homeowners "future proof" their homes.</b>	
A HERO program can help homeowners realize value over time.	
	<b>The current low cost of natural gas reduces financial incentives for homeowners.</b>
	However, with the increasing carbon tax, there is an opportunity to help homeowners "future proof their homes" by reducing energy needs now to significantly save money over time.
	<b>Homeowners using fuel oil (which is more common in rural areas) are already paying higher prices to heat their homes.</b> This premium will only increase with the carbon tax increase.
	A retrofit can help these homeowners reduce costs now, and in the future. These homeowners can take advantage of the newly announced Oil to Heat Pump Affordability Program which offers a \$5000 upfront payment to those fuel switching.
	<b>Retrofits that use heat pumps can be used for heating <i>and</i> cooling.</b>
	This will help homeowners be able to install air conditioning – which is becoming more important as the region sees high summer temperatures due to climate change.
<b>Finding #5: Homeowners require supports in navigating the retrofit and rebate application process.</b>	
	<b>An "energy coach" or "energy concierge" service is desired by homeowners.</b>
	Homeowners have expressed a strong desire for project management guidance and supports in navigating the application process for various incentive programs.
	<b>Requirement for a home energy audit is a barrier to participation.</b>
	Energy audits have been shown to bottleneck the application process and create barriers to entry for participants. It is advised that the "energy coach" work with applicants to understand their goals, timelines and financial situation. In order to access external rebates/incentive programs an Energuide Energy Audit is required – however some homeowners may value speed over accessing rebates.
	<b>Diversity of housing stock means scaling programs can be difficult.</b>
	Homeowners will have individualized needs and need a trusted, helpful expert to speak to about what retrofit best fits their needs.



✗	<b>Accurate methods to measure GHGs pre- and post- retrofit are difficult to implement.</b>
✓	Measuring impact is difficult. An Energy Coach can act as a point of contact to college homeowner testimonials, gather utility bills pre/post retrofit, and collect Energuide Assessments.
✓	<b>Upon scaling, a local retrofit delivery centre can be a regional delivery model – shared amongst several municipalities to reduce costs for operating the centre.</b>  This can also be helpful for contractors who work across the region to be able to speak to one point of contact about incentives. This one-stop-shop approach would streamline the application process for homeowners.

Overall, the research emphasized that the success of a program is not entirely dependent on the technology and financial support offered to homeowners. Instead, additional considerations including involvement and convenience for contractors, homeowners, and allowing a smooth transition for the supply chain are critical. Additionally, ensuring adequate resources for marketing and communications of the program itself is a key lesson learned from other programs.

### **Pilot Program**

Stakeholders identified that ideally, programs would build towards a whole-home retrofit solution with the primary goal of nearly eliminating GHG emissions. Conversely, this option was noted as currently not realistic for homeowners due to steep upfront financing, lack of clear financial return on investment, and perceived inconvenience during retrofit completion.

Instead, this study found overwhelming evidence to support offering a simple, foundational program that would provide small scale (\$5,000- \$20,000) loans to local homeowners to undertake specific kinds of renovations. This program could also complement already existing programs (offered through governments and local utilities) and scale over time. This approach would prioritize smaller retrofit projects that reduce GHGs while also being less burdensome on upfront financing and reducing stress on the supply chain.

The CCCM is currently designing the Better Homes Hamilton Program with the expectation that City administer a pilot program that would target homes from a variety of building archetypes especially those using heating oil, propane, or electricity for heating and cooling. These energy sources are either high GHG emitting sources of energy, or are costlier than the typical electricity/natural

gas home heating combination, or both. This approach would focus on piloting a program with homeowners who would realize a significant ROI while also targeting those most at risk of energy poverty (which is defined as a minimum >6% of take-home income dedicated to utilities).

This program would inform future programs, testing solutions to ensure broader applicability for Hamilton residents, while stimulating the retrofit market.

### **Next Steps**

Stakeholder outreach will continue to inform all aspects of the work going forward.

- The completion of a Hamilton Homeowner Communications Campaign by BACCC (May-June 2023).
- The completion of a Hamilton Contractor Education Campaign by CCCM (May-June 2023).
- Continued discussions with local advocacy groups, such as BACCC, to provide ongoing feedback.
- Recommendations on a marketing plan to drive uptake and participation from homeowners and contractors.

By May 2023, the CCCM will be prepared to report back to Council on the pilot project and next steps to develop and offer the HERO program.

The Centre for Climate Change Management is an applied research centre at Mohawk College.

The Centre is a regional hub for collaboration on climate action. The Centre brings together partners to collaborate and design climate change and sustainability solutions that improve our neighbourhoods, businesses, and public institutions.

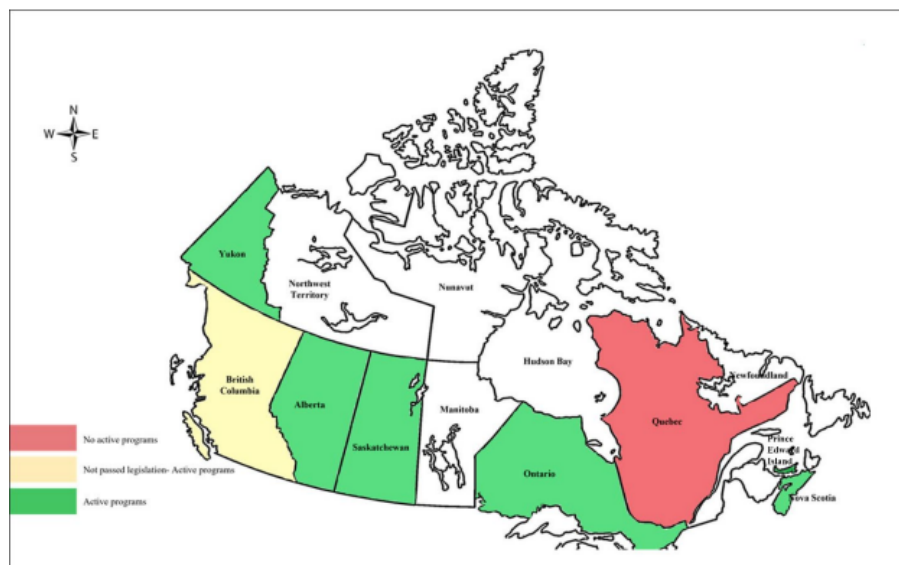
## APPENDIX B: MUNICIPAL RETROFIT PROGRAM SCAN

The following home energy retrofit opportunity (HERO) programs were examined as part of the background research which informed the recommendations and design of Hamilton's retrofit program.

A comprehensive list of municipalities within Canada that are either designing or offering municipal retrofit programs can be found within:

- [A Toolkit for Affordability Driven Home Energy Efficiency Retrofits Through Local Improvement Charge Programs](#) by Volta Research (Published Jan 15, 2023)
- [Accelerating Home Energy Efficiency Retrofits Through Local Improvement Charge Programs: A Toolkit for Municipalities](#) by Clean Air Partnership (2020)

There are 5 provinces (Alberta, Nova Scotia, Ontario, Prince Edward Island, and Saskatchewan) and 1 territory (Yukon) that have LIC/PACE enabling legislation. British Columbia is running Pilot Programs but does not have legislation.



Appendix B Figure 11 Status of PACE/LIC enabling legislation in Canada. Source: [Volta Research](#)

A comprehensive list of retrofit programs across Canada has been compiled by Volta Research and can be found at under "List of LIC and PACE Programs in Canada" at <https://voltaresearch.org/resources/affordable-retrofit-toolkit>

**Appendix B Table 12 Status of known retrofit programs in Ontario**

Municipality	Program Name	Progress	Target Audience	Financial Model	Delivery Model	Metrics of Success	Notes
Toronto	Toronto HELP	Available since 2014	Residential	LIC with low, fixed interest rates (3.7-4.4%) based on repayment 5-20yr  Average loan: \$22,000  2% Admin charge on loan	Windfall Energy	187 completed projects as of Feb 2019  Goal was 1000 homes by 2016  Projects typically resulted in 30% energy savings, 550tCO2e emissions reduction cumulative	A three-year pilot designed and implemented by the City of Toronto Two streams: Residential (HELP) and multi-family (Hi-RIS) First program created under Ontario's LIC regulation (O.Reg 586/06)
Kingston	City of Kingston Home Energy Retrofit Program (KHERP)	Available since 2019	Residential	LIC loan w/ 0% interest up to 40K or 10% of current home valuation  Includes rebates for GHG reductions up to \$5000 for >30%	Municipally delivered	Requires a minimum 20% reduction in GHGs  Targeting average of 30% GHG reduction per home  Program target to retrofit 25-50% of pre-1991 homes by 2040	
Ottawa	Better Homes Ottawa	Launched	Single-family homes	LIC	3 <sup>rd</sup> Party Enviro-centre		Pilot phase wrapping
Halton Hills	Retrofit Halton Hills	Pilot Program	Single-family homes	LIC		9 homes accepted	
Durham Region	Durham Greener Homes	Launched	Single-family homes	Loan 3 <sup>rd</sup> party Not LIC	Windfall Ecology Centre		Funded by Pathwise Credit Union and Rapport Credit Union

Municipality	Program Name	Progress	Target Audience	Financial Model	Delivery Model	Metrics of Success	Notes
City of Vaughan	-	Launched (operational study)	Low-rise residential	PACE 10% of property value			Operational study with Ontario Climate Consortium which researched LIC program, completed risk assessment, developed LIC toolkit and draft by-laws
City of Burlington	Better Homes Burlington	Designed (Pre-launch)	Single-family	LIC	Municipal	20 Home Pilot	
Town of Newmarket	Town of Newmarket Energy Efficiency Retrofit (NEER)	Designed	Homeowners of single-detached, semi-detached and townhomes	-	Municipal Service Corporation	-	-
City of Peterborough	Home Energy Efficiency Program (HEEP)	Designed	-	-	-	-	To launch 2024
Region of Waterloo		Program Design	Single-family homes		-	-	REEP Green Solutions designed program
City of Windsor	Windsor Residential Deep Energy Efficiency Retrofit (R-DEER)	Study Design  Business Case yet to be adopted	Single-family homes	-	-	-	Designed to avoid requirement for energy assessments
Brampton-Caledon-Mississauga	Brampton-Peel Residential Energy Program	Feasibility Study	-	-	-	-	-
Town of Oakville	-	Feasibility Study					Collaborating with Oakville Hydro
Clean Air Partnership	-	Feasibility Study	-	-	-	-	Partnership for feasibility

Municipality	Program Name	Progress	Target Audience	Financial Model	Delivery Model	Metrics of Success	Notes
							study with County of Dufferin, City of London, City of Barrie, Town of Huntsville, City of Kawartha Lakes, Municipality of Clarington
City of Thunder Bay	-	Feasibility Study	-	-	-	-	-
City of Greater Sudbury	-	Study examining retrofit models	-	-	-	-	-
Town of Cobourg	-	Feasibility study	-	-	-	-	-

## APPENDIX C: HOMEOWNER SURVEY

The following appendix contains the engagement report from the Homeowner Survey completed by Deloitte. This survey utilized both a web survey and telephone interviews in order to gather a representative sample that was unbiased across all Hamilton wards.

**Deloitte.**



**Mohawk College**

## Home Energy Retrofit Program Report

November 2022



**Deloitte.**

## Research Objectives

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**The purpose of the Home Energy Retrofit program survey were to:**

- Better understand attitudes and perceptions surrounding the completion of home energy efficiency upgrades.
- Identify potential incentives that may motivate homeowners to undertake energy retrofits.
- Evaluate pricing scenarios which would be most attractive to homeowners considering upgrades.



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## The survey used the following data collection methods:

### Phone Surveys

- Using a mix of cell and landline phone numbers in the region, numbers were randomly dialed by live interviewers.
- Respondents for the phone survey were screened to ensure they currently own homes in Hamilton. This resulted in 204 completed interviews.

### Web Surveys

- A web-survey was used, sent through email directly to individuals residing in Hamilton and also through social media platforms.
- The survey was open from October 7<sup>th</sup> to October 31<sup>st</sup> and captured 191 completed surveys.

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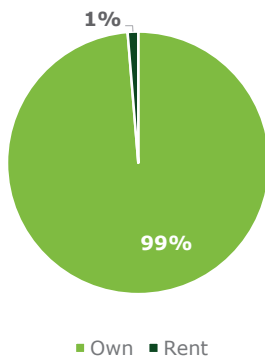
## Key Findings from the Market Research Data:

- The majority of homeowners (58%) indicated that they were at least *somewhat likely* to undertake home efficiency upgrades in the next two years.
- *Utility bill savings* and *environmental friendliness* were the top two motivations for home energy upgrades or renovations.
- Respondents felt that *upfront costs of different upgrade options* and *environmental benefits* were the most important pieces of information when considering moving forward with home energy efficiency upgrades.
- The vast majority of respondents (89%) agreed that the Home Energy Retrofit program would be beneficial to homeowners in Hamilton, and 82% would likely access an energy coaching program if it existed.

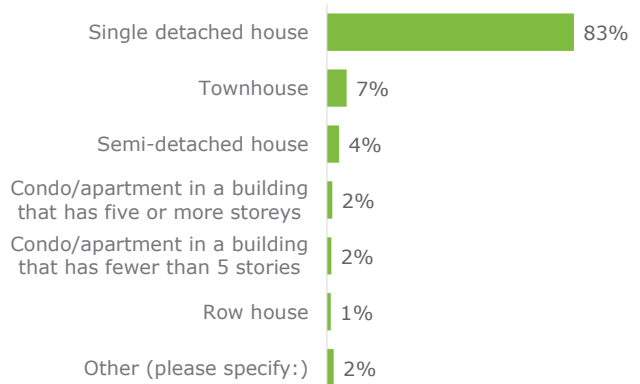


## Detailed Findings from Market Research Data

**83% of homeowner respondents owned a single detached house.**



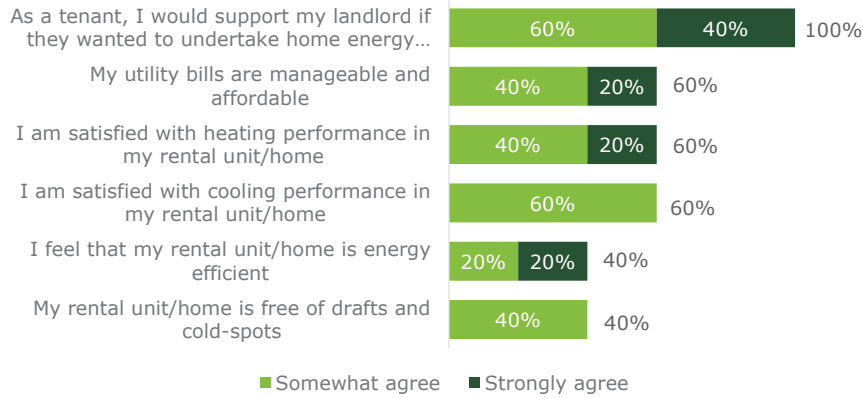
Do you own or rent your home? (N=395)\*



What type of dwelling is your home? (N=395)

\*Renters were only included in the online version of the survey.

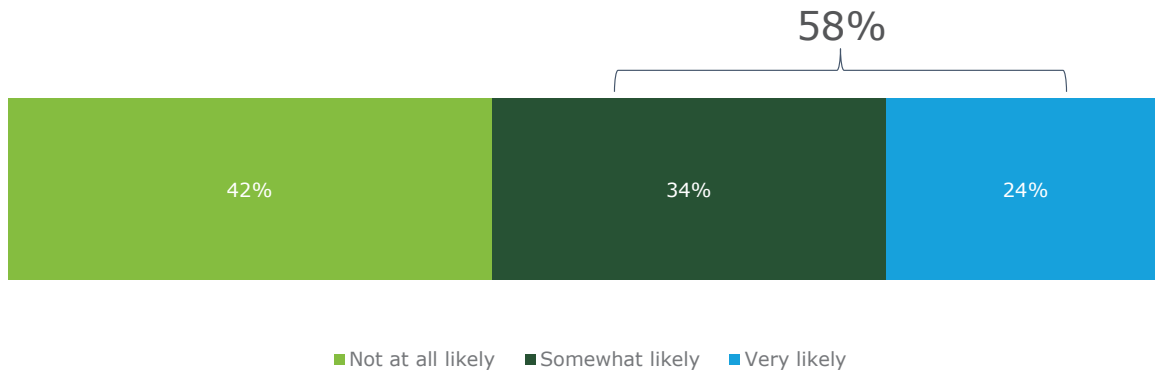
**100% of renters surveyed agreed with the statement "As a tenant, I would support my landlord if they wanted to undertake home energy improvements which improve the home's energy efficiency".**



As a renter, please indicate your level of agreement with each statement.

n=5 \*Renters were only included in the online version of the survey.

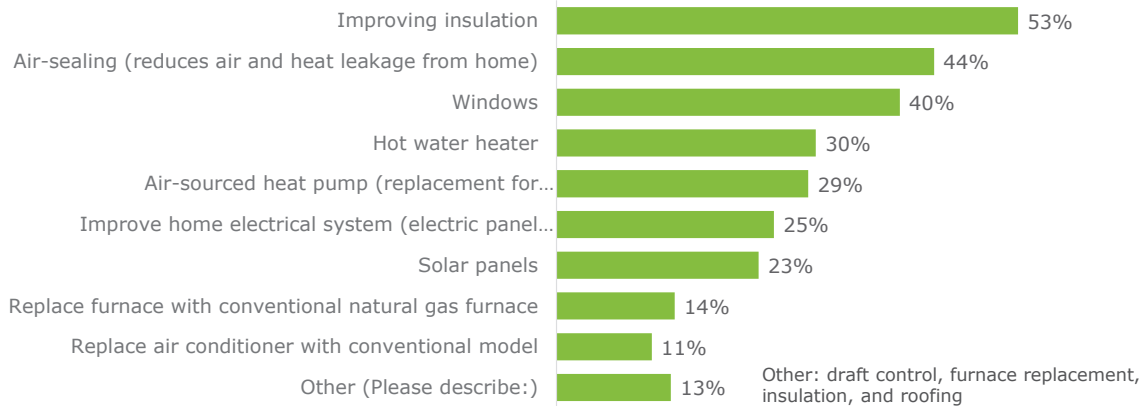
**The majority of respondents were very or somewhat likely to undertake a home energy efficiency upgrade in the next 2 years.**



How likely are you to undertake any home energy efficiency upgrades in the next 2 years?

n=390

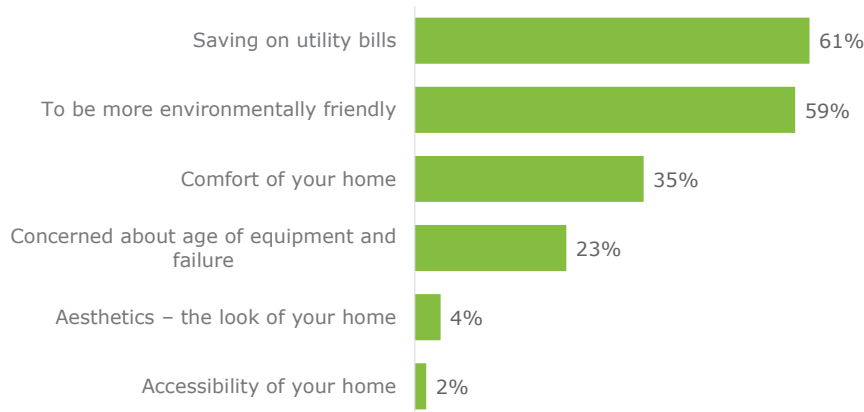
**Improving insulation, air sealing, and new windows were the top mentioned renovations.**



Which of the following best describes the type of upgrade or renovation you are considering?

n=227

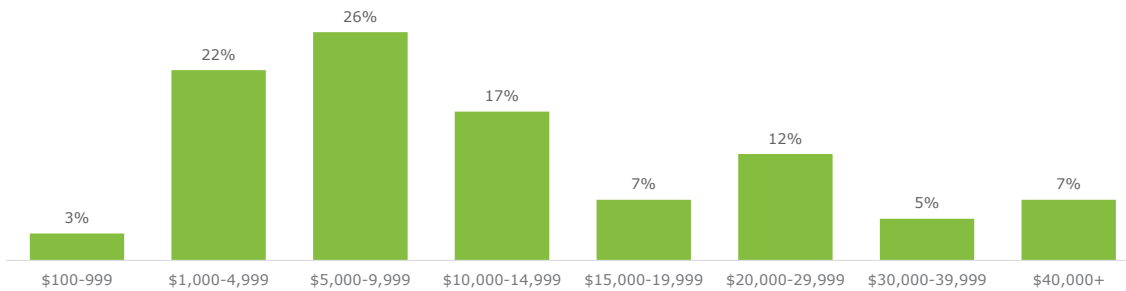
**The top two most commonly selected motivations for upgrades or renovations were to save on utility bills and to be more environmentally friendly.**



Which of the following are your top two motivations for this upgrade or renovation?

n=395

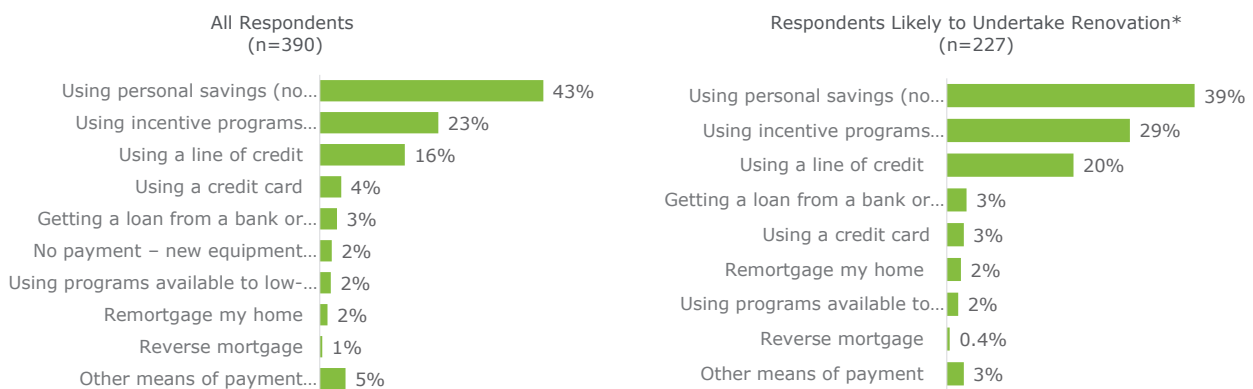
Approximately two thirds of respondents estimated they would spend between \$1,000 and \$15,000 on a home energy upgrade.



If you were to consider a home energy efficiency upgrade in the next 2 years how much would you estimate it would cost?

n=227

The most commonly selected potential financing options were using personal savings and using incentive programs for home energy efficiency upgrades.

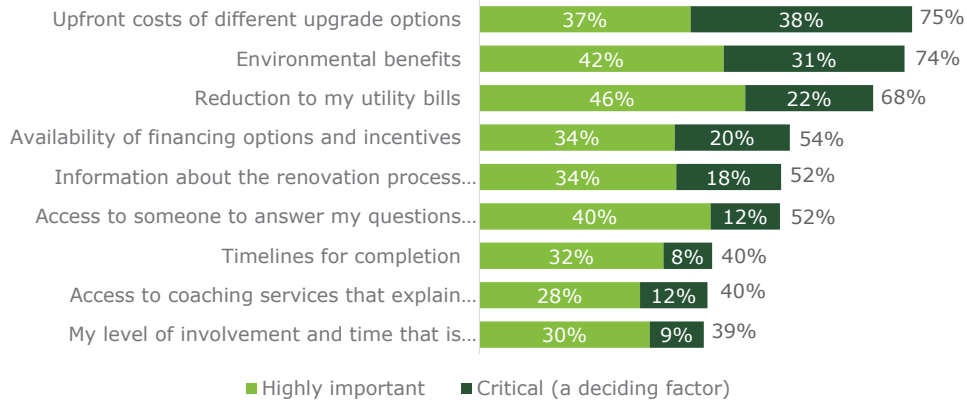


Other: cash, government programs, and not looking to complete home energy efficiency upgrade

If you were to complete a home energy efficiency upgrade in the next 2 years, which of the following financing options would be your primary source of funding?

\*Respondents who selected "Somewhat likely" or "Very Likely" in Q4

**The two most important factors that would impact respondents' decisions to move forward with a home energy upgrade are upfront costs and environmental benefits.**

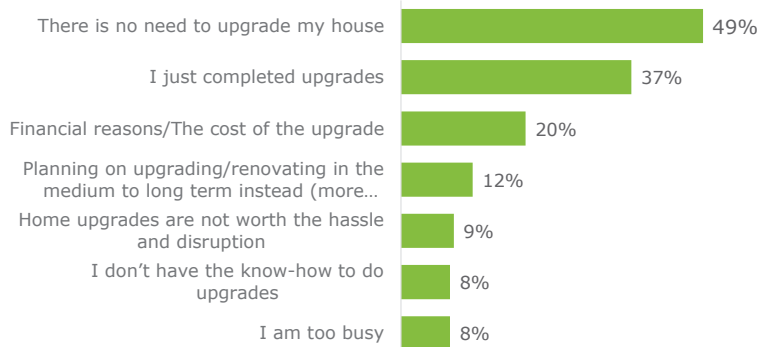


**If you were to consider a home energy efficiency upgrade in the next 2 years, how important would the following pieces of information be in your decision to move forward?**

n=226

Mohawk College Survey 2022 13

**Respondents most commonly selected "There is no need to upgrade my house" (49%) when asked about factors preventing them from undertaking a home energy upgrade.**

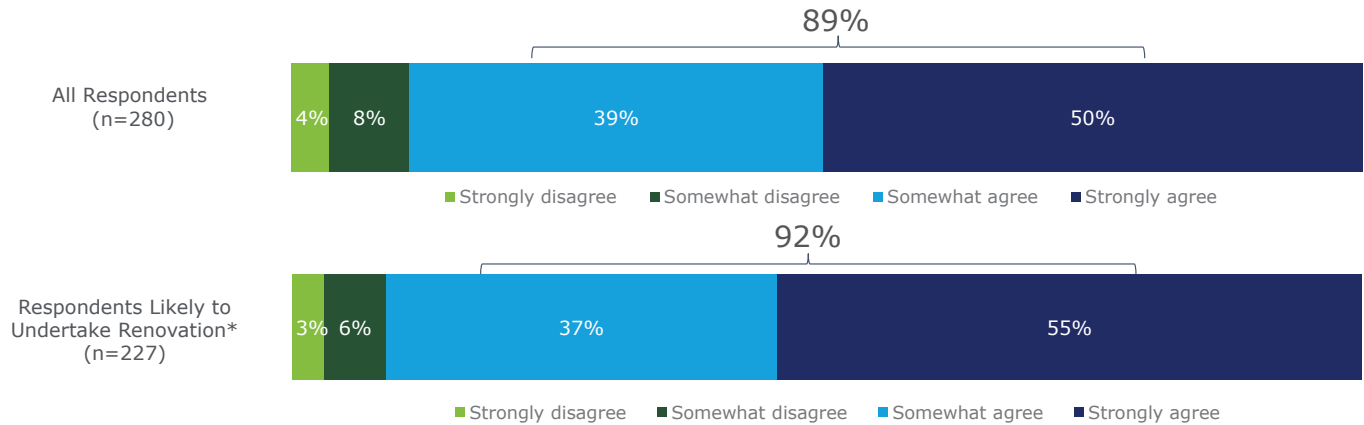


**Which of the following factors are preventing you from undertaking a home energy efficiency upgrade?**

n=163 \*Only respondents who selected "Not at all likely" in Q4

Mohawk College Survey 2022 14

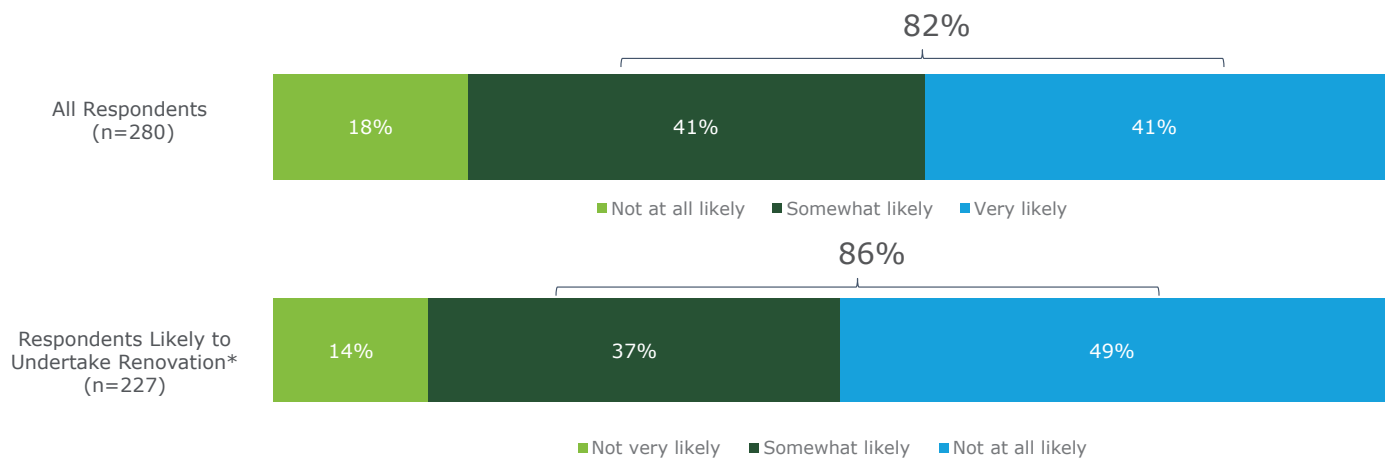
The vast majority of respondents agree that the Home Energy Retrofit program would be valuable to homeowners in Hamilton, with higher agreement registered with those likely to undertake a renovation (+3%).



Overall, how much to you agree or disagree that the program, as described, will be valuable to homeowners in Hamilton?

\*Respondents who selected "Somewhat likely" or "Very Likely" in Q4

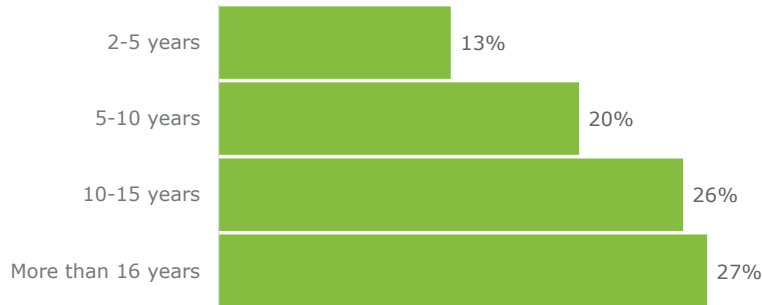
Respondents who were likely to undertake a renovation were 4% more likely to access an energy coaching program.



If the energy coaching program existed, how likely would you be to access this type of support?

\*Respondents who selected "Somewhat likely" or "Very Likely" in Q4

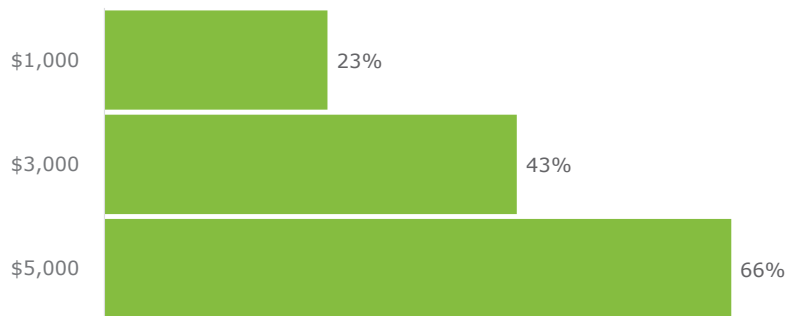
Only 13% of respondents would be likely to move forward with a repayment timeframe of 2-5 years, with most respondents being willing to move forward with a timeframe of more than 16 years.



Thinking about the upgrade you are considering, if a loan was available for up to \$15,000 with an approximate interest rate of 4-6%, how likely would you be to move forward if the repayment timeframe was...

n=227

The majority of respondents would definitely move forward with the upgrade if the rebate amount was \$5,000.

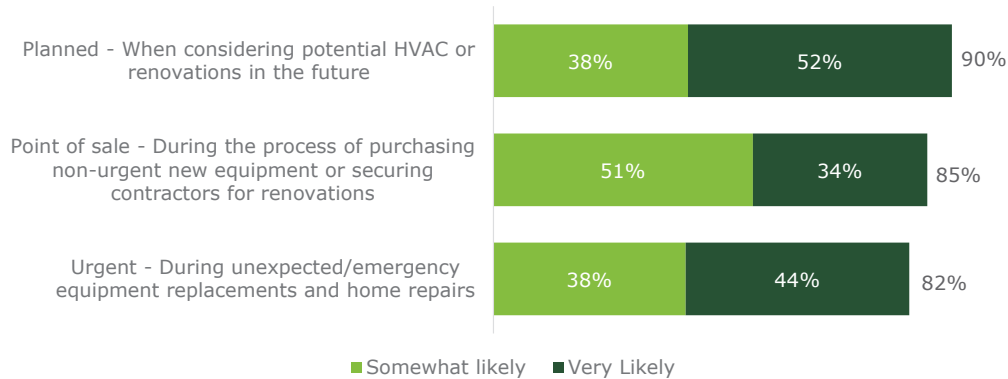


Again, thinking about the upgrade you are considering, if a rebate was available for the following amount which would be transferred to you within 2-3 months of project completion, how likely would you be to move forward if the rebate amount was...

n=227



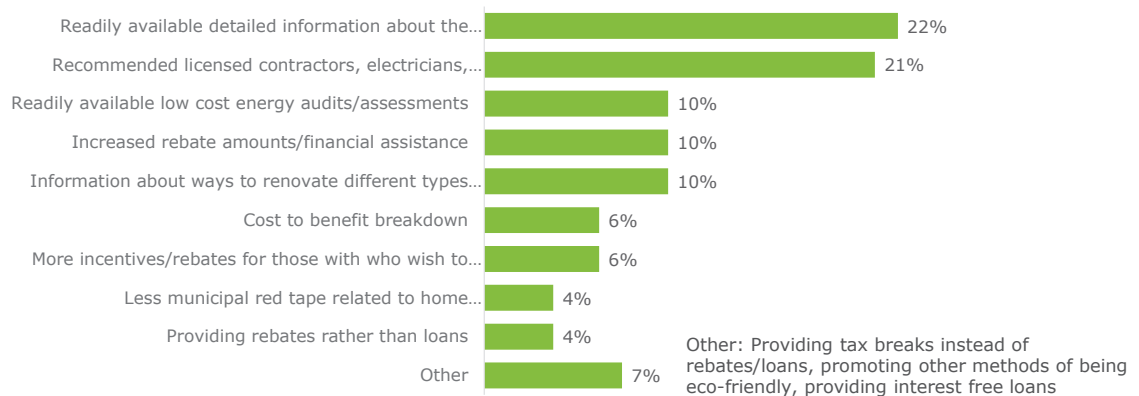
**Respondents were most likely to use the program when considering potential HVAC or renovations in the future.**



How likely would you be to use the program in the following scenarios, assuming the program would meet all necessary timelines?

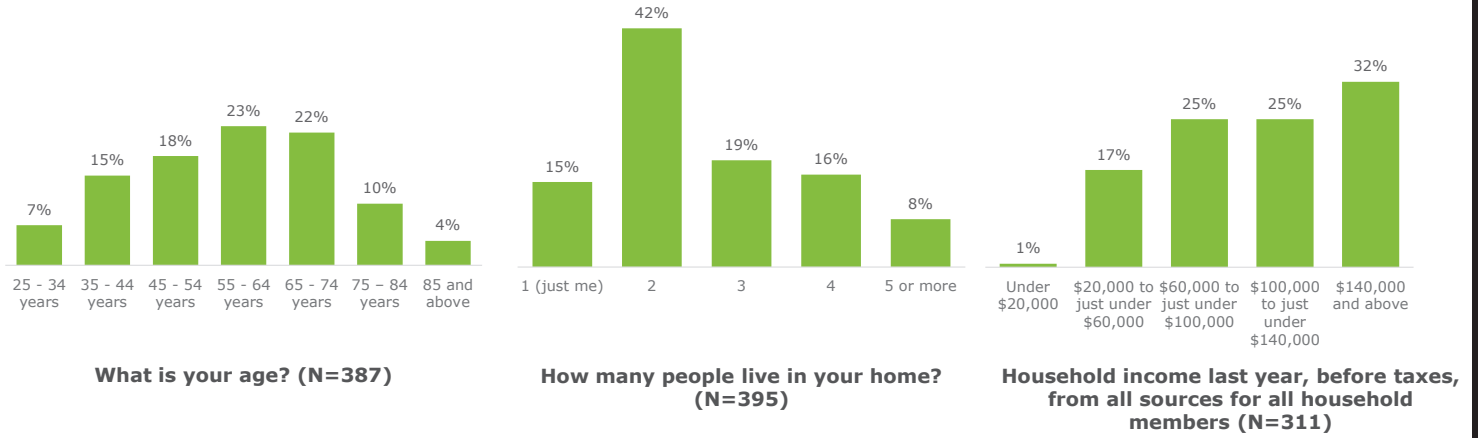
n=227

**Respondents most commonly felt that readily available detailed information about the program/rebates and recommended licensed contractors, electricians, and HVAC experts would be helpful when planning a home energy upgrade.**



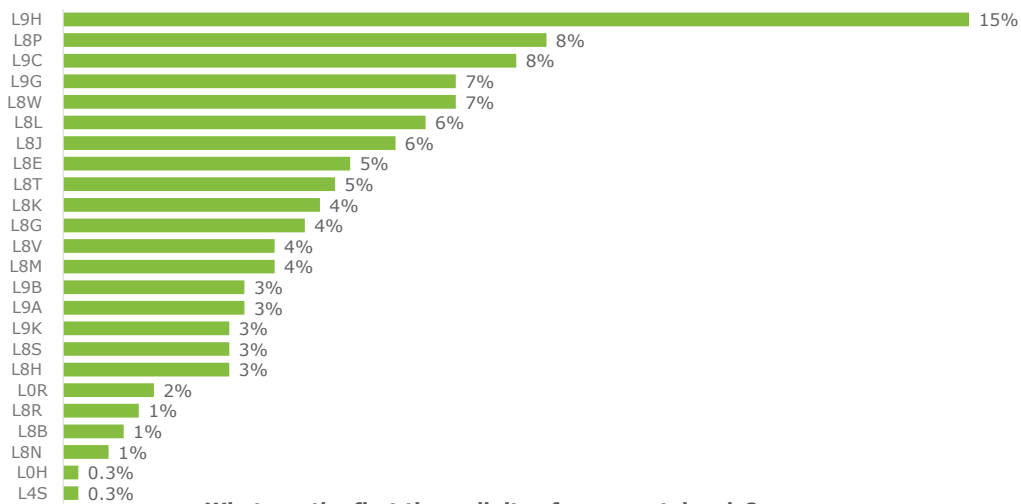
Is there anything else that you would consider to be helpful when planning a Home Energy upgrade?  
(Open-ended, coded into themes)

n=81



n=227

**Respondents most commonly have postal codes beginning with L9H.**



**What are the first three digits of your postal code?**

n=395

**Deloitte.**

## Home Energy Retrofit Program Report

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Project completed by  
**Deloitte.**



## APPENDIX D: LIGHTSPARK BUILDING ARCHETYPE REPORT

The following appendix includes the full report from Lightspark Inc: Analysis and Mapping of Housing and Energy Data to Inform Policy Development

This report uses existing EnerGuide audit data, utility consumption data by FSA, MPAC and census data to categorizes single-detached homes within Hamilton into 7 distinct archetypes. Average utility consumption and GHG emissions per archetype were analysed. Archetypes were then spatially mapped across the City by FSA.

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For City of Hamilton Distribution Only

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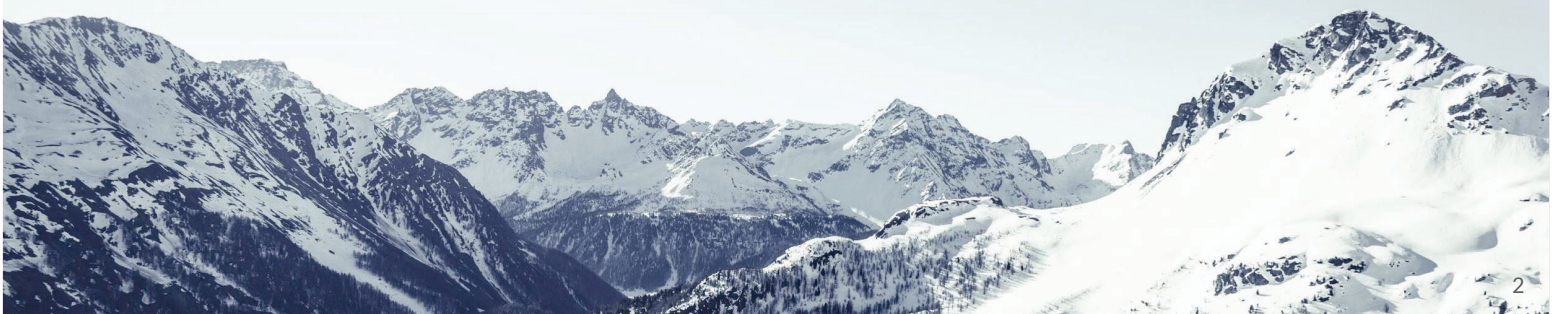
 (C) Lightspark Software Inc 2022

## **Analysis and Mapping of Housing and Energy Data to Inform Policy Development**

For: Nico Strabac, Mohawk College, Hamilton

By: Lindsay Smith & James Riley, Lightspark Software Inc.

Date: February 7th, 2023



# Definitions

**Archetype** A data methodology used to define a grouping of housing types using data science techniques

**FSA** The first three letters of a postal code, called a "Forward Sortation Area"

**Average Annual Energy Costs** Average electricity and natural gas usage

**tCO2e** Tonnes of carbon dioxide equivalent, which is a measure that allows you to compare the emissions of other greenhouse gases relative to one unit of CO<sub>2</sub>

**GJ** Gigajoule a unit of energy for both natural gas and electricity

## TOC

Scope of Work

Methodology

Breakdown by FSA

Data Sources

Archetype Definitions

Executive Summary

Lightspark Hamilton Map

## Scope of Work

- 1** **Executive summary** Summary of analysis and recommendations
- 2** **City-Wide analysis and Visualization** Use data models to produce key city-wide statistics, representing our Single Family Housing stock
- 3** **Archetype development** Represent the Hamilton's existing home stock with representative home types
- 4** **GHG Analysis** The Hamilton can influence GHG emissions, so annual GHG emissions are a key factor for analysis. To answer: how much and how quickly do we need to move to achieve our targets?

## Data Sources

- 1** **Energuide Audit Data** : Subset of building characteristics, heating systems, energy use in the Hamilton
- 2** **Utility Consumption Data:** Household and postal code level Electricity and Gas consumption numbers, respectively. HydroOne, Alectra, and Enbridge provided data.
- 3** **Canadian Census:** FSA level income, occupancy, ownership
- 4** **Building Footprints** : All building shapes in the Hamilton
- 5** **Building Energy Modelling:** Iterative modeling of varying conditions and characteristics
- 6** **Property Tax report** : All building tax reports in the Hamilton - **Age, address, floor area, parcel identifier.**

# Carbon Reduction Opportunity

Potential tCO<sub>2</sub>e Reduced

1.1%

With the following Archetypes recommendations made, the city's carbon footprint would be reduced by 5,730 tCO<sub>2</sub>e (of a total of 533,758 tCO<sub>2</sub>e across the City)

The data shows that **quick win** carbon reduction wins could be found by the following upgrades to **10% of households**

Archetype	Upgrade from Fossil Fuels
D	converting to Air Source Heat Pumps

Archetype	Upgrade
B	upgrading ceiling insulation and reducing air leakage
G	upgrading ceiling insulation and reducing air leakage

Potential GJ Reduced

0.6%

The selected archetypes are found throughout most FSA's and account for 81% of the housing stock and 75% of the tCO<sub>2</sub>e emitted by Single-Family homes.

The potential reductions from these upgrades assumes 10% of all of households of these archetypes will perform the upgrade.

# Carbon Reduction Opportunity

The data shows that **quick win** carbon reduction wins could be found by the following upgrades to **10% of households**

Potential tCO<sub>2</sub>e Reduced

1.1%

With the following Archetypes recommendations made, the city's carbon footprint would be reduced by 5,730 tCO<sub>2</sub>e (of a total of 533,758 tCO<sub>2</sub>e estimated by the City and 718,000 tCO<sub>2</sub>e estimated by Lightspark)

The data shows that **quick win** carbon reduction wins could be found by the following upgrades to **25% of households**

Potential tCO<sub>2</sub>e Reduced

2.6%

With the following Archetypes recommendations made, the city's carbon footprint would be reduced by 13,650 tCO<sub>2</sub>e (of a total of 533,758 tCO<sub>2</sub>e estimated by the City and 718,000 tCO<sub>2</sub>e estimated by Lightspark)

Potential GJ Reduced

0.6%

Potential GJ Reduced

1.9%



# Lightspark Data Methodology

Through unique approach to data handling and combining modelling techniques, Lightspark is able to represent the distribution and frequency energy and carbon profiles across the Hamilton at the FSA and archetype level.

Every single-family dwelling in the Hamilton is assigned an energy and carbon profile based on its age, size and archetype.

In brief we employ the following methods:

- Combine the data sources into the Lightspark data model
- Using spatial analysis techniques to match data and map data points
- Iterative building energy modelling under varying building characteristics and conditions
- Unsupervised machine learning algorithm used for archetype generation
- Map energy and carbon profiles to every single-family dwelling

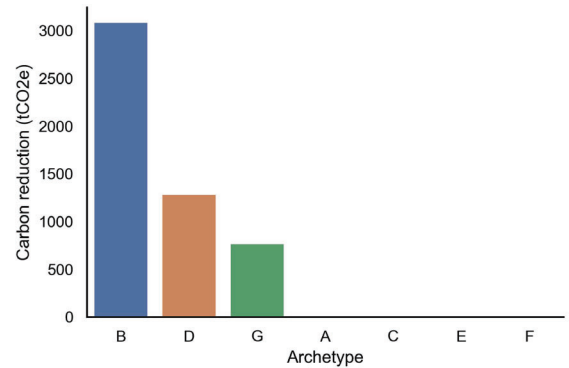


# Executive Summary

# Key Insights: Carbon Reduction

There is a strong opportunity to reduce carbon usage in these key archetypes (D, C, and F), across most FSAs by converting to Air Source Heat Pumps (D and C) and upgrading ceiling insulation and reducing air leakage (B and G). **These archetypes account for the majority of carbon emissions.**

- Current carbon emission (tonnes)
  - B - 237,762 tCO<sub>2</sub>e
  - G - 149,001 tCO<sub>2</sub>e
  - D - 12,104 tCO<sub>2</sub>e
- Total emission - 398,866 tCO<sub>2</sub>e
- Potential carbon reductions achieved by upgrading archetypes:
  - B - 3,088 tCO<sub>2</sub>e
  - D - 1,285 tCO<sub>2</sub>e
  - G - 770 tCO<sub>2</sub>e
- Total reduction - 5,730 tCO<sub>2</sub>e



# Energy Burden Across Archetypes

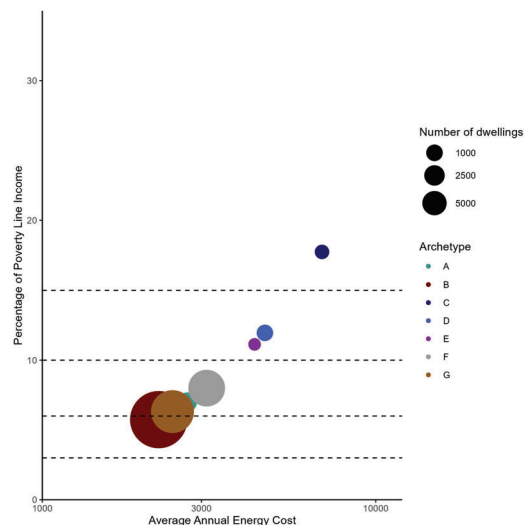
Energy Burden is the percentage of income spent on heating/cooling and electricity

Archetypes C, D, and E have the highest burden.

Using a benchmark annual household income of \$38,910, such a household living in a home in Archetype C would be paying 17.7% of their income on heating/cooling and electricity

Archetypes D and E spend 12.0 and 11.1%, respectively, on heating/cooling and electricity.

Moreover C, D, and E account for 1.7% (2,053) of the dwellings

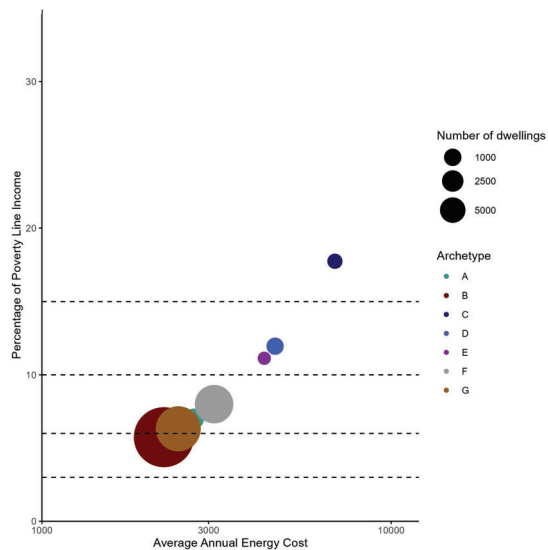




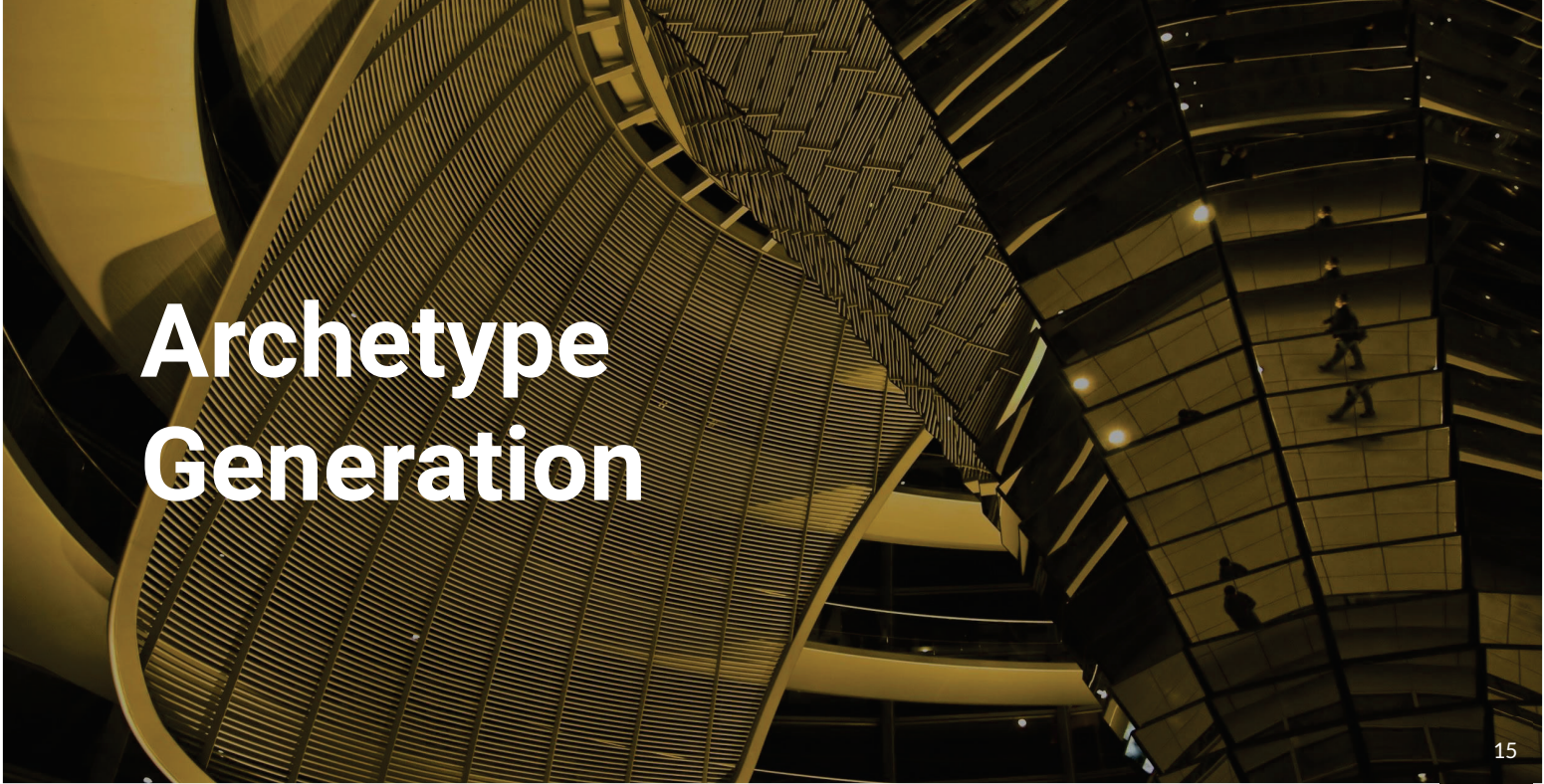
## Audit Breakdown

9.22 % (11,243 out of 121,844) of Single Family Dwellings in Hamilton have had an EnerGuide audit.

Archetype	Count
A	687
B	5197
C	115
D	346
E	23
F	2394
G	2481
<b>Total</b>	<b>11243</b>



\*New homes are homes that were occupied for less than 6 months from the date of the audit.



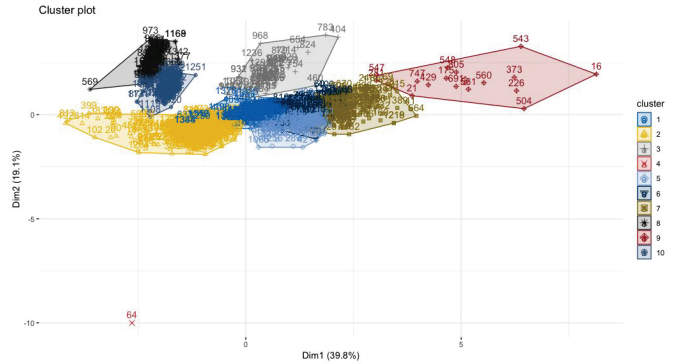
## Key Assumptions Behind Archetype Analysis

- **Emissions factor:** 12.8 gCO<sub>2</sub>e/kWh
- **Electricity cost:** \$0.11601 + Additional Charges
- **Oil cost:** \$1.283/L
- **Propane cost:** \$0.8596/L
- **Natural gas cost\*:** \$4.24/GJ + Additional Charges
- **Standard Heat Pump COP<sub>h</sub>** = 2.55
- **Recommended windows U-value** = 0.32 BTU/ft<sup>2</sup>.°F.h
- **Recommended wall insulation R-value** = 15.8 ft<sup>2</sup>.°F.h/BTU
- **Poverty line for Hamilton household of 4:** \$38,910
- Archetype parameters represent average for homes with and without retrofits
- For the home having multiple audits, the latest audit was selected for the analysis

# Using Lightspark's Machine Learning Algorithm

A data set of dwelling characteristics were audited on single-family dwellings within the Hamilton. Lightspark utilised an unsupervised machine learning algorithm to sort the audit data into clusters of dwelling types that exhibited similar characteristics, such as year built, size, location, energy consumption and tCO2e production.

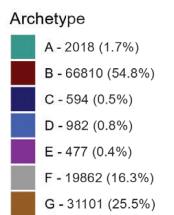
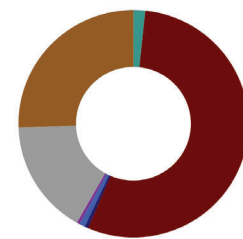
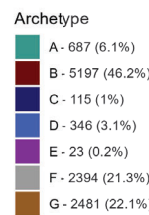
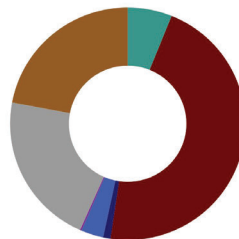
Client Implications:  
 7 clusters were identified as representative of the Hamilton's housing stock: Archetypes A - G



**Dwelling Clusters**  
 A total of 7 clusters were identified from a total of 11,243 audits of Single Family Dwellings

## Breakdown of Archetypes

- Archetypes B, G, and F account for 96.6% of the housing stock and 89.6% of the EnerGuide audits of Single-Family homes.
- A higher number of homes (dwellings) with audits increases data accuracy.



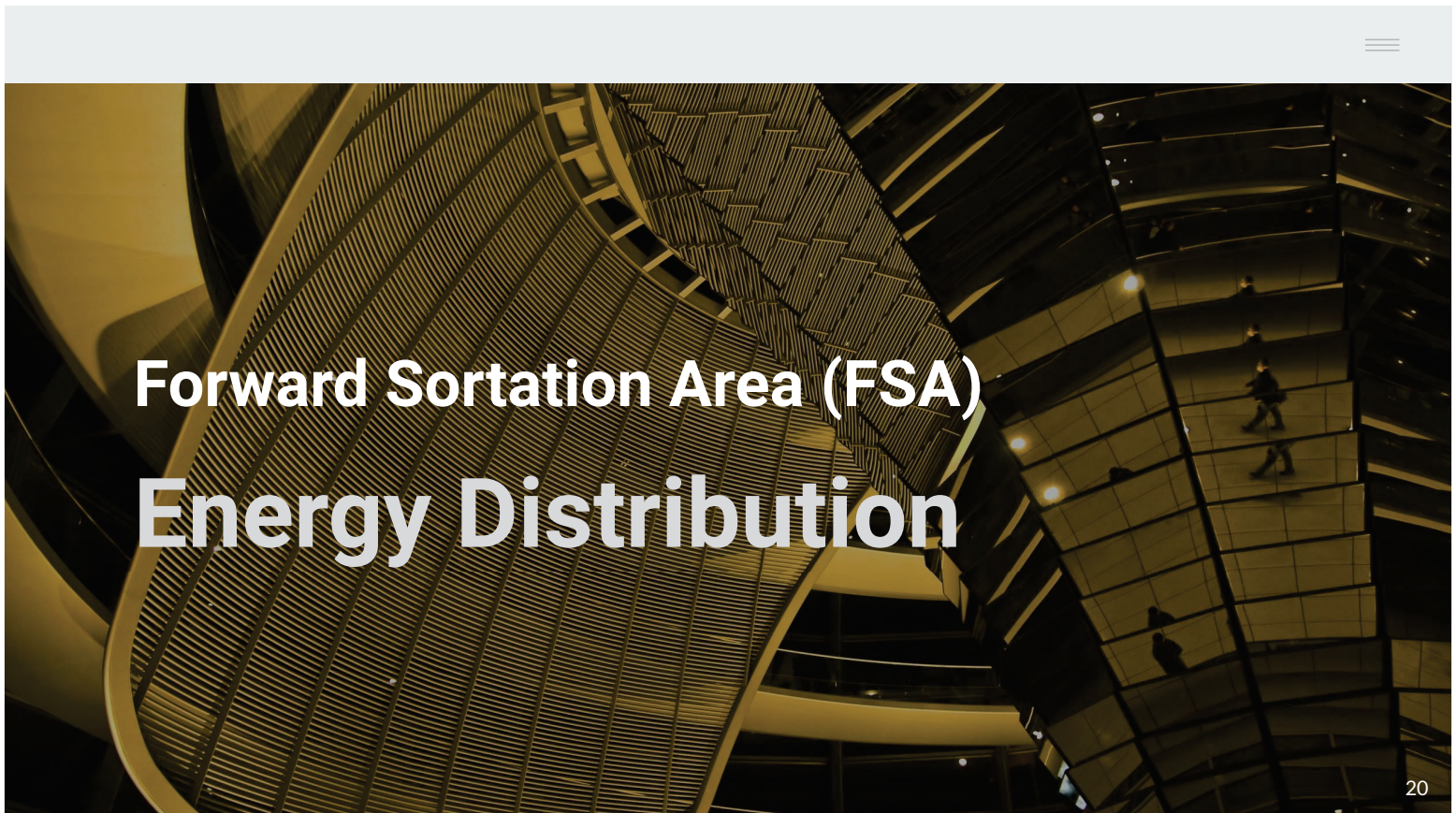
Audit Breakdown

Dwelling Breakdown

Total dwellings =  
 121,844

## Breakdown of Archetypes - Comparison

Archetype	Year of Construction	Floor Area (m2)	Primary Heat Source	Primary Fuel Type	Hot Water System	Hot Water System Fuel Type	Energy Intensity (GJ/m2)	Carbon Intensity (GJ/m2)	Dwelling Count
A	1952	184.8	Induced Draft Fan Furnace	Natural Gas	Conventional Tank (Pilot)	Natural Gas	0.92	0.04	2018
B	1957	169.1	Condensing Furnace	Natural Gas	Conventional Tank (Pilot)	Natural Gas	0.75	0.03	66810
C	1940	199.1	Furnace With Flame Retention Head	Oil	Conventional Tank	Electricity	1.03	0.05	594
D	1919	327.3	Boiler With Continuous Pilot	Natural Gas	Conventional Tank	Natural Gas	1.04	0.05	982
E	1949	238.2	Baseboard/Hydronic /Plenum(Duct) Htrs.	Electricity	Conventional Tank	Electricity	0.54	0.01	477
F	1931	190.0	Condensing Furnace	Natural Gas	Conventional Tank	Natural Gas	1.08	0.05	19862
G	1986	288.4	Condensing Furnace	Natural Gas	Conventional Tank (Pilot)	Natural Gas	0.51	0.02	31101



# Archetype A

01



These homes have an average floor area, and are natural gas heated with low/mid efficiency furnaces and use natural gas hot water systems

Average annual electricity costs: \$1,219  
 Average annual natural gas costs: \$1,488

**Average annual energy costs: \$2,723**

### Client Implications:

These homes consume 169.76 GJ (0.92 GJ/m<sup>2</sup>) of energy on average and produce 7.02 tCO<sub>2</sub>e (0.038 tCO<sub>2</sub>e/m<sup>2</sup>) on average. They represent 1.7% of the housing stock and 6.1% of the dwellings that have been audited in the Hamilton.

Variable	A	ESNH Standard*
Year of Construction	1952	-
Floor Area (m2)	184.8	-
Primary Heat Source	Induced Draft Fan Furnace	-
Primary Fuel Type	Natural Gas	-
Primary Heat Source Efficiency (%) AFUE	80.5	96
Heat Pump	No	No
Hot Water System	Conventional Tank (Pilot)	Tankless condensing
Hot Water System Fuel Type	Natural Gas	Natural Gas
Hot Water System Energy Factor	0.58	0.95
Ventilation Type	No	HRV 75% SRE
Ceiling Insulation (RSI)	3.8	10.56
Wall Insulation (RSI)	1.7	3.7
Foundation Insulation (RSI)	1.07	3.52
Number of Windows	14	-
Number of Doors	3	-
Electricity Consumption (GJ)	33.8 GJ (9,378.9 kWh)	-
Natural Gas Consumption (GJ)	135.4 GJ (3,630.6 m <sup>3</sup> )	-
Energy Score (GJ)	169.76	-
Carbon Score (tCO <sub>2</sub> e)	7.02	-
Air Tightness (ACH50P)	8.43	2.5+

\* Minimum standard based on Energy Star  
 † Maximum standard value based on Energy Star

# Archetype B

02



These homes have an average floor area, and are natural gas heated with high efficiency furnaces and use natural gas hot water systems

Average annual electricity costs: \$1,202  
 Average annual natural gas costs: \$1,023

**Average annual energy costs: \$2,234**

### Client Implications:

These homes consume 126.75 GJ (0.75 GJ/m<sup>2</sup>) of energy on average and produce 4.89 tCO<sub>2</sub>e (0.029 tCO<sub>2</sub>e/m<sup>2</sup>) on average. They represent 54.8% of the housing stock and 46.2% of the dwellings that have been audited in the Hamilton.

Variable	B	ESNH Standard*
Year of Construction	1957	-
Floor Area (m2)	169.1	-
Primary Heat Source	Condensing Furnace	-
Primary Fuel Type	Natural Gas	-
Primary Heat Source Efficiency (%)	96.1	96
Heat Pump	No	No
Hot Water System	Conventional Tank (Pilot)	Tankless condensing
Hot Water System Fuel Type	Natural Gas	Natural Gas
Hot Water System Energy Factor	0.61	0.95
Ventilation Type	No	HRV 75% SRE
Ceiling Insulation (RSI)	4.18	10.56
Wall Insulation (RSI)	1.85	3.7
Foundation Insulation (RSI)	1.19	3.52
Number of Windows	14	-
Number of Doors	2	-
Electricity Consumption (GJ)	33.3 GJ (9,243.5 kWh)	-
Natural Gas Consumption (GJ)	93.0 GJ (2,494.4 m <sup>3</sup> )	-
Energy Score (GJ)	126.75	-
Carbon Score (tCO <sub>2</sub> e)	4.89	-
Air Tightness (ACH50P)	7.02	2.5+

\* Minimum standard based on Energy Star  
 † Maximum standard value based on Energy Star

# Archetype C

04



These homes have an average floor area, and are oil heated with low/mid efficiency furnaces and use electricity hot water systems

Average annual electricity costs: \$1,751  
 Average annual natural gas costs: \$53  
 Average annual oil costs: \$5,090

**Average annual energy costs: \$6,900**

**Client Implications:**

These homes consume 204.26 GJ (1.03 GJ/m<sup>2</sup>) of energy on average and produce 10.78 tCO<sub>2</sub>e (0.054 tCO<sub>2</sub>e/m<sup>2</sup>) on average. They represent 0.5% of the housing stock and 1.0% of the dwellings that have been audited in the Hamilton.

Variable	D	ESNH Standard*
Year of Construction	1940	-
Floor Area (m <sup>2</sup> )	199.1	-
Primary Heat Source	Furnace With Flame Retention Head	-
Primary Fuel Type	Oil	-
Primary Heat Source Efficiency (%)	77.0	96
Heat Pump	No	No
Hot Water System	Conventional Tank	Tankless condensing
Hot Water System Fuel Type	Electricity	Natural Gas
Hot Water System Energy Factor	0.73	0.95
Ventilation Type	No	HRV 75% SRE
Ceiling Insulation (RSI)	3.39	10.56
Wall Insulation (RSI)	1.55	3.7
Foundation Insulation (RSI)	0.67	3.52
Number of Windows	16	-
Number of Doors	3	-
Electricity Consumption (GJ)	48.5 GJ (13,470.2 kWh)	-
Natural Gas Consumption (GJ)	4.9 GJ (130.3 m <sup>3</sup> )	-
Energy Score (GJ)	204.26	-
Carbon Score (tCO <sub>2</sub> e)	10.78	-
Air Tightness (ACH50P)	8.73	2.5+

\* Minimum standard based on Energy Star  
 † Maximum standard value based on Energy Star

# Archetype D

05



These homes have a relatively large floor area, and are natural gas heated with low/mid efficiency furnaces and use natural gas hot water systems

Average annual electricity costs: \$1,315  
 Average annual natural gas costs: \$3,317

**Average annual energy costs: \$4,652**

**Client Implications:**

These homes consume 338.96 GJ (1.04 GJ/m<sup>2</sup>) of energy on average and produce 15.34 tCO<sub>2</sub>e (0.047 tCO<sub>2</sub>e/m<sup>2</sup>) on average. They represent 0.8% of the housing stock and 3.1% of the dwellings that have been audited in the Hamilton.

Variable	E	ESNH Standard*
Year of Construction	1919	-
Floor Area (m <sup>2</sup> )	327.3	-
Primary Heat Source	Boiler With Continuous Pilot	-
Primary Fuel Type	Natural Gas	-
Primary Heat Source Efficiency (%)	85.3	96
Heat Pump	No	No
Hot Water System	Conventional Tank	Tankless condensing
Hot Water System Fuel Type	Natural Gas	Natural Gas
Hot Water System Energy Factor	0.59	0.95
Ventilation Type	No	HRV 75% SRE
Ceiling Insulation (RSI)	2.38	10.56
Wall Insulation (RSI)	1.1	3.7
Foundation Insulation (RSI)	0.7	3.52
Number of Windows	26	-
Number of Doors	3	-
Electricity Consumption (GJ)	36.4 GJ (10,117.5 kWh)	-
Natural Gas Consumption (GJ)	301.8 GJ (8,091.6 m <sup>3</sup> )	-
Energy Score (GJ)	338.96	-
Carbon Score (tCO <sub>2</sub> e)	15.34	-
Air Tightness (ACH50P)	9.36	2.5+

\* Minimum standard based on Energy Star  
 † Maximum standard value based on Energy Star



# Archetype E

06



These homes have an above average floor area, and are electricity heated baseboard/hydronic/plenum(duct) htrs. and use electricity hot water systems

Average annual electricity costs: \$4,158

Average annual natural gas costs: \$129

**Average annual energy costs: \$4,331**

### Client Implications:

These homes consume 128.23 GJ (0.54 GJ/m<sup>2</sup>) of energy on average and produce 1.47 tCO<sub>2</sub>e (0.006 tCO<sub>2</sub>e/m<sup>2</sup>) on average. They represent 0.4% of the housing stock and 0.2% of the dwellings that have been audited in the Hamilton.

Variable	F	ESNH Standard*
Year of Construction	1949	-
Floor Area (m <sup>2</sup> )	238.2	-
Primary Heat Source	Baseboard/Hydronic/Plenum(Duct) Htrs.	-
Primary Fuel Type	Electricity	-
Primary Heat Source Efficiency (%)	100.0	96
Heat Pump	No	No
Hot Water System	Conventional Tank	Tankless condensing
Hot Water System Fuel Type	Electricity	Natural Gas
Hot Water System Energy Factor	0.72	0.95
Ventilation Type	No	HRV 75% SRE
Ceiling Insulation (RSI)	3.95	10.56
Wall Insulation (RSI)	1.78	3.7
Foundation Insulation (RSI)	1.16	3.52
Number of Windows	17	-
Number of Doors	3	-
Electricity Consumption (GJ)	115.2 GJ (31,986.5 kWh)	-
Natural Gas Consumption (GJ)	11.7 GJ (314.4 m <sup>3</sup> )	-
Energy Score (GJ)	128.23	-
Carbon Score (tCO <sub>2</sub> e)	1.47	-
Air Tightness (ACH50P)	7.37	2.5+

\* Minimum standard based on Energy Star  
 † Maximum standard value based on Energy Star

# Archetype F

07



These homes have an average floor area, and are natural gas heated with high efficiency furnaces and use natural gas hot water systems

Average annual electricity costs: \$1,236

Average annual natural gas costs: \$1,869

**Average annual energy costs: \$3,112**

### Client Implications:

These homes consume 204.58 GJ (1.08 GJ/m<sup>2</sup>) of energy on average and produce 8.73 tCO<sub>2</sub>e (0.046 tCO<sub>2</sub>e/m<sup>2</sup>) on average. They represent 16.3% of the housing stock and 21.3% of the dwellings that have been audited in the Hamilton.

Variable	G	ESNH Standard*
Year of Construction	1931	-
Floor Area (m <sup>2</sup> )	190.0	-
Primary Heat Source	Condensing Furnace	-
Primary Fuel Type	Natural Gas	-
Primary Heat Source Efficiency (%)	90.8	96
Heat Pump	No	No
Hot Water System	Conventional Tank	Tankless condensing
Hot Water System Fuel Type	Natural Gas	Natural Gas
Hot Water System Energy Factor	0.6	0.95
Ventilation Type	No	HRV 75% SRE
Ceiling Insulation (RSI)	2.91	10.56
Wall Insulation (RSI)	1.27	3.7
Foundation Insulation (RSI)	0.74	3.52
Number of Windows	17	-
Number of Doors	3	-
Electricity Consumption (GJ)	34.2 GJ (9,510.3 kWh)	-
Natural Gas Consumption (GJ)	170.1 GJ (4,559.4 m <sup>3</sup> )	-
Energy Score (GJ)	204.58	-
Carbon Score (tCO <sub>2</sub> e)	8.73	-
Air Tightness (ACH50P)	10.64	2.5+

\* Minimum standard based on Energy Star  
 † Maximum standard value based on Energy Star

# Archetype G

08



These homes have a relatively large floor area, and are natural gas heated with high efficiency furnaces and use natural gas hot water systems

Average annual electricity costs: \$1,202  
 Average annual natural gas costs: \$1,225

**Average annual energy costs: \$2,457**

**Client Implications:**

These homes consume 145.86 GJ (0.51 GJ/m<sup>2</sup>) of energy on average and produce 5.85 tCO<sub>2</sub>e (0.02 tCO<sub>2</sub>e/m<sup>2</sup>) on average. They represent 25.5% of the housing stock and 22.1% of the dwellings that have been audited in the Hamilton.

Variable	H	ESNH Standard*
Year of Construction	1986	-
Floor Area (m <sup>2</sup> )	288.4	-
Primary Heat Source	Condensing Furnace	-
Primary Fuel Type	Natural Gas	-
Primary Heat Source Efficiency (%)	95.7	96
Heat Pump	No	No
Hot Water System	Conventional Tank (Pilot)	Tankless condensing
Hot Water System Fuel Type	Natural Gas	Natural Gas
Hot Water System Energy Factor	0.59	0.95
Ventilation Type	No	HRV 75% SRE
Ceiling Insulation (RSI)	5.06	10.56
Wall Insulation (RSI)	2.3	3.7
Foundation Insulation (RSI)	1.49	3.52
Number of Windows	18	-
Number of Doors	3	-
Electricity Consumption (GJ)	33.3 GJ (9,247.4 kWh)	-
Natural Gas Consumption (GJ)	111.5 GJ (2,988.4 m <sup>3</sup> )	-
Energy Score (GJ)	145.86	-
Carbon Score (tCO <sub>2</sub> e)	5.85	-
Air Tightness (ACH50P)	3.94	2.5+

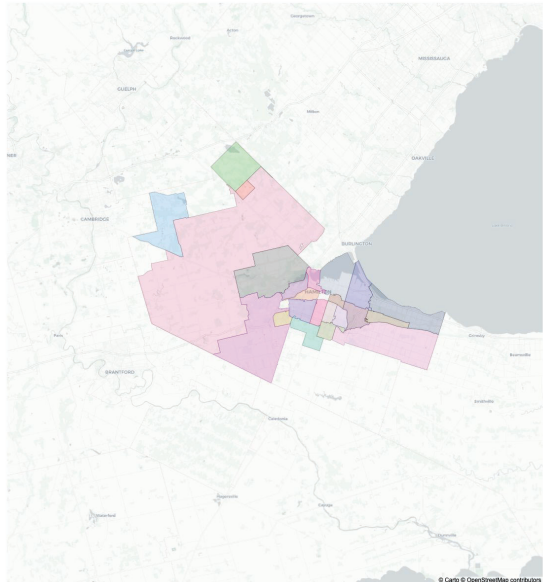
\* Minimum standard based on Energy Star  
 † Maximum standard value based on Energy Star

# Archetype Carbon Ranking

- Archetype D, C, and F are the most carbon intensive homes
- Capturing carbon savings by focusing on these homes is an important first step in decarbonization of the full city stock

Archetype	t CO <sub>2</sub> -e	GJ / year	Energy Cost (\$/year)	Dwelling Count
C	10.78	204.26	\$6,900	594
D	15.34	338.96	\$4,652	982
E	1.47	128.23	\$4,331	477
F	8.73	204.58	\$3,112	19,862
A	7.02	169.76	\$2,723	2,018
G	5.85	145.86	\$2,457	31,101
B	4.89	126.75	\$2,234	66,810

# Hamilton FSA Level



Forward sortation areas (FSA) are the first 3 letters of a post code and provide a means to segment the city using a uniform methodology.

<b>Number of FSAs</b>	31
<b>Number of households</b>	121,844
<b>Total Energy Use (GJ)</b>	13,321,233
<b>Total Electricity Use (GJ)</b>	4,002,660
<b>Total Natural Gas Use (GJ)</b>	13,164,723
<b>Total tCO2e</b>	533,759

# Archetype Distribution

Total number of archetypal single detached dwellings in the Hamilton by FSA.

**121,844 Single Family Dwellings**

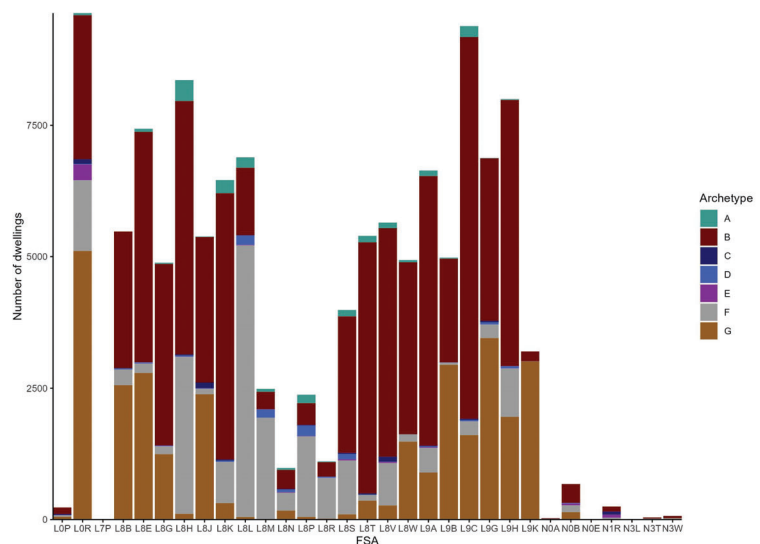
**7 Archetypes**

Archetype B, G, and F are the most numerous across all FSA's

**B - 66,810 dwellings**

**G - 31,101 dwellings**

**F - 19,862 dwellings**



# Total Energy Distribution

Total GJ by archetype distributed across FSA's:

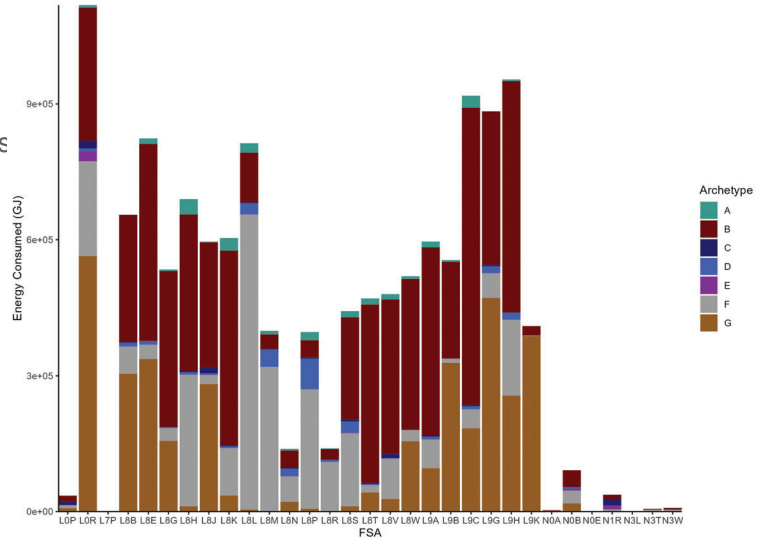
**13,321,233 GJ consumed**

Archetype B, G, and F consume the highest amount of total energy:

**B - 6,161,494 GJ**

**G - 3,717,553 GJ**

**F - 2,812,210 GJ**



# Total Tonnes CO2e Distribution

Total tCO2e by archetype distributed across FSA's:

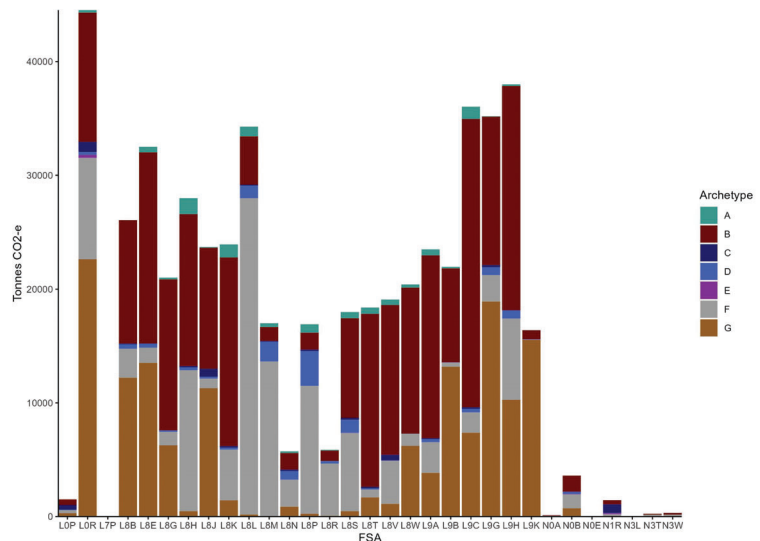
**533,759 tCO2e**

Archetype B, G, and F contribute the highest amount of CO2e:

**B - 237,762 CO2-e**

**G - 149,001 CO2-e**

**F - 120,032 CO2-e**





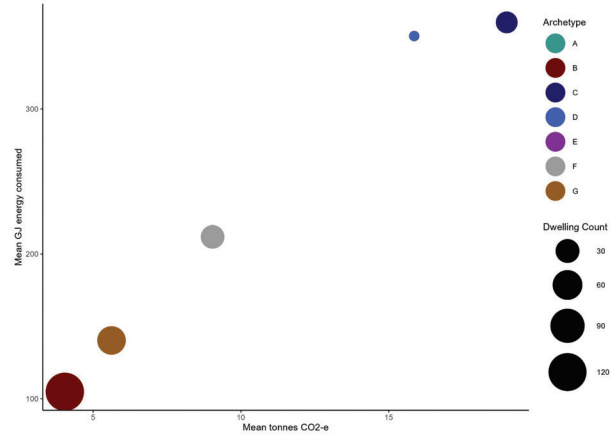
## LOP Breakdown

<b>Total number of single family dwellings:</b>	<b>229</b>
Annual median income (\$):	113,920
Average occupancy per dwelling:	2.9
Owner to renter ratio (%):	92
Total Energy Use (GJ):	35,087
Total tCO2e:	1,507



# LOP - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
B	123	12,892	497
C	22	7,916	418
D	2	701	32
F	29	6,143	262
G	53	7,435	298
Total	229	35,087	1,507

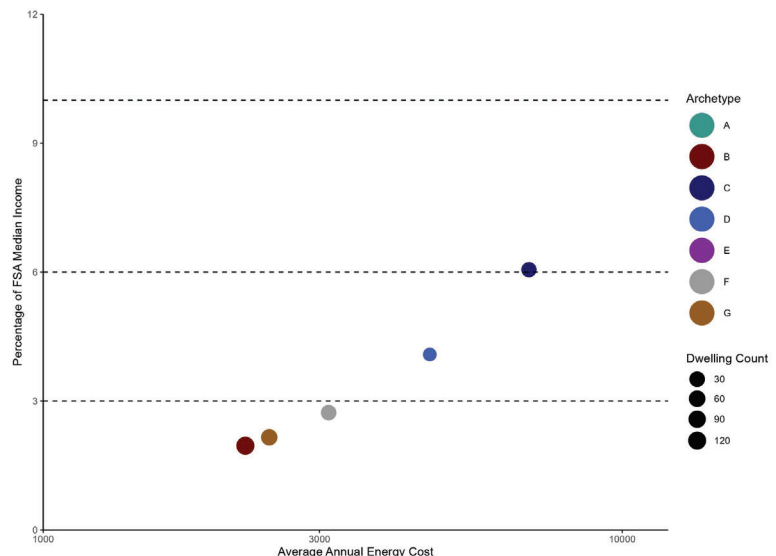


# LOP - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 6.1% dwellings in LOP



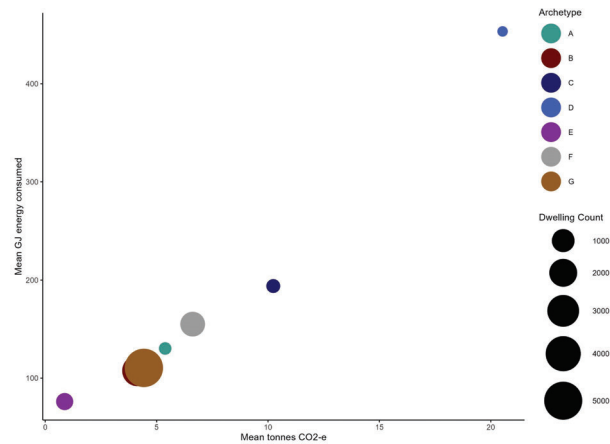
# LOR Breakdown

<b>Total number of single family dwellings:</b>	<b>229</b>
Annual median income (\$):	113,920
Average occupancy per dwelling:	2.9
Owner to renter ratio (%):	92
Total Energy Use (GJ):	35,087
Total tCO2e:	1,507



# LOR - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
B	123	12,892	497
C	22	7,916	418
D	2	701	32
F	29	6,143	262
G	53	7,435	298
<b>Total</b>	<b>229</b>	<b>35,087</b>	<b>1,507</b>

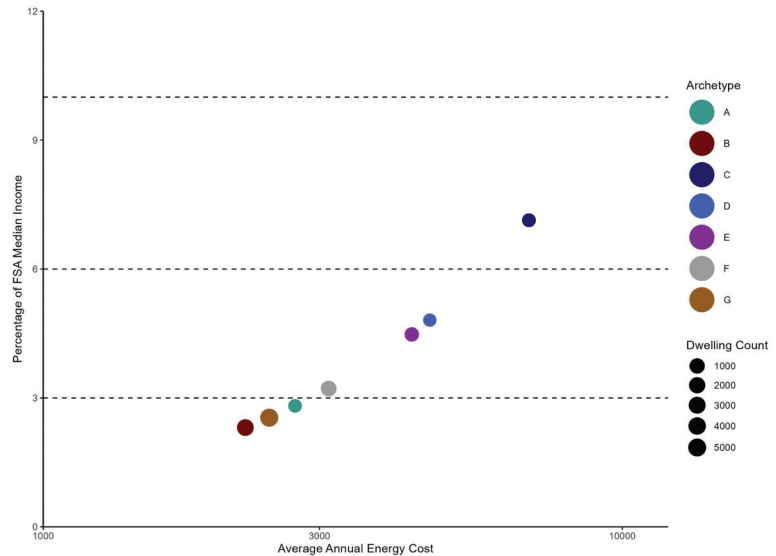


# LOR - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 7.1% dwellings in LOR



# L8E Breakdown

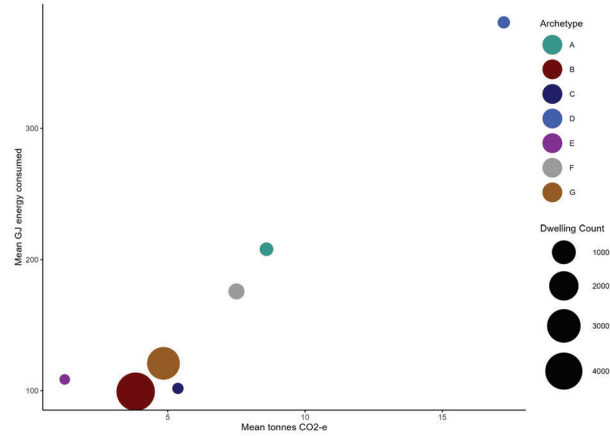
Total number of single family dwellings:	5,479
Annual median income (\$):	75,771
Average occupancy per dwelling:	2.7
Owner to renter ratio (%):	nan
Total Energy Use (GJ):	655,023
Total tCO2e:	26,052





# L8E - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	1	163	7
B	2,594	280,615	10,828
C	6	1,450	77
D	22	8,267	374
F	298	59,970	2,560
G	2,558	304,558	12,207
Total	5,479	655,023	26,052

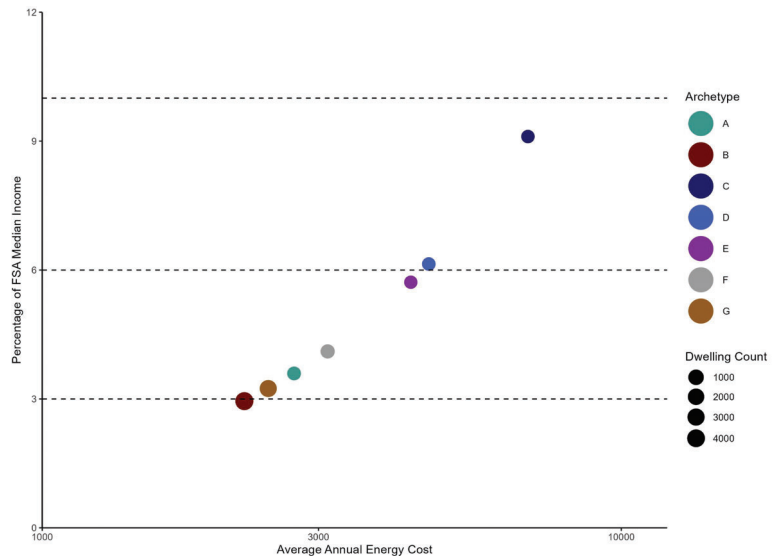


# L8E - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 9.1% dwellings in L8E



# L8G Breakdown

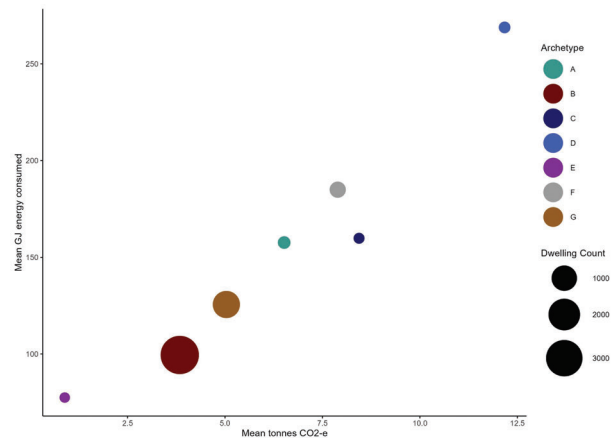
<b>Total number of single family dwellings:</b>	<b>7,434</b>
Annual median income (\$):	75,771
Average occupancy per dwelling:	2.7
Owner to renter ratio (%):	72
Total Energy Use (GJ):	823,762
Total tCO2e:	32,505



Lightspark

# L8G - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	58	12,063	499
B	4,380	434,719	16,775
C	5	509	27
D	20	7,617	345
E	2	217	2
F	179	31,463	1,343
G	2,790	337,175	13,514
<b>Total</b>	<b>7,434</b>	<b>823,762</b>	<b>32,505</b>



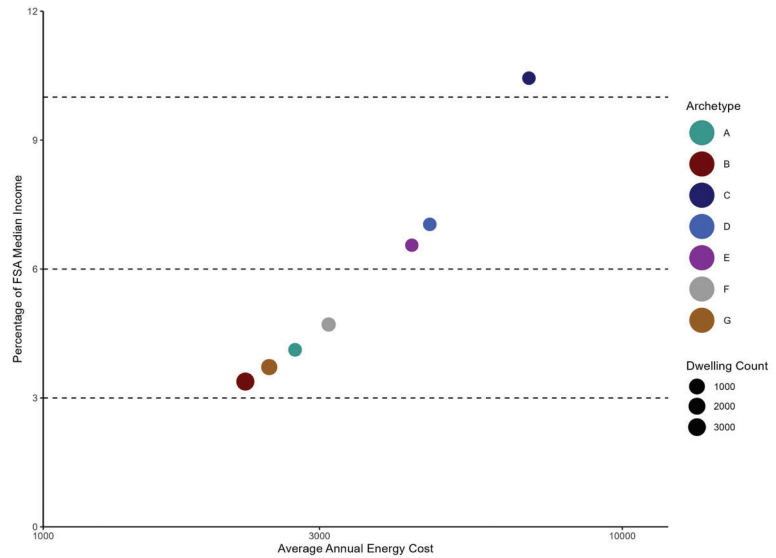
Lightspark 44

# L8G - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

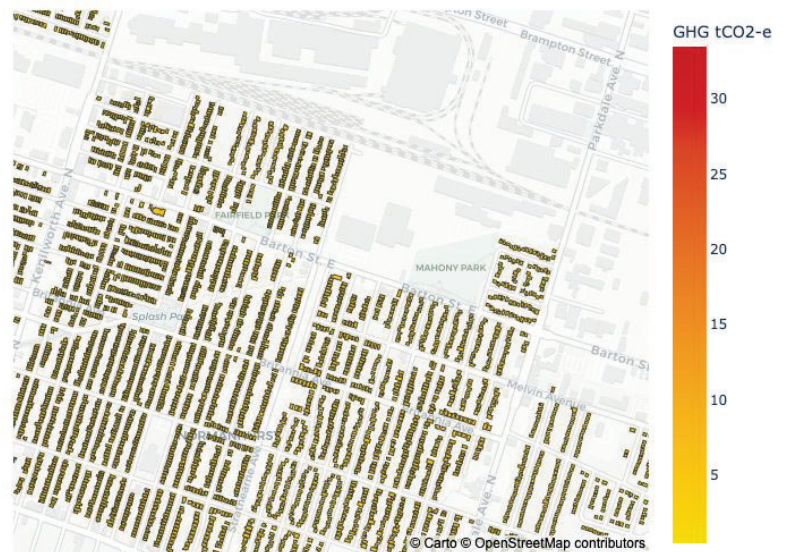
The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 10.4% dwellings in L8G



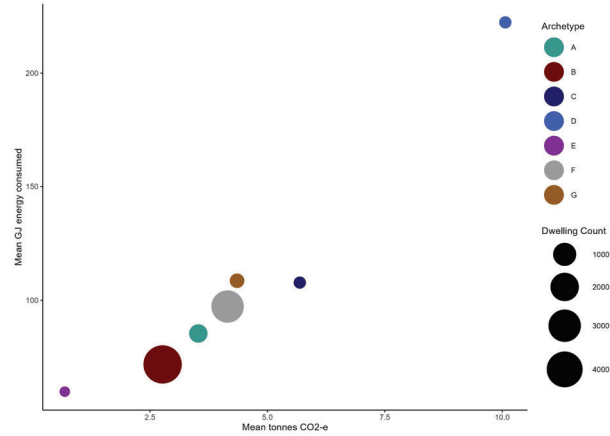
# L8H Breakdown

Total number of single family dwellings:	4,884
Annual median income (\$):	66,083
Average occupancy per dwelling:	2.3
Owner to renter ratio (%):	68
Total Energy Use (GJ):	534,227
Total tCO2e:	20,991



# L8H - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	24	3,784	156
B	3,451	343,282	13,247
C	3	480	25
D	9	2,420	110
E	2	155	2
F	150	27,731	1,184
G	1,245	156,376	6,268
Total	4,884	534,227	20,991

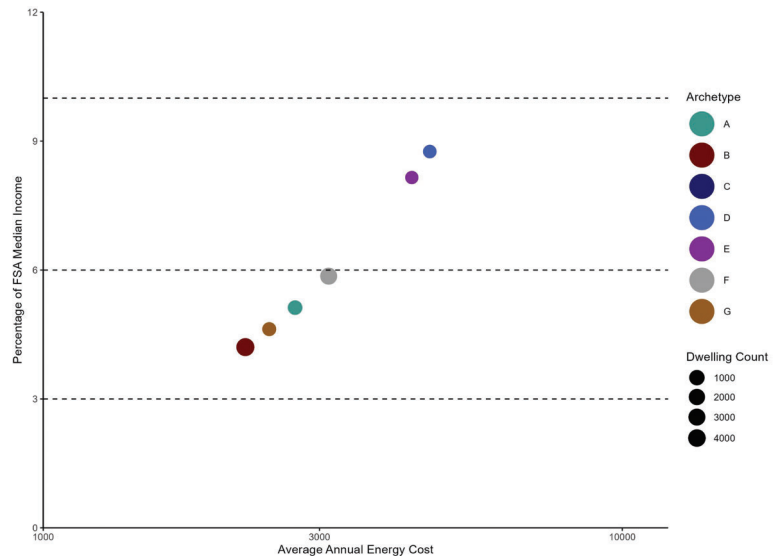


# L8H - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 13.0% dwellings in L8H



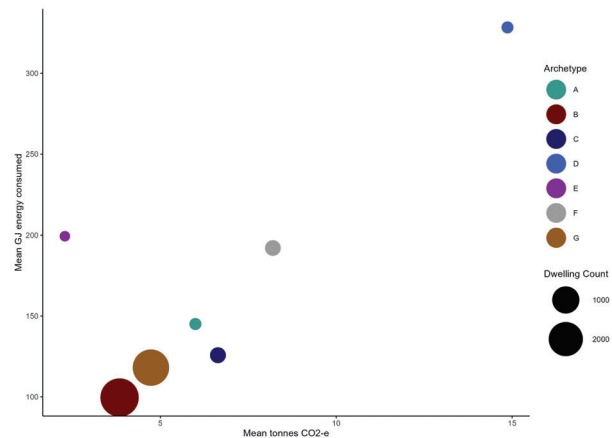
# L8J Breakdown

<b>Total number of single family dwellings:</b>	<b>8,361</b>
Annual median income (\$):	53,126
Average occupancy per dwelling:	2.3
Owner to renter ratio (%):	68
Total Energy Use (GJ):	689,749
Total tCO2e:	27,980



# L8J - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	399	34,059	1,408
B	4,816	345,422	13,329
C	22	2,371	125
D	24	5,336	242
E	4	239	3
F	2,988	290,592	12,403
G	108	11,730	470
<b>Total</b>	<b>8,361</b>	<b>689,749</b>	<b>27,980</b>

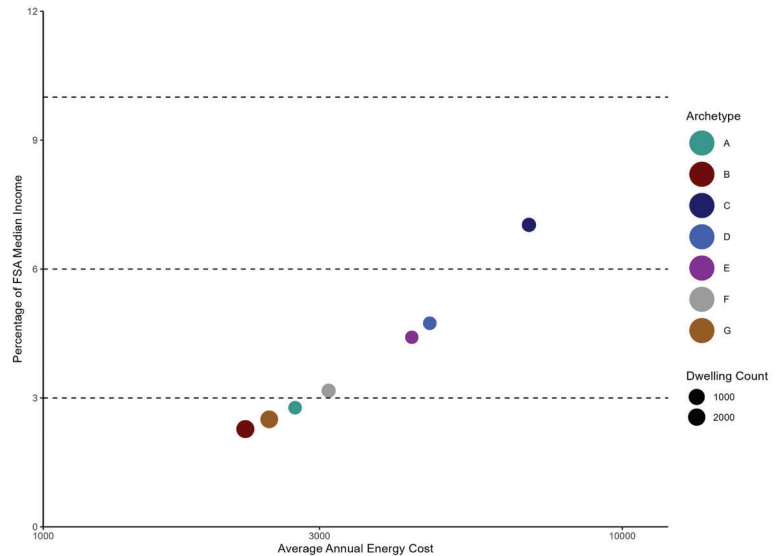


# L8J - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 7.0% dwellings in L8J



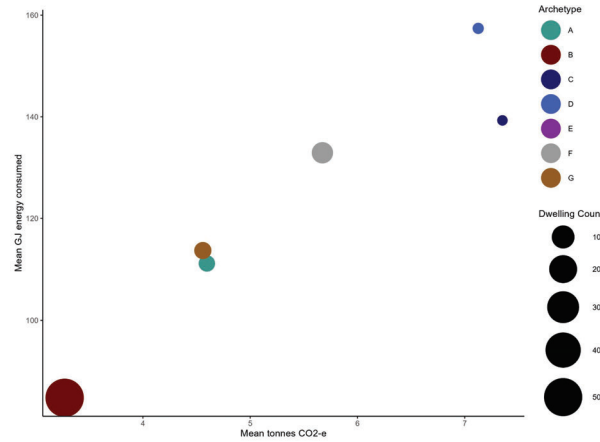
# L8K Breakdown

Total number of single family dwellings:	5,384
Annual median income (\$):	98,176
Average occupancy per dwelling:	3.1
Owner to renter ratio (%):	87
Total Energy Use (GJ):	595,782
Total tCO2e:	23,693



# L8K - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	12	1,741	72
B	2,764	275,167	10,618
C	106	13,332	704
D	11	3,613	164
E	3	598	7
F	102	19,595	836
G	2,386	281,736	11,292
Total	5,384	595,782	23,693

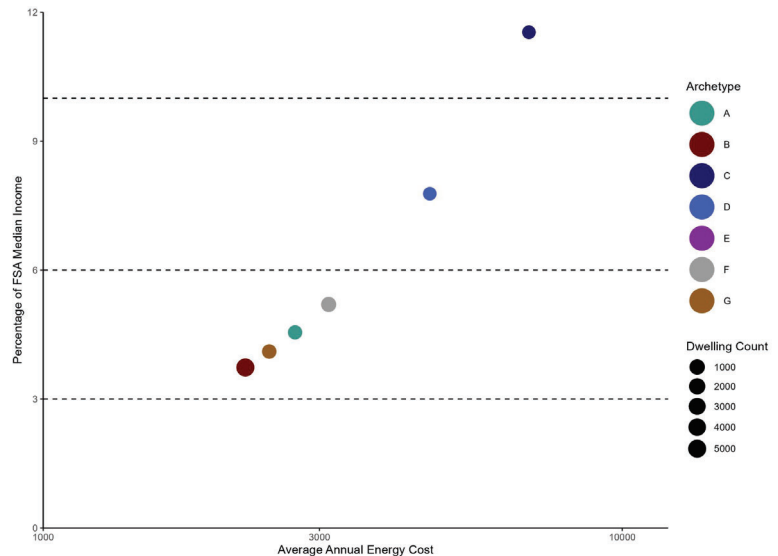


# L8K - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 11.5% dwellings in L8K



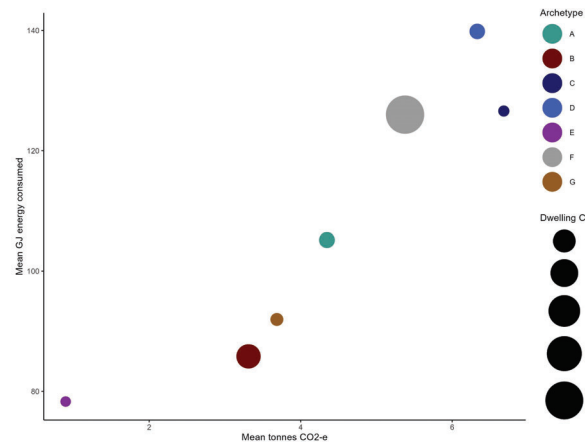
# L8L Breakdown

<b>Total number of single family dwellings:</b>	<b>6,458</b>
Annual median income (\$):	59,820
Average occupancy per dwelling:	2.3
Owner to renter ratio (%):	64
Total Energy Use (GJ):	603,746
Total tCO2e:	23,920



# L8L - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	251	27,909	1,154
B	5,064	429,180	16,561
C	20	2,786	147
D	24	3,778	171
F	787	104,607	4,465
G	312	35,486	1,422
<b>Total</b>	<b>6,458</b>	<b>603,746</b>	<b>23,920</b>



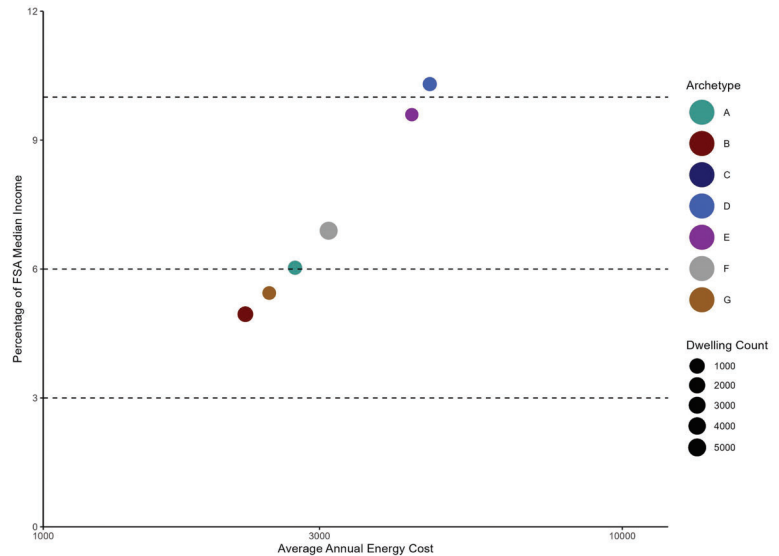


# L8L - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 15.3% dwellings in L8L



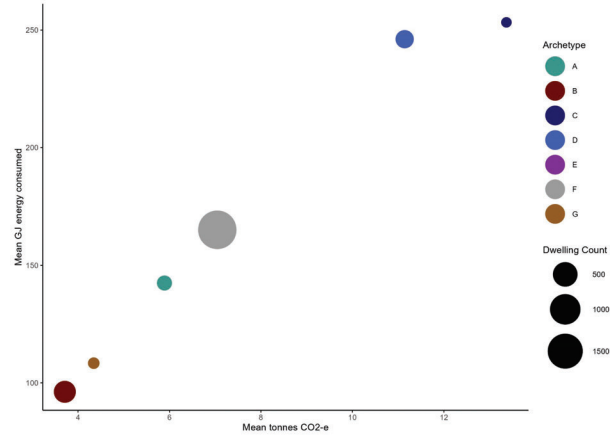
# L8M Breakdown

Total number of single family dwellings:	6,891
Annual median income (\$):	45,151
Average occupancy per dwelling:	2.4
Owner to renter ratio (%):	53
Total Energy Use (GJ):	813,222
Total tCO2e:	34,281



# L8M - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	200	21,033	869
B	1,281	109,945	4,243
C	10	1,266	67
D	178	24,894	1,127
E	7	548	6
F	5,169	651,305	27,799
G	46	4,231	170
Total	6,891	813,222	34,281

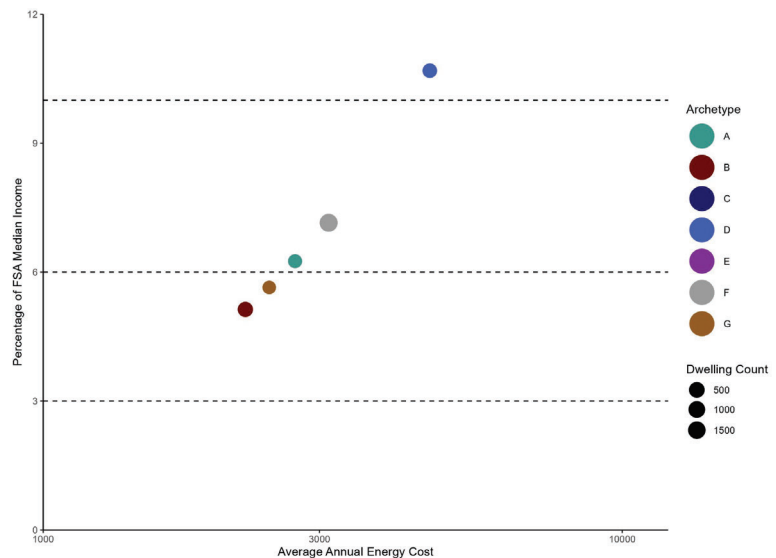


# L8M - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 15.9% dwellings in L8M



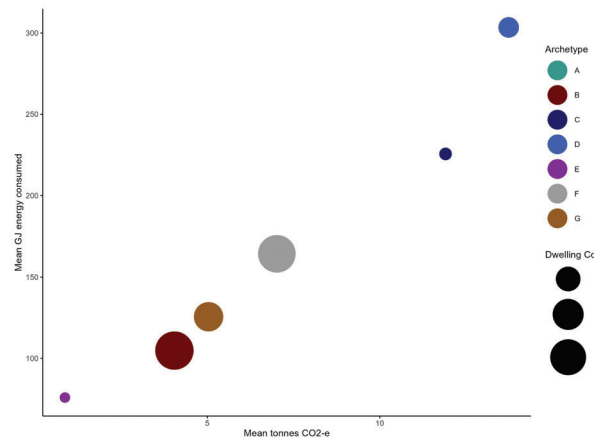
# L8N Breakdown

<b>Total number of single family dwellings:</b>	<b>2,489</b>
Annual median income (\$):	43,533
Average occupancy per dwelling:	2.1
Owner to renter ratio (%):	42
Total Energy Use (GJ):	399,306
Total tCO2e:	17,009



# L8N - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	57	8,122	336
B	332	31,935	1,232
C	4	1,013	53
D	156	38,397	1,738
F	1,933	319,080	13,619
G	7	759	30
<b>Total</b>	<b>2,489</b>	<b>399,306</b>	<b>17,009</b>

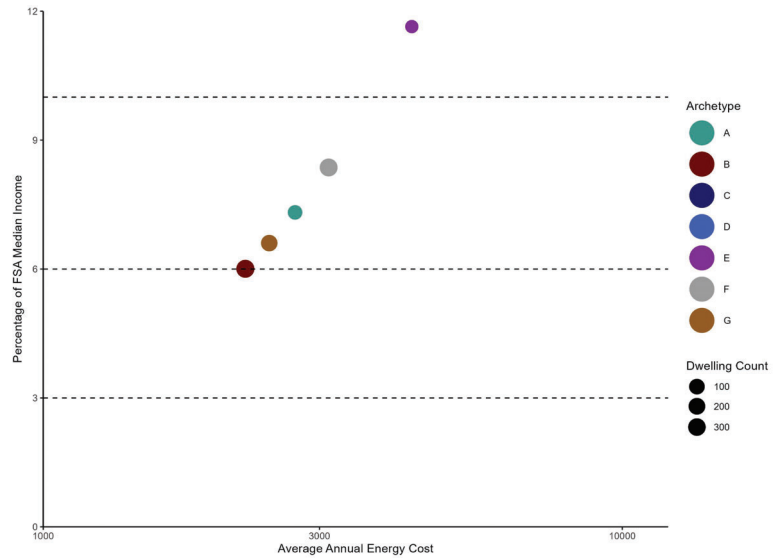


# L8N - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 18.5% dwellings in L8N



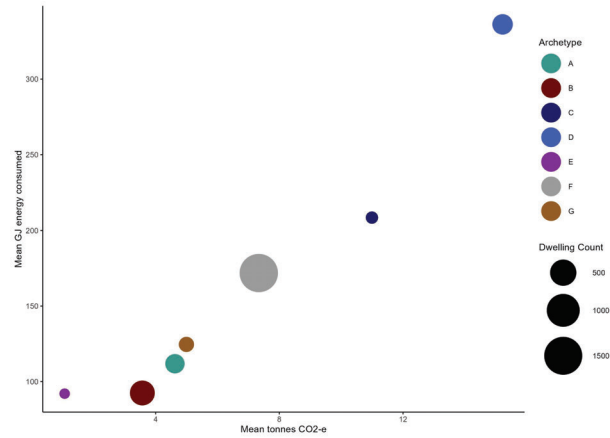
# L8P Breakdown

<b>Total number of single family dwellings:</b>	<b>981</b>
Annual median income (\$):	37,205
Average occupancy per dwelling:	1.9
Owner to renter ratio (%):	25
Total Energy Use (GJ):	138,475
Total tCO2e:	5,743



# L8P - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	37	3,750	155
B	359	37,631	1,452
C	11	2,482	131
D	55	16,690	756
E	9	683	8
F	340	55,883	2,385
G	170	21,357	856
Total	981	138,475	5,743

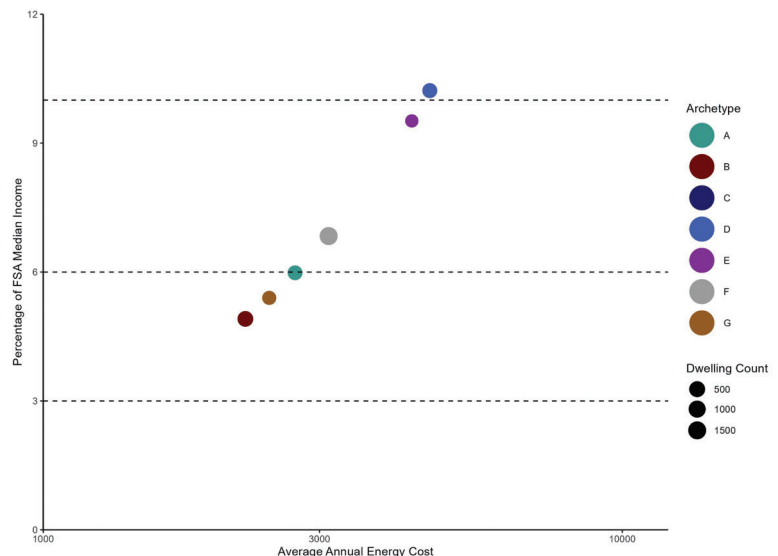


# L8P - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

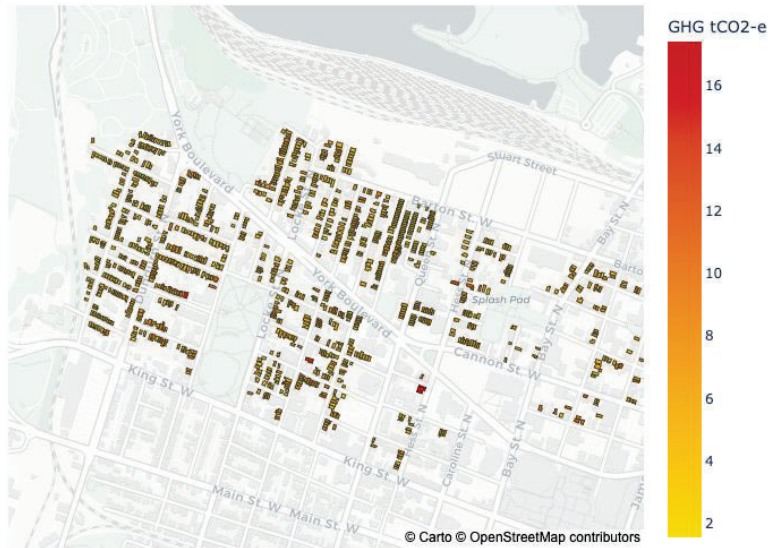
The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 15.2% dwellings in L8P



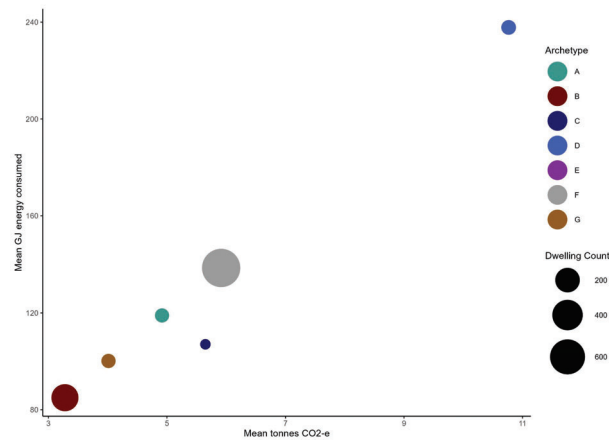
# L8R Breakdown

<b>Total number of single family dwellings:</b>	<b>2,377</b>
Annual median income (\$):	45,513
Average occupancy per dwelling:	1.7
Owner to renter ratio (%):	32
Total Energy Use (GJ):	396,675
Total tCO2e:	16,920



# L8R - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	162	18,117	749
B	414	38,285	1,477
C	12	2,500	132
D	201	67,585	3,060
E	5	460	5
F	1,534	263,622	11,252
G	49	6,106	245
<b>Total</b>	<b>2,377</b>	<b>396,675</b>	<b>16,920</b>

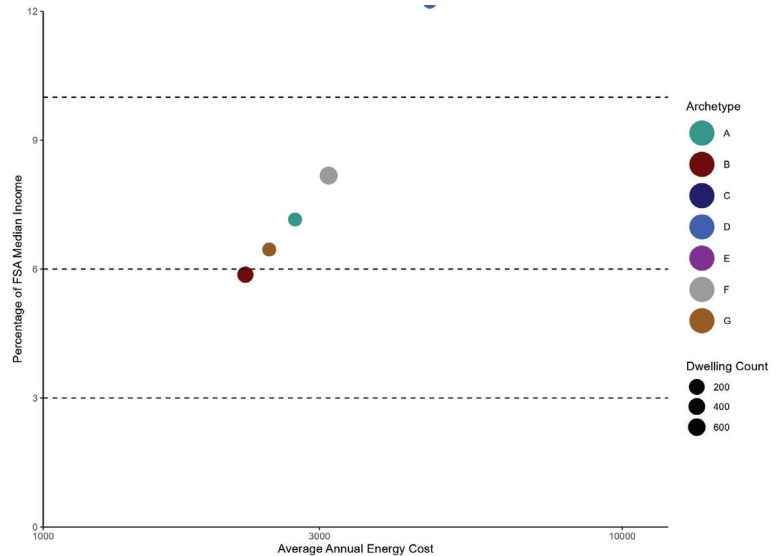


# L8R - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 18.1% dwellings in L8R



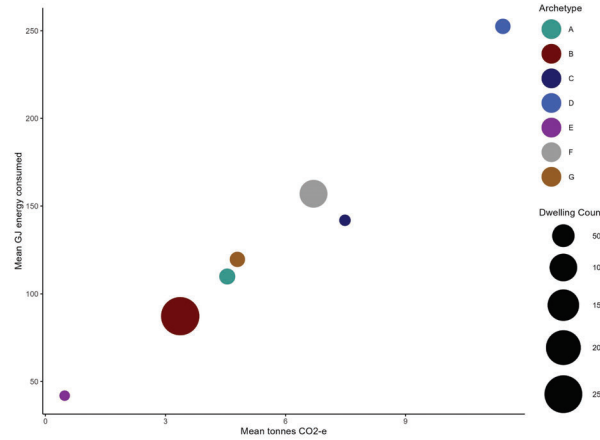
# L8S Breakdown

Total number of single family dwellings:	1,108
Annual median income (\$):	38,054
Average occupancy per dwelling:	2.0
Owner to renter ratio (%):	34
Total Energy Use (GJ):	139,753
Total tCO2e:	5,877



# L8S - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	16	1,903	79
B	276	23,457	905
C	2	214	11
D	20	4,756	215
F	778	107,819	4,602
G	16	1,603	64
Total	1,108	139,753	5,877

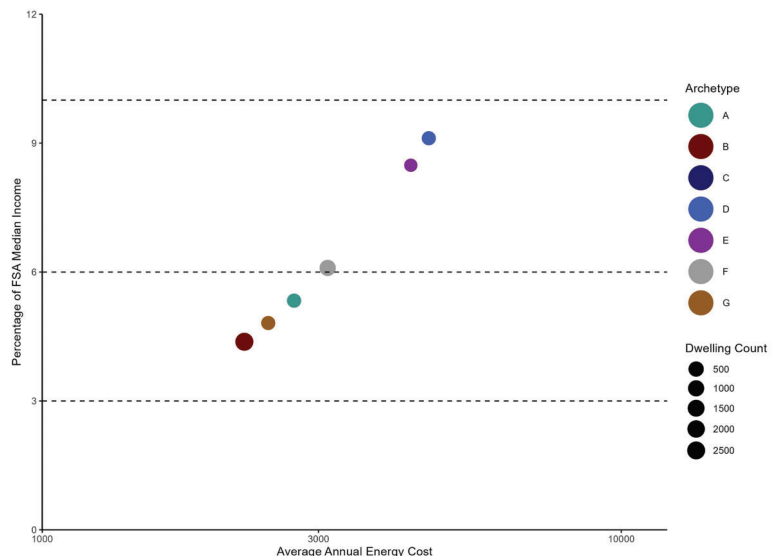


# L8S - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

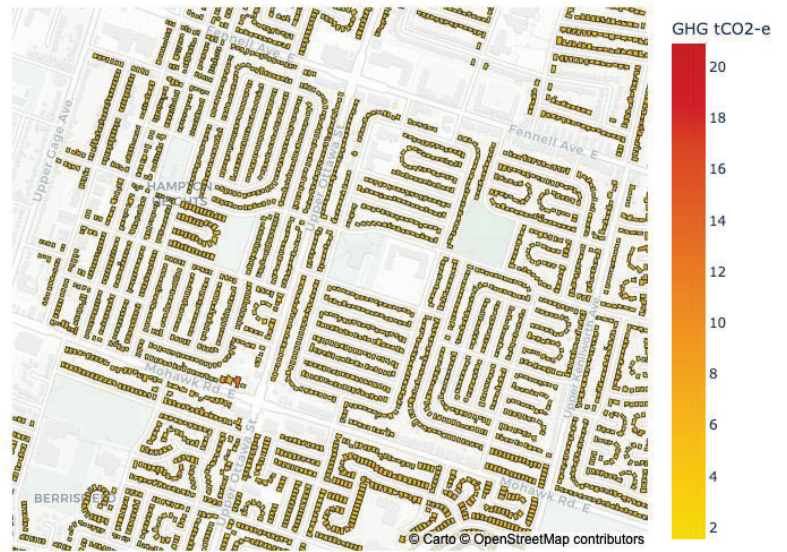
Archetype D has the burden above 6%, and accounts for 13.5% dwellings in L8S





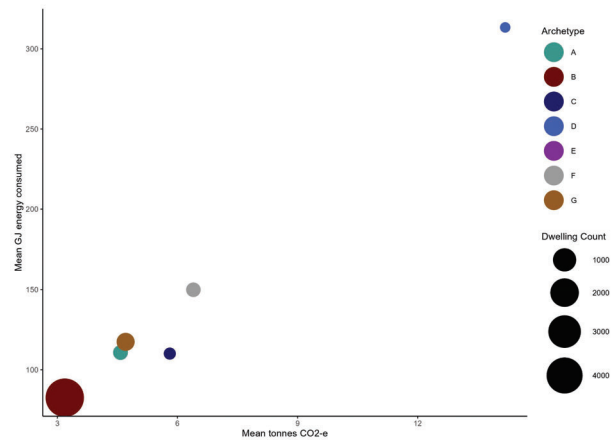
# L8T Breakdown

<b>Total number of single family dwellings:</b>	<b>3,990</b>
Annual median income (\$):	51,045
Average occupancy per dwelling:	2.2
Owner to renter ratio (%):	44
Total Energy Use (GJ):	442,805
Total tCO2e:	17,996



# L8T - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	123	13,521	559
B	2,598	226,739	8,750
C	23	3,262	172
D	101	25,505	1,155
E	20	838	10
F	1,027	161,209	6,881
G	98	11,730	470
<b>Total</b>	<b>3,990</b>	<b>442,805</b>	<b>17,996</b>

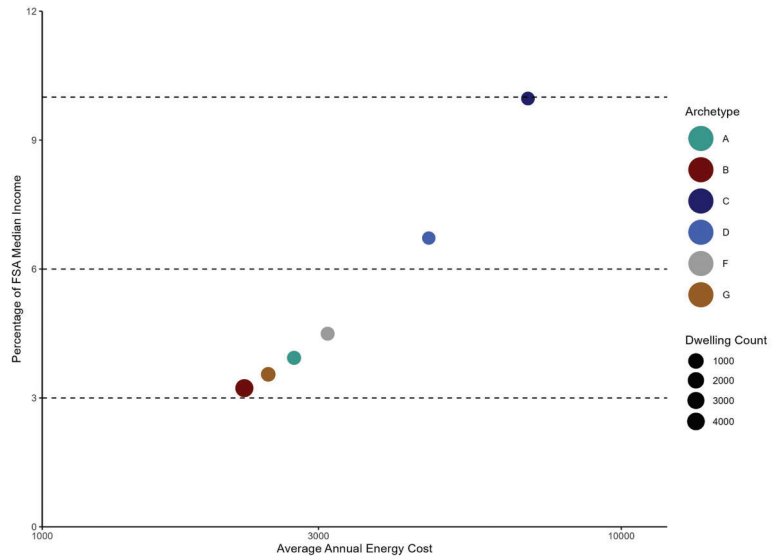


# L8T - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

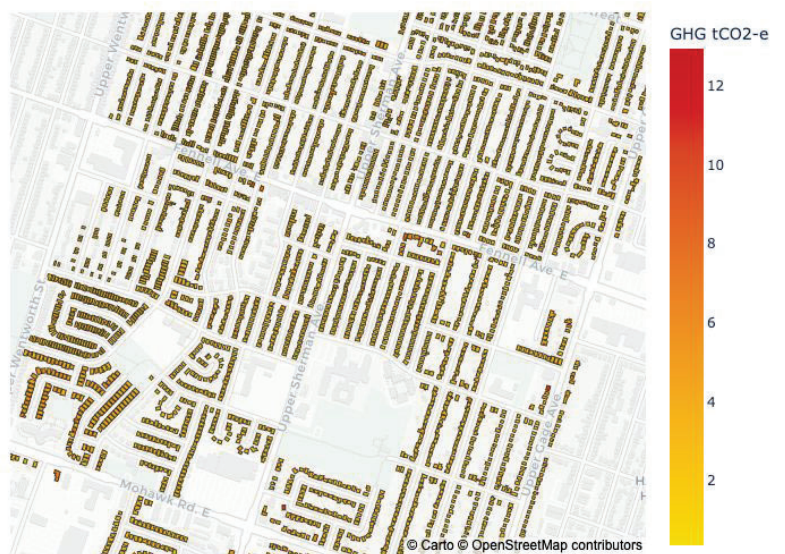
The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 10.0% dwellings in L8T



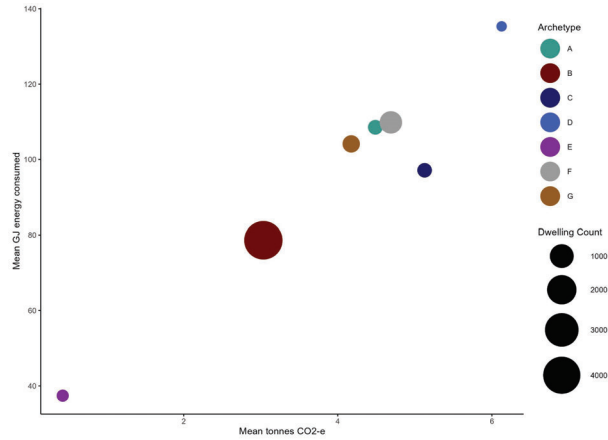
# L8V Breakdown

Total number of single family dwellings:	5,396
Annual median income (\$):	69,221
Average occupancy per dwelling:	2.5
Owner to renter ratio (%):	71
Total Energy Use (GJ):	470,940
Total tCO2e:	18,390



# L8V - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	123	13,618	563
B	4,776	394,236	15,213
C	23	2,531	134
D	7	2,194	99
F	109	16,337	697
G	358	42,024	1,684
Total	5,396	470,940	18,390

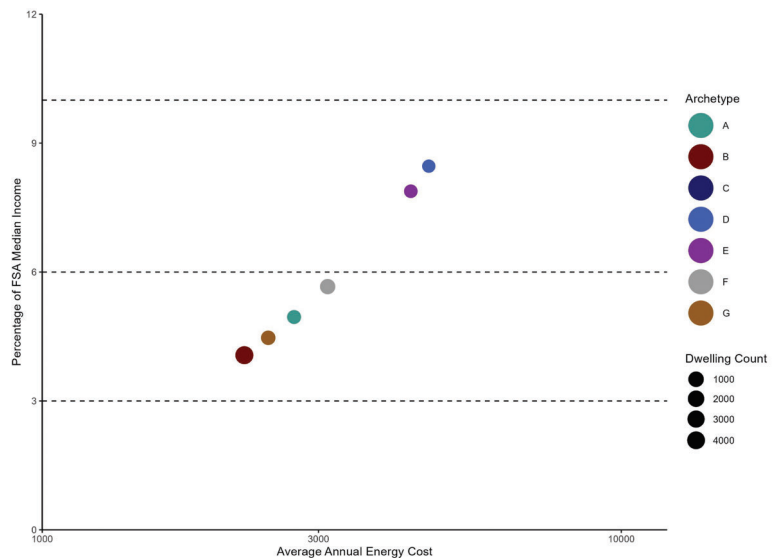


# L8V - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

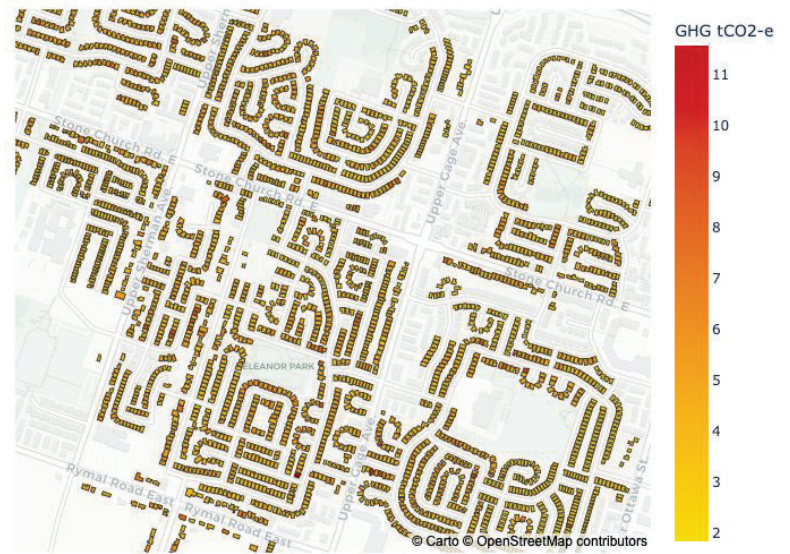
The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 12.6% dwellings in L8V



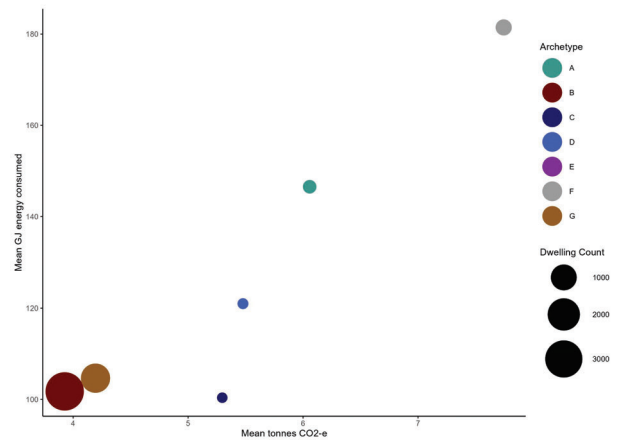
# L8W Breakdown

<b>Total number of single family dwellings:</b>	<b>5,648</b>
Annual median income (\$):	54,968
Average occupancy per dwelling:	2.2
Owner to renter ratio (%):	59
Total Energy Use (GJ):	480,516
Total tCO2e:	19,095



# L8W - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	108	11,723	485
B	4,344	341,509	13,178
C	96	9,325	492
D	4	541	25
E	20	748	9
F	809	88,865	3,793
G	267	27,805	1,114
<b>Total</b>	<b>5,648</b>	<b>480,516</b>	<b>19,095</b>

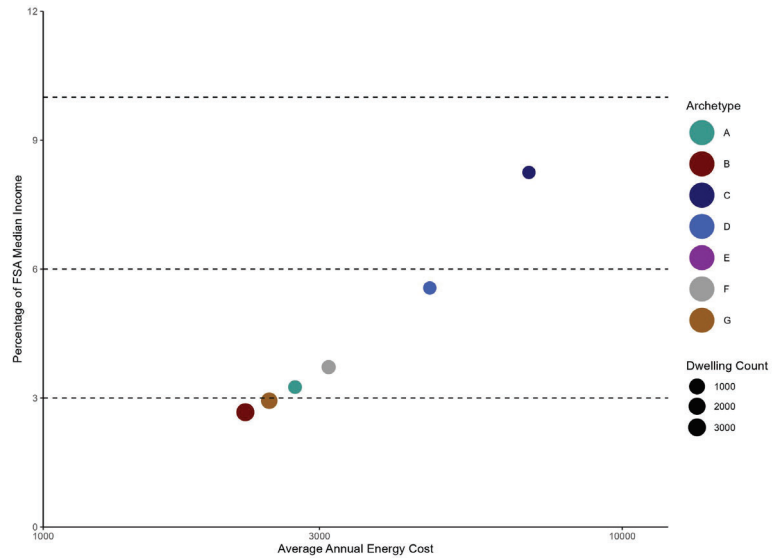


# L8W - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

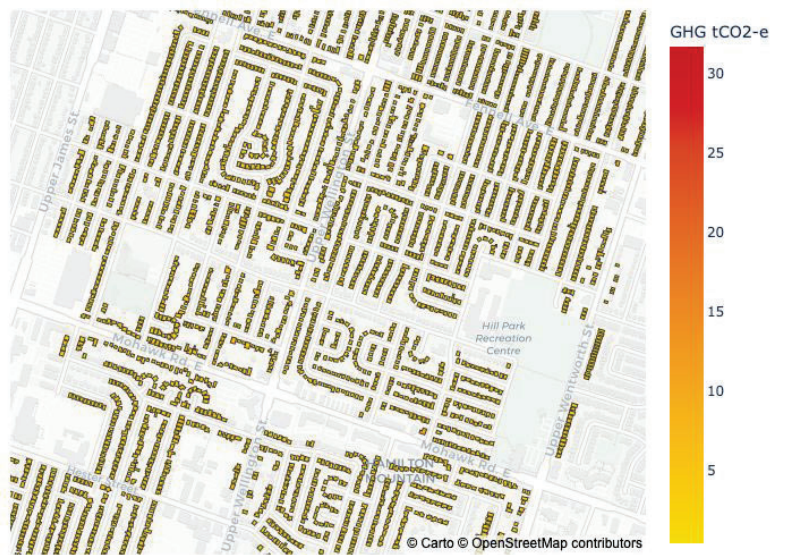
The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 8.3% dwellings in L8W



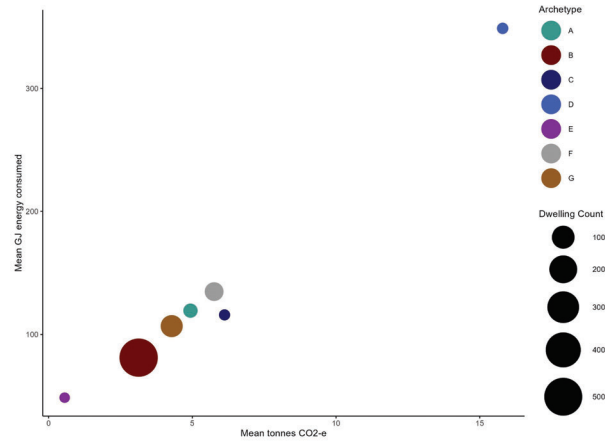
# L9A Breakdown

Total number of single family dwellings:	4,935
Annual median income (\$):	83,636
Average occupancy per dwelling:	3.1
Owner to renter ratio (%):	78
Total Energy Use (GJ):	519,291
Total tCO2e:	20,392



# L9A - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	42	6,155	254
B	3,270	332,736	12,840
C	1	100	5
D	2	242	11
F	137	24,861	1,061
G	1,483	155,197	6,220
Total	4,935	519,291	20,392

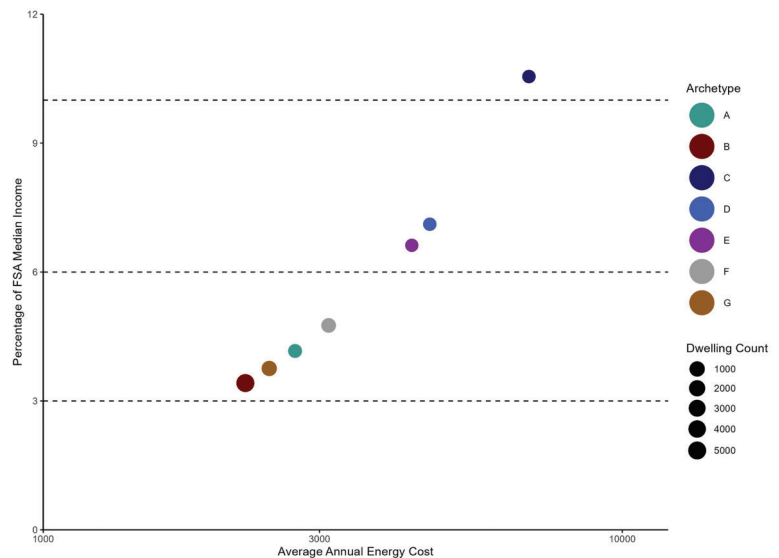


# L9A - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 10.5% dwellings in L9A



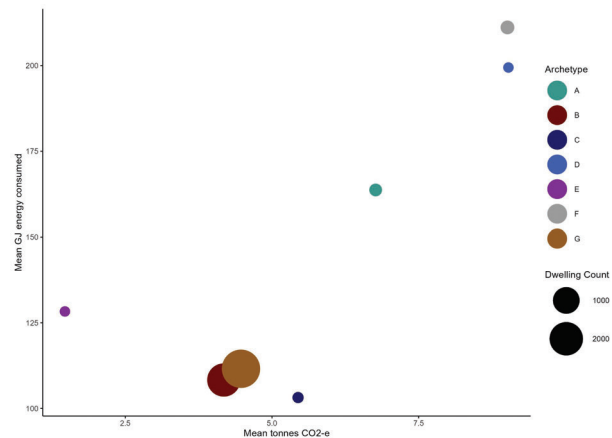
# L9B Breakdown

<b>Total number of single family dwellings:</b>	<b>6,640</b>
Annual median income (\$):	65,408
Average occupancy per dwelling:	2.5
Owner to renter ratio (%):	70
Total Energy Use (GJ):	595,901
Total tCO2e:	23,480



# L9B - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	107	12,777	528
B	5,126	416,026	16,054
C	14	1,624	86
D	17	5,933	269
E	11	534	6
F	469	63,279	2,701
G	896	95,729	3,837
<b>Total</b>	<b>6,640</b>	<b>595,901</b>	<b>23,480</b>

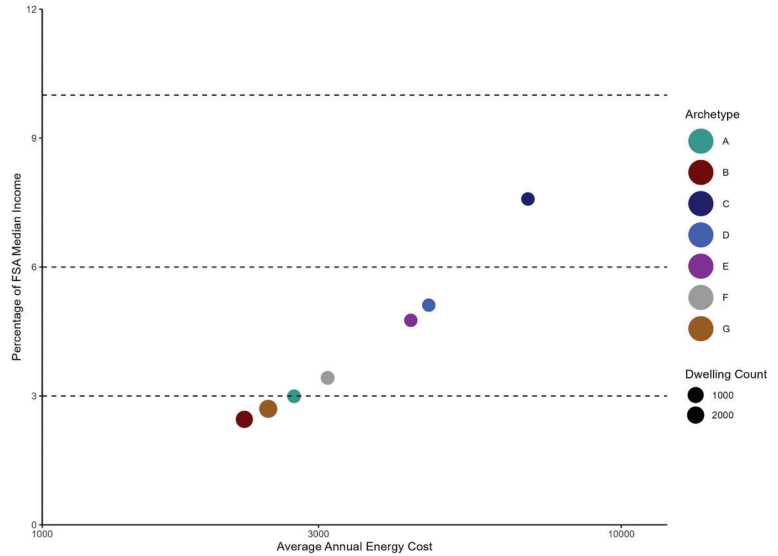


# L9B - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 7.6% dwellings in L9B



# L9C Breakdown

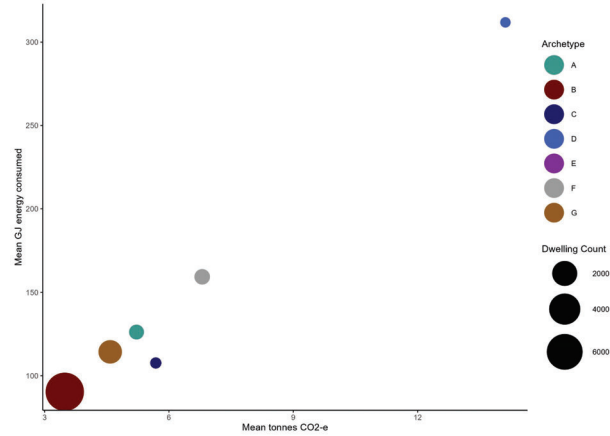
Total number of single family dwellings:	4,981
Annual median income (\$):	90,991
Average occupancy per dwelling:	3.0
Owner to renter ratio (%):	84
Total Energy Use (GJ):	554,628
Total tCO2e:	21,940





# L9C - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	21	3,438	142
B	1,968	213,118	8,224
C	3	310	16
D	1	199	9
E	1	128	1
F	42	8,869	379
G	2,945	328,567	13,169
Total	4,981	554,628	21,940

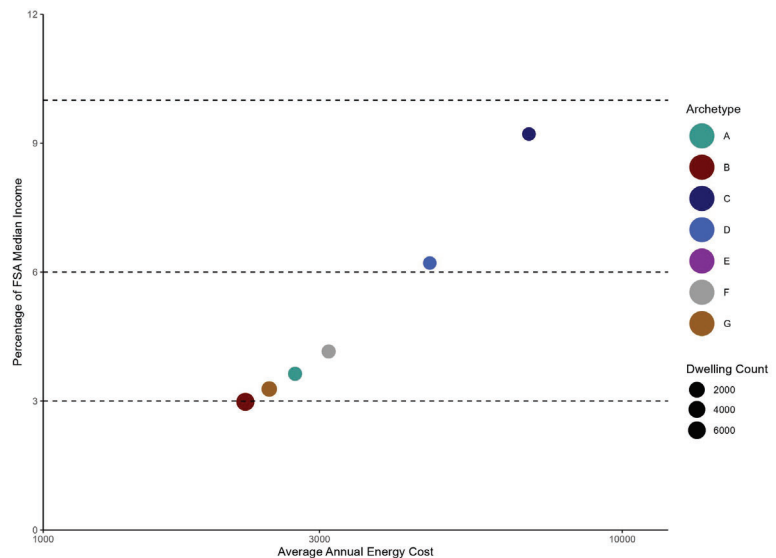


# L9C - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 9.2% dwellings in L9C



# L9G Breakdown

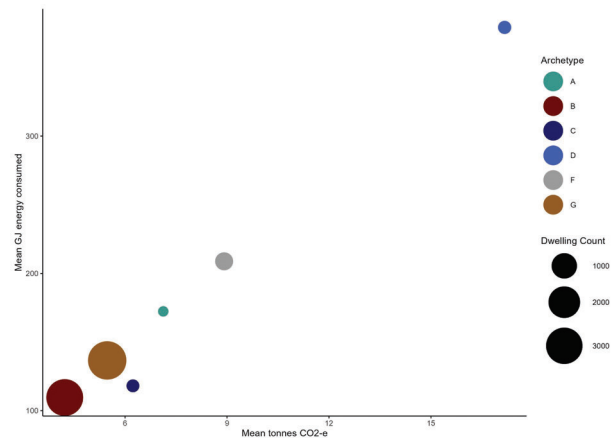
<b>Total number of single family dwellings:</b>	<b>9,390</b>
Annual median income (\$):	74,894
Average occupancy per dwelling:	2.7
Owner to renter ratio (%):	73
Total Energy Use (GJ):	918,168
Total tCO2e:	36,037



Lightspark

# L9G - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	209	26,381	1,090
B	7,261	656,191	25,321
C	27	2,907	153
D	22	6,861	311
F	264	42,073	1,796
G	1,607	183,755	7,365
<b>Total</b>	<b>9,390</b>	<b>918,168</b>	<b>36,037</b>



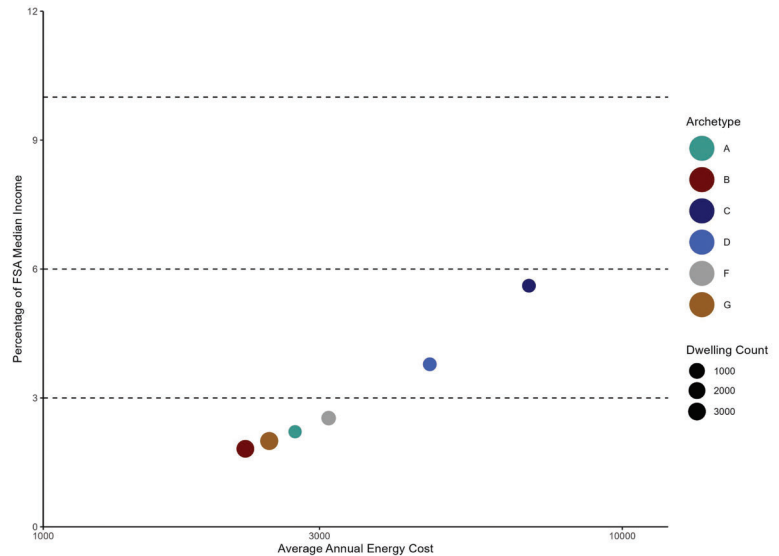
Lightspark 92

# L9G - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 5.6% dwellings in L9G



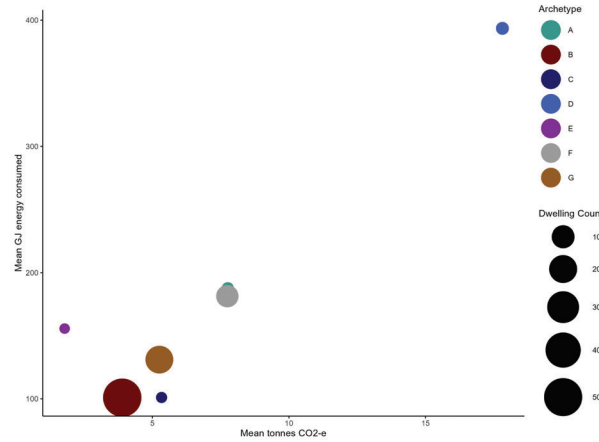
# L9H Breakdown

Total number of single family dwellings:	6,878
Annual median income (\$):	122,965
Average occupancy per dwelling:	2.8
Owner to renter ratio (%):	93
Total Energy Use (GJ):	883,958
Total tCO2e:	35,191



# L9H - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	6	1,034	43
B	3,088	338,230	13,052
C	31	3,661	193
D	40	15,168	687
F	258	53,890	2,300
G	3,455	471,974	18,917
Total	6,878	883,958	35,191

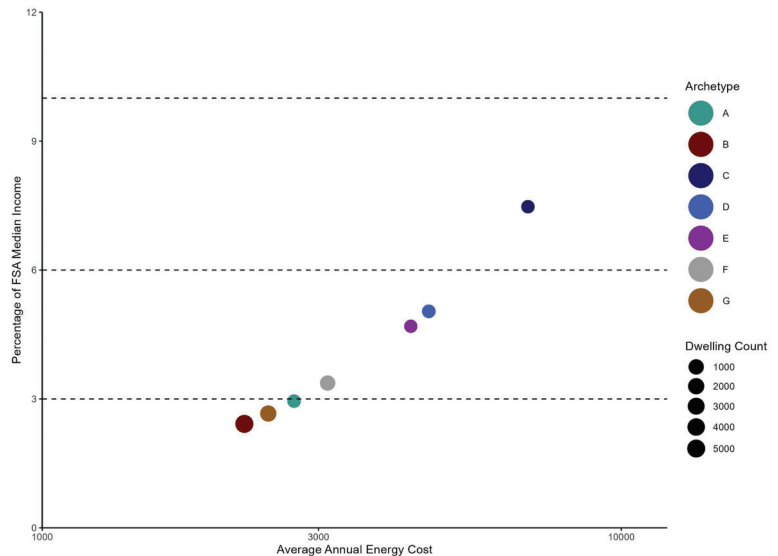


# L9H - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype D has the burden above 6%, and accounts for 7.5% dwellings in L9H



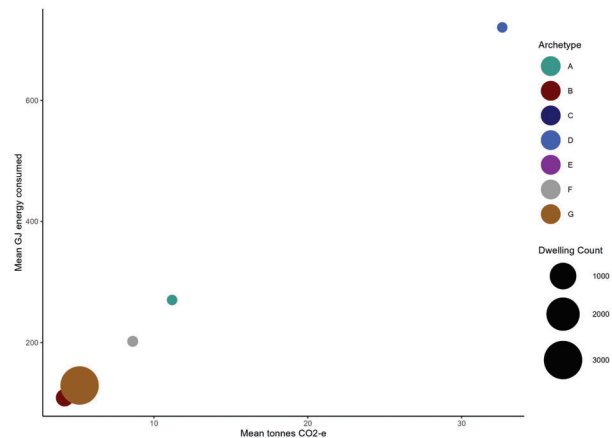
# L9K Breakdown

<b>Total number of single family dwellings:</b>	<b>8,000</b>
Annual median income (\$):	92,326
Average occupancy per dwelling:	2.4
Owner to renter ratio (%):	79
Total Energy Use (GJ):	954,012
Total tCO2e:	37,997



# L9K - Carbon and Energy Average per Archetype

Archetype	Count	Total Energy (GJ)	Total tCO2e
A	19	3,567	147
B	5,059	510,616	19,704
C	4	404	21
D	40	15,742	713
E	1	156	2
F	922	167,254	7,139
G	1,955	256,274	10,272
<b>Total</b>	<b>8,000</b>	<b>954,012</b>	<b>37,997</b>

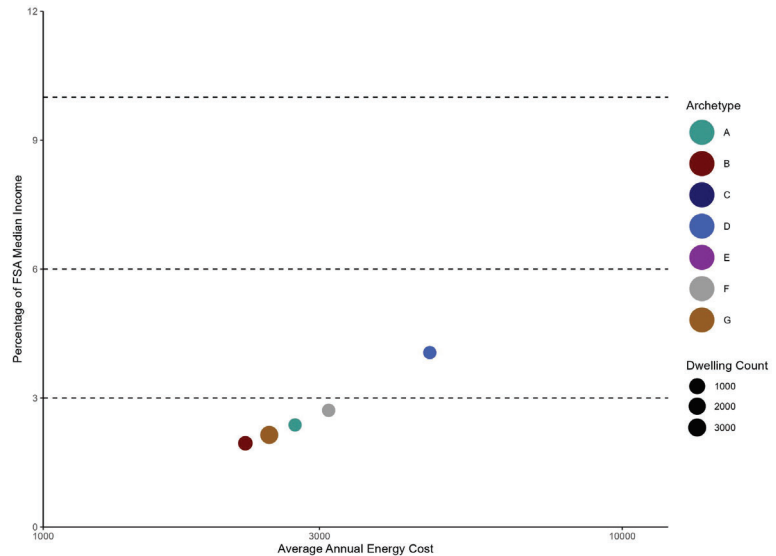


# L9K - Energy Burden

Energy Burden: % of income spent on heating/cooling and electricity

The median Canadian household spends under 3% of its income on energy (horizontal line). The benchmark for high energy burden is 6% of annual income.

Archetype E has the burden above 6%, and accounts for 4.1% dwellings in L9K



# References

- Emission factor
- <https://www.cer-rec.gc.ca/en/data-analysis/energy-commodities/electricity/report/2017-canadian-renewable-power/canadas-renewable-power-landscape-2017-energy-market-analysis-ghg-emission.html>
- Oil cost
- [https://www2.nrcan.gc.ca/eneene/sources/pripri/prices\\_bycity\\_e.cfm?productID=7&locationID=2&frequency=M&priceYear=2019&Redisplay=](https://www2.nrcan.gc.ca/eneene/sources/pripri/prices_bycity_e.cfm?productID=7&locationID=2&frequency=M&priceYear=2019&Redisplay=)
- Propane cost
- [https://www2.nrcan.gc.ca/eneene/sources/pripri/prices\\_bycity\\_e.cfm?productID=6&locationID=66&locationID=2&frequency=W&priceYear=2019&Redisplay=](https://www2.nrcan.gc.ca/eneene/sources/pripri/prices_bycity_e.cfm?productID=6&locationID=66&locationID=2&frequency=W&priceYear=2019&Redisplay=)
- Standard heat pump COPh
- [https://bcbuildinginspections.ca/uploads/cjp/resources/eco/heating\\_cooling\\_with\\_a\\_heat\\_pump\\_brochure.pdf](https://bcbuildinginspections.ca/uploads/cjp/resources/eco/heating_cooling_with_a_heat_pump_brochure.pdf)
- Recommended R-value and U-value
- <https://www2.gov.bc.ca/assets/gov/farming-natural-resources-and-industry/construction-industry/building-codes-and-standards/guides/climatezone4.pdf>
- Poverty lines for Canadian Cities
- <https://www.canada.ca/en/employment-social-development/programs/poverty-reduction/reports/strategy.html>
-

# Next Steps

  
**Thank you.**



# Contact

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(778) 223-6745

[james.riley@lightsparkinc.com](mailto:james.riley@lightsparkinc.com)



# Supporting Slides



## APPENDIX E: BUSINESS CASE

**Table 13 BHH Program Budget using only municipal funds**

Municipal Support Only						
REVENUE						
		Climate Reserve	Additional Funding			
Maximum Loan Amount	\$20,000	Pilot (2 Years)	Year 1	Year 2	Year 3	Year 4
# Homes upgraded		50	60	80	100	120
Payment Type	Frequency	Amount (\$)	Amount (\$)	Amount (\$)	Amount (\$)	
<b>Admin and Service Fees</b>						
\$200 admin fee	One-time	-	12,000	16,000	20,000	24,000
<b>Grants</b>						
		-	-	-	-	-
<b>External</b>						
Municipal in-kind, partnerships, sponsorships, utilities, youth hiring etc.	Annual					
<b>TOTAL PROGRAM REVENUE (\$)</b>		-	12,000	16,000	20,000	24,000
EXPENSES						
		Pilot (1-2 Years)	Year 2	Year 3	Year 4	
<b>Staff</b>	<b>Frequency</b>	<b>Amount (base salary) (\$)</b>				
Senior Project Manager	Annual	158381	158381	158381	158381	158381
Additional Staff		142229	142229	142229	142229	142229
Interdepartmental Support .5 FTE		IN KIND	IN KIND	IN KIND	IN KIND	IN KIND
Legal Support (.2)						
Clerk (.1)						
Finance (.1)						
Taxation (.1)						
<b>TOTAL PAYROLL</b>		<b>300,610</b>	<b>300,610</b>	<b>300,610</b>	<b>300,610</b>	<b>300,610</b>
<b>Other</b>	<b>Frequency</b>	<b>Amount</b>				
Marketing and Promo	Annual	60,000	30,000	30,000	30,000	30,000
Web Development (yr 1)	Startup	10,000	0	0	0	0
Website Maintenance	Annual	400	400	400	400	400
RETScreen templates	Startup	5,000	0	0	0	0
<b>TOTAL OTHER</b>		<b>75,400</b>	<b>30,400</b>	<b>30,400</b>	<b>30,400</b>	<b>30,400</b>
<b>LIC Loan Financing</b>						
Loan Loss Reserve (5%)	Annual	50,000	60,000	80,000	100,000	120,000
Loan Capital	Annual	1,000,000	1,200,000	1,600,000	2,000,000	2,400,000
<b>TOTAL OPERATING COST (\$)</b>		<b>376,010</b>	<b>331,010</b>	<b>331,010</b>	<b>331,010</b>	<b>331,010</b>
<b>TOTAL LIC LOAN + LRR</b>		<b>1,050,000</b>	<b>1,260,000</b>	<b>1,680,000</b>	<b>2,100,000</b>	<b>2,520,000</b>
<b>TOTAL (Payroll, Loan Amount, Other)(\$)</b>		<b>1,726,620</b>	<b>1,891,620</b>	<b>2,311,620</b>	<b>2,731,620</b>	<b>3,151,620</b>
<b>Total Loan Amount (recoverable)</b>	<b>8,200,000</b>					
<b>Total Budget</b>	<b>11,813,100</b>					





## APPENDIX G: CONTRACTOR REGISTRY FRAMEWORK

The CCCM advises the Office of Climate Change Initiatives (OCCI) develop a registry of contractors ahead of the Better Homes Hamilton (BHH) program launch. A template Contractor Registry intake form can be found below.

While the City of Hamilton cannot require participants to select any one contractor to complete a BHH workorder, this Contractor Registry may act as a starting point for participant to gather quotes from organizations that have shown the good business practices, and the training required to install eligible upgrades.

As a reminder, any contractor able to produce the following information may participate in the BHH program:

- Proof of a Hamilton business license
- Quote must show Registered HST#
- Proof of purchased liability insurance that coveralls all employees
- WSIB compliance

Participants of the BHH program are responsible for gathering quotes. It is advised that participants gather a minimum of 3 quotes per upgrade.

Before completing the Funding Request Form, the BHH Program Manager will review quotes with the participant, ensuring all criteria above are in place, as well as reviewing the scope of work to ensure all expenses are eligible under the BHH program guidelines.

The City of Hamilton does not assume any responsibility for quality of work, scheduling of work, or any other aspect of project management.

# Better Homes Hamilton Contractor Registry Intake Form

By filing this form, you are expressing your interest in joining the BHH Contractor Registry. This registry will act as a starting point for BHH participants when gathering quotes.

Participation in the BHH Contractor Registry is voluntary, and membership is subject to review by the Program Manager within the Office of Climate Change Initiatives at the City of Hamilton. As a Registered Contractor, you will have the opportunity to display your organizations logo and website on the BHH program webpage.

Please fill out the form below and return it to [Senior Project Manager Name] at [BHH program email]

## Better Homes Hamilton Contractor Registry Form

### Baseline Requirements Program

In order to participate in the BHH Program, **all contractors** must show:

- Proof of a Hamilton business license
- Quoted work must show Registered HST#
- Proof of purchased liability insurance that coveralls all employees
- WSIB compliance

### Contractor Registry Requirements

Please provide the following items via email to the Program Manager upon submission of this form.

- 3 costumer testimonials for workorders relating to eligible BHH expenses
- If available, a link to your organization's corporate sustainability plan or climate commitments
- If available, a link to your organization's corporate equity, diversity and inclusion commitments
- A company logo for display on the BHH program webpage

In addition to the items above, please refer to the requirements under the applicable service areas below.

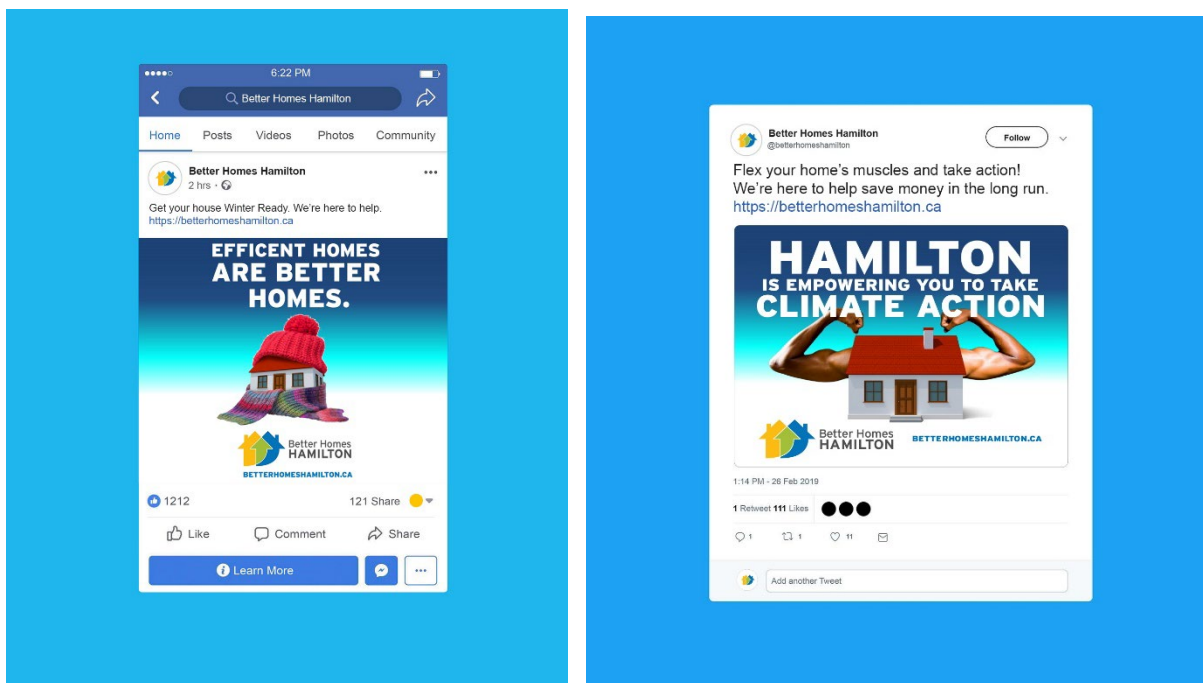
<p><b>HVAC Contractors</b></p>	<p><b>Baseline Credentials</b></p> <p>Applicable licenses include:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 313A or 313D license</li> <li><input type="checkbox"/> Minimum of G2 gas ticket</li> <li><input type="checkbox"/> Minimum of OBT2 oil burning technician ticket</li> <li><input type="checkbox"/> 308A Sheet Metal Mechanic license</li> </ul>
	<p><b>Contractor Registry Credentials</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Proof of completion of manufacturer training on ASHP install</li> <li><input type="checkbox"/> Proof of heat loss &amp; heat gain competency</li> <li>OR</li> <li><input type="checkbox"/> Completion of <a href="#">HRAI: Residential Heat Loss &amp; Heat Gain Calculations</a></li> <li><input type="checkbox"/> <b>Optional:</b> Completion of <a href="#">HRAI: The Heat Pump Advantage</a></li> </ul>
<p><b>Insulation Contractors</b></p>	<p><b>Contractor Registry Credentials</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Completion of NAIMA Canada's <a href="#">National Insulation and Air Sealing Training Program</a></li> <li>OR</li> <li><input type="checkbox"/> Equivalent training</li> </ul>
<p><b>Electrical Contractors</b></p>	<p><b>Baseline Credentials</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> ESA Licence required for any contractor completing electrical services (i.e. upgrading breaker panel)</li> </ul>

## APPENDIX H: SAMPLE BRANDING, MARKETING AND WEB DESIGN MATERIALS

The following section includes marketing materials, a sample marketing budget and a mock wireframe produced by Agenda Marketing. These assets should be considered a starting point to support future BHH communications campaigns and web design

### Sample Marketing Assets

The BHH program should have seasonal communications across a variety of mediums. See sample communications below.



**Figure 12 Sample BHH Social Media Advertisements**



**Figure 13 Sample BHH bus shelter advertisement**



**Figure 14 Sample BHH billboard advertisement**





**Figure 15 Mock BHH tote bags**

A sample marketing budget overview outlining potential advertising costs, as well as a sample BHH website wireframe can be found below. Please note, these appendices are suggestions based on best practices.

It is recommended that the City of Hamilton Web Development team take inspiration from the wireframe as it contains elements found within retrofit program websites

Facebook ad sizes for examples

**APPLY FOR A HOUSEHOLD ENERGY \$AVING RETROFIT TODAY.**

 **Better Homes HAMILTON**  
[BETTERHOMESHAMILTON.CA](http://BETTERHOMESHAMILTON.CA)

A Hamilton Council backed community & climate program 

**APPLY FOR HOUSEHOLD ENERGY SAVING RETROFITS TODAY.**

A Hamilton Council backed community program

 **Better Homes HAMILTON**  
[BETTERHOMESHAMILTON.CA](http://BETTERHOMESHAMILTON.CA)

**TO SIMPLY \$AVE ON YOUR ENERGY BILLS APPLY HERE.**

 **Better Homes HAMILTON**  
[BETTERHOMESHAMILTON.CA](http://BETTERHOMESHAMILTON.CA)

**SAVE ON ENERGY BILLS. SAVE ON THE HASSLE TO DO IT.**

 **Better Homes HAMILTON**  
[BETTERHOMESHAMILTON.CA](http://BETTERHOMESHAMILTON.CA)

**APPLY FOR ENERGY SAVING RETROFITS TODAY.**

A Hamilton Council backed community program

 **Better Homes HAMILTON**  
[BETTERHOMESHAMILTON.CA](http://BETTERHOMESHAMILTON.CA)

## Marketing Budget Suggestions

### 1. INTRODUCTION

Better Homes Hamilton will introduce a new Home Retrofit Program to the Greater Hamilton Area and we require a marketing approach with a large emphasis on awareness.

We hypothesize that once citizens become aware of the program they will take action and search online to learn more. The website we have developed conveys enough information that anyone who has Googled the name, "Better Homes Hamilton", will be educated on who can benefit from the program and how to proceed.

A two-step customer journey will maximize the marketing budget and deliver results. There are many ways to build awareness in Hamilton and the target audience for this program is wide, Better Homes Hamilton should consider Pay-Per-Click advertising, billboards, Radio spots, TV advertising, furniture ad placements, advertising on the HSR, posters, clothing and social media marketing.

### 2. COST

Agenda Marketing has researched estimated costs for each of the suggested channels. Below is a breakdown of those costs as of Mar 24, 2023 :

#### **CLOTHING AND ACCESSORIES**

*Clothing and totes can be given away as incentives to follow social media accounts or as prizes at in-person events.*

- 500 x 1 L Canvas Totes - \$7,105.00
- 100 x T-Shirts (Gildan 8.8oz) - \$1,169.00

## Marketing Budget Suggestions

### **POSTERS AND OUT-OF-HOME MARKETING SUGGESTIONS**

*Out-of-home marketing placements can grab attention, start conversions and give marketing a physical existence within the city.*

- 100 x 12" x 18" Glossy Posters - \$82.42
- Billboards in Hamilton - \$3,500.00 (monthly cost)
- Kiosks, benches, bus stops and other street furniture placements - \$3,000.00 (monthly cost)
- Downtown Hamilton Digital Posters (Main & Dundurn) - \$3,500.00 (monthly cost)

### **RADIO ADVERTISING**

*30-second spots throughout the day, over the course of a month, will help cement the message and drive people to Google BetterHomesHamilton.ca*

- 20, 30-second ads on Bounce 102.9 FM between 5 am and 1 am, Monday through Sunday - \$6,640.00 (monthly cost)

### **SOCIAL MEDIA MARKETING**

*With graphics and animations supplied by the City, ads on social media can be hyper segmented to various socio-economic strata and geo-targeted to specific areas within the Greater Hamilton Area.*

- 600,000 video views on Facebook, Instagram, Twitter and TikTok - \$4,000.00 (monthly cost)

### **PAY-PER-CLICK & ORGANIC SEARCH ENGINE OPTIMIZATION**

*Better Homes Hamilton can invest in organic search engine optimization to increase visibility on target Google searches as well as pay for key search terms.*

---

## Marketing Budget Suggestions

- Rank for organic keywords, like Better Homes Hamilton, future home, greener homes loan, energy suit Hamilton, etc. - \$600.00 (monthly cost)
- Pay to get 500 clicks from search terms, like Hamilton home loan, and home loan program Hamilton. - \$1,000.00 (approximate budget that buys keywords via auction and is only redeemed for every click)

### **3. RECOMMENDATION**

Agenda Marketing recommendations are a front-loaded campaign, spending more money at the beginning of the campaign to amass marketing material (posters and totes) and then slowly transitioning to digital marketing.

With a budget of \$100,000 over two years, radio and out-of-home advertising will be too expensive. Although beneficial in the beginning, we recommend a digital approach supplemented with marketing material that can be given out, used in advertising and strategically placed at events.

## Brand Guidelines and Logo Use

The following section showcases the BHH brand guidelines developed by Agenda Marketing. The City of Hamilton brand guidelines were consulted when developing this document.



Better Homes  
**HAMILTON**

# Brand Guidelines

for the application of our new identity.

Here are some alternative examples of the use of our logo with the Hamilton city logo ensuring safety areas and visibility in all uses is paramount.

Note we recomend that the Hamilton City logo is used to the right of the logo as this creates the best visual balance.

The examples here are shown in black and white as a primary alt to our solid colour versions.

As a third alternative we have an outline of the house icon. We would reserve the use of this logo and for the agency to be consulted in its use to determind where and what on.





These brand guidelines are designed to give its users a clear and helpful way to apply our new visual identity that has been developed.

Key to the success of any brand is ensuring it's consistent application across all channels.

This guide takes you through all the steps to use the logo, its typography and colour systems correctly

**This guide includes:**

- Our new logo
- Rules around its application
- Typefaces and family
- Colour systems & application

The symbol of a house indicates individual homes being improved to bring personal, community and environmental benefit.

Our typeface has been selected to feel both modern & confident but also human and approachable.



**Better Homes  
HAMILTON**

Our colours have been selected to reflect the idea of our local environment and the warmth of a home that has been retro-fit.

The two houses come together to create an arrow a simple icon for improvement and the uplifting of living standards.

The curved base of the homes and rounded corners give our homes a more human feel. Just like the corner of a smile being created.

1



These versions of our brand have been created to work in different use situations so they maintain legibility and clear function in whatever formats they are used in.

### 1. Safety Zone

The "Safety Zone" ensures that when our logo is placed with other content it stands out and is free and clear of any visual clutter.

By using the letter N from the word HAMILTON, it gives a designer an easy way of scaling the required distance in all circumstances.

2



### 2. Outlined Logo

Only to be used in limited applications where a lighter impression of our brand is needed.

3



### 3. Black on & white out options

To be used where colour use is restricted.



Our Brand colour system has been checked against AODA colour contrast and accessibility.

For the main brand colours they are AAA rated for either black or white text on them.

Our 3 main colour themes are clearly based on environmental influences.

**BHH Yellow**

The sun / The warmth of a home.

**BHH Green**

Nature / calm / Approval ( greenlight).

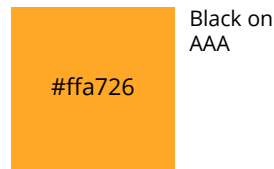
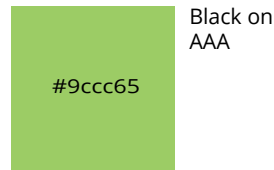
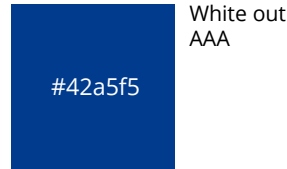
**BHH Blue**

Air / water / clear skies / easy to see.

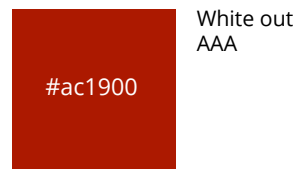
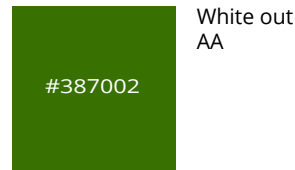
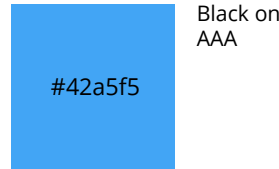


# Better Homes HAMILTON

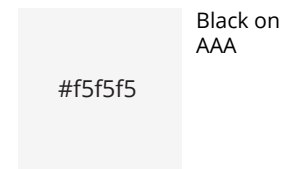
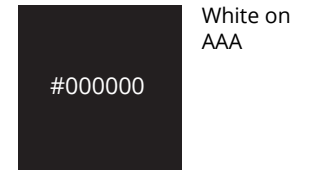
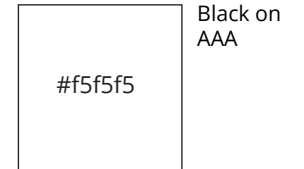
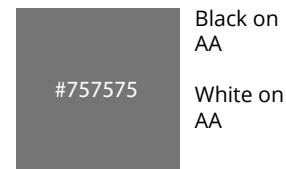
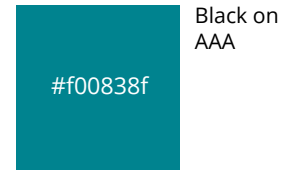
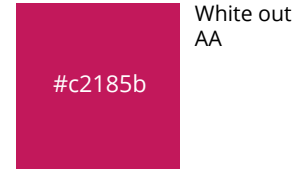
Our Core Brand Palette



Our Secondary Brand Palette



Complementary Brand Colours



## Logo typeface Interstate

Interstate  
Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

Our typeface **Interstate** is our logo typeface digital typeface based on Humanist San Serif themes and can be used across signage & print.

While we use this face for our main identity we have paired it with a freely available font from google **Open Sans**

**Open Sans** that compliments our logo face, but has the advantages that is is accessible to use across platforms. Use this face for all content and text to support the main brand in its communications.

Interstate  
Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

## Body copy & content typeface Open Sans

Open Sans  
Light

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

Open Sans  
Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

Open Sans  
Light

ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
1234567890

Here are examples of how Open Sans is used for our stationary design. Using different weights to allow key information to be highlighted, for ease of navigation.

The application of a simple colour bar further reinforces our brand colours while helping ground our content & information on the page. To create a simple but effective design system.



Here are examples of use of our logo with the Hamilton city logo ensuring safety areas and visibility in all uses is paramount.

Note, we recomend that the Hamilton City logo is used to the right of the logo as this creates the best visual balance.

In all cases the N from Hamilton is being used as a guide for spacing.

If the Hamilton City logo needs to be used to the righthand side of the BHH logo, an additional N space must be added between the logo to achieve the same visual balance as indicated here.



## Sample BHH Wireframe

This section includes a wireframe for a potential BHH program website. The CCCM collected examples of other HERO program webpages, and reviewed best practices with the Agenda Marketing Team with respect to user experience and accessible web design.

The CCCM recommends the BHH program webpage contain elements of the wireframe below including;

- Clear BHH branding with eye-catching imagery which speaks to the program's core mandate of financing energy efficiency upgrades
- Minimize click-throughs
- Provide background information about the BHH program, and what kind of experience participants can expect
- Clearly outlines the eligible upgrades and incentives
- Directs users to rebates and other incentive programs that they can access both through the BHH program and independently.



Carousel Images of BHH Program



## Get Started

Click here to apply to the Better Homes Hamilton Pilot Project today

[Apply](#)

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### Learn More

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[Learn More](#)

### Incentives & Resources

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[Learn More](#)

#### Tagline

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#### Explore

[About](#)  
[Eligible Upgrades](#)  
[Incentives & Resources](#)

#### Contact Us

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HERO image/Logo or Graphic

## BHH Project Background

The Better Homes Hamilton program allows Hamiltonians to take climate action by providing access to low-interest, fixed-rate loans to serve as the capital required to complete upgrades which result in a reduction in household GHG emissions, as well as an increase in home comfort and energy efficiency.

The BHH program utilizes a Local Improvement Charge (LIC) framework which enables the municipality to issue loans against the title of a property as a "special charge" lien. Loan repayment is collected via regularly scheduled property tax bills.

[Hamilton Climate Action Strategy](#) 

[Council Decision/directive](#) 



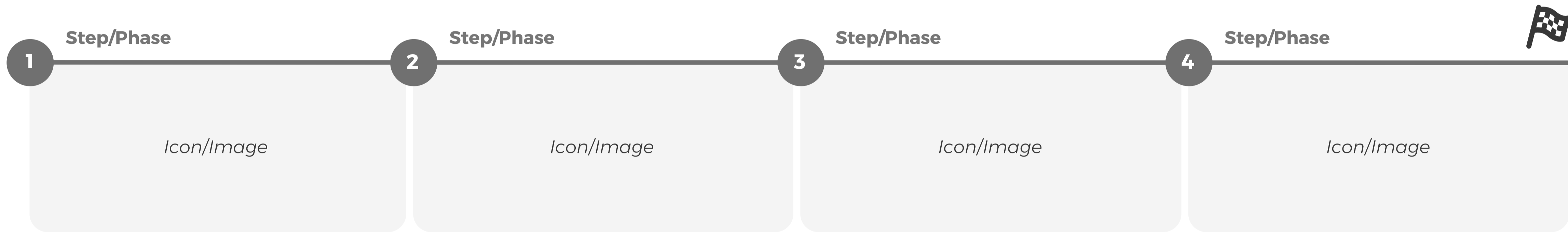
## Project Goals

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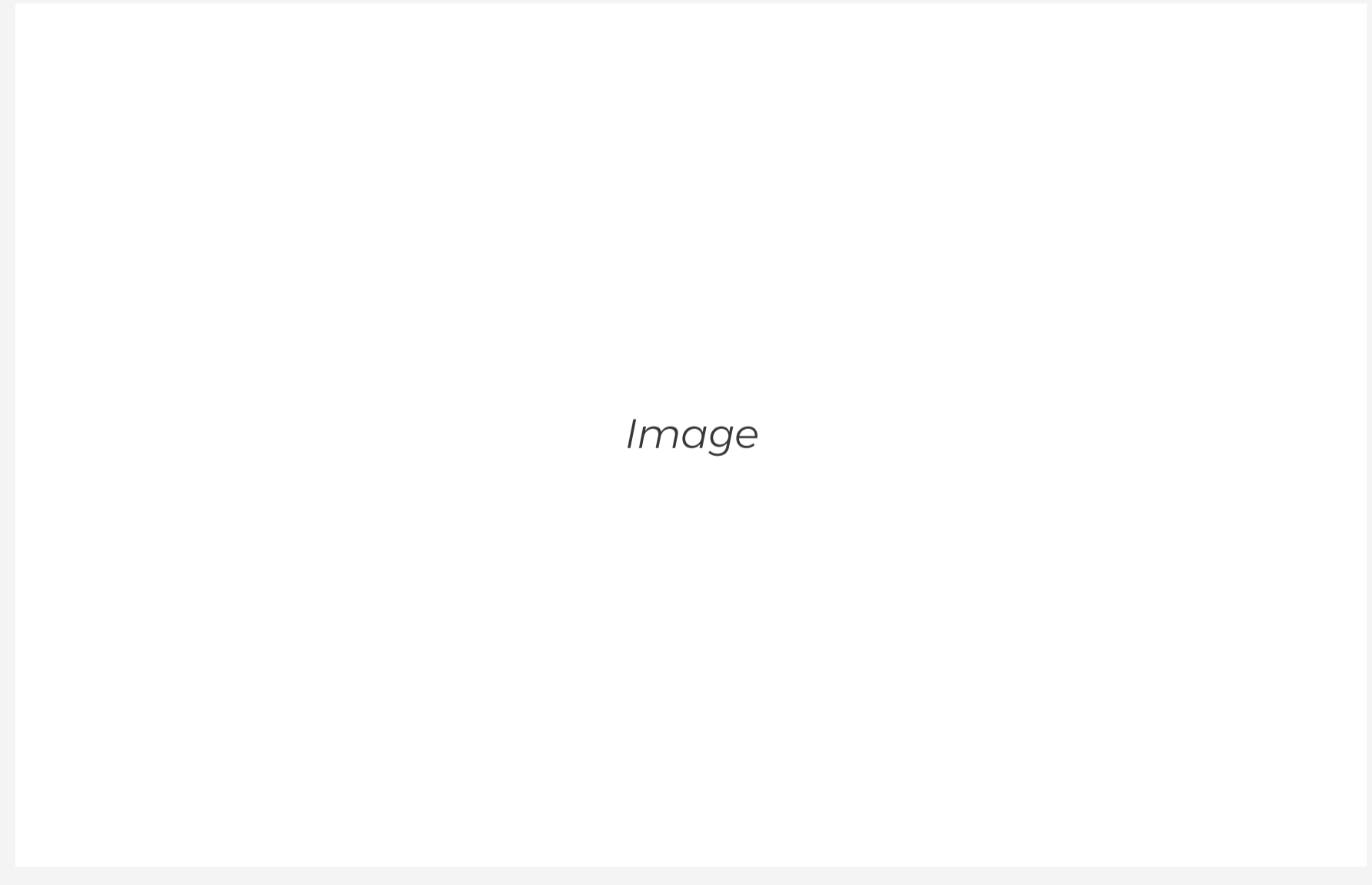
[Upgrade Now](#)

## Project Timeline



## Participant Eligibility Criteria

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## Supporting Partners



Upgrades and Eligible Expenses Graphic

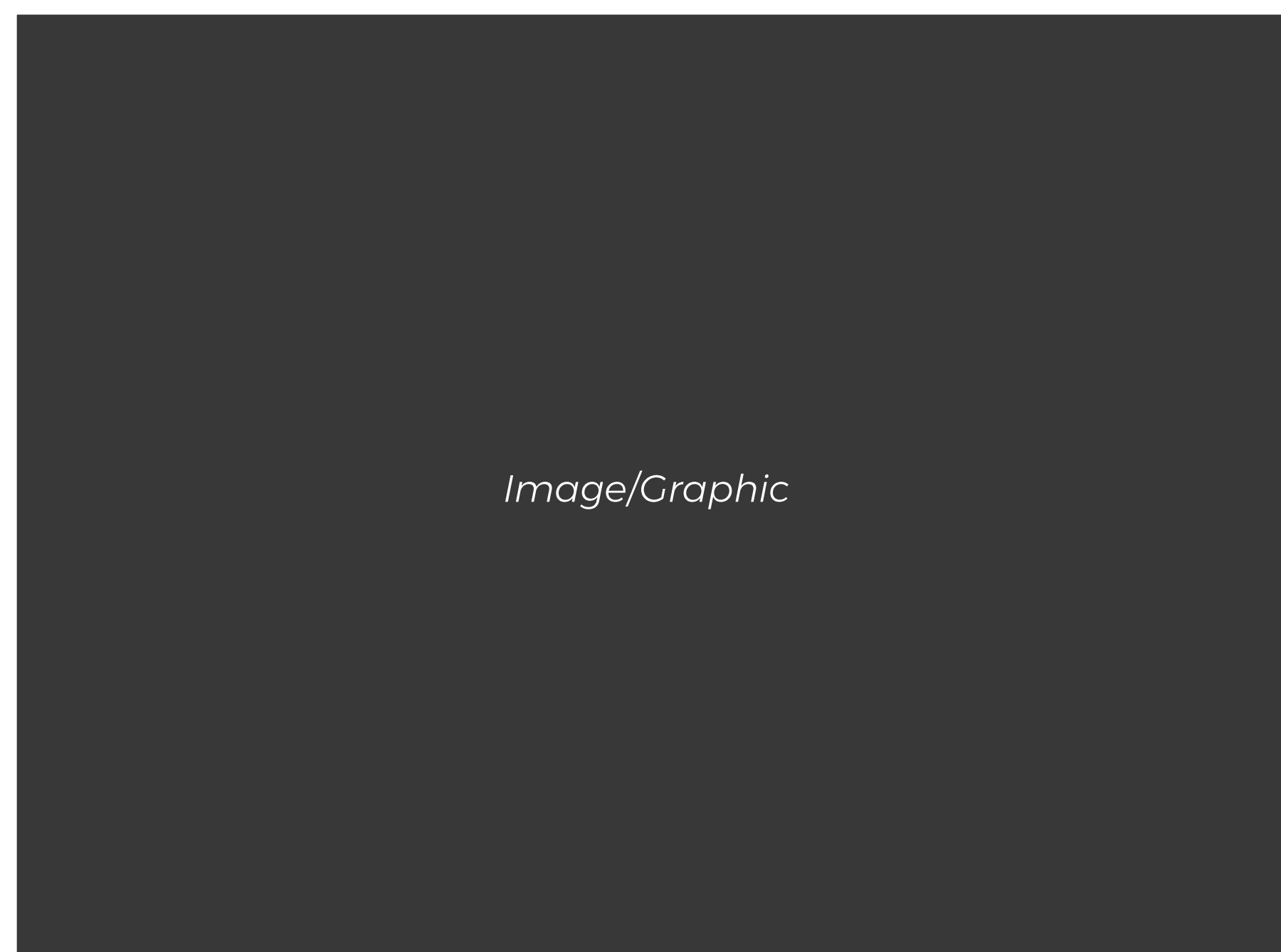
Permitting and Assessments

Building Envelope

Heating and Cooling

Infrastructure Upgrades

## Permitting and Assessments



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## Complete Cost of Energy Audit

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## Applicable Building Permits

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## By participating in the BHH pilot project, you can receive:

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- Access to project management guidance through the energy concierge service
- Guidance relating to applying to applicable rebates

### Tagline

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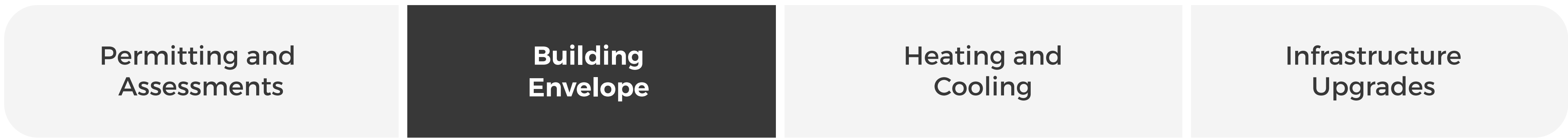
About Eligible Upgrades Incentives & Resources

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Hamilton Land Acknowledgement



*Upgrades and Eligible Expenses Graphic*

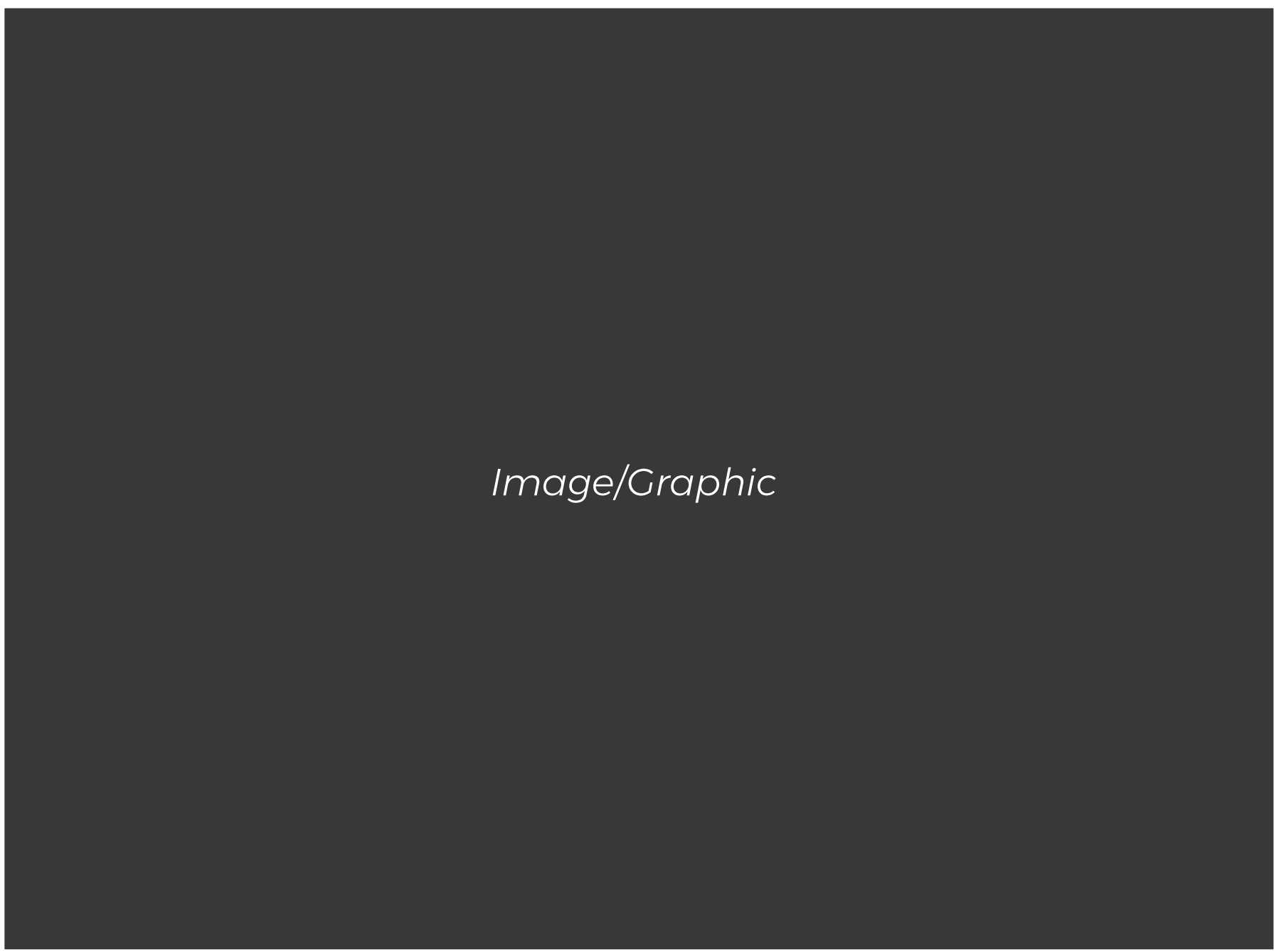


## Building Envelope

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### Air-sealing



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### Draft Proofing

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### Insulation

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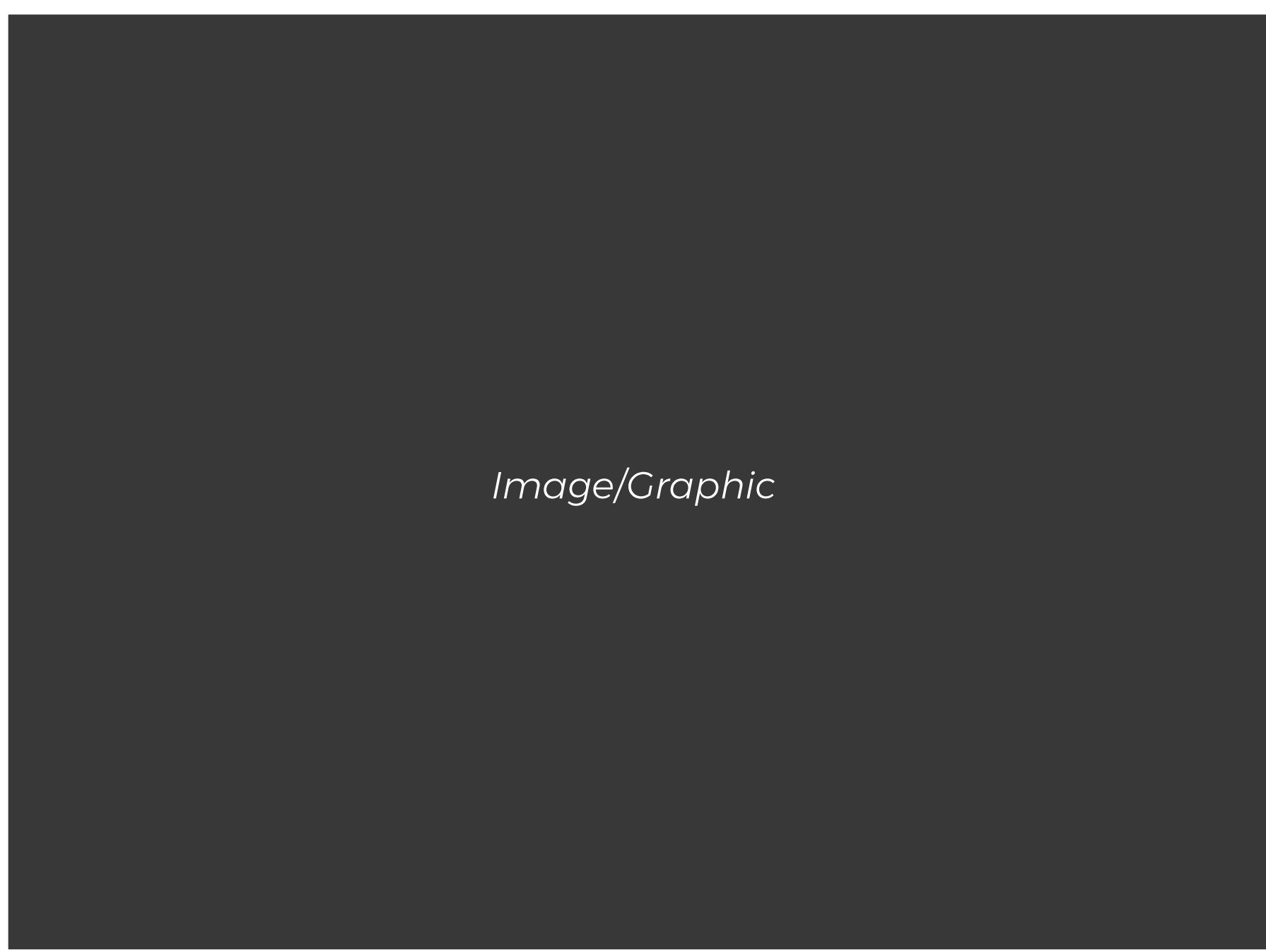
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Upgrades and Eligible Expenses Graphic



## Heating and Cooling



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### Air-source Heat Pumps

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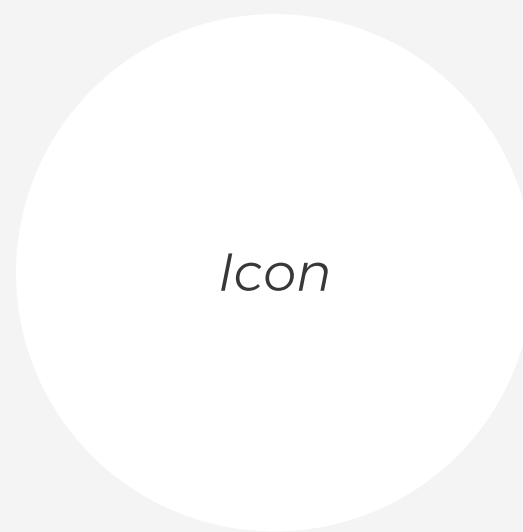
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### Smart Thermostat



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### Smart Controller

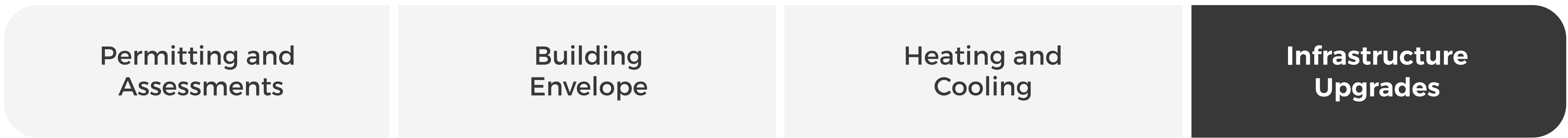


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Upgrades and Eligible Expenses Graphic

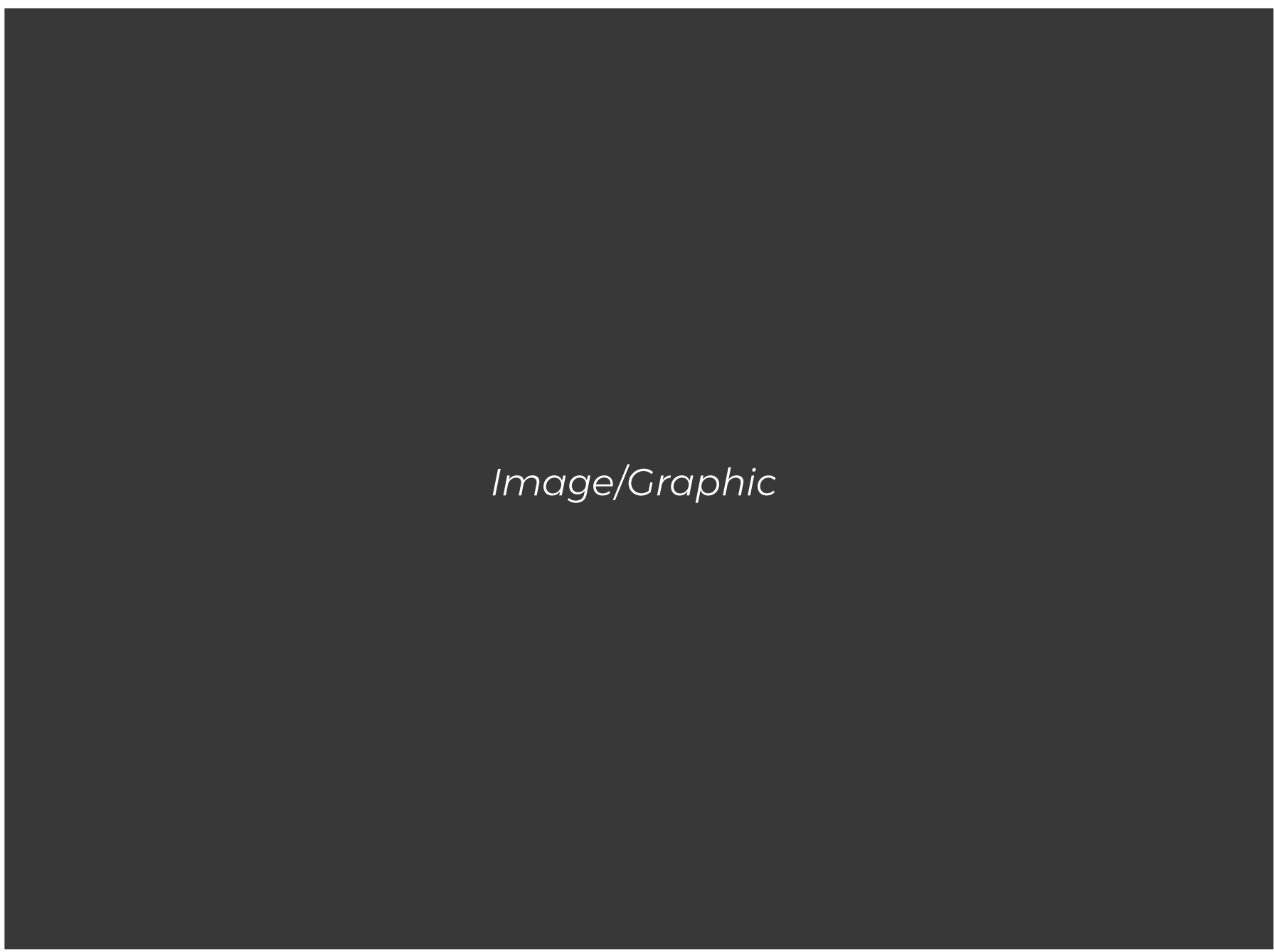


## Infrastructure Upgrades

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## Breaker Panel

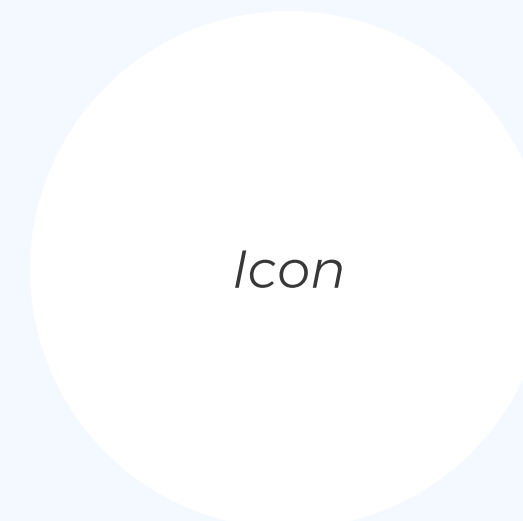
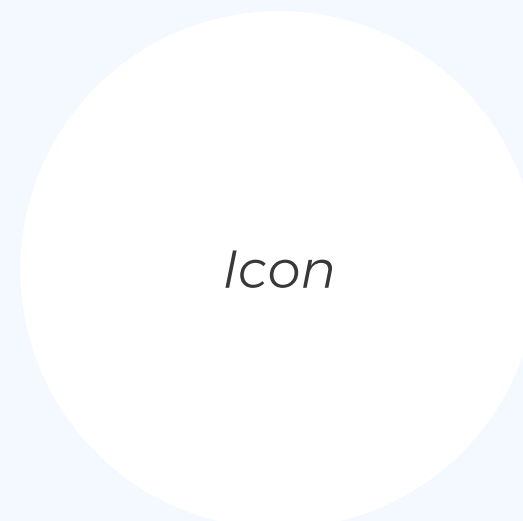


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## Ductwork Repair

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Rebates Graphic

## Rebates

Participants may access a number of rebates to immediately begin paying back their loan. Speak with your energy concierge about how to apply!



Grants & Rebates	Loans	Income-Qualifying Supports
Enbridge HER+	Greener Homes Loan	Enbridge Winterproofing
Greener Homes Grant		SaveON Energy Energy
OHPA Grant		Affordability Program
Enbridge Smart Thermostat		

### Tagline

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Contact Us Graphic

## Contact Us

For questions about the Better Homes Hamilton program contact:

[betterhomeshamilton@hamilton.ca](mailto:betterhomeshamilton@hamilton.ca)

To learn more about Climate Action in the City of Hamilton contact:

XXX-XXX-XXXX

### Tagline

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### Contact Us

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Maecenas a congue tortor.

Apply Now Graphic

## Better Homes Hamilton Application Form (Example)

Name \*

Contact Preference \*  Email  Phone

Question/Comment \*

Address

City \*

Building Type \*

I currently heat with: \*

My electricity provider is:

My natural gas provider is:

I am a:  Homeowner  Renter  Strata council representative  Indigenous community member  Contractor  Energy Advisor or Modeller  Building manager  Other

I heard about the Energy Coach Service from:

I would like to receive information about future programs  Yes  No

Terms and Privacy Policy \*  I agree to the Terms of Use and Privacy Policy  
[Read Terms of Use](#)

Need Help with the Application?

Reach out and we'll walk you through your options

### Tagline

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc vitae elementum eros. Maecenas a congue tortor. Sed molestie magna

### Explore

[About](#)  
[Eligible Upgrades](#)  
[Incentives & Resources](#)

### Contact Us

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc vitae elementum eros. Maecenas a congue tortor.



## APPENDIX I: SAMPLE LOCAL IMPROVEMENT CHARGE BYLAWS

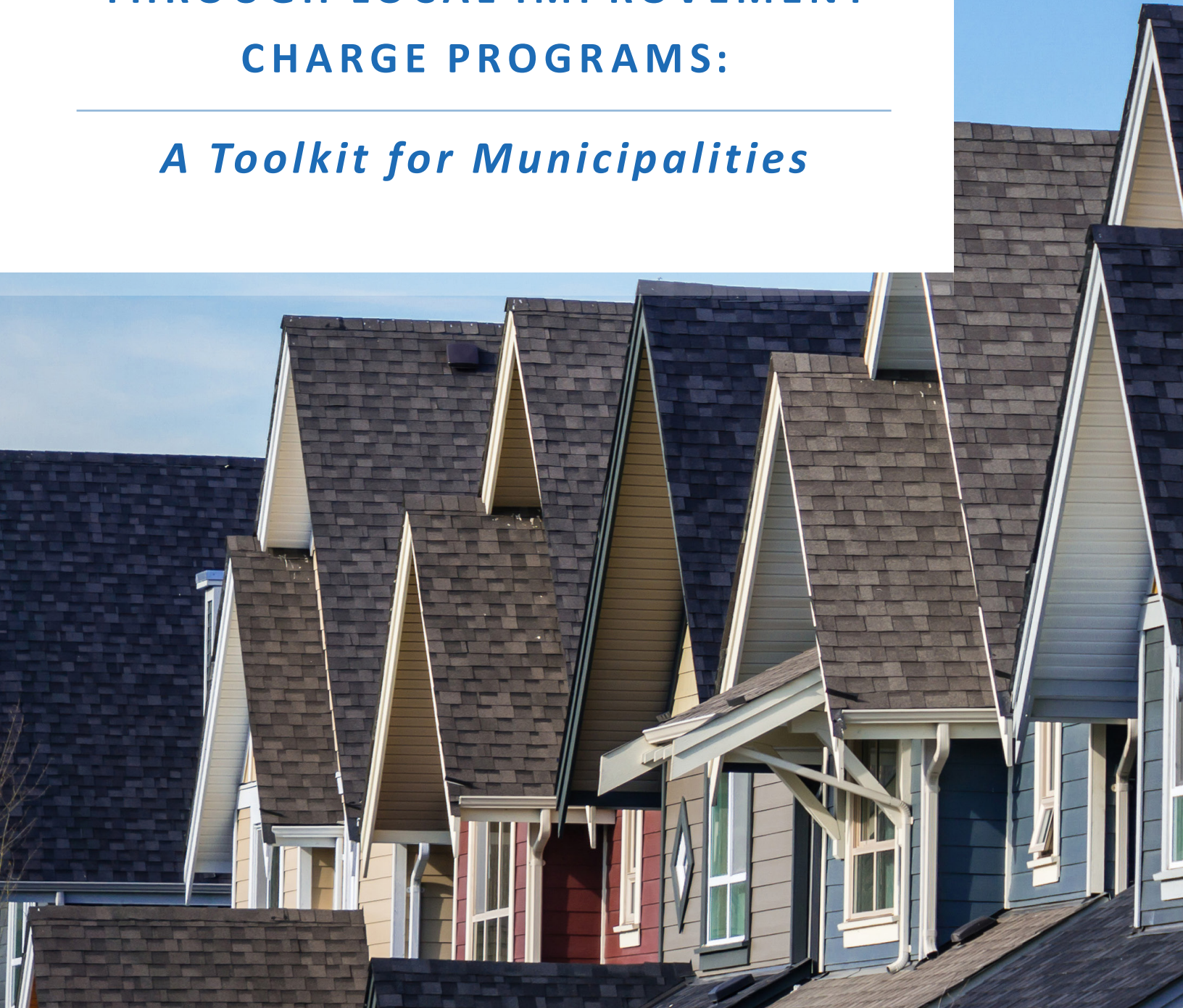
The following section shows sample LIC bylaws from Appendix B1 and B2 of the 2020 Clean Air Partnership report, [Accelerating Home Energy Efficiency Retrofits Through Local Improvement Charge Programs: A Toolkit for Municipalities](#)

It is recommended that the City of Hamilton consult these template bylaws when generating the LIC bylaws to support the BHH Program.

# ACCELERATING HOME ENERGY EFFICIENCY RETROFITS THROUGH LOCAL IMPROVEMENT CHARGE PROGRAMS:

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## *A Toolkit for Municipalities*





### **ABOUT THE CLEAN AIR PARTNERSHIP:**

Clean Air Partnership (CAP) is a registered charity that works in partnership to promote and coordinate actions to improve local air quality and reduce greenhouse gases for healthy communities. Our applied research on municipal policies strives to broaden and improve access to public policy debate on air pollution and climate change issues. Clean Air Partnership's mission is to transform cities into more sustainable, resilient, and vibrant communities where resources are used efficiently, the air is clean to breathe and greenhouse gas emissions are minimized.

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### **REPORT AUTHORS:**

*Vanessa Cipriani, Clean Air Partnership*  
*Heather McDiarmid, University of Waterloo*  
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This initiative is offered through the Municipalities for Climate Innovation Program, which is delivered by the Federation of Canadian Municipalities and funded by the Government of Canada.



## ACKNOWLEDGMENTS:

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**Jade Schofield**

*Project Manager — Sustainability and Climate Change, Town of Whitby*

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**Alex Chapman**

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**James Krauter**

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# APPENDIX B1 |

## SAMPLE MUNICIPAL BY-LAW FOR ENABLING LIC RETROFIT PROGRAM



## APPENDIX B1 | SAMPLE MUNICIPAL BY-LAW FOR ENABLING LIC RETROFIT PROGRAM

*\*Please note that this is just a sample by-law. Specific program details should be added, modified, or removed based on all applicable legislation, regulations, and local context.*

**A by-law to authorize the undertaking of energy efficiency and water conservation works on private residential property as local improvements under the Residential Retrofit Program.**

**Whereas** Part III of Ontario Regulation 586/06 authorizes Council to pass a by-law to undertake works on private residential property as local improvements for the purpose of raising all or part of the cost of the work by imposing special charges on lots upon which all or some part of the local improvement is or will be located; and

**Whereas** such a by-law may authorize the undertaking of works which satisfy the requirements of a [MUNICIPALITY] program; and

**Whereas** at its meeting of [XXXX], [MUNICIPALITY] Council adopted the [Residential Retrofit Program] pursuant to authority of Ontario Regulation 586/06;

The Council of [MUNICIPALITY] enacts:

1. Council authorizes the undertaking of energy efficiency and water conservation works on private residential property as local improvements under the Residential Retrofit Program, as set out in Appendix A to this By-law, for the purpose of raising all or part of the cost of the work by imposing special charges on lots upon which all or some part of the local improvement is or will be located.

**Enacted by [MUNICIPALITY] Council this XX day of XX, 20XX.**

---

Mayor

---

[MUNICIPALITY] Clerk

Authorized by Item No. \_\_\_\_ of Report No. \_\_\_\_

of the Committee \_\_\_\_\_

Adopted by [MUNICIPAL] Council on \_\_\_\_\_

## **APPENDIX A: RESIDENTIAL RETROFIT PROGRAM DESIGN**

### **I. SINGLE-FAMILY HOUSING PROGRAM STREAM**

#### **1.0. | Overview**

The Residential Retrofit Program is designed to extend municipal funding to consenting homeowners for the installation of qualifying natural gas, electricity and water conservation improvements and related energy assessments and then to secure payment by imposing a local improvement charge (LIC) on the private residential property, as authorized by the Regulation. This program may be administered completely by the municipality or by the municipality in conjunction with a third party administrator, to be named at a later date.

#### **1.1. | Program Eligibility**

Residential low-rise buildings located within the [MUNICIPALITY] of the following forms are eligible: detached, semi-detached, townhouse and more generally housing forms with fewer than [7] units.

The property must have a property tax account with the [MUNICIPALITY]. [The property must also be a customer of [UTILITY/GAS COMPANY].

Participation is voluntary, owner-initiated and subject to the following conditions:

- » All registered owner(s) of the property must consent to participating in the Program;
- » Property tax, utility bills and all other payment obligations to the [MUNICIPALITY] for the past five years must be in good standing; and
- » [OPTIONAL: Consent from all mortgage lenders, if the property is subject to one or more mortgages.]

### 1.2. | Geographic Scope/ Neighbourhood Selection Process [OPTIONAL]

Any owner of an eligible building in [MUNICIPALITY] can participate in the residential retrofit program.

[OR]

The municipality has selected X neighbourhoods to pilot the Program.

The neighbourhood selection process is to be guided by the preliminary criteria set out below:

[SELECT IF APPLICABLE]

- » Above average utility-calculated natural gas and electricity end-use consumption;
- » Above average number of pre 1980 building vintages and uniform building types;
- » Higher than average ratio of owner-occupied versus rental properties;
- » Varying demographic and socio-economic characteristics (i.e. low-income neighbourhoods); and
- » Existing community initiatives or organizations interested in being aligned with the Program to achieve efficiencies in terms of program delivery (i.e. marketing and outreach support).

The [MUNICIPALITY] will monitor Program uptake within the pilot neighbourhoods during the implementation of the Program. If appropriate, the Program may be rolled out [MUNICIPALITY] wide to achieve the participation goals.

### 1.3. | Home Energy Assessments [OPTIONAL]

Similar to the ecoENERGY Home Retrofit Program designed by the Federal Government, the

[MUNICIPALITY]'s Program will utilize the EnerGuide Rating System (the "[ERS](#)") that provides a standard measure of a home's energy performance. It provides a standardized tool and process to assess home energy efficiency and can model energy savings projects.

The property owner must hire a Certified Energy Advisor (the "CEA") - certified by Natural Resources Canada ("NR Can") - to perform pre- and post-retrofit assessments in accordance with ERS. CEAs are experts in the field of energy efficiency and well-versed in the 'whole home' approach to home energy systems, technologies and products. The cost of the energy assessments are paid by the homeowner to the CEA.

A homeowner may be eligible for a rebate for the cost of an energy assessment if they participate in a utility energy retrofit incentive program.

Upon completion of the pre-retrofit home energy assessment, a report is provided to the homeowner with the NRCAN EnerGuide rating for the home and recommendations for energy improvements that could potentially increase that rating. This report is to be provided to the [MUNICIPALITY] in order to access LIC funding.

After the retrofit is complete, a second and final home assessment is performed by the CEA to obtain a second EnerGuide rating and to verify the completion of work.



Provided that the second assessment that the homeowner provides to the [MUNICIPALITY] indicates that the EnerGuide rating has increased and the improvements have been completed, then the utility incentives (described in Section 1.8. — Access to Utility Rebates & Incentives) can be determined and the [MUNICIPALITY] can issue the final disbursement of funds.

The applicant can determine whether to deduct the utility incentive amounts from the final disbursement.

#### **1.4. | Qualifying Energy Efficiency & Water Conservation Measures**

The home energy assessment must demonstrate the potential to achieve cost-effective energy reductions in order to qualify for LIC funding. Financing is designated for capital costs (not maintenance costs) with an expected useful life of 5 years or greater and for measures that are permanently affixed to a property. The expected useful life of the retrofit measures is to be linked with the LIC term. The non-exhaustive list of the categories of measures eligible under the Program, subject to any permitting and regulations, includes:

- » **i.** Thermal envelope upgrades: attic, wall and basement insulation, windows, air-sealing.
- » **ii.** Mechanical systems (space heating and cooling): high efficiency furnace, boiler and air conditioner replacement, thermostats and controllers, air source heat pumps, ground source heat pumps.
- » **iii.** Mechanical systems (water heating): high-efficiency water heaters (e.g., hybrid heat pump, tankless, etc.), drain water heat recovery systems, solar hot water systems.
- » **iv.** Renewable energy and energy storage and EV chargers: solar photovoltaic systems, electric vehicle charging stations (Level 2), battery storage devices.
- » **v.** Water efficiency: low-flow toilets, hot water circulation pump and system, greywater treatment system, closed-loop shower water recovery system, rainwater harvesting system (subject to eligibility criteria).
- » **vi.** Other: New energy efficient (certified) products as they become available will be considered as additional eligible technologies

The cost of an EnerGuide home energy assessment is eligible to include in the LIC financing. Note that utility rebates may be available for this cost.

Ineligible measures include equipment or products not permanently affixed to the property, previously installed in another home and are deemed general maintenance. By recommending categories of retrofit improvements and associated measures, the [MUNICIPALITY] makes no guarantees of the materials, performance, cost-effectiveness or any warranty of the measures supported by the Program.

Only the costs associated with retrofits of up to [X] percent of the Current Value Assessment of the property or to a maximum of \$XX,XXX are eligible for the Program.

### 1.5. | Completing the Retrofit through Contractor Engagement

The [MUNICIPALITY] will provide financing to homeowners for eligible measures covered by the Program that have been:

- » recommended by the CEA
- » verified by the [MUNICIPALITY] or the assigned Program Administrator
- » installed by contractors hired by the property owner

The [MUNICIPALITY/PROGRAM ADMINISTRATOR] will not pre-qualify contractors or procure contractors to perform energy assessments or install retrofit improvements on behalf of homeowners in connection with this Program. The homeowner will use the funds disbursed by the [MUNICIPALITY] to pay contractors directly.

The [MUNICIPALITY/ PROGRAM ADMINISTRATOR] is not responsible for the work quality of any contractors hired in connection with this Program and assumes no liability for the works undertaken. All retrofit improvements and renovations must adhere to local codes and by-laws. The homeowner is responsible for ensuring that hired contractors are licensed, bonded, and insured. Any issues that may arise relating to the quality of workmanship or post-installation performance of energy measures, for example, should be dealt with by the property owner and contractor.

### 1.6. | Application Process

The steps below outline the process and requirements homeowners need to follow as part of the Program. [MUNICIPALITY /PROGRAM ADMINISTRATOR] staff will periodically review this process to ensure effective Program implementation and, where deemed appropriate, the [MUNICIPALITY /PROGRAM ADMINISTRATOR] may make changes in its sole discretion.

#### **Step 1: Pre-qualification**

Homeowners submit an on-line application form that includes, but is not limited to, the following information:

- » Property address to confirm location is within eligible municipality;
- » Property assessment roll number to confirm no outstanding payments owed to the [MUNICIPALITY] in the last five years; and
- » Evidence of mortgage lender consent (where applicable).

If a homeowner has one or more outstanding mortgage(s) associated with the property, then the homeowner must obtain (at his or her own expense) consent from the mortgage lender(s) through a form that the [MUNICIPALITY] will provide. Property owners will advise their mortgage lender(s) of their intention to participate in the Program and receive permission from the lender(s) perhaps up to only a specific dollar amount) as a requirement of the Program.

Once the property owner has been prequalified by [MUNICIPALITY/ PROGRAM ADMINISTRATOR], based on the above criteria, the [MUNICIPALITY/ PROGRAM ADMINISTRATOR], will provide Notice to Proceed to the homeowner.

## **Step 2: Energy Assessment and Funding Request Form**

### *1. Energy Assessment*

The homeowner completes the pre-retrofit home energy assessment in accordance with Section 1.3 *Home Energy Assessments* and submits to the [MUNICIPALITY/ PROGRAM ADMINISTRATOR], the resulting Energy Assessment Report that the CEA provides to the homeowner.

That Energy Assessment Report must include:

- » the current NRCan EnerGuide rating for the home;
- » recommended improvements that have been customized for the home based on existing conditions which could potentially increase the NR Can EnerGuide rating of the home;
- » the estimated useful life of the proposed improvement(s);
- » estimated energy cost savings that may be realized after installing the recommended improvements

Potential eligibility for utility rebates and incentives offered by [UTILITY] or through the Save On Energy program is optional to include in the Energy Assessment Report.

Any estimated cost of the works can be included in the Energy Assessment Report, but will require contractor invoices to verify the costs for inclusion in the Funding Request Form.

### *2. Funding Request Form*

Along with the Energy Assessment Report, the homeowner also will need to submit a Funding Request Form that:

- » identifies the improvements that the property owner intends to install based on the Energy Assessment Report;
- » identifies the cost for each improvement (including equipment, materials and labour costs); and
- » the amount of prepayment (up to a maximum of 10% of the estimated cost of the work) being requested from the [MUNICIPALITY] upon signing the POA.

Following receipt of the Funding Request Form, the [MUNICIPALITY/ PROGRAM ADMINISTRATOR], will:

- » confirm the eligibility of the works (e.g. items affixed to property);
- » verify the reasonableness of retrofit costs and labour costs by consulting manufacturer pricing and prevailing labour rates;
- » calculate the administrative costs [FOR EXAMPLE, using a formula that apportions the cost to the [MUNICIPALITY] to operate this program between participating properties as percentage of the cost of the work undertaken relative to the percentage of the cost of the work to the overall Program budget for each Program Stream; (n.b. the "cost to the [MUNICIPALITY]" includes recurring costs and any non-recurring costs not covered by the grant funding that the [MUNICIPALITY] has obtained for the Program); and
- » estimate the eligible utility rebates and incentives available to the homeowner.

The above steps will enable the [MUNICIPALITY/ PROGRAM ADMINISTRATOR], to derive the funding amount up to the maximum of [eg.five percent of the property's assessed value] to include in the Property Owner Agreement.

### **Step 3: Property Owner Agreement**

After the [MUNICIPALITY/ PROGRAM ADMINISTRATOR], has confirmed the acceptability of the Energy Assessment Report and the Funding Request Form, the [MUNICIPALITY] will prepare a property owner agreement ("POA"), in accordance with Appendix B for the homeowner(s) to review and sign.

### **Step 4: Completing Improvements**

#### *1. Initial Funding Disbursement*

Following execution of the POA, the [MUNICIPALITY] will provide the homeowner with the initial disbursement agreed upon in the POA to a maximum of [X%, EG. 10] of the estimated cost of the work that can be used by the homeowner to pay contractors or suppliers (i.e. security deposit).

The property owner will be contractually obligated to repay this initial disbursement to the [MUNICIPALITY] if the property owner does not complete the improvements.

The property owner can then proceed with hiring contractor(s) and performing the approved energy improvements to the property. The improvements must be completed within a reasonable timeframe, as stipulated in the POA, to be determined by the [MUNICIPALITY] in its sole discretion.

#### *2. Final Funding Disbursement*

As will be detailed in the POA, the [MUNICIPALITY] will provide the final disbursement only after the homeowner provides a copy of the post-retrofit assessment report from the CEA that:

- » includes a Certificate of Completion that attests the approved retrofit measures having been installed and provides an EnerGuide rating of the home after the retrofit measures have been completed which is greater than the original EnerGuide rating noted on the pre-retrofit assessment report from the CEA; and
- » indicates the actual costs and useful life for all the works.

### **Step 5: LIC Repayment**

Following the [MUNICIPALITY] Treasurer's [and CFO'S] periodic certification of the local improvement roll, (which occurs after the improvements on a given set of properties are complete and the final amounts of funding are confirmed), the [MUNICIPALITY] Solicitor will submit a corresponding bill for Council to adopt a by-law pursuant to Section 36.14 of O.Reg 586/06 to impose the special charges on the participating properties. For each property included in the by-law, the Treasurer will then add to the [MUNICIPALITY] 's tax roll for that property each year that portion of the imposed special charge that is due in that year. These collective steps will provide priority lien status for the annual amount that the Treasurer [and CFO] adds to the tax roll and will ensure that any subsequent property owner who was not a party to the POA is bound to pay that amount.

To facilitate repayment of the annual special charge, the POA will require homeowners to sign up for the pre-authorized payment plan option for property tax payments.

At any time, a homeowner can make advance payments, including a one-time payment of the total outstanding amount owing to clear the property of the LIC charge. Failure to make payments is treated with the same remedy as uncollected property taxes which may include penalties and interest charges.

### **1.7. | LIC Disclosure**

As indicated above, the subsequent owner of a property on which the [MUNICIPALITY] has imposed a special charge is required to pay the [MUNICIPALITY] the annual LIC amount even though that subsequent owner was not a party to the original POA. In addition to notice that the [MUNICIPALITY] will be providing in accordance with the provisions of O. Reg. 586/06, the [MUNICIPALITY] also will take the following steps to ensure even greater transparency of the LIC to interested parties by:

- i) posting on the [MUNICIPALITY]'s website notice of the special charge by-law to impose the charge on the property in advance of its introduction and after its adoption; and
- ii) updating the Tax Certificate to include the full LIC amount, amount payable in the current year, outstanding amounts owing and a note to reference the by-law pursuant to which the special charge was imposed.

### **1.8. | Access to Utility Rebates & Incentives**

The [MUNICIPALITY] encourages applicants to review the energy savings programs of utilities and agencies such as [UTILITY] and the Province's Save On Energy program. Energy efficiency and water conservation measures that are eligible under this residential retrofit program may also be eligible for rebates from utilities to applicants.

The applicant can decide whether the financing advanced by the [MUNICIPALITY] will be net of any rebates or other incentives received by the homeowner.

### **1.9. | Quality Control**

As a means of additional oversight to confirm that the funded improvements were completed, the POA will indicate that the [MUNICIPALITY] reserves the right to have a [MUNICIPALITY] official or third-party contractor arrange with the property owner for an inspection. The property owner(s) is also responsible for keeping original copies of contractor invoices and photos of installed measures, especially for harder to verify measures like insulation, and be prepared to disclose this information to the [MUNICIPALITY] upon request.

### **1.10. | Measurement and Verification**

Pursuant to the POA, the property owner(s) must consent to providing the [MUNICIPALITY] with access to the property's utility usage data in order to monitor results and evaluate the Program's effectiveness for a period of five years after completion of the retrofit. Also, the property owner(s) agrees to participate in surveys and other follow-up activities to help the [MUNICIPALITY/ PROGRAM ADMINISTRATOR], evaluate the Program.

# APPENDIX B2 |

## SAMPLE BY-LAW TO AFFIX LIC TO A PROPERTY



## APPENDIX B2 | SAMPLE BY-LAW TO AFFIX LIC TO A PROPERTY

*\*Please note that this is just a sample by-law. Specific details should be added, modified, or removed based on all applicable legislation, regulations, and local context.*

**To authorize the imposition of special charges on [PROPERTY ADDRESS] (the "benefitting property").**

**Whereas** at its meeting on [DATE], Council enacted By-law XX-XXX, being a by-law to authorize the undertaking of energy efficiency and water conservation works on private residential property as local improvements under the Residential Retrofit Program, in accordance with Ontario Regulation 586/06 ("O. Reg. 586/06"); and

**Whereas** the owner(s) of the benefitting property and the MUNICIPALITY (the "MUNICIPALITY") have entered into a Property Owner Agreement (the "POA") pursuant to O. Reg. 586/06 for the [MUNICIPALITY] to undertake work as a local improvement (the "Work") on the benefitting property and to raise the cost of the Work (the "Cost") by imposing a special charge on the benefitting property; and

**Whereas** the [MUNICIPAL] Clerk has certified the POA pursuant to O. Reg. 586/06; and

**Whereas** the Work has been completed; and

**Whereas** a local improvement roll was prepared in accordance with O. Reg. 586/06, setting out the Cost of the Work, the proposed special charges to be imposed on the benefitting property, when the special charges are to be paid, and the lifetime of the Work; and

**Whereas** the [MUNICIPALITY] has given notice of the proposed local improvement roll to the owner(s) of the benefitting property pursuant to O. Reg. 586/06; and

**Whereas** the Treasurer has certified the proposed local improvement roll in accordance with O.Reg. 586/06; and

**Whereas** section O. Reg. 586/06 provides that after the Treasurer has certified the local improvement roll, the [MUNICIPALITY] shall by by-law provide that the amount specially charged on the lot set out in the roll shall be sufficient to raise the lot's share of the cost by a number of equal annual payments and that a special charge shall be imposed in each year on the lot equal to the amount of the payment payable in that year;

**The Council of the [MUNICIPALITY] enacts:**

- » **(13)** The provisions of O. Reg. 586/06 apply to the benefitting property as a result of the completion of the Work pursuant to the POA.
- » **(14)** The amounts specially charged on the lot as set out in the certified local improvement roll attached as Schedule A to this by-law (the "Special Charge") is sufficient to raise the lot's share of the Cost and shall be imposed on and collected by annually adding the annual amount payable as set out in Schedule A to this by-law (the "Annual Payment") to the tax roll of the lot.
- » **(15)** The Annual Payments as set out in certified local improvement roll attached as Schedule A do not extend beyond the lifetime of the Work.
- » **(16)** The amount of each payment made in respect of the Special Charge shall be entered in the local improvement roll by the Treasurer.
- » **(17)** This by-law shall be deemed repealed on the date on which the Treasurer certifies that the Special Charge has been paid in full.

**Enacted and passed on [DATE]**

**[MUNICIPAL CLERK NAME]**





Better Homes  
**HAMILTON**



Hamilton

# Better Homes Hamilton: Program Design

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**Hamilton City Council  
General Issues Committee**



**CENTRE FOR  
CLIMATE CHANGE  
MANAGEMENT  
AT MOHAWK COLLEGE**

May 3rd, 2023  
Presented by Nico Strabac, Project Lead  
Centre for Climate Change Management

# PROJECT BACKGROUND

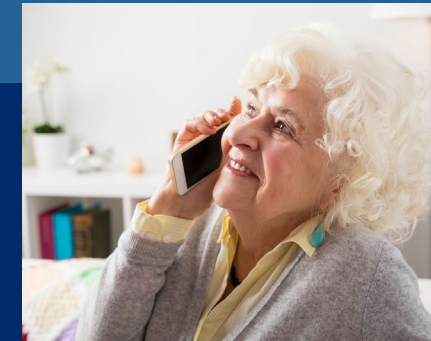
In May 2021, City Council directed staff to “develop a detailed design for a flexible Home Energy Retrofit Opportunity (HERO) program”

Funding obtained from Federation of Canadian Municipalities (FCM) for the development of a Detailed Design Study and supporting consulting services

The Centre for Climate Change Management was contracted to complete program design and implementation plan



# Evidence-based Program Design



## Best practices

- ◆ Compared HERO programs in Canada, US, and Europe
- ◆ Examined best practices and lessons learned
- ◆ Evaluated existing incentive programs

## Stakeholder Engagement

- Consulted with 40+ stakeholders:
- ◆ City staff
  - ◆ Municipalities with HERO programs
  - ◆ Environmental NGOs
  - ◆ Tenant advocacy groups
  - ◆ Contractors (HVAC, insulation, renovations)
  - ◆ Building science experts
  - ◆ Real estate lawyers and realtors
  - ◆ Energy advisors and registered service providers
  - ◆ Utility providers

## Survey

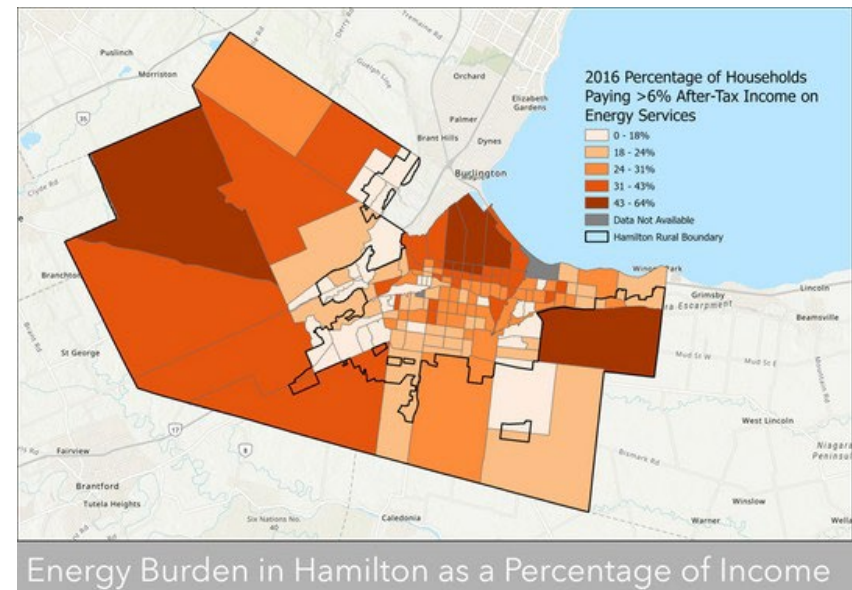
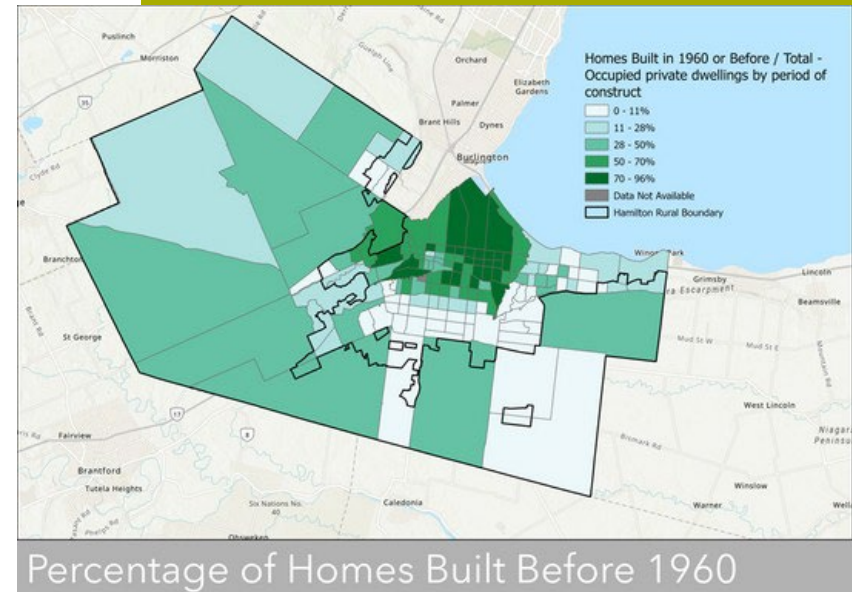
- 395 completed interviews:
- ◆ 204 by phone
  - ◆ 195 online
- Survey provided insights:
- ◆ Motivation to participate
  - ◆ Barriers to participation
  - ◆ Desires and needs from a HERO program

# BUILDING DATA REVIEW

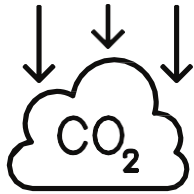
Examined residential building information:

- Examined dwelling types per 2021 Census data
- Commissioned an energy data analysis and spatial mapping of eligible building archetypes
- Evaluated energy burden across the City of Hamilton
- Analyzed average GHG emissions across building archetypes

**75% of residential dwellings in Hamilton qualify for the program as designed**



# PROGRAM PRINCIPLES



Support Low Carbon Transformation 2: Transforming our Buildings within the Community Energy & Emissions Plan (CEEP)



Support the greatest number of Hamiltonians to undertake retrofits which lower GHG emissions while increasing household energy efficiency and home comfort



Maximize program uptake by reducing barriers to participation



Design a program that stacks with and compliments existing rebates and incentives to maximize rebates for lowering GHGs



Provide program participants with energy coaching services, delivered by a knowledgeable, trustworthy City staff member

# PRESENTING:



Better Homes  
**HAMILTON**



Hamilton



Better Homes  
HAMILTON

# PROGRAM ELEMENTS

## Financial Model

- Local Improvement Charge (LIC)
- Max. \$20,000 loan per applicant
- Loan repaid via property tax

## Eligibility Criteria

- Homeowner within Hamilton
- Property tax account in good standing (no liens or arrears)
- Detached, semi-detached, townhouse, row house

## Eligible Expenses

- EnerGuide assessments & permits
- Mechanical upgrades: Air-source heat pumps, smart thermostats, smart controllers
- Building envelope: Air-sealing, and attic, basement, exterior wall insulation
- Supporting upgrades: Breaker panel upgrade (200 amp), ductwork repair

## Participant Supports

- Energy coach
- Contractor registry for informational purposes
- Guidance in project management & accessing rebates

# Let's take an example...

## ARCHETYPE B

Single-detached homes account for 56% of the City's residential building stock.

Building Archetype B represents 53% of Hamilton's single-detached building stock, over 66,800 structures.

- ◆ High efficiency natural gas furnace
- ◆ Approximately 1,800 square feet
- ◆ \$1,200 in electricity costs; \$1,025 in natural gas costs annually
- ◆ Emits 4.89 tCO<sub>2</sub>e per year







In this scenario, the Hamilton homeowner:

- Wants more efficient home heating/cooling
- Aware of the HER+ rebates but intimidated by the paperwork
- Would otherwise face challenges spending \$20,000 on home energy retrofits
- Has low understanding of home efficiency

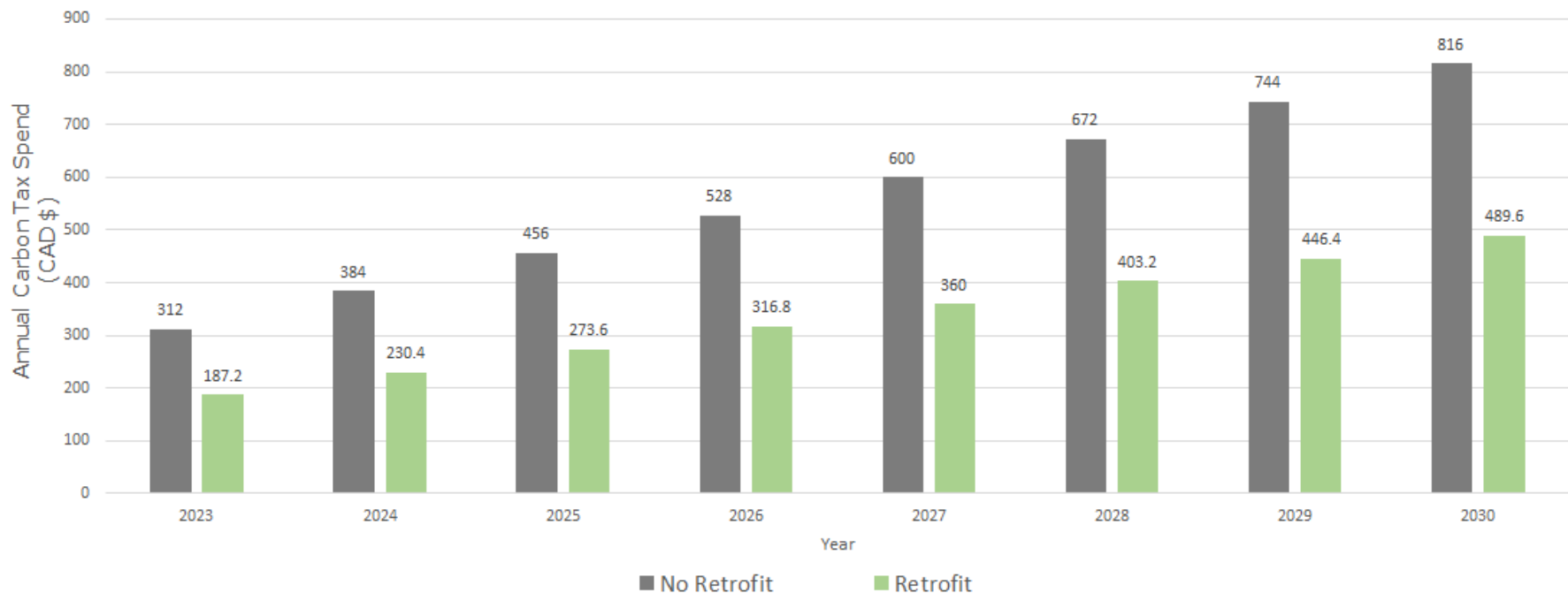
**Better Homes Hamilton reduces barriers to home efficiency by providing a low-cost loan and supportive energy coaching services.**

## ARCHETYPE B

Upgrade	Expense (\$)	Expected Cost with HER+ rebate
EnerGuide Energy Assessment	\$1,000	\$400
Air-source heat pump	\$17,000	\$11,750
Attic insulation to R25	\$2,000	\$1,200
Total cost of renovations	\$20,000	\$13,350*

\*Homeowner uses HER+ rebates as a lump-sum payment against the loan when received.

# CARBON POLLUTION PRICING SAVINGS: ARCHETYPE B



- Average single-detached home in Hamilton (4.89 tCO<sub>2</sub>e emissions/year)
- Assumes conservative 60% reduction in GHG emissions
- Carbon Pollution Pricing savings 2023-30: \$1,805
- Annual Carbon Pollution Pricing savings 2030-beyond: \$327/year



Better Homes  
HAMILTON

# INCUBATION STAGE: PILOT PROGRAM

PAGE 10

Administered by the Office of Climate Change Initiatives, a recommended 2-year pilot will allow staff to evaluate and tweak the program.

Program element	Description
Target	50 homes with variety of eligible building types, diversity of homeowners
Financial model	Max \$20,000 LIC loan with 0% fixed interest rate
Eligibility	Homeowners in Hamilton Current on property tax payments No other liens against title Single-detached, semi-detached, townhouse, row house
Eligible expenses	Permits and assessments Building envelope (air sealing, insulation) Mechanical systems (ASHP, smart thermostat, smart controllers) Supporting infrastructure (breaker panel upgrade, duct work repair)

# STEPS BEFORE LAUNCHING

If pilot is approved, the next steps are:



- Hiring Senior Project Manager with Energy coach skillset, within the Office of Climate Change Initiatives
- Bringing forward required LIC by-laws for Council approval
- Establishing inter-departmental workflows between supporting divisions (Finance, Legal, Taxation)

# Key Recommendations



- Approval of the 'Incubation Stage' Better Homes Hamilton (BHH) program (Appendix "A" BHH Program Overview);
- Direction to Staff to bring forward enabling Local Improvement Charge (LIC) By-law;
- Launch 'Incubation Stage' with target of 50 homes before the end of 2024;
- Approve \$1.0M loan receivable on City's balance sheet;
- Approve \$275K from Climate Change Reserve for fixed costs (i.e. loan loss, marketing, software, staff support etc.);
- Direction to Staff to report back within 2 years on results and feasibility for scaling.



# THANK YOU! QUESTIONS?



**CENTRE FOR  
CLIMATE CHANGE  
MANAGEMENT  
AT MOHAWK COLLEGE**

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## INFORMATION REPORT

<b>TO:</b>	Mayor and Members General Issues Committee
<b>COMMITTEE DATE:</b>	May 3, 2023
<b>SUBJECT/REPORT NO:</b>	Hamilton Region Decarbonization Hub (CM22013(a)/PED22176(a)) (City Wide) <b>(Outstanding Business List Item)</b>
<b>WARD(S) AFFECTED:</b>	City Wide
<b>PREPARED BY:</b>	Cyrus Tehrani (905) 546-2424 Ext. 2261 Lynda Lukasik (905) 546-2424 Ext. 3169 Norm Schleeahn (905) 546-2424 Ext. 2669
<b>SUBMITTED BY:</b>	Cyrus Tehrani Chief Digital Officer & Director of Innovation City Manager's Office
<b>SIGNATURE:</b>	
<b>SUBMITTED BY:</b>	Lynda Lukasik Director, Office of Climate Change Initiatives Planning and Economic Development Department
<b>SIGNATURE:</b>	
<b>SUBMITTED BY:</b>	Norm Schleeahn Director, Economic Development Planning and Economic Development Department
<b>SIGNATURE:</b>	

### COUNCIL DIRECTION

This report is an information update to the Hamilton Region Decarbonization Hub recommendation report (CM220013/HSC22046/PED22176) (City Wide). On August 8,

OUR Vision: To be the best place to raise a child and age successfully.

OUR Mission: To provide high quality cost conscious public services that contribute to a healthy, safe and prosperous community, in a sustainable manner.

OUR Culture: Collective Ownership, Steadfast Integrity, Courageous Change, Sensational Service, Engaged Empowered Employees.

**SUBJECT: Hamilton Region Decarbonization Hub (CM22013(a)/PED22176(a))  
(City Wide) - Page 2 of 4**

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2022 Council conditionally approved a total 4-year funding contribution Hamilton Region Decarbonization Hub (the “Hub”) to a maximum of \$240,000 (\$60,000/per year) to be funded from existing funding allocation equally between the Economic Development Investment Reserve, Climate Change Reserve Account and Smart City Capital Project Account. The funding commitment was conditionally approved pending efforts to secure the total operating budget for the Hub for four years.

**INFORMATION**

Since August 2022 additional outreach and advocacy efforts have occurred to secure that funding via the joint efforts of the City of Hamilton, the Transition Accelerator (the “Accelerator”) and various partners of the Hub with Federal and Provincial governments, industry associations and the private sector.

The combined effort has resulted in funding commitments to enable the launch of the Hub based on a \$3.13 Million four-year draft operations budget as outlined in Appendix “A” to this report. The budget outlines the funding entities as well as anticipating Hub operating costs and in-kind value received as part of the Hub model. The funding would support Hub operations and staffing complement all of which would be net new positions directly supporting the Hub via local and City-promoted recruitment and position advertising. Hub staff would be employees of the not-for-profit Accelerator that would manage salaries and administration, but Hub staff would ultimately report to and take direction from the Hub via the proposed draft governance structure. The Hub would be a virtual entity without a physical location.

The draft governance structure including, an overview of the proposed Hub operating model, is outlined in Appendix “B” to this report. The Hub model would include a steering committee, integrating secretariat for managing day-to-day activities, action teams focused on Industry, Buildings, Transportation and Clean Energy Supply as well as marketing and communications activities related to the Hub.

The Hub aligns with the City of Hamilton’s mission to reach net-zero carbon emissions by 2050, which was borne out of the City Council’s approved motion declaring a climate change emergency in 2019. In addition, it aligns across various city priorities specifically:

- 2021-2025 Economic Development Action Plan (PED21001)
- Advanced Manufacturing Strategy (PED23005)
- Foreign Direct Investment (FDI) Attraction Strategy (PED23033)
- Bayfront Industrial Area Strategy – Phase 2 (PED14117(d))
- Our Community Energy & Emissions Plan (CEEP) and the Climate Change Impact Adaptation Plan (CCIAP) (CM22016/PED22058(a)/HSC22030(a))
- 2023 Priority Focus Areas for the Office of Climate Change Initiatives (PED23064)
- Smart City/Intelligent Community focus areas

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**SUBJECT: Hamilton Region Decarbonization Hub (CM22013(a)/PED22176(a))  
(City Wide) - Page 3 of 4**

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Appendix “C” of this report contains a high-level summary of the Hub’s alignment and potential ability to support and complement various existing City priorities and strategies.

As part of initial work to gauge local interest in the establishment of the Hub significant outreach efforts were undertaken both internally at the City and wide range of external stakeholders:

**Internal Consultation:**

- Digital, Innovation and Strategic Partnerships, City Manager’s Office
- Office of Climate Change Initiatives, Planning & Economic Development
- Economic Development, Planning and Economic Development
- Government Relations and Community Engagement, City Manager’s Office
- Legal and Risk Management, Corporate Services
- Procurement, Corporate Services

**External Consultation:**

- ArcelorMittal Dofasco (AMD)
- Bay Area Climate Change Council (BACC)
- Canadian Steel Producers Association (CSPA)
- Centre for Integrated Transportation and Mobility (CITM)
- Energy suppliers: Alectra, Air Liquide, Atura, Enbridge, Mitsui & Suncor
- Federal Economic Development Agency for Southern Ontario (FedDev Ontario)
- Hamilton Anchor Institutions Leadership (HAIL)
- Hamilton Chamber of Commerce
- Hamilton Industrial Environmental Association (HIEA)
- Hamilton International Airport / Vantage Airport Group
- Hamilton Oshawa Port Authority (HOPA)
- Hamilton Utilities Corporation & Hamilton Community Enterprise (HUC/HCE)
- Innovation Factory
- Ontario Ministry of Energy (MOE)
- Ontario Ministry of Economic Development, Job Creation and Trade (MEDJCT)
- Ontario Ministry of the Environment, Conservation and Parks (MECP)
- McMaster University
- Mohawk College
- Natural Resources Canada (NRCAN)
- Stelco Inc.

**SUBJECT: Hamilton Region Decarbonization Hub (CM22013(a)/PED22176(a))  
(City Wide) - Page 4 of 4**

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**Next Steps:**

- Finalize funding agreements with contributors
- Begin recruitment process for Hub Director/Lead
- Establish Steering Committee Membership
- Develop Steering Committee Terms of Reference
- Develop broader Hub governance model
- Hire Hub Staff
- Launch Action Teams

**APPENDICES AND SCHEDULES ATTACHED**

Appendix "A" to Report CM22013(a)/PED22176(a): Proposed Hamilton Region Decarbonization Hub Funding Breakdown

Appendix "B" to Report CM22013(a)/PED22176(a): Hamilton Region Decarbonization Hub Concept and Draft Proposed Governance Overview

Appendix "C" to Report CM22013(a)/PED22176(a): Hamilton Region Decarbonization Hub Alignment to City Strategies

Proposed Hamilton Region Decarbonization Hub  
Funding Breakdown

	2023-24	2024-25	2025-26	2026-27	TOTAL	%	Status
<b>Funding Sources/Revenues:</b>							
Federal Economic Development Agency for Southern Ontario (FedDev ON)	400,000	400,000	400,000	400,000	<b>1,600,000</b>	51.1	Application Pending
Municipal (City of Hamilton)	60,000	60,000	60,000	60,000	<b>240,000</b>	7.7	Committed
Transition Accelerator	200,000	200,000	200,000	200,000	<b>800,000</b>	25.6	Committed
Ivey Foundation	100,000	100,000	100,000	100,000	<b>400,000</b>	12.8	Committed
Hamilton Community Enterprises	10,000	10,000	10,000	10,000	<b>40,000</b>	1.3	Committed
Hamilton Industrial Environmental Association	10,000	10,000	10,000	10,000	<b>40,000</b>	1.3	Committed
Hamilton Chamber of Commerce	2,500	2,500	2,500	2,500	<b>10,000</b>	0.3	Committed
<b>Total</b>	<b>\$782,500</b>	<b>\$782,500</b>	<b>\$782,500</b>	<b>\$782,500</b>	<b>\$3,130,000</b>	100.0%	
<b>Expenses: *</b>							
HRDH Executive Director/Lead	130,000	133,250	136,581	139,996	<b>539,827</b>	17.2	
Analyst/Engineer (Quantity 3)	270,000	276,750	283,669	290,760	<b>1,121,179</b>	35.8	
Communications & Marketing	120,000	123,000	126,075	129,227	<b>498,302</b>	15.9	
Project Coordinator/Engagement (Quantity 2)	160,000	164,000	168,100	172,303	<b>664,403</b>	21.2	
Administration/Conferences/Travel/Technology	72,500	74,313	76,170	78,075	<b>301,057</b>	9.6	
<b>Total</b>	<b>\$752,500</b>	<b>\$771,313</b>	<b>\$790,595</b>	<b>\$810,360</b>	<b>\$3,124,768</b>	99.8%	
<b>In-Kind:</b>							
Steering Committee (2x per month/60 mins/8-10 people/\$50/hr)	12,000	24,000	24,000	24,000	<b>84,000</b>		
Action Teams (2x per month/60 min/6-7 people/\$50/hr)	8,400	16,800	16,800	16,800	<b>58,800</b>		
<b>Total</b>	<b>\$20,400</b>	<b>\$40,800</b>	<b>\$40,800</b>	<b>\$40,800</b>	<b>\$142,800</b>		

\*Assumes a 2.5% annual increase in expenses

## ***Appendix B: Hamilton Region Decarbonization Hub Concept and Draft Proposed Governance Overview. A new approach to speed progress to Net Zero***

### **Introduction**

This appendix provides an overview of the Hamilton Region Decarbonization Hub (the “Hub”) model and draft governance framework. The Hub’s main goal is to align and coordinate currently disparate interests and sectors to take a cooperative Hamilton-based approach to create pathways to net zero emissions across the city by 2050 and help accelerate the pace of decarbonization.

### **Background**

The Hub is a new model of national interest, where key industries, governments and stakeholders collaborate to develop investable opportunities on pathways to net zero and will be a first of its kind in Canada. The Hub will be designed and operated to give real-time insights and learnings to other areas across the country, including key industrial areas, so other regions can accelerate their progress on emissions reduction in ways that are compatible with the net zero, emissions elimination paradigm.

The Hub presents an evolution of the more limited Hub concept model that may focus solely on one decarbonization pathway (i.e. hydrogen only) into a full, regional Decarbonization Hub, centred on forms of low or zero carbon and their interconnections. The Transition Accelerator, in collaboration with key Hamilton stakeholder partners, proposes the challenge of decarbonizing Hamilton’s advanced manufacturing, buildings and transportation systems that can be strongly influenced and supported along a decarbonization pathway via opportunities demanded by the steel production and related support industries. The Steel industry – as a large economic engine - but also a large emitter, also creates an ideal anchor industry that has high potential to be reframed into a system-level change where solutions to decarbonize the steel sector can also help decarbonize other sectors and emissions sources such as transportation, buildings, and other industries (e.g. advanced manufacturing).

### **Decarbonization Hubs**

Hubs are coordinated, synergistic, regional initiatives for economic development to create an economically viable value chain where clean energy is a fuel and/or a novel industrial feedstock, thereby achieving substantial reductions in greenhouse gas (GHG) emissions. The Hub is not a legal structure but a high-communication, high-trust, high-collaboration model. The level of collaboration within a Hub will depend on the nature of the outcomes, for example, the greater the complexity of the desired outcomes, the greater the level of collaboration required and expected. Actionable steps would be developed to capitalize on opportunities to resolve any identified barriers.

**Appendix “B” to Report CM22013(a)/PED22176(a)**  
**Page 2 of 9**

**Some Potential Barriers and Opportunities:**

<b>Barriers to Overcome</b>	<b>Opportunities to Resolve</b>
Energy cost of production and distribution	Cost decreases with the increased scale of use
Inefficient value chain	Transparent techno-economic analyses put into public domain in real-time, private sector empowered to find lasting solutions
Lack of system optimization: Incomplete understanding of the economic opportunity, among a full suite of actors	Broader suite of players informed on existing and future potential, leading to more competition to deliver better solutions cheaper
Lack of critical investment scale	Engage strategically with funders/financiers creating fundable projects. Enable private-public funding opportunities
Differing views by incumbents on preferred technologies slow public and private decision making	Single process engages players on full value chain, performs independent techno-economic analyses detailing pros/cons of different solutions, speeding better decision making, ensuring lasting solutions serve the public good
Regulatory barriers incompletely understood	Regulators get real-time, real-life input about what changes are needed and when to enable progress, while still fulfilling mandate

The following draft objectives and principles could be considered to guide the Hub operations. These objectives also align with the Government of Canada’s priorities of utilizing public funding for a forward-thinking un-siloed approach to reach net zero goals.

**Draft Objectives**

The accelerated, strategic deployment of public-private partnerships along the value chain that creates reliable domestic markets for low/zero carbon energy supplies as a fuel or industrial feedstock, and connects low-cost, low/zero carbon energy supply with the new markets. The key is the interconnections between energy subsystems into a single system and achieving scale required for economic viability. The Hub will focus on innovating business and supply/value chains as a priority versus new technology development – though technology innovation will be an organic outcome of the efforts.

**Principles for Success**

**Bold** Move assertively to seize the opportunity.

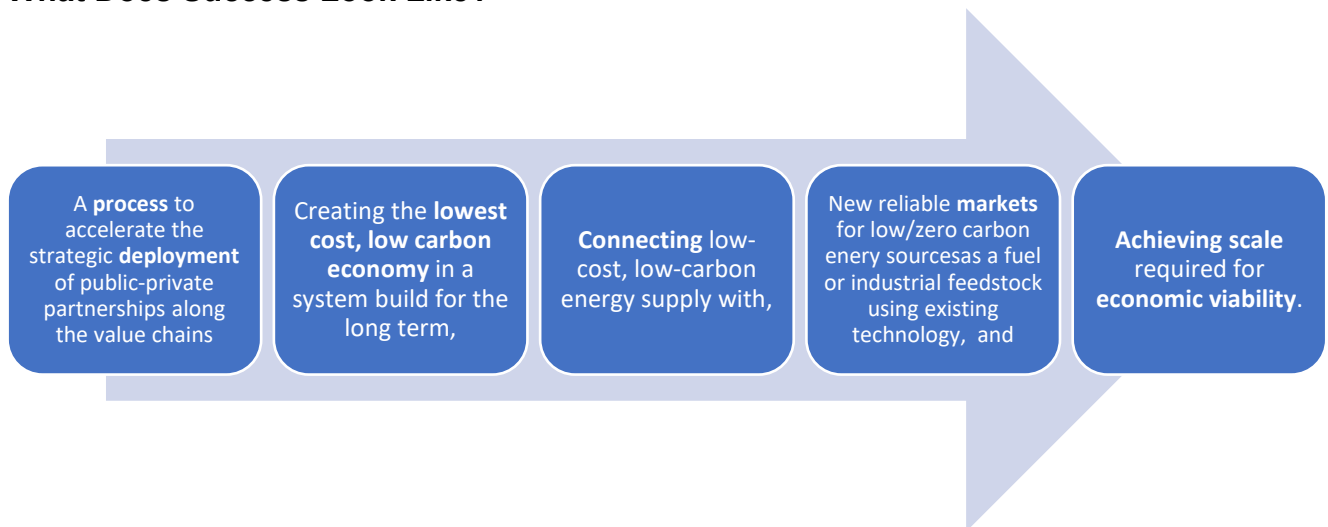
**Objective** Data and knowledge-driven, even if uncomfortable.

**Highly Leveraged** Good ideas and expertise will be embraced no matter where they come from.

## Appendix “B” to Report CM22013(a)/PED22176(a)

Page 3 of 9

<b>Inclusive</b>	Co-designing and co-adjusting.
<b>Action</b>	Action-orientated and nimble, doubling down on success, adjusting quickly if things do not work.
<b>Failure</b>	Fail fast and fix preferred to paralysis by analysis.
<b>Outcome Focussed</b>	Laser focussed on delivering outcomes in the real world; agnostic to which companies will benefit or not from hub activities so long as best solutions to challenges are advanced.
<b>Top down and bottom up</b>	Embrace an approach that takes advantage of practical/tangible advice and progress, and theoretical/strategic advice and progress simultaneously.
<b>Public Good</b>	A low-cost, low-carbon energy economy that maximizes the permanent economic, environmental, and social good is more important than the success of individual companies.
<b>Transparency</b>	Team members from government, industry associations, economic development organizations, and Accelerator staff are expected to fully share all relevant intelligence with other Team members, subject to NDA limitations, and not share intelligence or insights gained via the Hub in ways that give preferential access to some stakeholders/members etc.

**What Does Success Look Like?**

**Appendix “B” to Report CM22013(a)/PED22176(a)**  
**Page 4 of 9**

**Hubs are not structures, they are a series of strategic, integrated dialogues informed by independent analyses, among players along the full value chain.**

While Hubs have no decision-making or funding authority, they leverage collaborative decisions by sector (e.g. coordinating municipal fleet implementation, facilitating and securing of new low / zero carbon energy supplies, supporting the development of public-private partnerships to advance waste heat energy supply systems for building decarbonization).

Hubs create quantitative but generic future scenario descriptions and models that when integrated, describe potential transition pathways to economically viable decarbonization pathways. Analyses benefit from real-time, real-life input by stakeholders along the full value chains. Findings are put into the public domain quickly so individual players (companies, governments, others), and/or coalitions, can benefit from a systems-level analysis as they develop their projects and target their investments.

The objective of a Hub is to link low-cost energy supply with a very low or zero carbon footprint with new, reliable markets for associated energy sources and fuels in transport and buildings, or as a fuel in industrial feedstocks. Hubs consciously focus on technologies that are already de-risked for commercial deployment.

**How are Hubs Organized?**

Hubs are comprised of a Steering Committee, Action Teams, and an integrating secretariat, all of which are embedded in a larger Ecosystem to ensure the participation of any person or organization that has an interest in economic development and emissions reduction (See Figure 1). Initial Action Teams are presented in Figure 2. Additional Teams could be added based on learnings and progress. Existing bodies or organizations could fulfill the function of an Action Team rather than launching a new Team. In addition, economic development and philanthropic entities will be formed to support the Hub as part of a broader ecosystem. There will be regular two-way information exchange across all groups.

Figure 1.0 Draft Hub Governance Model

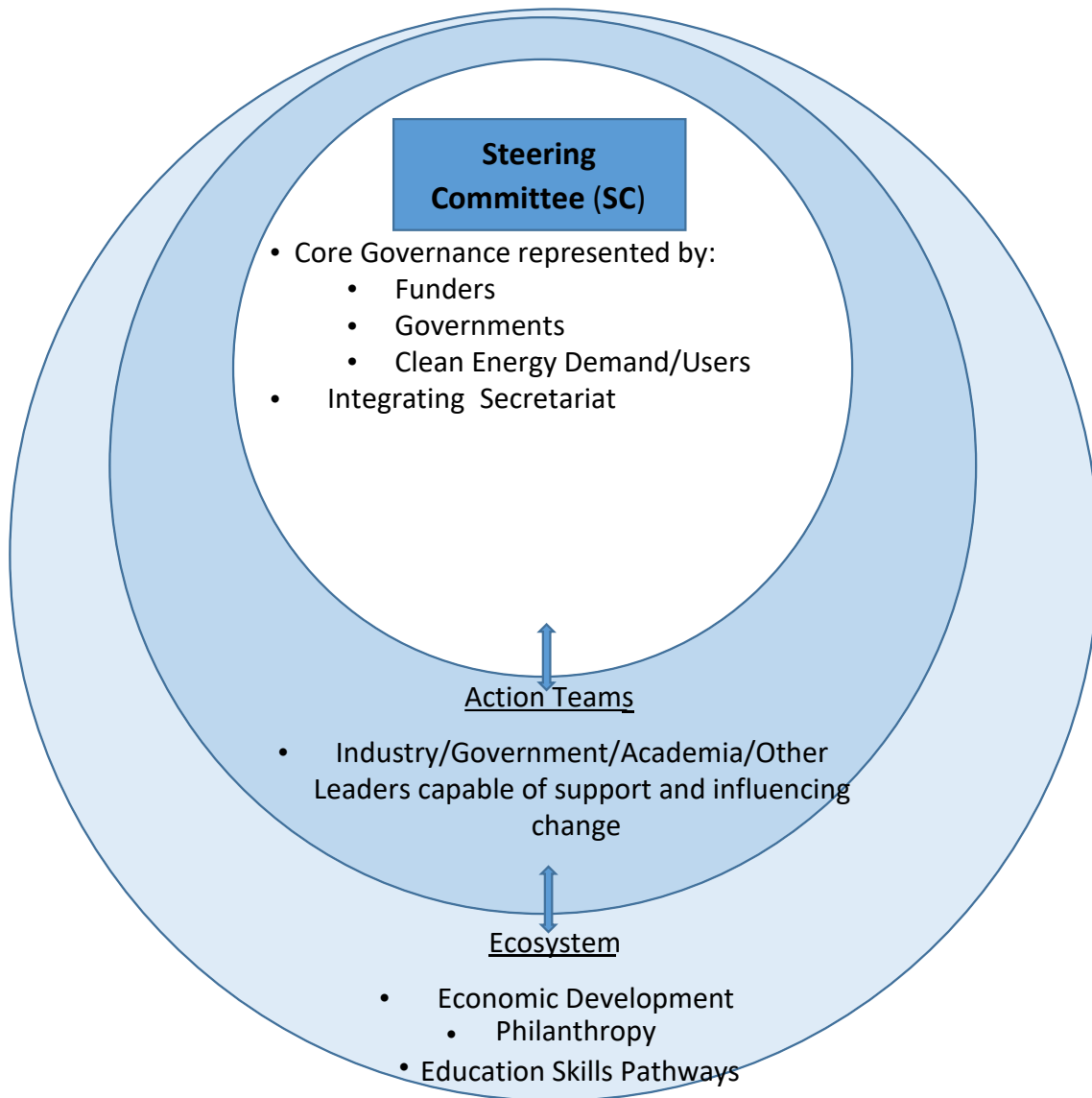
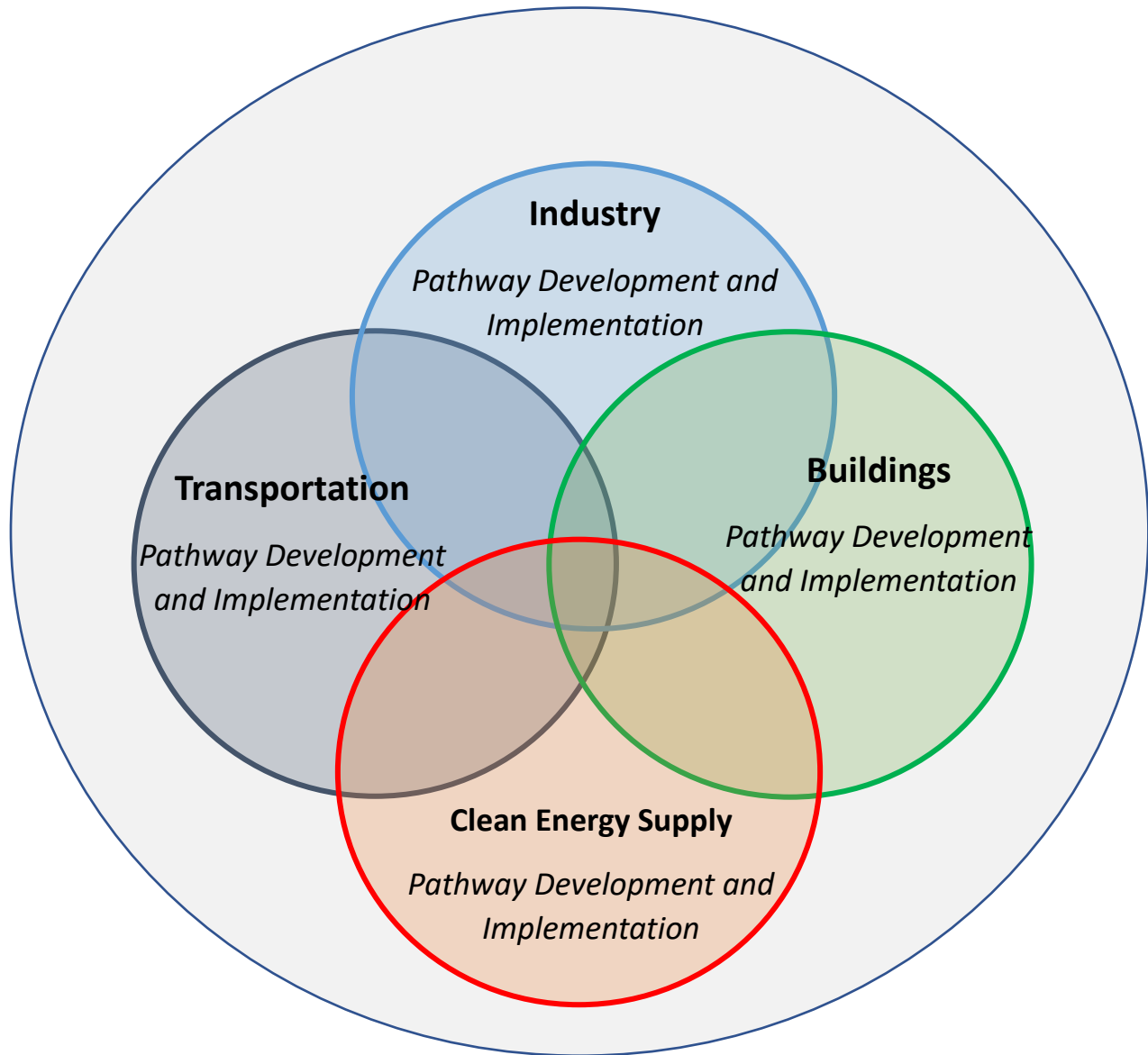




Figure 2.0 Proposed Action Teams



### Roles and Responsibilities/Terms of Reference (Draft)

The proposed roles and responsibilities are adopted from existing Hub models but will be augmented to fit the Hamilton Hub needs:

#### Leadership Team (For consideration as an additional layer if deemed required):

- Membership: Provincial and Municipal officials, private sector leader(s) at CEO level (potentially retired to avoid conflicts), other(s) (e.g. Indigenous)
  - Co-Chairs: To-be-determined if a Leadership Team is required.

**Appendix “B” to Report CM22013(a)/PED22176(a)****Page 7 of 9**

- Role: Publicly support and validate the Hub process; Coordinate high-level Hub Communication functions; Manage effective relationships with other orders of government.
- Responsibilities: Task and empower the Steering Committee, and secure resources.

**Steering Committee**

- Membership: Senior Provincial and Municipal government officials, other funding entities, senior Transition Accelerator staff
  - Co-chair: Municipal or Provincial official
- Role: Drive the process forward through intensive collaboration; Create and communicate an open, supportive attitude towards suggestions for improvement wherever they come from; Coordinate and delegate responsibilities; Ensure agility and resilience by managing transformational change effectively.
- Responsibilities: Resource, task and coordinate Action Teams; Engage all levels of government and private sector to align resources and other initiatives; Develop and ensure execution of a hub communications plan using participating organization resources; Support Leadership Team members that lead their organization; Effectively build an innovation-driven culture to facilitate transformational change management.

**Integrating Secretariat**

- Membership: Transition Accelerator (staff or secondees)
- Role: Manage the day-to-day activities and help drive progress through intensive collaboration across multiple sectors concurrently.
- Responsibilities: Management support for Steering Committee, techno-economic support for Action Teams, logistical support for Action Teams (convening, coordination, communications support), liaising between management and sub-teams

**Action Teams**

- Executive Membership: Government, industry, industry associations, Indigenous and regulators (where applicable) (6-8 members); open participation on the Team by all appropriate stakeholders/partners
  - Chair: Municipal/Government and Transition Accelerator
- Role: Detailed planning, project funding identification, identify required additional techno-economic analyses
- Responsibilities: Guide de-risking techno-economic analyses performed by the secretariat, solicit feedback on analyses from players interested in the work of the Action Team, identify regulatory barriers and solutions and infrastructure requirements to ensure an economically sustainable low carbon economy emerges quickly, develop project criteria if requested by the government, convene and ensure two-way communication with potential private and public project funders

**Appendix “B” to Report CM22013(a)/PED22176(a)****Page 8 of 9**

- Team Member applicable skills sets and/or experience:
  - Senior managers that lead the Action Team area in their organization, authority to represent and make decisions for their organization, timely access to other resources in their organization necessary for the success of the Team, formal support from their home organization to be able to allocate sufficient time to ensure Team success
  - Ability to:
    - Manage finances and continuously monitor financial decisions in achieving defined goals
    - Manage information and knowledge by providing stakeholders with the right information at the right time and empowering them to use their gained knowledge
    - Manage technology – to support the strategic and operational goals of the Node

**Launch and Operations**

Soft launch of Teams could proceed immediately to retain momentum as funding is secured. The overall communication and implementation plan of the Hub could be announced publicly as soon as practical and begin recruitment of the Hub staffing complement.

Action Teams will ensure their work benefits from a broad array of perspectives and competencies by engaging the broader community of stakeholders in the Team dialogue using structures and processes appropriate for their area of activity. Techniques could include public release of DRAFT documents/discussion papers and solicitation of comments, workshops, virtual presentations and Q&A sessions, wikis etc. Existing organizations (industry associations, organizations with convening capabilities) will be leveraged when possible.

**Key Outcomes****General**

- Coordinate and build low /zero carbon energy demand to support private sector development of the most competitive supply at scale.
- Expand reputation and image (environmental, social, economic) to attract investment and a broad range of economic development.
- Improve relations across industries, public organizations, and the community at large.

**Appendix “B” to Report CM22013(a)/PED22176(a)**  
**Page 9 of 9**

**Tactics**

- Greater familiarization of the benefits of system-level decarbonization among a greater number of players along full value chains
- Improved relationships among current largely disparate players, leading to systems-level thinking, quicker and more strategic actions
- Quicker and more strategic project development and funding
- Attraction of more investment from more sources
- Jurisdictions recognized as able to react quickly to changing strategic conditions, capitalizing on new thinking and models of organization to drive progress.
- Permanent jobs in new energy systems compatible with global trends in emissions reductions

**Specific**

- Support the identification of key barriers and potential solutions in implementing the Hub
- In conjunction with key partners, development, and refinement of the Hub’s methodology to strategically engage players along the value chains to de-risk public and private investment decisions.
- The methodology will be designed to be replicable, and easily applied to multiple strategic locations across Canada with the objective of sharing all knowledge and lessons learned from the Hub in order to evaluate and/or mobilize strategies to decarbonize.
- Effective public and private sector decision-making by creating and publicly publishing valuable, standardized aggregate infrastructure and market data including:
  - Identifying, assessing, and reporting on market opportunities for various parts of the value chain for the Hub,
  - Assisting the Hub with feasibility analysis and/or evaluation of different sub-regional options and opportunities, and
  - Ensuring information is in the public domain, allowing the private sector to develop solutions and compete to deliver efficient, low-cost production and distribution.

## Hamilton Region Decarbonization Hub Alignment to City Strategies

### 2021-2025 Economic Development Action Plan (PED21001):

#### Under Growing Business and Investment Priority Area:

- Priority 22: Identify opportunities to increase “social”, “local” and “green” Procurement
- Priority 30: Initiate and Implement an updated Advanced Manufacturing Sector Strategy – including Aerospace, Electrical & Autonomous vehicle opportunities

#### Under Moving Goods and People Priority Area:

- Priority 41: Complete Feasibility Studies for A-line, S-Line and remaining Higher Order Transit (BLAST) Corridors
- Priority 42: Expand Micro-mobility travel options such as Bike Share and E-scooters
- Priority 44: Continue to investigate the potential for On-Demand Transit Services to provide or supplement regular public transit services to, from and within employment areas and community nodes, using the Flamborough On-Demand Service as a pilot
- Priority 46: Update the Goods Movement Sector Strategy
- Priority 50: Encourage new development within the Airport and AEGD to incorporate District Energy Systems to reduce environmental impacts
- Priority 51: Work with Port partners to introduce environmentally sustainable options for cargo movement through container service and increased rail and intermodal operations.

#### Under the Revitalizing Priority Areas and Placemaking Priority Area:

- Priority 60: Re-envision the existing Hamilton LEEDing the Way Community Improvement Plan to better incentivize environmentally sustainable development and investments
- Priority 62: Revise incentive programs to support the achievement of climate change targets

#### Under the Building Transformational Projects Priority Area:

- Priority 73: Explore and implement decarbonization initiatives with Local Industry
- Priority 74: Promote Hamilton’s District Energy Systems to major construction projects as a climate change benefit and as a low-carbon alternative to traditional energy systems
- Priority 75: Encourage new development within the Airport and AEGD to incorporate District Energy Systems to reduce environmental impacts

**Appendix “C” to Report CM22013(a)/PED22176(a)**  
**Page 2 of 3**

**Community Energy & Emissions Plan (CEEP) and the Climate Change Impact Adaptation Plan (CCIAP) (CM22016/PED22058(a)/HSC22030(a)):**

The actions related to industrial emission includes:

- Action 1: Establish an Industrial Energy Efficiency and Decarbonization Working Group;
- Action 2: Establish a Clean-tech Accelerator; and
- Action 3: Expand Local Industrial Energy Management Training Programs.

Setting up the Hub will work to directly achieve the first two actions, with several spin-off benefits including potential training programs and developing the technology to support other additional actions described in the CEEP including:

- Action 8: Decarbonize the City’s Transit;
- Action 11: Establish a Commercial Fleet Decarbonization Working Group (aimed at decarbonizing commercial fleets across Hamilton)
- Action 18: Complete a Technical Analysis of Green Hydrogen; and
- Action 19: Decarbonize and Expand our District Energy Systems.

**Advanced Manufacturing Strategy (PED23005)**

Further enhancement of Hamilton as ‘business friendly’:

- Identify leading practices from international jurisdictions which have streamlined an efficient government approvals process for investment attraction (and decarbonization) that can be implemented in Hamilton
- Advocate for an assessment of Hamilton’s energy supply to identify/assess potential challenges identified by stakeholders and encourage the development of associated recommendations for improvement

Clean energy transition:

- Work with key stakeholders to develop an industry-focused decarbonization transition roadmap that supports local industry in achieving decarbonization targets by understanding areas of opportunity for reducing carbon emissions
- Working with key stakeholders, undertake a match-making exercise to connect innovative start-up companies focused on decarbonization with established companies focused on clean energy transition

Alignment with City initiatives:

- Further support the City’s focus on a low-carbon economy by continuing to promote decarbonization across the industry and including principles related to the transition across all manufacturing-related initiatives

**Foreign Direct Investment (FDI) Attraction Strategy (PED23033):**

Decarbonization technologies related advantages and opportunities:

- Development opportunities: As hydrogen is projected to represent 18% of global energy consumption by 2050, opportunities exist to leverage recent initiatives across Hamilton to support the clean energy transition in Canada and abroad.

**Appendix “C” to Report CM22013(a)/PED22176(a)**  
**Page 3 of 3**

- Growth opportunity: secure and expand Hamilton’s industrial capabilities, commitment to decarbonization, and growth in hydrogen demand put the City in a unique position to attract investment into a hydrogen supply chain and to support the expansion of the local alternative fuels ecosystem.
- Innovation hub: iHub’s reputation and resources position Hamilton to become a global destination to develop, test and commercialize EV technologies. By leveraging iHub’s work, Hamilton can support local subject matter experts (SMEs) and also ensure the adequate training of Hamilton’s EV workforce
- Growth opportunity: secure Hamilton should focus on securing local SMEs and supporting iHub’s work as well as attracting more investment into its growing EV motors sector.

**Clean energy transition:**

- The City of Hamilton has demonstrated a commitment to transitioning to clean and sustainable energy through initiatives such as the Hamilton Region Decarbonization Hub, ReCharge Hamilton, and ArcelorMittal Dofasco’s decarbonization commitments. These initiatives, along with federal and provincial ambitions will help to further develop local capabilities and attract private investment in this growing sector

**Bayfront Industrial Area Strategy – Phase 2 (PED14117(d)):**

- Recognizing The Bayfront’s role as a major industrial area, there is an opportunity to more aggressively offset the area’s GHG emissions through a combination of efforts – including but not limited to supporting green industry investments in new technology, energy-efficient building design, co-generation, district energy...
- important to continue to attract new industries which support Hamilton’s Steel Cluster by diversifying the value chain (e.g. automotive component manufacturing, downstream steel production, fabrication, coating, etc.), ultimately reinforcing the strength of Hamilton’s steel cluster.

**2023 Priority Focus Areas for the Office of Climate Change Initiatives (PED23064):**

- Climate Change Governance & Innovation focus area as well as supporting municipal corporate innovation via outcomes and work of the Hub’s proposed action teams specifically the buildings, transportation and manufacturing sectors.



Hamilton

# HAMILTON REGION DECARBONIZATION HUB INFORMATION UPDATE

May 3, 2023

General Issues Committee

**Hamilton Region Decarbonization Hub**

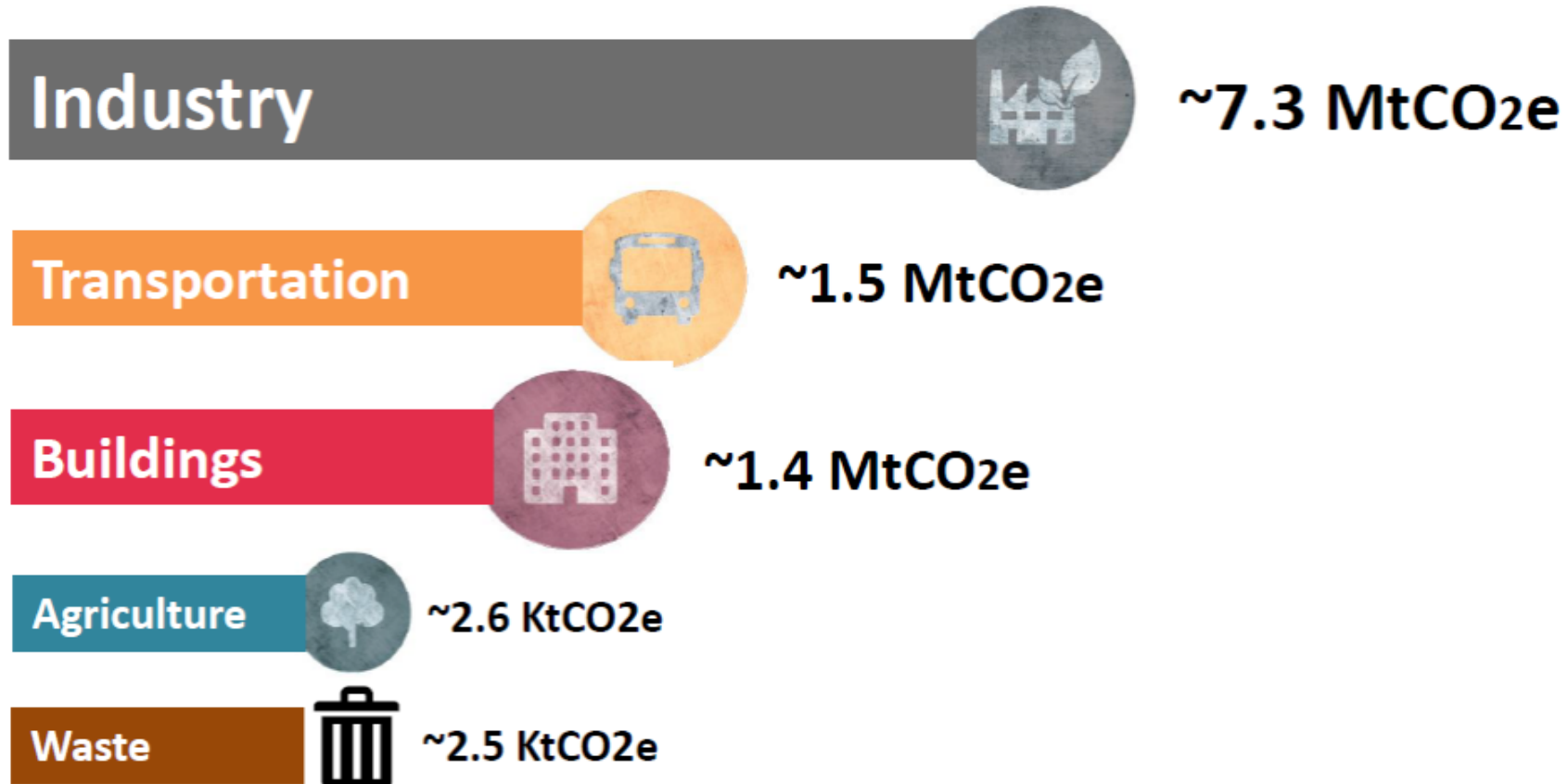
Climate Change Initiatives Office / Digital & Innovation / Economic Development  
City Manager's Office / Planning & Economic Development



# Council Direction & Update

- In 2022, Council conditionally approved a 4-year funding contribution to Hamilton Region Decarbonization Hub (the “Hub”) to a maximum of \$240,000 (\$60,000/per year)
- Funding to be split equally between the Economic Development Investment Reserve, Climate Change Reserve Account and Smart City Capital Project Account (\$80,000 each)
- Since August 2022, work has focused on securing funding commitments for a total \$3.13 Million, 4-year proposed operating budget
- City’s contribution would be approximately 7.6% of total funding (not including in-kind support )
- City is a funding partner with operational logistics for the Hub supported via the Transition Accelerator (a not-for-profit pan-Canadian organization that works to identify and advance viable pathways to Canada's 2050 climate targets)

# GHG Emissions – Hamilton Context (2020)



# Alignment to Key City Strategies

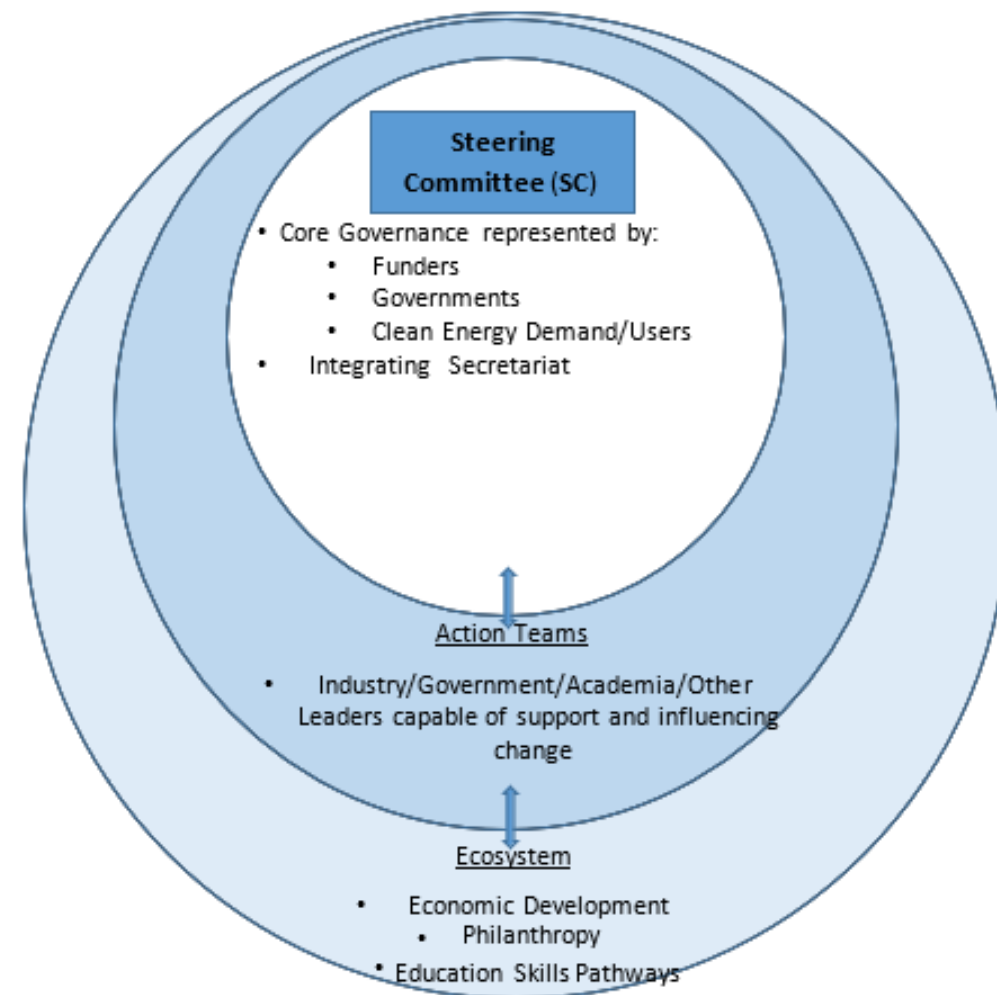
- The Hub aligns with the City of Hamilton's mission to reach net-zero carbon emissions by 2050, which was borne out of the City Council's approved motion declaring a climate change emergency in 2019.
- 2021-2025 Economic Development Action Plan (PED21001)
- Advanced Manufacturing Strategy (PED23005)
- Foreign Direct Investment (FDI) Attraction Strategy (PED23033)
- Bayfront Industrial Area Strategy – Phase 2 (PED14117(d))
- Community Energy & Emissions Plan (CEEP) and the Climate Change Impact Adaptation Plan (CCIAP) (CM22016/PED22058(a)/HSC22030(a))
- 2023 Priority Focus Areas for the Office of Climate Change Initiatives (PED23064)
- Smart City/Intelligent Community focus areas

# Hub Overview

- Hubs are coordinated, synergistic, regional initiatives for economic development to create an economically viable value chain based on moving sectors to a net-zero end state
- The objective of a Hub is to link low-cost energy supply with a very low or zero carbon footprint with new, reliable markets for associated energy sources in the advanced manufacturing, transportation, and building sectors
- All funding will be for net-new dedicated staffing solely supporting the Hamilton Region Decarbonization Hub activities with position advertising locally and via City of Hamilton Website.

# Hub Overview

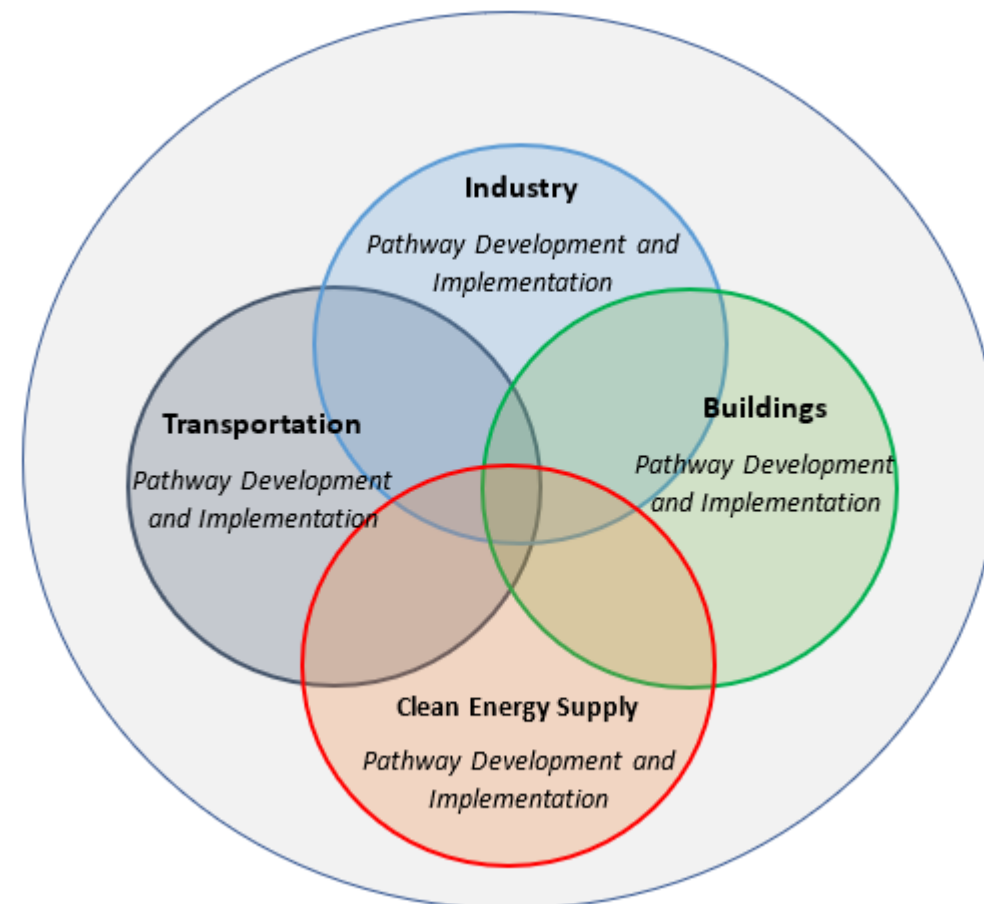
- Hub is not a legal structure but a high-communication, high-trust, high-collaboration model,
- The proposed Hub Model includes a Steering Committee, Integrating Secretariat that would manage day-to-day activities, and sector-specific Action Teams



# Hub Overview

## Action Teams:

- Responsible for detailed planning, project funding identification, and identify synergies and areas of shared interest
- Ensure open communication and information sharing across partners and with other Action Teams as required



# Engagement

## Outreach efforts included:

- ArcelorMittal Dofasco (AMD)
- Bay Area Climate Change Council (BACC)
- Canadian Steel Producers Association (CSPA)
- Centre for Integrated Transportation and Mobility (CITM)
- Energy suppliers: Alectra, Air Liquide, Atura, Enbridge, Mitsui & Suncor
- Federal Economic Development Agency for Southern Ontario (FedDev Ontario)
- Hamilton Anchor Institutions Leadership (HAIL)
- Hamilton Chamber of Commerce
- Hamilton Industrial Environmental Association (HIEA)
- Hamilton International Airport / Vantage Airport Group
- Hamilton Oshawa Port Authority (HOPA)
- Hamilton Utilities Corporation & Hamilton Community Enterprise (HUC/HCE)
- Innovation Factory
- Ontario Ministry of Energy (MOE)
- Ontario Ministry of Economic Development, Job Creation and Trade (MEDJCT)
- Ontario Ministry of the Environment, Conservation and Parks (MECP)
- McMaster University
- Mohawk College
- Natural Resources Canada (NRCAN)
- Stelco Inc.

# Targeted Outcomes

- Coordinating and building low/zero carbon energy demand to support sector development
- Demonstrating leadership (environmental, social, economic) to attract investment and a broad range of economic development
- Improving relations and knowledge across industries, public organizations, and the community at large
- Facilitate the industrial sector's ability to realize net zero carbon emissions by or before 2050



# Next Steps

- Finalize funding agreements with contributors (Q3 2023)
- Begin recruitment process for Hub Director/Lead (Q3 2023)
- Establish Steering Committee Membership (Q3 2023)
- Develop Steering Committee Terms of Reference (Q3/Q4 2023)
- Develop a broader Hub governance model (Q3/Q4 2023)
- Hire Hub Staff (Q3/Q4 2023)
- Launch Action Teams (Q4 2023)



Hamilton

THANK YOU

# Appendix – Proposed Funding Breakdown


## Proposed Hamilton Region Decarbonization Hub Funding Breakdown

	2023-24	2024-25	2025-26	2026-27	TOTAL	%	Status
<b>Funding Sources/Revenues:</b>							
Federal Economic Development Agency for Southern Ontario (FedDev ON)	400,000	400,000	400,000	400,000	<b>1,600,000</b>	51.1	Application Pending
Municipal (City of Hamilton)	60,000	60,000	60,000	60,000	<b>240,000</b>	7.7	Committed
Transition Accelerator	200,000	200,000	200,000	200,000	<b>800,000</b>	25.6	Committed
Ivey Foundation	100,000	100,000	100,000	100,000	<b>400,000</b>	12.8	Committed
Hamilton Community Enterprises	10,000	10,000	10,000	10,000	<b>40,000</b>	1.3	Committed
Hamilton Industrial Environmental Association	10,000	10,000	10,000	10,000	<b>40,000</b>	1.3	Committed
Hamilton Chamber of Commerce	2,500	2,500	2,500	2,500	<b>10,000</b>	0.3	Committed
<b>Total</b>	<b>\$782,500</b>	<b>\$782,500</b>	<b>\$782,500</b>	<b>\$782,500</b>	<b>\$3,130,000</b>	100.0%	
<b>Expenses: *</b>							
HRDH Executive Director/Lead	130,000	133,250	136,581	139,996	<b>539,827</b>	17.2	
Analyst/Engineer (Quantity 3)	270,000	276,750	283,669	290,760	<b>1,121,179</b>	35.8	
Communications & Marketing	120,000	123,000	126,075	129,227	<b>498,302</b>	15.9	
Project Coordinator/Engagement (Quantity 2)	160,000	164,000	168,100	172,303	<b>664,403</b>	21.2	
Administration/Conferences/Travel/Technology	72,500	74,313	76,170	78,075	<b>301,057</b>	9.6	
<b>Total</b>	<b>\$752,500</b>	<b>\$771,313</b>	<b>\$790,595</b>	<b>\$810,360</b>	<b>\$3,124,768</b>	99.8%	
<b>In-Kind:</b>							
Steering Committee (2x per month/60 mins/8-10 people/\$50/hr)	12,000	24,000	24,000	24,000	<b>84,000</b>		
Action Teams (2x per month/60 min/6-7 people/\$50/hr)	8,400	16,800	16,800	16,800	<b>58,800</b>		
<b>Total</b>	<b>\$20,400</b>	<b>\$40,800</b>	<b>\$40,800</b>	<b>\$40,800</b>	<b>\$142,800</b>		

\*Assumes a 2.5% annual increase in expenses



# INFORMATION REPORT

<b>TO:</b>	Mayor and Members General Issues Committee
<b>COMMITTEE DATE:</b>	May 3, 2023
<b>SUBJECT/REPORT NO:</b>	2023 Employer Survey (PED23087) (City Wide)
<b>WARD(S) AFFECTED:</b>	City Wide
<b>PREPARED BY:</b>	Adam Durrant (905) 546-2424 Ext. 4486
<b>SUBMITTED BY:</b>	Norm Schleeahn Director, Economic Development Planning and Economic Development Department
<b>SIGNATURE:</b>	

## COUNCIL DIRECTION

Not Applicable

## INFORMATION

### 1. Relevant Context

The 2021-2025 Economic Development Action Plan identifies the facilitation of an adaptable workforce as the first of six key priorities. Within this priority, the design and delivery of an annual survey focused on local economic conditions and workforce needs is identified as action item 3.

In late-2022 the previously delivered Hamilton Business and Workforce Needs Survey (HBWNS) was rebranded to “Employer One” as part of an ongoing data gathering partnership with Workforce Planning Hamilton. The delivery of this survey occurred concurrent to an additional employer survey sponsored by the Adult Basic Education Association in support of their Career Pathways tool. Economic Development made efforts to promote this survey by providing a direct link to it at the end of the Employer One survey. This approach represented a best effort at mitigating the effect of survey fatigue among Hamilton’s employers – a paramount concern since the outset of the COVID-19 pandemic.

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OUR Vision: To be the best place to raise a child and age successfully.

OUR Mission: To provide high quality cost conscious public services that contribute to a healthy, safe and prosperous community, in a sustainable manner.

OUR Culture: Collective Ownership, Steadfast Integrity, Courageous Change, Sensational Service, Engaged Empowered Employees.

**SUBJECT: 2023 Employer Survey (PED23087) (City Wide) - Page 2 of 9**

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The timing of Employer One, which opened for data collection on January 12, 2023 and closed on February 24, 2023 was aligned to past employer surveys delivered jointly by Economic Development and Workforce Planning Hamilton.

**2. Survey Distribution and Participation**

Invitations to complete the survey were delivered primarily through weekly email blasts. The contact database for this outreach combined mailing lists from Economic Development's internal business directory and Business Licencing's contact directory to produce a list of approximately 8,228 Hamilton businesses. In coordination with Workforce Planning Hamilton, Economic Development staff also prepared a robust social media and traditional media outreach campaign. The latter securing two earned media placements via interviews with Economic Development staff on CHML AM900.

Overall, 1,039 respondents opened the survey, which yielded 612 completed responses and an additional 48 partial responses which were included in the dataset for a total sample size of 660 responses. Though this sample size is smaller than the data set gathered in January to February of 2022, the final completion rate increased from 58.1% in 2022 to 63.5% in 2023. This decline in survey opens can be seen as part of a broader trend of survey fatigue observed among businesses since the early days of the pandemic. This survey fatigue is also combined with contemporary business challenges that are perceived to be too large in scope to be supported through a local data gathering exercise e.g. inflation, rising inflation rates, trade and supply chain disruptions, and a persistently tight labour market.

Despite declining participation levels, the data collected remains a statistically viable sample for Citywide business trends at a 95% confidence level and a  $\pm 3.8\%$  margin of error. While ward data were collected these data should only be treated as representative of the business who completed the survey, and not extrapolated to be statistically reliable indicators of ward-level trends.

**3. Survey Findings****3.1 Industry Profile**

The industry sectors (Appendix "A" to Report PED23087, Fig. 1) that reported the greatest survey completion were accommodation and food service (19.3% of respondents) other services (12.6%) – note: this sector typically includes businesses engaged in the repair or maintenance of machines, the provision of personal care services, the provision of funerary services, and all other services related to grant making or the advocacy of social causes – manufacturing (12.0%) retail trade (10.8%) and construction

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**SUBJECT: 2023 Employer Survey (PED23087) (City Wide) - Page 3 of 9**

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(10.6%). These five sectors account for more than 65% of all survey responses.

### **3.2 Employee Count**

Survey respondents were asked to compare their current employee count in January 2023 to an early-pandemic employee count in January 2021 (Appendix “A” to Report PED23087, Table 1). Respondents reported employing a total of 23,869 employees in January of 2021, which increased by 20.2% to 28,680 in January of 2023. Respondents in accommodations and food service reported the sharpest increase in employees, in absolute terms, with a 44.4% (1,041 employees) increase in their workforce. The largest proportional increase was seen among respondents in the Finance and Insurance sector, who reported a 110.3% increase in employees – though this only represented an absolute gain of 256 individuals.

### **3.3 Business Outlook**

A majority of respondents (62.5%) n=648 reported a short-term business outlook (Appendix “A” to Report PED23087, Table 2) as either excellent (rapid growth/expansion of business), very good (growth/expansion of business), or good (stable business operation with stable/growth outlook).

The most commonly selected response to this question was a “good” outlook, representing 45.8% of respondents. Approximately 23.3% of respondents reported a fair outlook (relatively stable business operations with a slightly negative outlook).

Fewer than one percent of responses (0.77%) reported an emergency (imminent permanent closure) and slightly less than one response in ten (9.9%) reported a poor outlook (unstable business operations with a negative outlook). Staff reviewed all responses who reported either a poor, emergency, or “other” business outlook for follow-up by the Business Investment and Sector Development Section’s Business Development Consultant team. Business outlook data were also provided to the Hamilton Business Centre to support targeted funding applications in support of Hamilton’s retail and personal service businesses.

Ward level business outlooks are provided in Appendix “A” to Report PED23087, Table 3. Note that ward level data was derived by asking employers “in what wards do your operations have a physical presence?”. Following-up on efforts to improve ward-level data gathering from last year’s survey, this year’s survey tool was programmed with a ward map to facilitate ease of response. Respondents were then able to select multiple wards

**SUBJECT: 2023 Employer Survey (PED23087) (City Wide) - Page 4 of 9**

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such that the average number of wards represented per respondent was approximately 1.7.

### **3.4 Revenue Changes and Labour Costs**

Approximately 29.7% of survey respondents noted that they suffered some level of revenue loss in 2022 compared to 2021 (Appendix “A” to Report PED23087, Figure 2). The plurality of responses (48.8%) reported that revenues increased during the same time period, and slightly more than one respondent in five (21.4%) reported no impact or change.

These data can be put into further context by comparing the 62.5% of respondents who forecasted either stable or growing business conditions for 2023 to the 70.2% of respondents who reported either an increase or stable year-on-year revenue. Both of these data points suggest generally positive trends at the citywide level and a clear improvement over data reported during the height of the COVID-19 pandemic.

### **3.5 Staffing Cost Changes**

The seventh stretch target in the 2021-2025 Economic Development Action Plan calls for the creation of a list of 1,000 living wage employers in Hamilton. This survey acts as Economic Development’s primary tool for creating this list through a question that asked respondents to self-identify as living wage employers (Appendix “A” to Report PED23087, Figure 3). Among 638 respondents to this question, 368 believed they qualified as living wage employers. In 2022’s survey 255 respondents self-identified as living wage employers. The preliminary list of 623 employers can now be vetted in collaboration with the Hamilton Roundtable for Poverty Reduction.

This year’s survey also asked respondents how the increase of Ontario’s minimum wage to \$15.50/hour impacted business operations. This most recent increase was pegged to inflationary pressures as measured in the Consumer Price Index. From among 637 respondents, approximately 63.3% reported that it had no noticeable impact on the business (Appendix “A” to Report PED23087, Figure 4). Slightly more than one-in-five respondents (22.8%) reported a moderate negative impact and slightly more than one-in-ten respondents (11.2%) reported a large negative impact. Only 2.8% of respondents reported that the minimum wage increase had a positive impact on their business.

**SUBJECT: 2023 Employer Survey (PED23087) (City Wide) - Page 5 of 9**

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**3.6 Labour Force Availability and Recruitment**

The COVID-19 pandemic had the effect of accelerating expectations on the changing nature of work, while creating additional demographic pressures on the Canadian labour force. Consequently, measures of labour force quality and recruitment challenges are an essential component of this survey.

Among 629 respondents, only 15 rated the availability of qualified workers in Hamilton as “excellent” on a four-point scale (Appendix “A” to Report PED23087, Figure 5). The majority of respondents rated labour force availability as either “poor” (33.4%) or fair (40.1%). For additional context, the Canadian Survey on Business Conditions (CSBC) reported in Q1 of 2023 that 32.3% of Ontario businesses reported recruiting skilled employees was a key business obstacle for the next three months.

Similarly, among 629 respondents, 30.0% rated their organization’s hiring climate as “very difficult” and 40.9% rated it as “difficult” (Appendix “A” to Report PED23087, Figure 6). This results in more than 73% of respondents holding a negative view of labour availability and more than 70% of respondents holding a negative view on ease of hiring. Given that only 27.3% of Ontario businesses in the Q1 2023 CSBC reported labour shortages as business obstacles, both of these data points may suggest that Hamilton’s local labour market is tighter than the provincial benchmark.

**3.7 Business Priorities for 2022**

The Employer One survey asked respondents to identify their business priorities for the balance of 2023 (Appendix “A” to Report PED23087, Table 4). Respondents were able to select from a matrix of priorities as well as offering their own priority before identifying which of those priorities was their top priority for 2023.

From among 540 respondents, the most selected priority was “attracting new employees” (51.1% of respondents). This was followed by “increasing marketing/promotional activities to increase customer awareness (including increasing online presence)” (44.4% of respondents) and “finding and applying to current provincial and federal government funding programs” (43.3% of respondents). As aligned to previous data captured in this survey, “attracting new employees” was as the most frequently identified top priority for respondents.



**SUBJECT: 2023 Employer Survey (PED23087) (City Wide) - Page 6 of 9**

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These top three priorities are all closely aligned to Economic Development's in-progress efforts underway to support Hamilton's employers and businesses:

- 1) In Early 2023, Economic Development staff kicked off the development of a city-wide workforce retention and attraction strategy. The primary purpose of this strategy is to map the employer support landscape in Hamilton and then determine where Economic Development can best support the work already in progress and engage in new activities;
- 2) The Hamilton Business Centre is entering its fourth delivery of the Digital Main Street program, which supports businesses creating modern websites and other e-commerce tools; and,
- 3) In Q4 of 2022 Economic Development staff launched a "funding finder" tool on [investinhamilton.ca](http://investinhamilton.ca) that allows companies of all sizes to leverage an AI-driven funding aggregation tool.

### **3.8 Business Concerns for 2023**

Survey respondents were asked to identify their primary business concern for 2023. Once again respondents could choose multiple responses from a matrix, which also allowed the creation of their own priority. (Appendix "A" to Report PED23087, Table 5). From this list, respondents were asked to rank their top concern.

Among the 550 respondents who completed this question, "the impacts of inflation on my business and customers" was selected by a majority of respondents (59.1%) and was also the top ranked concern for 2023. Other frequently cited concerns included "the mental and physical health of the employees of the business" (39.6%), "global supply chain issues relating to receiving good/shipping goods" (37.8%), and existing business debt levels (26.9%).

Of additional note, 81 respondents (14.7%) noted downsizing their operation as a concern for 2023. Similarly, 62 respondents (11.3%) identified having to permanently close their business as a concern for 2023. Only 17 respondents identified downsizing as top ranked concern, with another 15 identifying permanent closure as a top concern. Contact information on these respondents, where authorized by the respondent, was provided to City Staff for follow-up.

**SUBJECT: 2023 Employer Survey (PED23087) (City Wide) - Page 7 of 9**

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**3.9 Hiring Equity in Leadership Positions**

The consultations that informed the creation of the 2021-2025 Economic Development Action Plan identified a need for actions and insights supporting equity, diversity, and inclusion in Hamilton. As such, the findings of these questions provide boots-on-the-ground insights that will support and inform Economic Development's existing work with the CITYLab program (EDAP action item 2) while providing valuable intelligence to the Division's emerging workforce development strategy (EDAP action item 5).

This year's delivery of the Employer One survey asked respondents to identify if one of the organization's owners, C-Suite officers, or senior executives identified as a member of an equity deserving group. The options presented (Indigenous peoples, members of racialized groups, women, and persons with disabilities) are aligned with the groups identified in the *Canadian Employment Equity Act*, and further allow Employer One data to be placed into a national context using data from the Government of Canada 2016 Employment Equity Data Report.

Among survey respondents, 394 (59.7% of survey respondents) identified as having senior leadership from at least one identified group under the *Canadian Employment Equity Act* (Appendix "A" to Report PED23087, Figure 7). Approximately 17.0% of survey respondents identified as having senior leadership from two or more groups identified under the *Canadian Employment Equity Act*.

Data on women from the most recent Employment Equity Data Report, which is derived from census data, reported 51% of private sector employers had women in executive roles. Among Hamilton's survey respondents, 50.3% noted having women in leadership/senior executive positions. Staff intent to revisit these data when the 2021 Report is released.

**3.10 Policies Supporting Identified Groups**

New to 2023's delivery of the Employer One survey is a question that asks respondents if their organization had experienced any successes that had emerged from the creation of policies and procedures that support the recruitment and retention of any of the below listed groups of people.

- Indigenous peoples;
- Racialized peoples and communities;
- 2SLGBTQIA+ peoples and communities;

**SUBJECT: 2023 Employer Survey (PED23087) (City Wide) - Page 8 of 9**

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- Women;
- Newcomers to Canada (i.e. refugees, landed immigrants, and permanent residents);
- Francophone peoples;
- Non-official language speakers;
- Persons with disabilities;
- Recent graduates;
- Youth (aged 15 to 29); and,
- Older individuals (aged 55+).

Among respondents to this question, 38.5% reported they had experienced success from the creation of these policies. Furthermore, 33.6% of respondents reported that their organization would be interested in furthering knowledge of equity, diversity and inclusion through the participation in training programs. Data such as these will offer a direct benefit the ecosystem mapping component of Economic Development's workforce strategy. Sectors that reported most frequently finding success from creating these policies and procedures were: accommodation and food services (20.4% of respondents who reported successes from targeted recruitment and retention polices), other services (14.0%), and manufacturing (11.3%) (Appendix "A" to Report PED23087, Table 6).

Respondents were invited to share individual success stories through this survey. A total of 39 success stories were shared. Staff will review these stories as to determine if best practices can be identified and integrated into the workforce survey.

### **3.11 Newcomer Recruitment and Retention**

More than 75% of respondents stated that their organization had not experienced challenges in the past with respect to recruiting and retaining newcomers (i.e. landed immigrants, refugees, and permanent residents). The remaining 24.1% of respondents who noted they had experienced challenges in newcomer recruitment and retention received a follow-up question asking them to select all applicable challenges to their hiring newcomers (Appendix "A" Report PED23087, Figure 8)

**SUBJECT: 2023 Employer Survey (PED23087) (City Wide) - Page 9 of 9**

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Slightly more than one-third (35.9%) of those respondents to the follow-up on specific challenges cited a lack of newcomer/immigrant applicants. About one-third (33.8%) of respondents noted that their newcomer/immigrant applicants had insufficient qualifications. Slightly less than one-third (30.3%) of respondents selected both a lack of knowledge on where to find newcomer/immigrant talent and that newcomer/immigrant applicants lacked sufficient work experience.

The least most pressing challenges identified by respondents was the inability to assess a foreign educational qualification (8.5%), and an inability to compete with other employers for qualified candidates (7.7%).

**4.0 Expectations for 2024's Survey**

This year's delivery of the survey marked the second successive year of declining survey opens since the joint survey was created with Workforce Planning Hamilton in 2021 as part of a coordinated pandemic response. With survey opens declining, but survey completions increasing following a year of streamlines and improvements to the survey tool, Economic Development has proposed further changes to survey that would result in a radical redesign that aims to reduce the length of the survey by more than 50%. This change would attempt to encourage completions on the survey. Increasing survey opens in a data gathering landscape that is highly saturated by private-sector market research firms who are offering tangible incentives for survey completion (e.g. gift cards, cash payments, draws) is likely to remain a challenging proposition in the years to come. Workforce Planning Hamilton has been receptive to this idea, and meetings are planned for Q2 of 2023 to explore the redesign in more detail.

This year further demonstrated that direct email campaigns delivered by City Staff and City partners yielded the strongest results in terms of survey opens. Approximately 80.4% of survey opens were received through direct email campaigns. Despite the creation of on-going social media campaigns to promote the survey, these efforts yielded approximately 2% of total survey opens. As such, staff recommend that efforts toward digital promotion of this survey be scaled back to a bare minimum as this is not a vertical has proven capable of driving businesses to opening the survey.

**APPENDICES AND SCHEDULES ATTACHED**

Appendix "A" to Report PED23087 – Invest In Hamilton – Where Innovation Goes To Work

**WHERE INNOVATION GOES TO WORK**

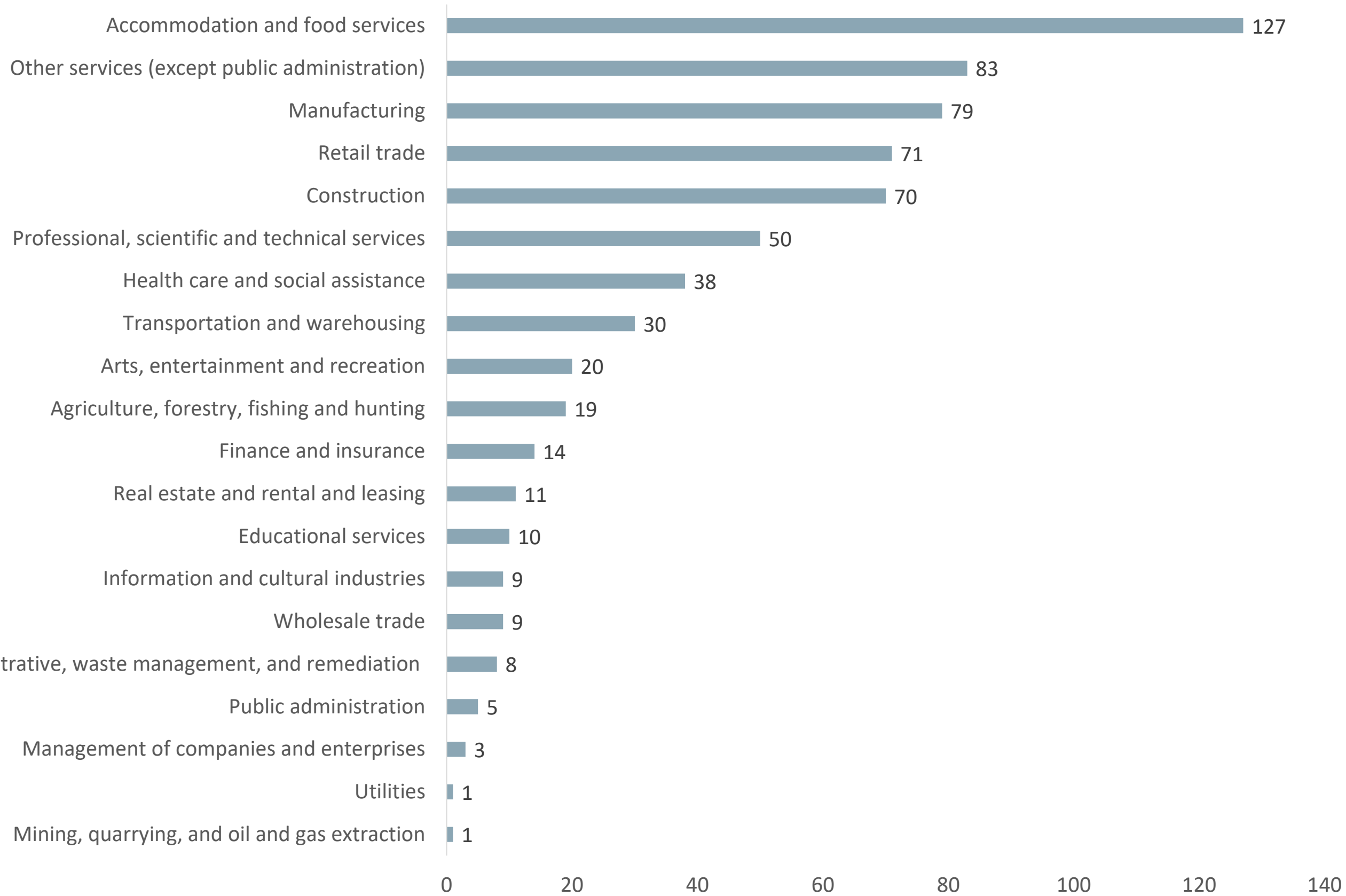


# **INVEST IN HAMILTON**



**Figure 1**

# Sector Representation



Survey Respondents by 2-digit North American Industrial Classification System Code. n=658.

The sectors comprising the majority of the data set include:

- Accommodation and food service: 19.3%
- Other services: 12.6%
- Manufacturing: 12.0%
- Retail Trade: 10.8%
- Construction: 10.6%

**Table 1**

# Employee Counts

Sector	Employee Count Jan 2021	Employee Count Jan 2023	Absolute Change	% Change
Manufacturing	4,978	5,242	264	5.3%
Accommodation and food services	2,345	3,386	1,041	44.4%
Health care and social assistance	2,514	3,148	634	25.2%
Arts, entertainment and recreation	2,391	2,763	372	15.6%
Educational services	2,054	2,533	479	23.3%
Retail trade	1,468	2,224	756	51.5%
Construction	1,551	2,010	459	29.6%
Transportation and warehousing	1,737	1,856	119	6.9%
Other services (except public administration)	1,283	1,402	119	9.3%
Agriculture, forestry, fishing and hunting	1,217	1,317	100	8.2%
Professional, scientific and technical services	730	811	81	11.1%
Finance and insurance	232	488	256	110.3%
Management of companies and enterprises	222	322	100	45.0%
Administrative and support, waste management and remediation services	330	320	-10	-3.0%
Wholesale trade	269	307	38	14.1%
Real estate and rental and leasing	148	170	22	14.9%
Public administration	173	164	-9	-5.2%
Information and cultural industries	137	127	-10	-7.3%
Mining, quarrying, and oil and gas extraction	45	45	0	0.0%
Utilities	45	45	0	0.0%
<b>Total</b>	<b>23,869</b>	<b>28,680</b>	<b>4,811</b>	<b>20.2%</b>

Survey Respondents by 2-digit North American Industrial Classification System Code. n=658

Hamilton’s industry sectors that reported the largest absolute growth in employees between January 2021 and January 2023 include:

Accommodation and food service: 1,041 employees added

Retail Trade: 756 employees added

Healthcare and Social Assistance: 634 employees added

Educational Services: 479 employees added

Construction: 459 employees added

**Table 2**

# Business Outlook - Citywide

Short Term Business Outlook	Number of Responses	Percentage
Excellent - Rapid growth / expansion of business	22	3.4%
Very Good - Growth / expansion of business	86	13.3%
Good - Stable business operation with stable/growth outlook	297	45.8%
Fair - Relatively stable business operations with a slightly negative outlook	151	23.3%
Poor - Unstable business operations with a negative outlook	64	9.9%
Emergency - Imminent permanent closure	5	0.8%
Other	23	3.6%

Survey Respondents: n=648

An aggregation of responses on the 2023 business outlook among survey respondents yields the following results:

Positive Outlook: 62.5%  
 Negative Outlook: 34.0%  
 Other Outlook: 3.5%



**Table 3**

# Business Outlook - Wards

Ward	Excellent	Very Good	Good	Fair	Poor	Emergency	Other	Respondent Count
Ward 1	6.6%	18.0%	36.1%	26.2%	8.2%	1.6%	3.3%	61
Ward 2	3.4%	14.5%	39.3%	25.5%	9.7%	2.8%	4.8%	145
Ward 3	6.3%	20.7%	39.6%	20.7%	6.3%	1.8%	4.5%	111
Ward 4	5.9%	14.9%	46.5%	15.8%	12.9%	1.0%	3.0%	101
Ward 5	6.3%	12.7%	54.0%	15.9%	3.2%	1.6%	6.3%	63
Ward 6	3.0%	13.4%	38.8%	20.9%	14.9%	1.5%	7.5%	67
Ward 7	0.0%	13.7%	49.0%	19.6%	9.8%	2.0%	5.9%	51
Ward 8	0.0%	11.4%	43.2%	22.7%	11.4%	2.3%	9.1%	44
Ward 9	6.4%	10.6%	46.8%	21.3%	6.4%	2.1%	6.4%	47
Ward 10	5.4%	24.1%	37.5%	23.2%	5.4%	0.9%	3.6%	112
Ward 11	0.0%	16.7%	45.8%	27.1%	4.2%	2.1%	4.2%	48
Ward 12	2.5%	16.5%	55.7%	13.9%	6.3%	1.3%	3.8%	79
Ward 13	2.8%	16.7%	47.2%	19.4%	8.3%	1.4%	4.2%	72
Ward 14	2.2%	15.2%	50.0%	15.2%	6.5%	2.2%	8.7%	46
Ward 15	1.5%	10.8%	46.2%	33.8%	1.5%	1.5%	4.6%	65

Survey Respondents: n=648

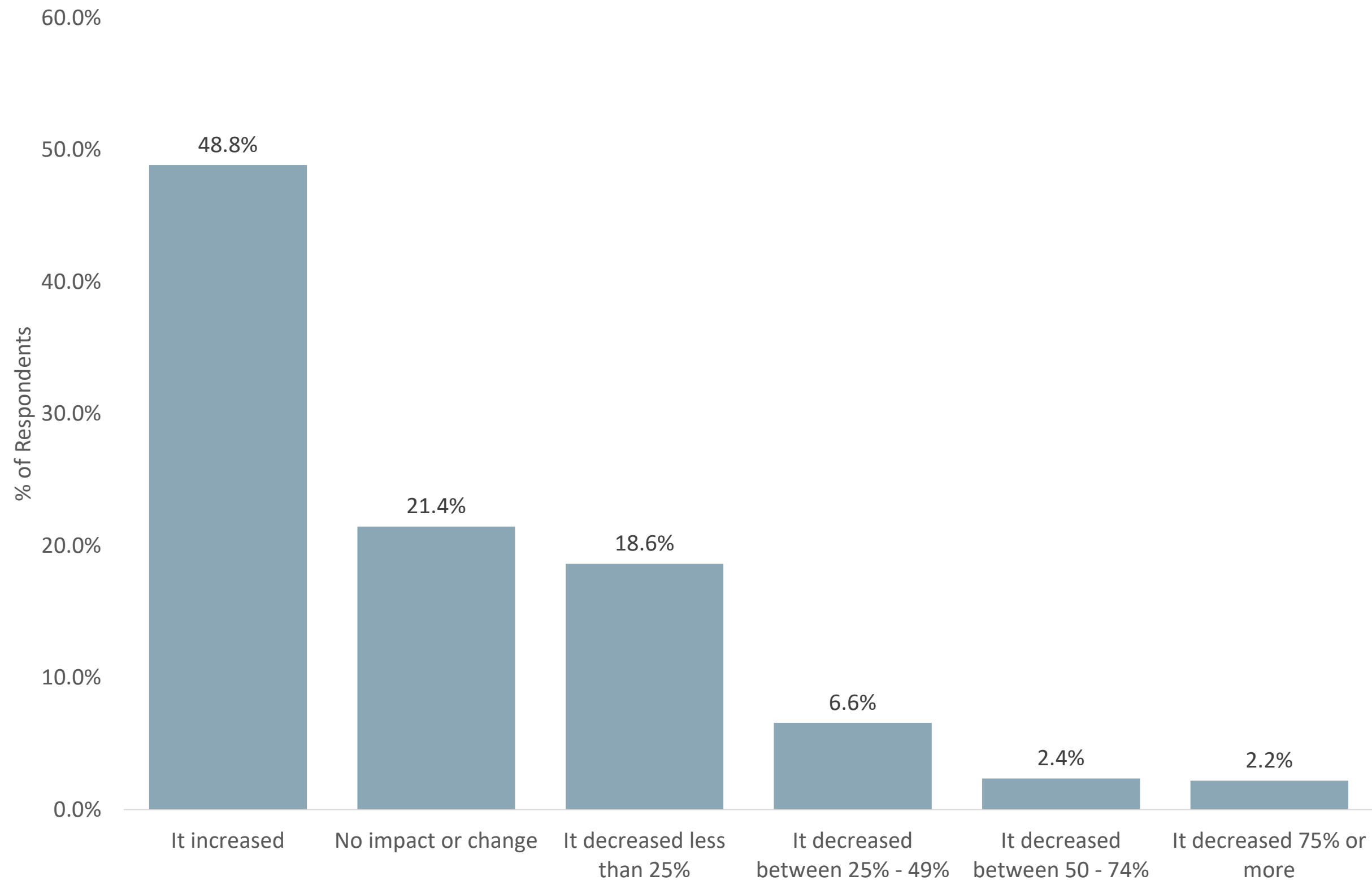
Survey respondents were asked in which wards did their operations have a physical presence. A ward map was provided in the survey tool to increase completion rates on this question compared to in previous years.

The average number of wards represented per response was 1.7.

While the number of responses to this survey are statistically reliable at a city level, ward data should only be seen as reflecting those businesses who completed the survey, and not extrapolated to reflect business conditions as a whole at the ward level.

**Figure 2**

# Revenue Change 2022 compared to 2021



Survey Respondents: n=639

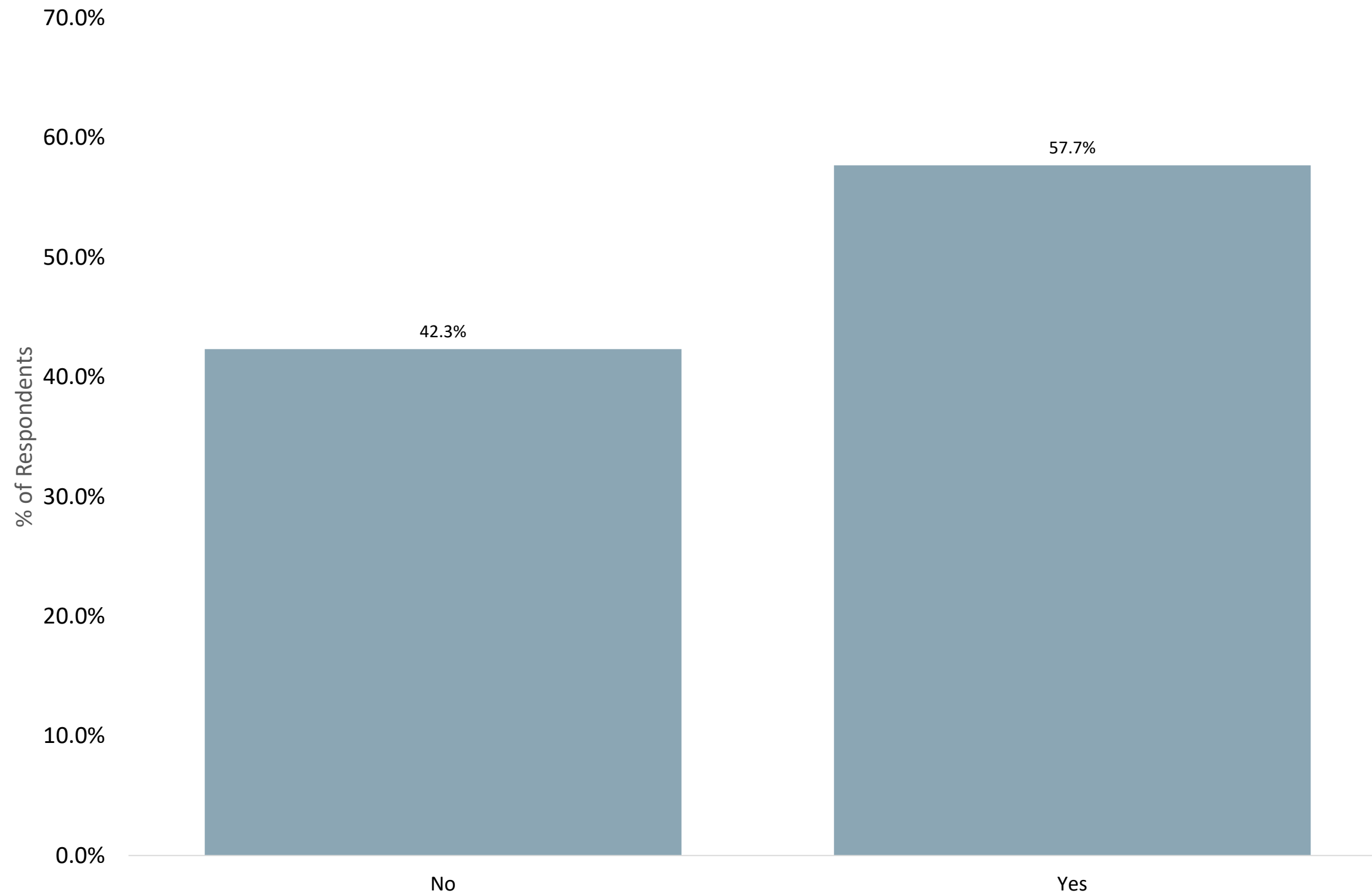
48.8% of respondents reported revenue growth in 2022 compared to 2021

21.4% of respondents reported no revenue change in 2022 compared to 2021

29.7% of respondents reported revenue loss in 2022 compared to 2021

**Figure 3**

# Self-Identified Living Wage Employers

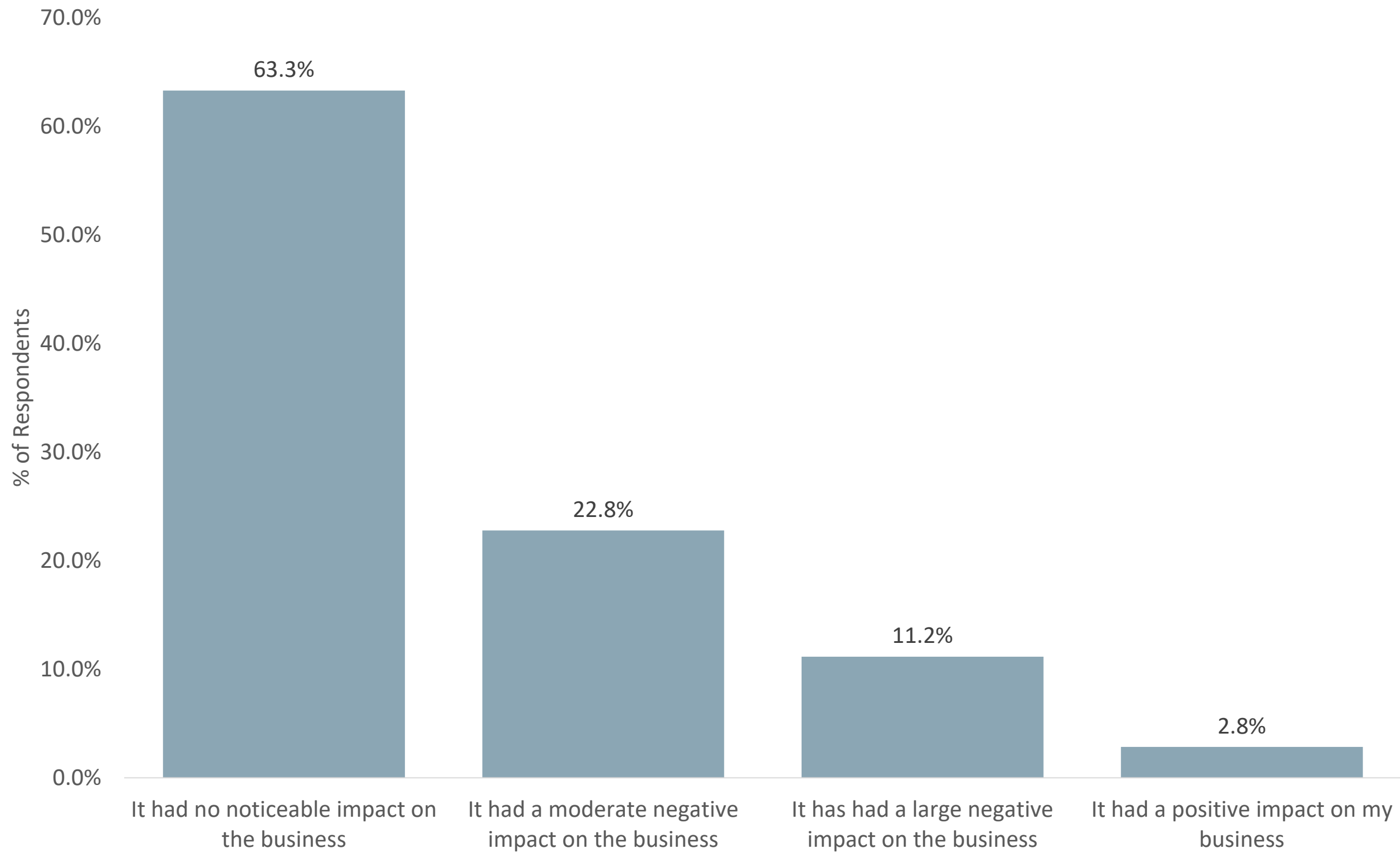


Survey Respondents: n=638

Respondents were offered a yes/no response to the following question: The Ontario Living Wage Network estimates Hamilton's living wage at \$19.05 per hour. Based on this definition, do you believe your company qualifies as a living wage employer such that all employees earn at least \$19.05 per hour?

**Figure 4**

# Impacts of Minimum Wage Increases

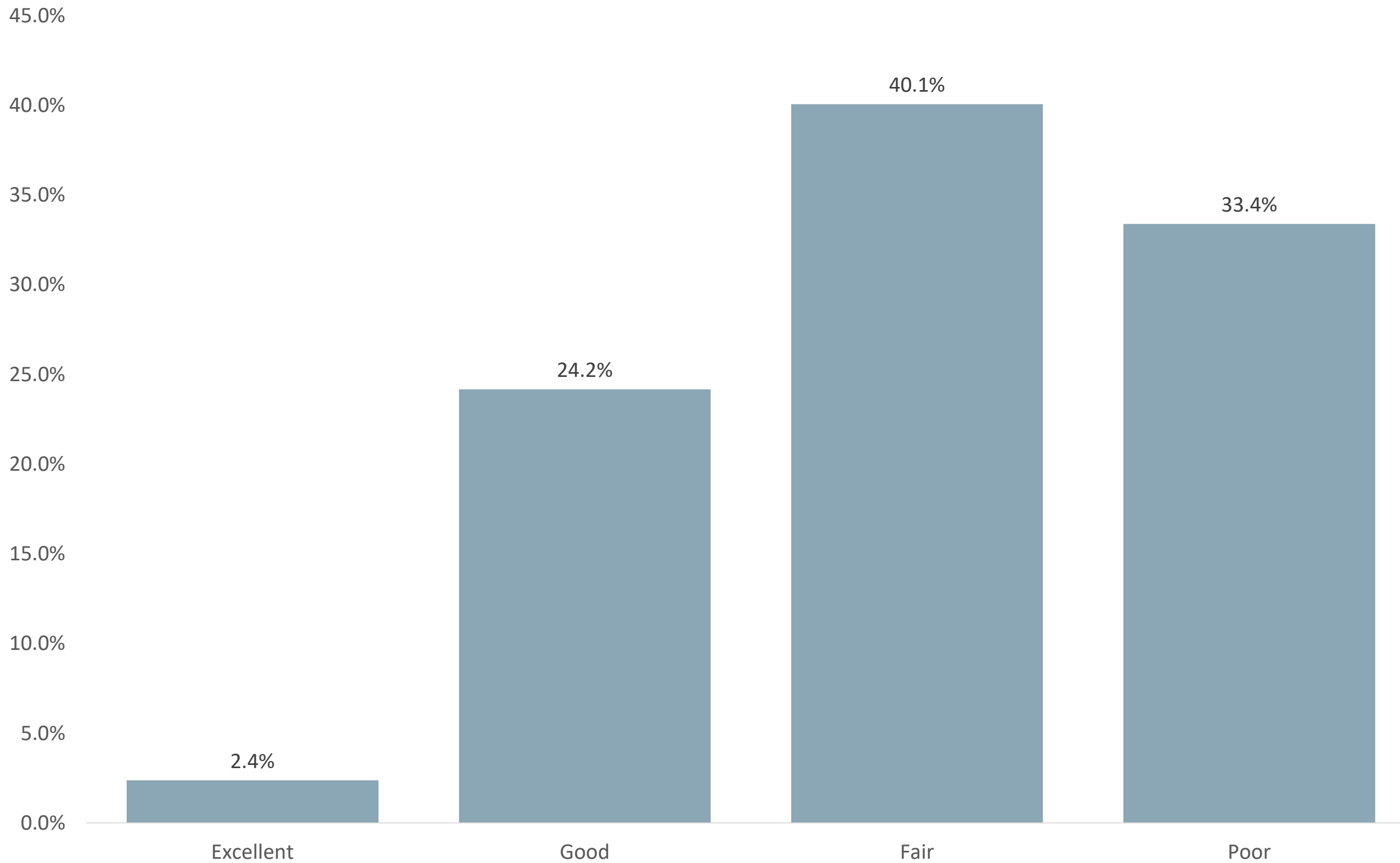


Survey Respondents: n=637

Ontario's minimum wage increased to \$15.50. This calculation was derived based on increases to the consumer price index. Subsequent increases to Ontario's minimum wage are generally expected to be announced in April of a given year, coming into force in October of the same year.

**Figure 5**

# Labour Force Availability

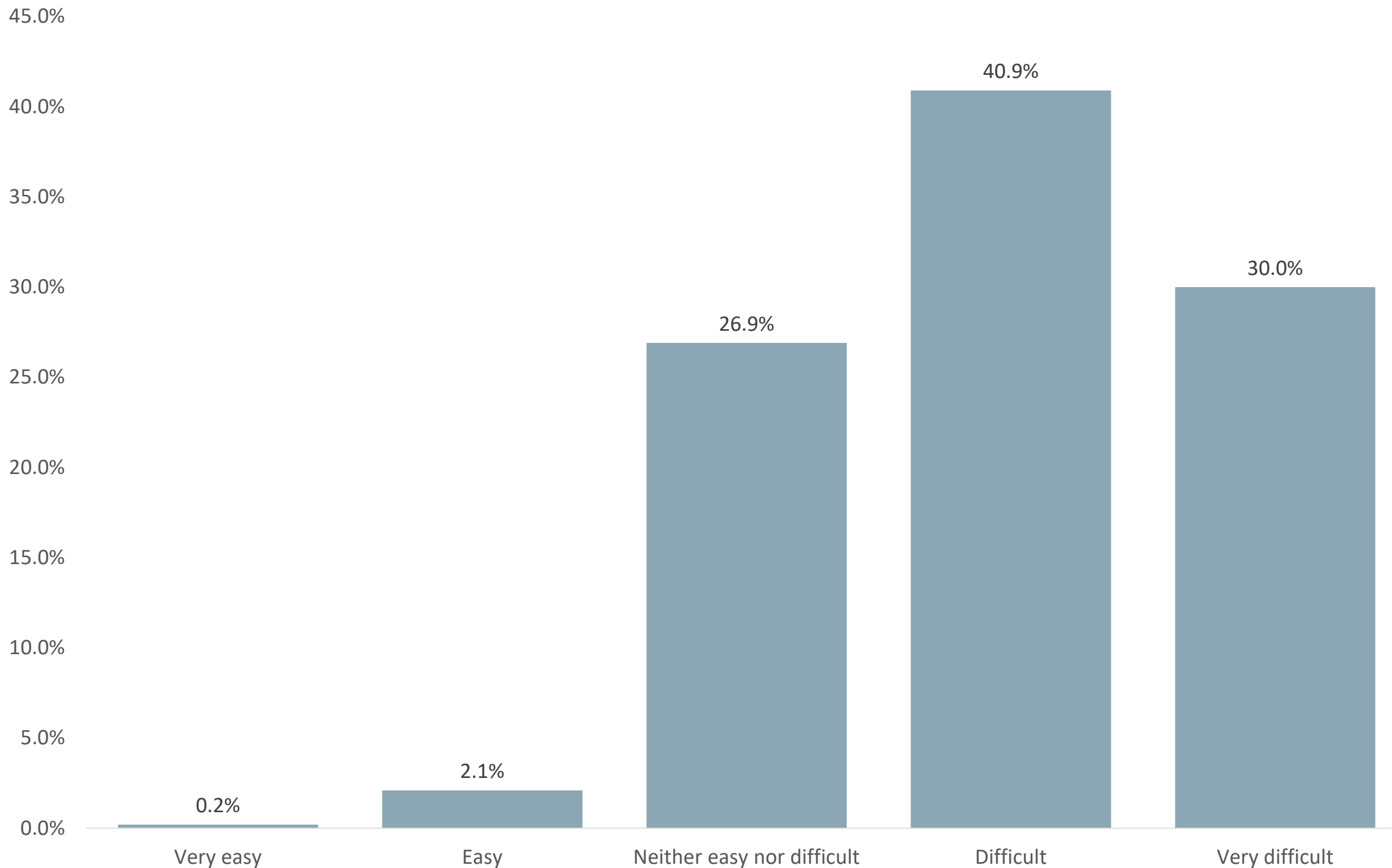


Survey Respondents: n=629.

Additional context on these data can be seen in Q1 2023 data from the Canadian Survey on Business Conditions. Therein, 32.3% of Ontario businesses surveyed Canadian Survey on Business Conditions reported that “recruiting skilled employees” was a key business obstacle for the next three months. Though methodologies differ between these two surveys, the two data points convey similar insights.

**Figure 6**

# Difficulty to Hire in Current Business Climate



Survey Respondents: n=629

Contextual data for Ontario from the Canadian Survey on Business Conditions suggests Hamilton’s hiring climate may be more challenging than that of Ontario, as a whole.

Therein, the Canadian Survey on Business Conditions only reports 27.3% of Ontario respondents citing a shortage of labour as an obstacle to the business or organization. Once again, these data points are not covariant as they emerge from differing surveys. As a piece of related context, the provincial trend supports a greater understanding of Hamilton’s potentially unique labour force trends.

**Table 4**

# Business Priorities for 2023

Priority for 2023	Count of Responses	% of Respondents
Attracting new employees	276	51.1%
Increasing marketing / promotional activities to increase customer awareness (including increasing online presence)	240	44.4%
Finding and applying to current provincial and federal government funding programs	234	43.3%
Offering co-op, internship, apprenticeship and/or work placements	181	33.5%
Implementing new technologies/systems to automate or improve processes	144	26.7%
Forming local partnerships / buying local	141	26.1%
Providing external training or professional development opportunities for your staff (example digital skills)	137	25.4%
Wanting help in accessing the immigrant/newcomer talent pool	127	23.5%
Increasing equity / diversity / inclusion (or EDI) practices in your business (hiring, staff training, client relations, etc.)	116	21.5%
Expanding my business (to a larger location or adding another location)	108	20.0%
Seeking financing for my business (increasing debt or pursuing investment)	98	18.1%
Increasing environmental protection (or "Green") activities in your business	90	16.7%
Succession planning for new ownership	80	14.8%
Undertaking research and development activities	56	10.4%
Pursuing international export opportunities	39	7.2%
Other (please specify)	34	6.3%

Survey Respondents: n=540

Respondent rankings of top priorities similarly aligned to the top three priorities in Table 4. Therein, attracting new employees, increasing marketing, and finding and applying to funding programs were the top three priorities.

Economic Development is already undertaking activities to support all of these activities through the creating of a workforce attraction and retention strategy, delivering the Digital Main Street program through the Hamilton Business Center, and hosting an AI-driven funding aggregator on [investinhamilton.ca](https://investinhamilton.ca)

**Table 5**

# Citywide Business Concerns for 2023

Concern for 2023	Count of Concerns	% of Companies Responding
The impacts of inflation on my business and my customers	325	59.1%
The mental and physical health of the employees of the business	218	39.6%
Global supply chain issues relating to receiving goods/shipping goods	208	37.8%
Existing business debt levels	148	26.9%
The inability to reasonably predict the business environment in the short term	134	24.4%
The mental and physical health of the owners of the business (including myself)	134	24.4%
Ability to obtain financing to continue operating my business (either debt or equity financing)	115	20.9%
Criminal activity and/or the perceived safety in the immediate area my business operates	94	17.1%
Having to downsize my business and reduce existing employment levels	81	14.7%
Succession planning (who will I be able to transfer or sell my business to)	79	14.4%
Availability of land or facilities to enable growth or expansion in Hamilton	73	13.3%
Having to permanently close my business	62	11.3%
Other (please specify)	53	9.6%
The impacts of climate change	49	8.9%

Survey Respondents: n=550

Almost 60% of survey respondents identified the rising cost of inflation as a business concern for 2023.

For context, 56.4% of Ontario Businesses completing the Q1 2023 Canadian Survey on Business Conditions identified rising inflation as a business obstacle. While these survey methods are not identical, they both identify inflation as the most frequently selected concern from two separate sample groups.



**Table 5a**

# Ward-Level Business Concerns for 2023

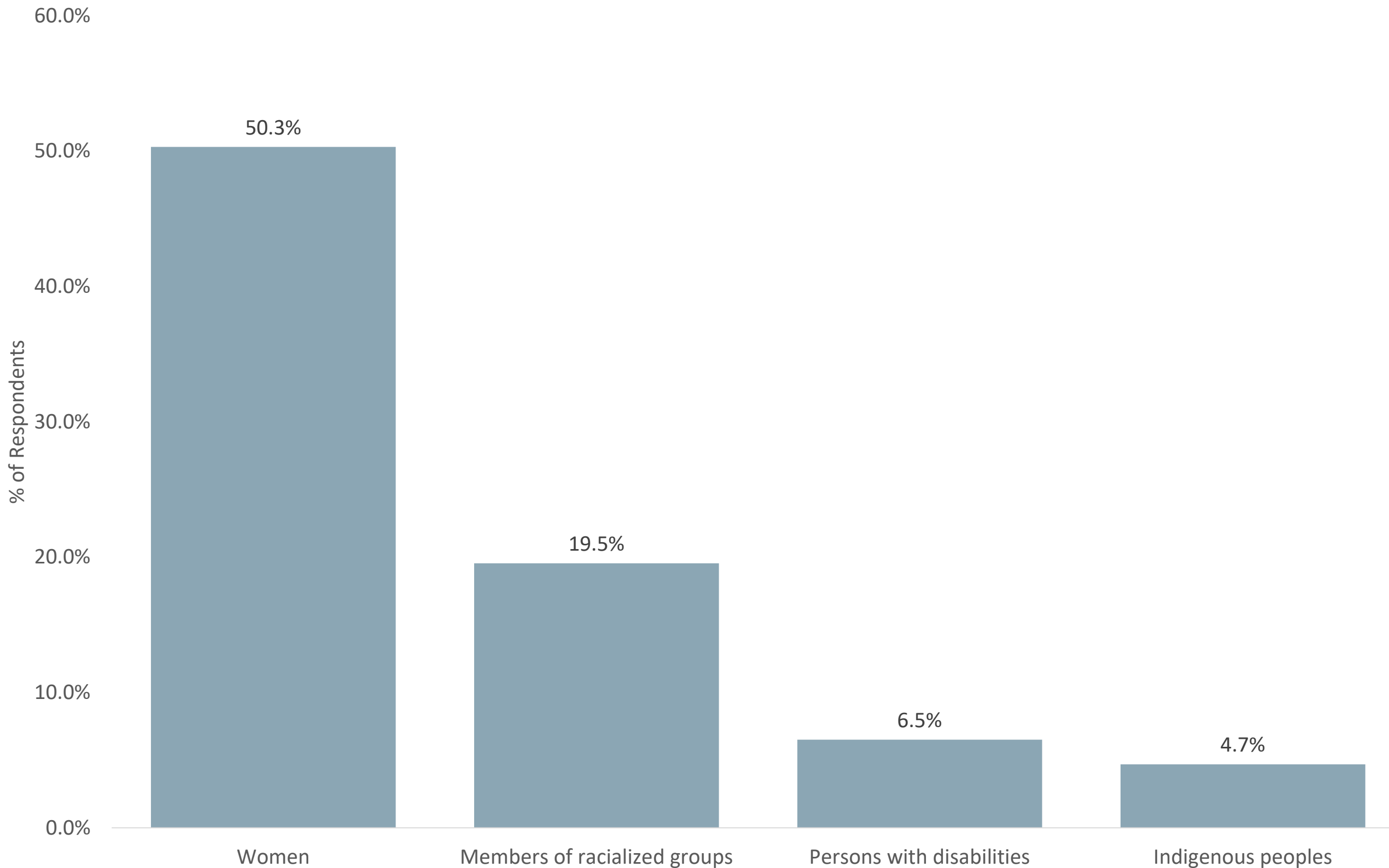
Ward	Most Selected Concern	Second Most Selected Concern	Third Most Selected Concern
Ward 1	The impacts of inflation on my business and my customers	Existing business debt levels	The inability to reasonably predict the business environment in the short term
Ward 2	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Criminal activity and/or the perceived safety in the immediate area my business operates
Ward 3	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Global supply chain issues relating to receiving goods/shipping goods
Ward 4	The impacts of inflation on my business and my customers	Global supply chain issues relating to receiving goods/shipping goods	The mental and physical health of the employees of the business
Ward 5	The impacts of inflation on my business and my customers	Global supply chain issues relating to receiving goods/shipping goods	The mental and physical health of the employees of the business
Ward 6	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Global supply chain issues relating to receiving goods/shipping goods
Ward 7	The impacts of inflation on my business and my customers	Existing business debt levels	Global supply chain issues relating to receiving goods/shipping goods
Ward 8	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Global supply chain issues relating to receiving goods/shipping goods
Ward 9	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Global supply chain issues relating to receiving goods/shipping goods
Ward 10	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Global supply chain issues relating to receiving goods/shipping goods
Ward 11	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Global supply chain issues relating to receiving goods/shipping goods
Ward 12	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Existing business debt levels
Ward 13	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Existing business debt levels
Ward 14	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Existing business debt levels
Ward 15	The impacts of inflation on my business and my customers	The mental and physical health of the employees of the business	Existing business debt levels

Survey Respondents: n=550

Note: ward-level data conveyed in this table is only representative of the businesses who completed the survey. The sample size of this survey does not allow for reliable extrapolation of these data to the ward level as anything more than a bellwether for future follow-up.

**Figure 7**

# Hiring Equity in Leadership Positions



Survey Respondents: n=660

Approximately 59.7% of survey respondents, 394 respondents in total, reported that one of their establishment's owners, C-suite officers, or senior executives, as defined by the Canadian Employment Equity Act.

The 2016 Canadian Employment Equity Data Report, which is derived from 2016 Census data, reported that 51% of private sector employers, nationally, employed women in executive roles.

**Table 6**

# Ward-Level Business Concerns for 2023

Sector	Count	Percentage
Accommodation and food services	45	20.4%
Other services (except public administration)	31	14.0%
Manufacturing	25	11.3%
Professional, scientific and technical services	21	9.5%
Retail trade	17	7.7%
Construction	14	6.3%
Health care and social assistance	14	6.3%
Agriculture, forestry, fishing and hunting	10	4.5%
Arts, entertainment and recreation	10	4.5%
Transportation and warehousing	7	3.2%
Information and cultural industries	6	2.7%
Educational services	5	2.3%
Finance and insurance	4	1.8%
Administrative and support, waste management and remediation services	3	1.4%
Real estate and rental and leasing	3	1.4%
Wholesale trade	3	1.4%
Management of companies and enterprises	2	0.9%
Public administration	1	0.5%

Survey Respondents: n=574

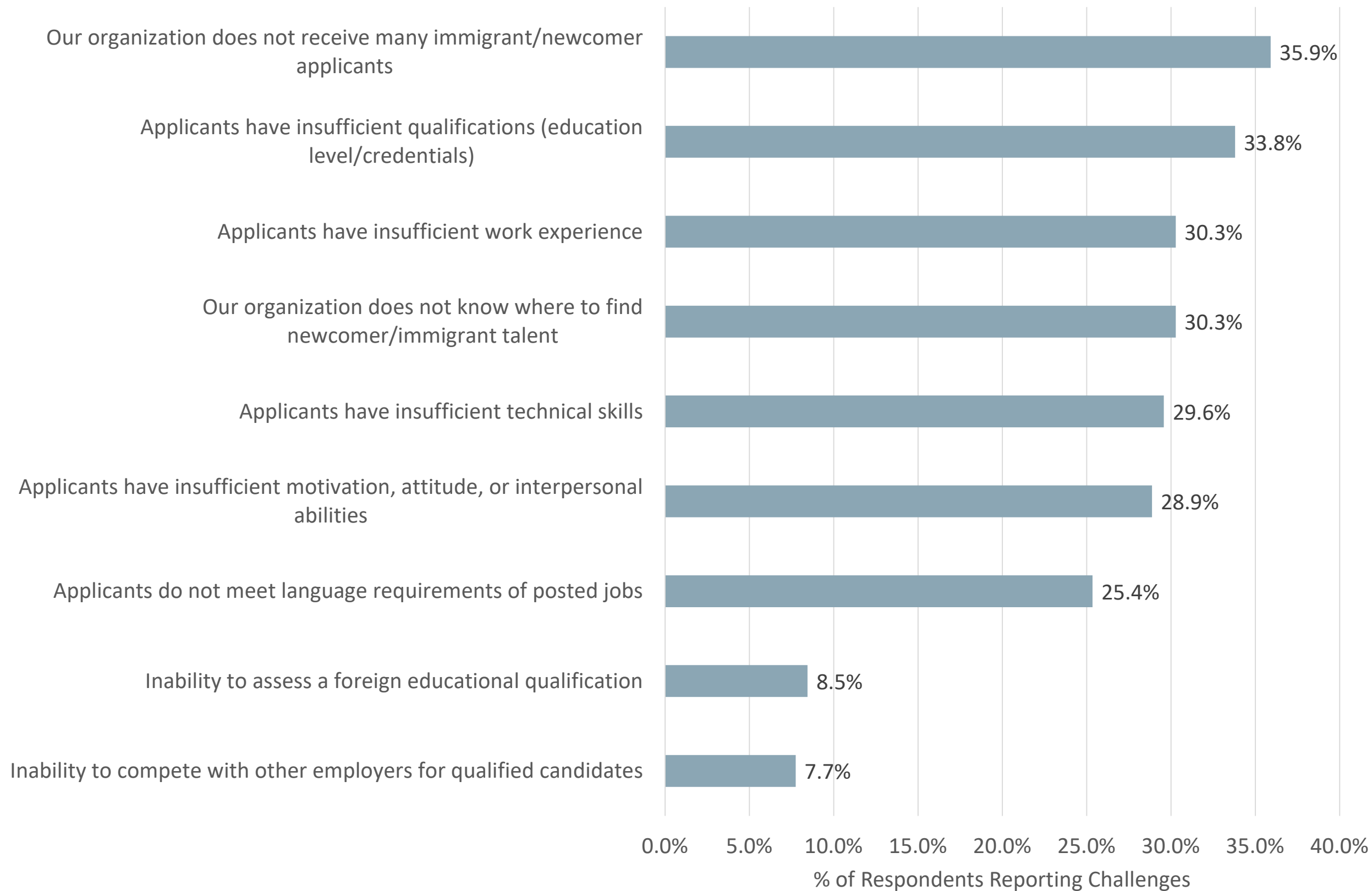
Approximately 38.5% of respondents to this question reported successes that emerged from the creation of policies and procedures that supported the recruitment and retention of peoples from the following groups:

- Indigenous peoples
- Racialized peoples and communities
- 2SLGBTQIA+ peoples and communities
- Women
- Newcomers to Canada (i.e. refugees, landed immigrants, and permanent residents)
- Francophone peoples
- Non-official language speakers
- Persons with disabilities
- Recent graduates
- Youth (aged 15 to 29)
- Older individuals (aged 55+)

From those responses 39 success stories were shared through the survey. Economic Development and HIPC staff are reviewing these success stories to identify possible best practices to support the in-progress Workforce Strategy.

**Figure 8**

# Newcomer Recruitment




Survey Respondents: n=589

More than 75% of respondents reported that their organization did not experience challenges with respect to recruiting or retaining newcomers (i.e. landed immigrants, refugees, and permanent residents).

Among those who did report difficulties, a lack of applicants was the most frequently selected response, closely followed by applicants lacking sufficient qualifications, and applicants lacking sufficient work experience.



# INFORMATION REPORT

<b>TO:</b>	Mayor and Members of Council General Issues Committee
<b>COMMITTEE DATE:</b>	May 3, 2023
<b>SUBJECT/REPORT NO:</b>	Labour Relations Activity Report & Analysis (2018-2022) (HUR23006) (City Wide)
<b>WARD(S) AFFECTED:</b>	City Wide
<b>PREPARED BY:</b>	Julie Shott (905) 546-2424 Ext. 4335 Yakov Sluchenkov (905) 546-2424 Ext. 2655
<b>SUBMITTED BY:</b>	Lora Fontana Executive Director Human Resources
<b>SIGNATURE:</b>	

## COUNCIL DIRECTION

To provide Council with an overview of the City's labour relations activities for the period 2018-2022.

## INFORMATION

This Report focuses on a five-year historical review of the data for the period of 2018 through 2022 and reviews the general labour relations activities across unions and departments. The Report is intended to provide Council and other City stakeholders with an understanding of the state of labour relations.

## CITY UNIONIZATION OVERVIEW

The City has a highly unionized workforce with unionized employees representing 78.5% of the City's overall workforce. Chart 1 provides an overview of the unionized headcount by department. The largest number of unionized employees are in the two largest City departments – Public Works and Healthy and Safe Communities.

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(HUR23006) (City Wide)**

Page 2 of 16

Chart 1 – 2022 Union Headcount by Department

Department	Headcount	Unionized Headcount	% of Unionized Headcount within Department	% of Unionized Headcount within COH
<b>CityHousing Hamilton</b>	199	100	50.3%	1.2%
<b>City Manager's Office</b>	148	5	3.4%	0.1%
<b>Corporate Services</b>	539	274	50.8%	3.2%
<b>Healthy and Safe Communities</b>	4358	3639	83.5%	42.8%
<b>Planning &amp; Economic Development</b>	875	489	55.9%	5.8%
<b>Public Works</b>	2375	2162	91.0%	25.5%
<b>Total</b>	<b>8494</b>	<b>6669</b>	<b>N/A</b>	<b>78.5%</b>

Graph 1 below shows the percentage of the City's unionized workforce across the eleven bargaining units. CUPE 5167 Inside/Outside is the largest bargaining unit at the City and accounts for approximately 48.2% of the City's overall unionized headcount. In contrast, IUOE 772 is the smallest bargaining unit and accounts for approximately 0.1% of unionized headcount at the City.

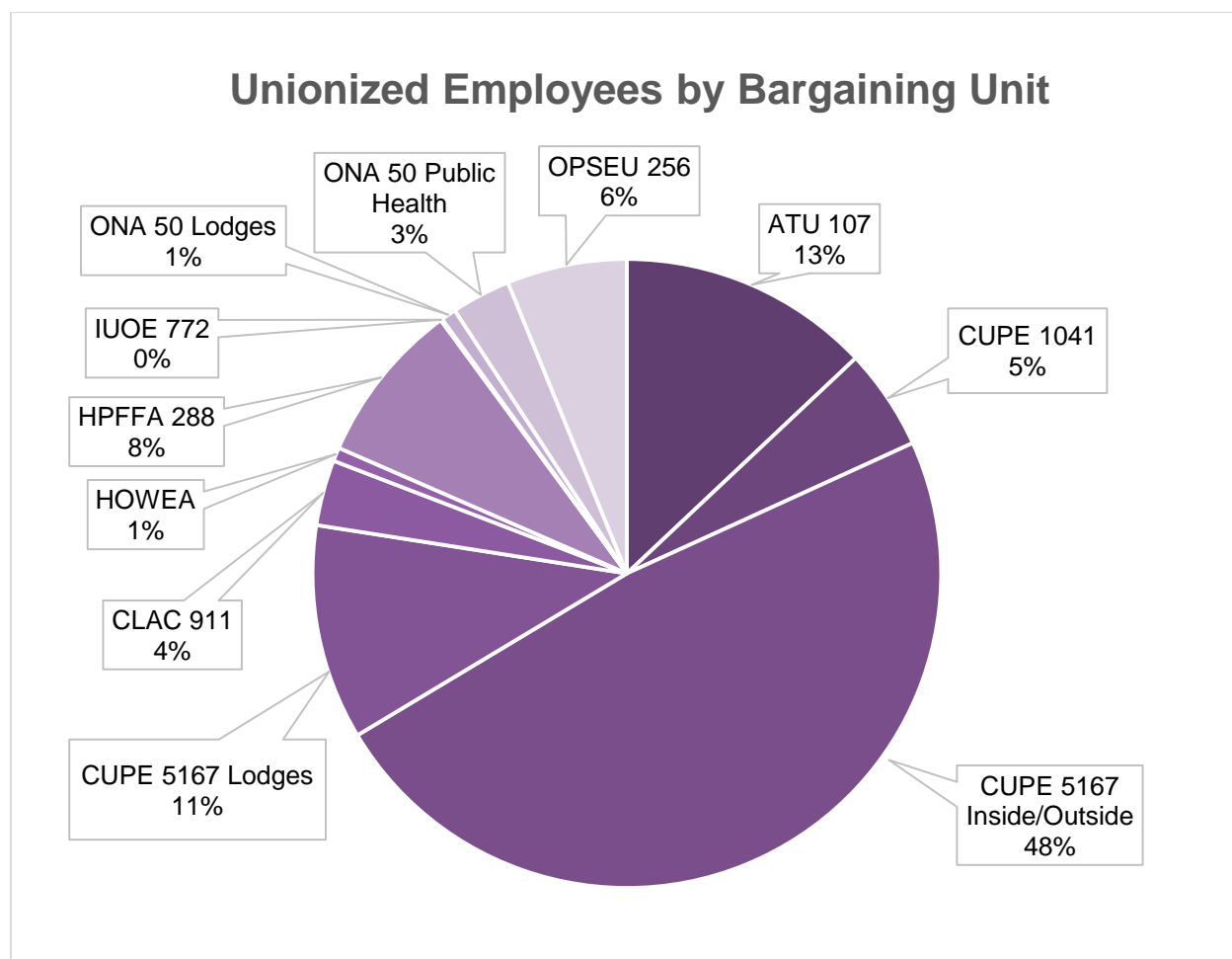
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**Graph 1 – Unionized Employees by Bargaining Unit**



### OVERALL GRIEVANCE ACTIVITY

The 2018-2022 Report identifies the degree of stability in the overall level of grievance activity and the state of labour relations across the City. As shown in Graph 2 and Chart 2 below, the total number of grievances filed in 2022 decreased to 309, representing the lowest level of grievance activity over the last five years. The total number of grievances filed in 2022 was roughly 17% below the five-year average of 362 grievances per year.

While the total number of grievances filed can be one general indicator of the state of labour relations, it is not the sole indicator of the labour-management relationship. The grievance activity is primarily a communication tool to resolve conflict regarding the terms and conditions of employment. Analysis beyond a direct count of grievances is always necessary, and caution should be given to drawing too many conclusions. While

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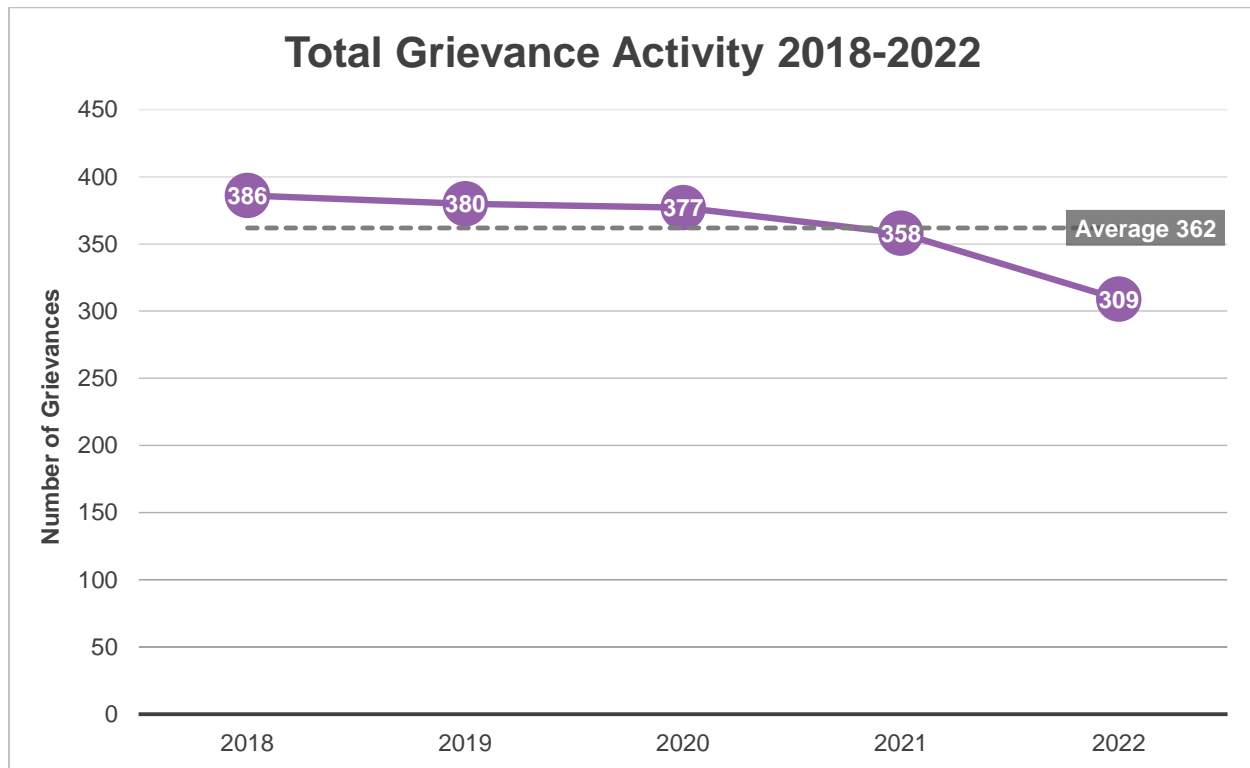
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(HUR23006) (City Wide)**

**Page 4 of 16**

the cause and underlying issues may not always be immediately apparent, what is clear is that the grievance submission rate has dropped, which is a positive sign for an organization.

**Graph 2 – Total Grievance Activity 2018-2022**



**Chart 2 – Grievances Filed, Resolved, and Outstanding 2018-2022**

Year	Number of Grievances Filed	Total Number of Grievances Resolved	Number of Outstanding Grievances
<b>2018</b>	386	332	54
<b>2019</b>	380	337	43
<b>2020</b>	377	326	51
<b>2021</b>	358	260	98
<b>2022</b>	309	154	155
<b>Total</b>	<b>1810</b>	<b>1409</b>	<b>401</b>

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(HUR23006) (City Wide)**

**Page 5 of 16**

The grievance resolutions include those achieved in the grievance process, mediated settlements and grievances withdrawn by the bargaining unit. In 2020, COVID-19 significantly affected the regular union-management processes, resulting in deferred grievance meetings and cancelled mediation proceedings. A majority of the 2020 scheduled hearing dates were rescheduled to 2021 and 2022, which resulted in the higher-level of active grievances at year end in 2021 and 2022. Nevertheless, many of the grievances previously filed in 2018 to 2022 were resolved in 2022, for a total of 341 grievances resolved from the five-year term (Chart 3).

**Chart 3 – Number of Grievances Filed in 2018-2022 that were Resolved in 2022**

Year Grievance Filed	Total Number of Grievances Filed	Number of Grievances from Year Resolved in 2022
<b>2018</b>	386	9
<b>2019</b>	380	30
<b>2020</b>	377	57
<b>2021</b>	358	115
<b>2022</b>	309	131
<b>Total</b>	<b>1810</b>	<b>342</b>

**GRIEVANCE ACTIVITY BY BARGAINING UNIT**

The overall rate of grievance activity remained relatively stable until 2022 where a drop in the number of grievances filed is observed. Grievance activity by bargaining unit over the last five years can be found in Chart 4. The overall grievances filed in 2022 decreased by 13.7% from 2021 and, of the eleven bargaining units within the City, five bargaining units showed a reduction in grievance submissions in 2022 (Chart 4).

The CUPE 5167 Inside/Outside bargaining unit continues to show a downward trend in the number of grievances filed, with total grievances filed in 2021 and 2022 below the five-year average. As the largest bargaining unit at the City, this downward trend in CUPE 5167 Inside/Outside grievances significantly decreases the total number of yearly grievances. In 2022, there was 44 less CUPE grievances filed than in 2021. One of the reasons for this downward trend includes the state of labour relations between management and CUPE 5167 Inside/Outside union leaders continuing to make concerted efforts to meet and discuss issues with a view to pro-actively resolving them prior to the grievances being filed.

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**(HUR23006) (City Wide)**

Page 6 of 16

**Chart 4 – Total Grievances Filed by Bargaining Unit 2018-2022**

Bargaining Unit	2018	2019	2020	2021	2022	2021/2022 Percent Change	Five-Year Average
<b>ATU 107</b>	12	46	28	45	44	-2.2%	35
<b>CUPE 1041</b>	28	31	39	32	23	-28.1%	31
<b>CUPE 5167 Inside/Outside</b>	214	192	229	174	130	-25.3%	188
<b>CUPE 5167 Lodges</b>	20	50	35	38	44	15.8%	37
<b>CLAC 911</b>	1	0	0	1	1	100.0%	1
<b>HOWEA</b>	26	15	5	8	12	50.0%	13
<b>HPFFA 288</b>	15	9	16	15	11	-26.7%	13
<b>IUOE 772</b>	0	0	0	0	0	0.0%	0
<b>ONA Lodges</b>	4	7	4	19	14	-26.3%	10
<b>ONA PH</b>	3	2	3	5	6	20.0%	4
<b>OPSEU 256</b>	63	28	18	21	24	14.3%	31
<b>Total</b>	<b>386</b>	<b>380</b>	<b>377</b>	<b>358</b>	<b>309</b>	<b>-13.7%</b>	<b>362</b>

In 2021, there was a significant increase in grievance activity for the ONA Lodges group due to COVID-19 related matters, such as vacation scheduling and overtime call out, as well as policy grievances and bargaining unit scope matters. With some carryover of these grievances into 2022, many of these items have been resolved and a lower grievance rate for this bargaining unit is anticipated for 2023.

HOWEA ratified a new collective agreement at the end of 2021. After a new collective agreement is negotiated, an increase of grievances may be filed as a result of a lack of familiarity with new language or interpretation disputes. This is the case for HOWEA which saw an increase in grievances in 2022.

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(HUR23006) (City Wide)**

**Page 7 of 16**

In contrast, many bargaining units experienced a decrease in total grievances filed in 2022 compared to 2021. The decrease in grievances can be attributed to the positive working relationship between management, and largely the union leaders. In many instances, both parties made concerted efforts to meet and discuss issues before grievances were filed, resulting in a positive impact on overall grievance activity.

Chart 5 provides an overview of bargaining unit breakdown relative to headcount and grievance activity. As expected, Chart 5 shows that the City's largest bargaining unit, CUPE 5167 Inside/Outside, submitted most of the total grievances filed in 2022. However, it should be noted that CUPE 5167 Inside/Outside's grievance submission rate per 100 employees (N = 4.0), was lower than other bargaining units of smaller size.

**Chart 5 – 2022 Union Headcount by Bargaining Unit and Number of Grievances**

Union Group	Headcount	% of Unionized Headcount within COH	Number of Grievances (2022)	% of Overall Grievances submitted	Grievance Rate per 100 Unionized Employees
<b>ATU 107</b>	866	13.0%	44	14.2%	5.1
<b>CUPE 1041</b>	347	5.2%	23	7.4%	6.6
<b>CUPE 5167 Inside/Outside</b>	3215	48.2%	130	42.1%	4.0
<b>CUPE 5167 Lodges</b>	738	11.1%	44	14.2%	6.0
<b>CLAC 911</b>	225	3.4%	1	0.3%	0.4
<b>HOWEA</b>	47	0.7%	12	3.9%	25.5
<b>HPFFA 288</b>	558	8.4%	11	3.6%	2.0
<b>IUOE</b>	6	0.1%	0	0.0%	0.0
<b>ONA 50 Lodges</b>	52	0.8%	14	4.5%	26.9
<b>ONA 50 Public Health</b>	203	3.0%	6	1.9%	3.0
<b>OPSEU 256</b>	412	6.2%	24	7.8%	5.8
<b>Total</b>	<b>6669</b>	<b>100%</b>	<b>309</b>	<b>100%</b>	<b>4.6</b>

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## GRIEVANCE ACTIVITY BY DEPARTMENT

Another indication of the state of labour-management relations outside of the broader organizational context, is a review of grievance activity in the various City departments. Chart 6 provides an overview of unionized headcount by department along with the number grievances filed in the 2022 calendar year. As expected, the largest number of grievances filed in 2022 occurred in the two of the City's largest departments – Public Works and Healthy and Safe Communities.

**Chart 6 – 2022 Union Headcount by Department and Number of Grievances**

Department	Headcount	Unionized Headcount	% of Unionized Headcount within Department	% of Unionized Headcount within COH	Number of Grievances (2022)	% of Overall Grievances
CityHousing Hamilton	199	100	50.3%	1.2%	2	0.6%
City Manager's Office	148	5	3.4%	0.1%	0	0.0%
Corporate Services	539	274	50.8%	3.2%	13	4.2%
Healthy and Safe Communities	4358	3639	83.5%	42.8%	127	41.1%
Planning & Economic Development	875	489	55.9%	5.8%	25	8.1%
Public Works	2375	2162	91.0%	25.5%	131	42.4%
City Wide Grievances*	n/a	n/a	n/a	n/a	11	3.6%
<b>Total</b>	<b>8494</b>	<b>6669</b>	<b>N/A</b>	<b>78.5%</b>	<b>309</b>	<b>100%</b>

\*City Wide grievances are grievances that are not tied to a single department.

In general, the overall grievances filed in 2022 decreased from 2021 and, of the six departments within the City, four departments experienced a reduction in grievance submissions in 2022 (Chart 7).

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(HUR23006) (City Wide)**

**Page 9 of 16**

City Wide grievances are those that are not tied to a single department. For example, policy grievances that affect employees across multiple departments. In 2022, there was an increase of approximately 57% of City Wide grievances. This increase is largely due to the amendments to the COVID-19 Mandatory Vaccination Verification Policy and the introduction of a termination provision. The majority of City Wide grievances filed in 2022 were related to this corporate policy.

Overall, the grievance activity across the City's departments provides a favourable outlook on the state of labour-management relations showing either relative stability or a reduction in grievances filed.

**Chart 7 – Grievance Activity by Department 2018-2022**

Department	2018	2019	2020	2021	2022	2021/2022 Percent Change	5-Year Average
CityHousing Hamilton	3	9	4	4	2	-50.0%	4
City Manager's Office	2	1	0	0	0	0.0%	1
Corporate Services	9	18	11	11	13	18.2%	12
Healthy & Safe Communities	144	148	146	149	127	-14.8%	143
Planning & Economic Development	32	27	28	31	25	-19.4%	29
Public Works	188	175	182	156	131	-16.0%	166
City Wide Grievances*	8	2	6	7	11	57.1%	7
<b>Total</b>	<b>386</b>	<b>380</b>	<b>377</b>	<b>358</b>	<b>309</b>	<b>-13.7%</b>	<b>362</b>

\*City Wide grievances are grievances that are not tied to a single department.

## GRIEVANCE ACTIVITY BY CATEGORY

When grievances are filed, they are categorized into grievance categories by the issue being grieved. A description of all grievance categories can be found in Appendix "A" to Report HUR23006. Graph 3 below compares the number of grievances filed by grievance category in 2022 compared to 2021.

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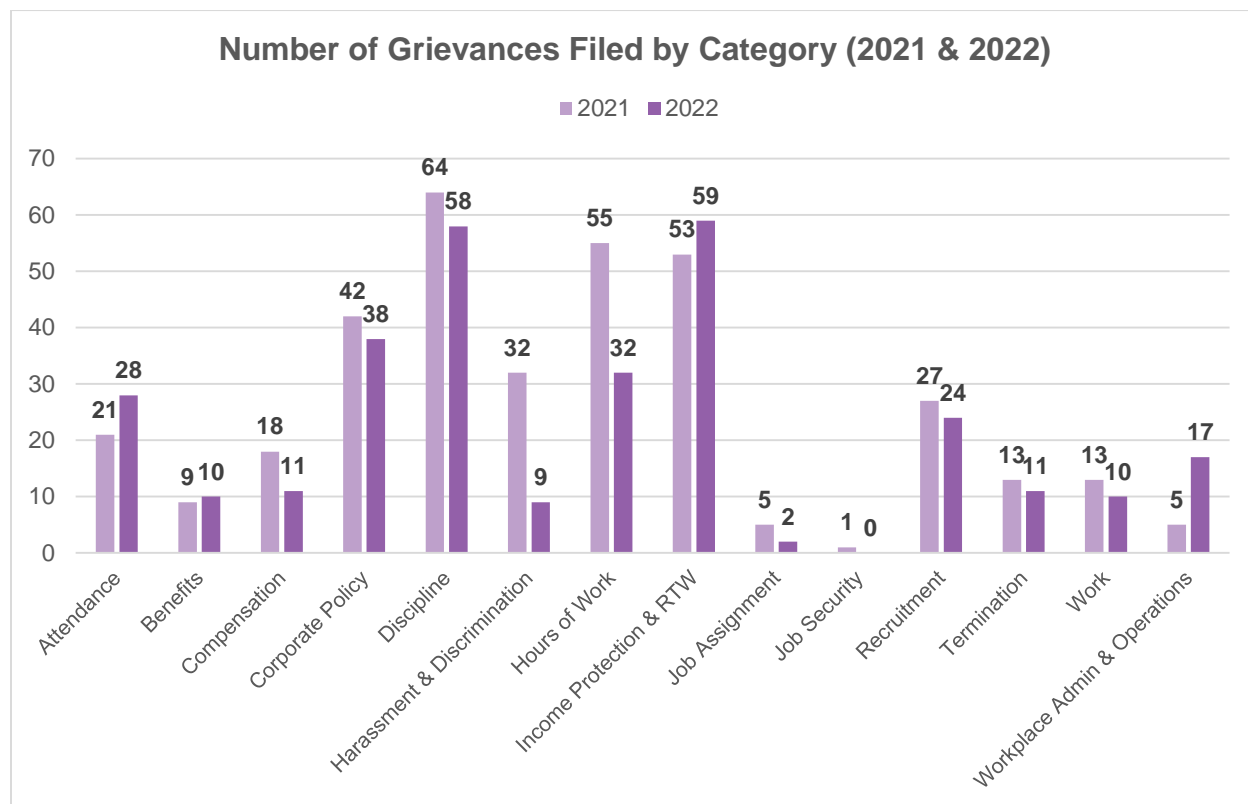
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(HUR23006) (City Wide)**

Page 10 of 16

**Graph 3 – Grievances Filed by Category 2021 and 2022**



Income protection plan, discipline, corporate policy, and hours of work related grievances continue to make the top five list of grievance categories from 2021 to 2022. In 2022, the top five grievance categories were income protection plan, discipline, corporate policy, hours of work, and attendance.

The “Attendance” grievance category displaced the “harassment and discrimination” grievance category in the top five list in 2022. There was a decrease of approximately 72% of harassment and discrimination grievances being filed last year (Chart 8). The number of harassment and discrimination related grievances filed in 2021 were mainly in response to performance management issues, returning to the office and evolving expectations within the departments.

Chart 8 below provides an overview of the number of grievances filed by grievance category in 2021 and 2022. Overall, there was a decrease in the number of grievances filed over most grievance categories, with only a few grievance categories experiencing increases or remaining relatively stable. The Workplace Admin & Operations category increased from five (5) to seventeen (17) grievances in 2022. This is a miscellaneous category and the increases are due to a variety of grievances including but not limited to clothing/ uniform, seniority and training.

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(HUR23006) (City Wide)**

Page 11 of 16

**Chart 8 – Grievances Filed by Grievance Category 2021 and 2022**

Grievance Category	Number of Grievances (2021)	Number of Grievances (2022)	2021/2022 Percent Change
Attendance	21	28	33.3%
Benefits	9	10	11.1%
Compensation	18	11	-38.9%
Corporate Policy	42	38	-9.5%
Discipline	64	58	-9.4%
Harassment & Discrimination	32	9	-71.9%
Hours of Work	55	32	-41.8%
Income Protection & RTW	53	59	11.3%
Job Assignment	5	2	-60.0%
Job Security	1	0	-100.0%
Recruitment	27	24	-11.1%
Termination	13	11	-15.4%
Work	13	10	-23.1%
Workplace Admin & Operations	5	17	240.0%
<b>TOTAL</b>	<b>358</b>	<b>309</b>	<b>-13.7%</b>

**LABOUR RELATIONS LEGAL COSTS FOR 2021 AND 2022**

In 2022, the total labour relations legal costs increased by approximately 14%. This increase is predominately due to union and non-union COVID-19 related disputes and hearings. Chart 9 provides a summary of legal costs in 2022 compared to 2021. Although there has been a rise in overall labour relations legal costs, the total cost remains below the budgeted amount (Graph 4).

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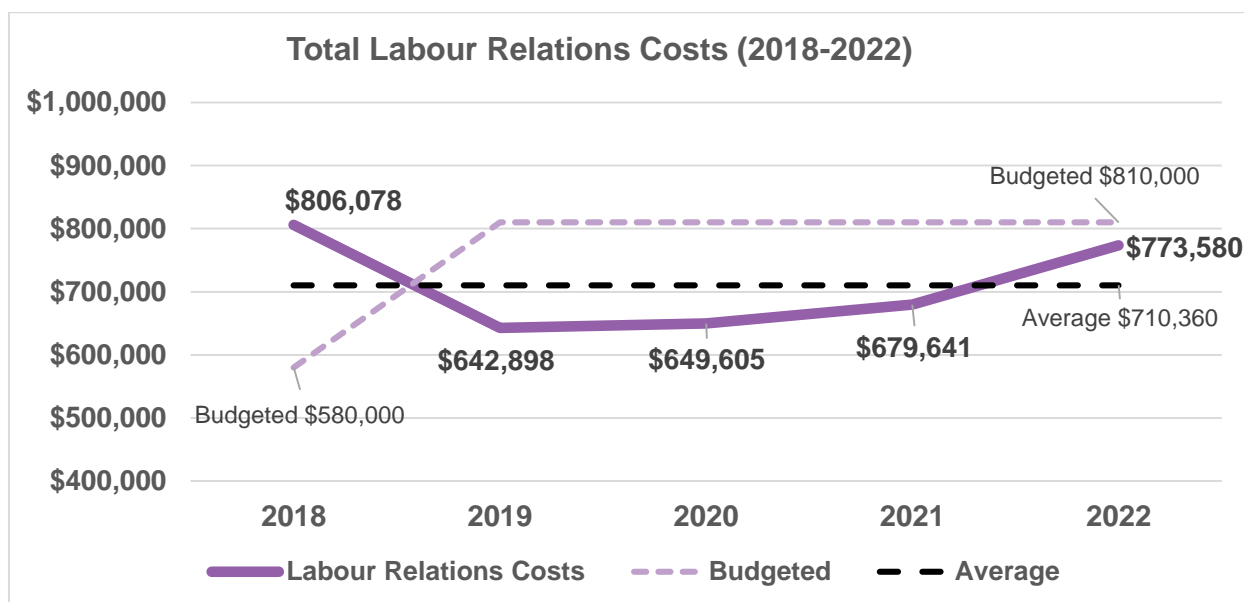
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**(HUR23006) (City Wide)**

Page 12 of 16

**Chart 9 – Summary of Total Legal Costs in 2021 and 2022**

	Mediator Fees	Arbitrator Fees	Legal Fees	Total Labour Relations Costs
<b>2022 Total</b>	\$42,251	\$67,208	\$664,121	<b>\$773,580</b>
<b>2021 Total</b>	\$45,553	\$49,670	\$584,417	<b>\$679,641</b>
<b>Difference</b>	-\$3,302	\$17,537	\$79,704	<b>\$93,939</b>
<b>Percent Change</b>	-7.2%	35.3%	13.6%	<b>13.8%</b>

**Graph 4 – Total Labour Relations Legal Costs (2018-2022)**



Overall, there was an increase in grievance activity costs in 2022. As expected, the highest costs are associated with two of the City's largest departments – Public Works and Healthy and Safe Communities. The increase in City Wide grievance activity costs is predominately due to COVID-19 Mandatory Vaccination Policy arbitration hearings that occurred in 2022.

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**(HUR23006) (City Wide)**

Page 13 of 16

**Chart 10 – Grievance Activity Costs by Department**

Department	Mediator Fees	Arbitrator Fees	Legal Fees	Total Cost	Percent of Total Cost
City Manager's Office	\$0	\$2,290	\$11,353	\$13,642	3.1%
Healthy & Safe Communities	\$13,293	\$38,618	\$169,124	\$221,035	50.5%
Public Works	\$26,383	\$15,793	\$41,019	\$83,196	19.0%
City Housing Hamilton	\$0	\$0	\$1,490	\$1,490	0.3%
Planning & Economic Development	\$1,079	\$0	\$253	\$1,332	0.3%
City Wide Grievances*	\$0	\$10,507	\$106,265	\$116,772	26.7%
<b>Total (2022)</b>	<b>\$38,618</b>	<b>\$67,208</b>	<b>\$331,641</b>	<b>\$437,467</b>	
<b>Total (2021)</b>	<b>\$45,553</b>	<b>\$47,851</b>	<b>\$264,020</b>	<b>\$357,425</b>	
<b>Percent Change</b>	<b>-15.2%</b>	<b>40.5%</b>	<b>25.6%</b>	<b>22.4%</b>	

\*City Wide grievances are grievances that are not tied to a single department.

In 2022, the non-grievance related activity remained relatively stable from the previous year. Chart 11 provides an overview of the total non-grievance labour relations legal fees. The total non-grievance labour relations legal costs increased by 4.3% in 2022, which was due to an increase in non-union employee relations matters.

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(HUR23006) (City Wide)**

Page 14 of 16

**Chart 11 – Non-Grievance Activity Costs**

Description	Mediator Fees	Arbitrator Fees	Legal Fees	Total Cost	Percent of Total Cost
<b>Cancellation Fees</b>	\$1,496	\$0	\$0	<b>\$1,496</b>	<b>0.4%</b>
<b>Interest Arbitration</b>	\$0	\$0	\$3,016	<b>\$3,016</b>	<b>0.9%</b>
<b>Non-Union Termination</b>	\$0	\$0	\$12,917	<b>\$12,917</b>	<b>3.8%</b>
<b>Human Rights Claims</b>	\$0	\$0	\$55,117	<b>\$55,117</b>	<b>16.4%</b>
<b>Legal Fees</b>	\$0	\$0	\$263,566	<b>\$263,566</b>	<b>78.4%</b>
<b>Total (2022)</b>	<b>\$1,496</b>	<b>\$0</b>	<b>\$334,617</b>	<b>\$336,113</b>	
<b>Total (2021)</b>	\$0	\$1,819	\$320,397	\$322,216	
<b>Percent Change</b>	100.0%	-100.0%	4.4%	4.3%	

**COVID-19 RELATED IMPACTS**

Working together with union partners in responding to the multitude of COVID-19 challenges had a direct impact on the City's grievance numbers. All stakeholders continue to work well together to resolve pandemic-related issues in a collaborative and efficient manner. During 2022, in-person meetings were reintroduced with the return to the office for most City employees. While this may represent the beginning of a return to the status quo, from an operational perspective, all stakeholders continue to make use of the technologies they became accustomed to throughout the pandemic. Specifically, virtual meeting usage did continue for most labour relations meetings such as consultations, labour-management meetings, fact findings, investigations, discipline activity, layoffs and bumping, terminations, grievance handling, mediations, arbitrations, and collective bargaining. Virtual technology has made meetings and hearings more efficient, expeditious, and affordable to the parties that appear before it. It is expected that continued use of these practices and technologies will be used where it is appropriate to do so.

**COLLECTIVE BARGAINING**

No new collective agreements were ratified in 2022. The OPSEU collective bargaining process remains ongoing with an interest arbitration hearing date in May 2023. Collective agreements for CUPE 5167 Inside/Outside, ATU 107, HPFFA 288, ONA 50 Public Health, CUPE 1041, and IUOE 772 expired in December 2022. Collective agreements for CUPE 5167 Lodges, ONA 50 Lodges, and CLAC 911 are set to expire in 2023. The 2023 bargaining year has commenced with both virtual and in-person collective bargaining meetings being scheduled.

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**Chart 12 – Collective Agreement Activity**

Collective Agreement	Term	Status
<b>CUPE 5167 Inside/Outside</b>	January 1, 2019 – December 31, 2022	Negotiations Underway
<b>ATU 107</b>	January 1, 2019 – December 31, 2022	Negotiations Underway
<b>HPFFA 288</b>	January 1, 2018 – December 31, 2022	Negotiations Pending
<b>ONA 50 Lodges</b>	April 1, 2019 – March 31, 2023	Negotiations Pending
<b>ONA 50 Public Health</b>	January 1, 2019 – December 31, 2022	Negotiations Pending
<b>CUPE 1041</b>	January 1, 2019 – December 31, 2022	Negotiations Pending
<b>IUOE 772</b>	January 1, 2019 – December 31, 2022	Negotiations Pending
<b>CUPE 5167 Lodges</b>	April 1, 2019 – March 31, 2023	Negotiations Pending
<b>CLAC 911</b>	January 1, 2020 – December 31, 2023	Agreement Ratified 2021
<b>OPSEU 256</b>	April 1, 2016 – March 31, 2020	Awaiting Interest Arbitration
<b>HOWEA</b>	January 1, 2021 – December 31, 2024	Agreement Ratified 2021

**CONCLUSION**

The Labour Relations Activity Report continues to provide valuable insight with a view to delivering contextual data and trend analysis within the City's labour relations environment. This year's report continues to highlight positive labour relations trending with stability and, in many cases, decreases in varying grievance activity categories. A snapshot of the 2022 Labour Relations Activity can be reviewed in the infographic provided for in Appendix "B" to Report HUR23006. Through improved dialogue, as well as a demonstrated willingness from all stakeholders to work in a collaborative and efficient manner, labour relations continues to achieve positive indicators of success on a City Wide basis.

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**SUBJECT: Labour Relation Activity Report & Analysis (2018-2022)  
(HUR23006) (City Wide)**

**Page 16 of 16**

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**APPENDICES AND SCHEDULES ATTACHED**

Appendix "A" to Report HUR23006- Additional Data

Appendix "B" to Report HUR23006 - Infographic

Appendix "C" to Report HUR23006 – Definitions Respecting Grievance Categories

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**GRIEVANCE CATEGORIES**

**Attendance:** Vacation, Stat Holidays, Absent Without Leave (AWOL), Leave of Absence, Bereavement, Attendance Support Program (ASP), Lieu Bank, Flex Time

**Benefits:** Health Benefits, Life Insurance, OMERS, Accidental Death & Dismemberment (AD&D), Benefits

**Compensation:** Wages, Premium Pay, Shift Premiums, Meal Allowance, Compensation, Acting Pay, Job Evaluation, Retro Pay, Union Dues, Training Allowance, Pay-out Entitlements

**Corporate Policy:** Driver Safety & Compliance Manual, Corporate Policy (i.e. Mandatory Vaccination Policy)

**Discipline:** Verbal, Written, Suspension, Discipline

**Harassment/Discrimination:** Harassment, Discrimination, Human Rights, Toxic/Poisonous Workplace

**Hours of Work:** Overtime, Call-in, Call-out, Standby, Continuation of the work day, shift schedule, hours of work

**Income Protection & RTW:** Short Term Disability (STD), Income Protection Plan (IPP), Long Term Disability (LTD), Work Accommodation, Return to Work, Doctors Note, Bridging

**Job Assignment:** Seniority, Conditions of Employment, Restructuring, Transfer, Job Location, Job Share, Shift Change

**Job Security:** Lay-off, Recall, Bumping,

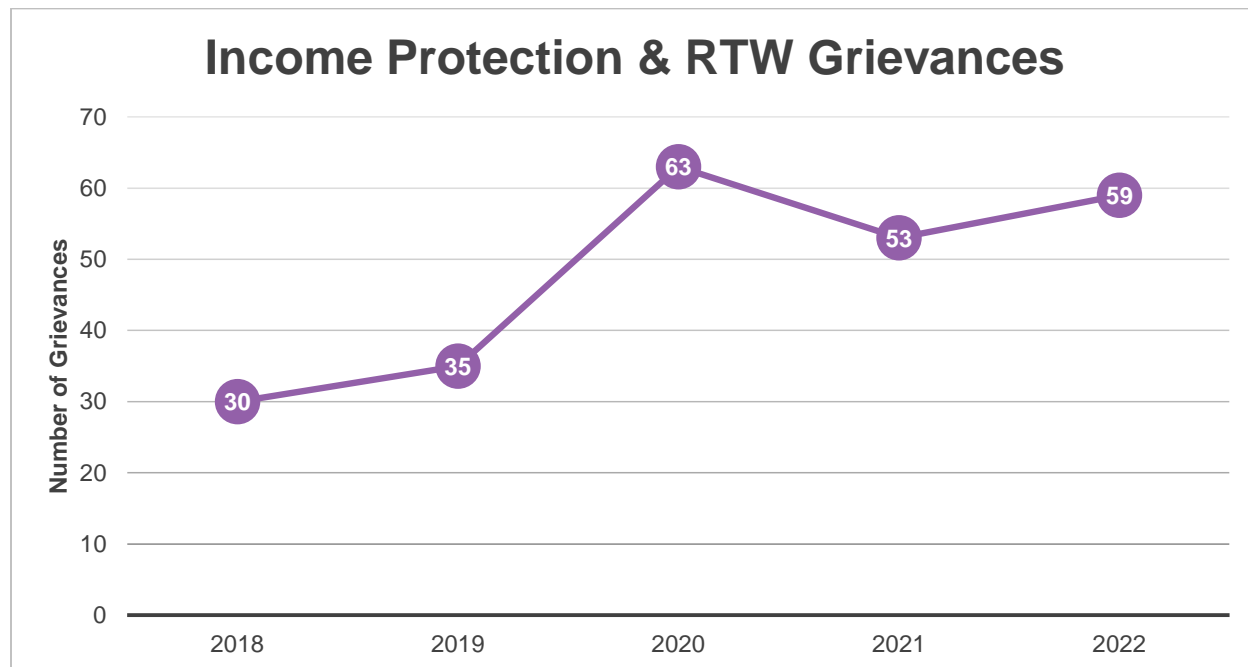
**Recruitment:** Job postings & filling, Promotion, Demotion, Complement, Vacancies, Testing, temporary postings

**Termination:** Termination, Severance

**Work:** Duties, Scope, Work of the Bargaining Unit, Contracting Out, Union Representation, Technological Change, Workplace Safety, Meal Breaks

**Workplace Admin & Operations** Parking, Mileage, City Vehicle, Bus Pass, Confidentiality, Tuition Reimbursement, Performance Appraisal, Admin-other, Clothing Allowance, Cleaning Allowance, Clothing/Uniform, Safety Wear, Training, Missed Page, Seniority

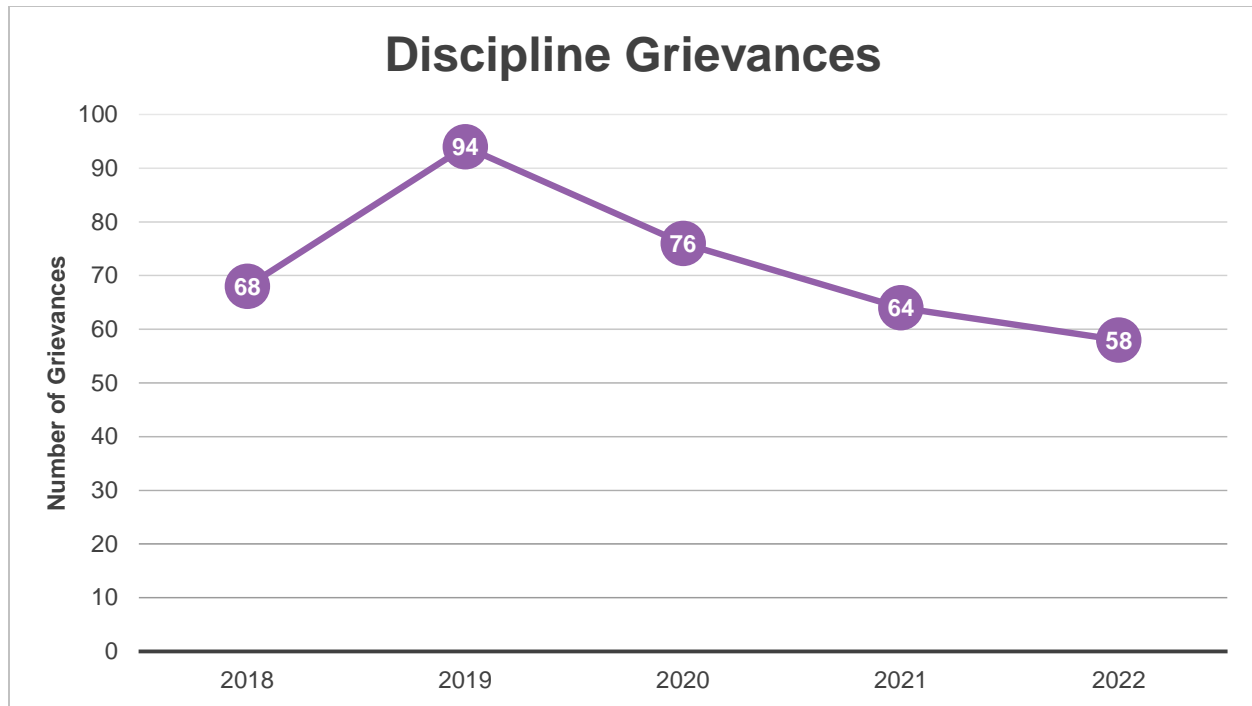
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**TOP FIVE GRIEVANCE CATEGORIES IN 2022****1. Income Protection & RTW: STD, IPP, LTD, Work Accommodation, Return to Work, Doctors Note, Bridging****Chart Data**

<b>Income Protection &amp; RTW Grievances</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>
<b>ATU Local 107</b>	0	5	5	14	10
<b>CUPE Local 1041</b>	3	3	8	7	5
<b>CUPE Local 5167</b>	10	10	35	18	20
<b>CUPE Local 5167 Lodges</b>	3	3	7	7	12
<b>CLAC Local 911 Vol Fire</b>	0	0	0	0	0
<b>HOWEA Water Treatment Plant</b>	0	2	0	1	3
<b>HPFFA Local 288 Fire</b>	2	0	1	2	1
<b>ONA Local 50 Health</b>	2	0	2	0	0
<b>ONA Local 50 Lodges</b>	0	0	0	0	4
<b>OPSEU Local 256 EMS</b>	10	12	5	4	4
<b>Total</b>	<b>30</b>	<b>35</b>	<b>63</b>	<b>53</b>	<b>59</b>

## 7

## 2. Discipline - Verbal, Written, Suspension, Discipline

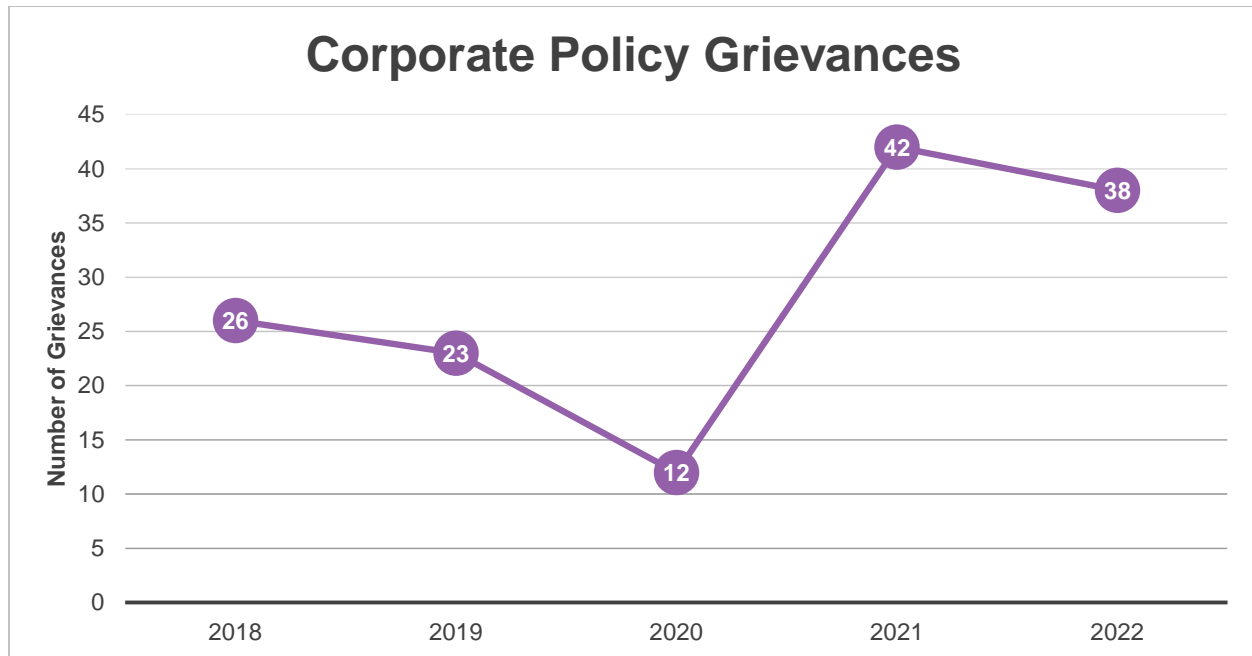


## Chart Data

Discipline Grievances	2018	2019	2020	2021	2022
ATU Local 107	1	13	4	17	13
CUPE Local 1041	3	3	6	2	4
CUPE Local 5167	54	51	54	35	31
CUPE Local 5167 Lodges	6	23	11	4	2
CLAC Local 911 Vol Fire	0	0	0	0	0
HOWEA Water Treatment Plant	2	1	0	0	0
HPFFA Local 288 Fire	0	0	1	0	0
ONA Local 50 Health	0	1	0	3	1
ONA Local 50 Lodges	1	2	0	1	1
OPSEU Local 256 EMS	1	0	0	2	6
<b>Total</b>	<b>68</b>	<b>94</b>	<b>76</b>	<b>64</b>	<b>58</b>

## 7

## 3. Corporate Policy: Driver Safety &amp; Compliance Manual, Corporate Policy



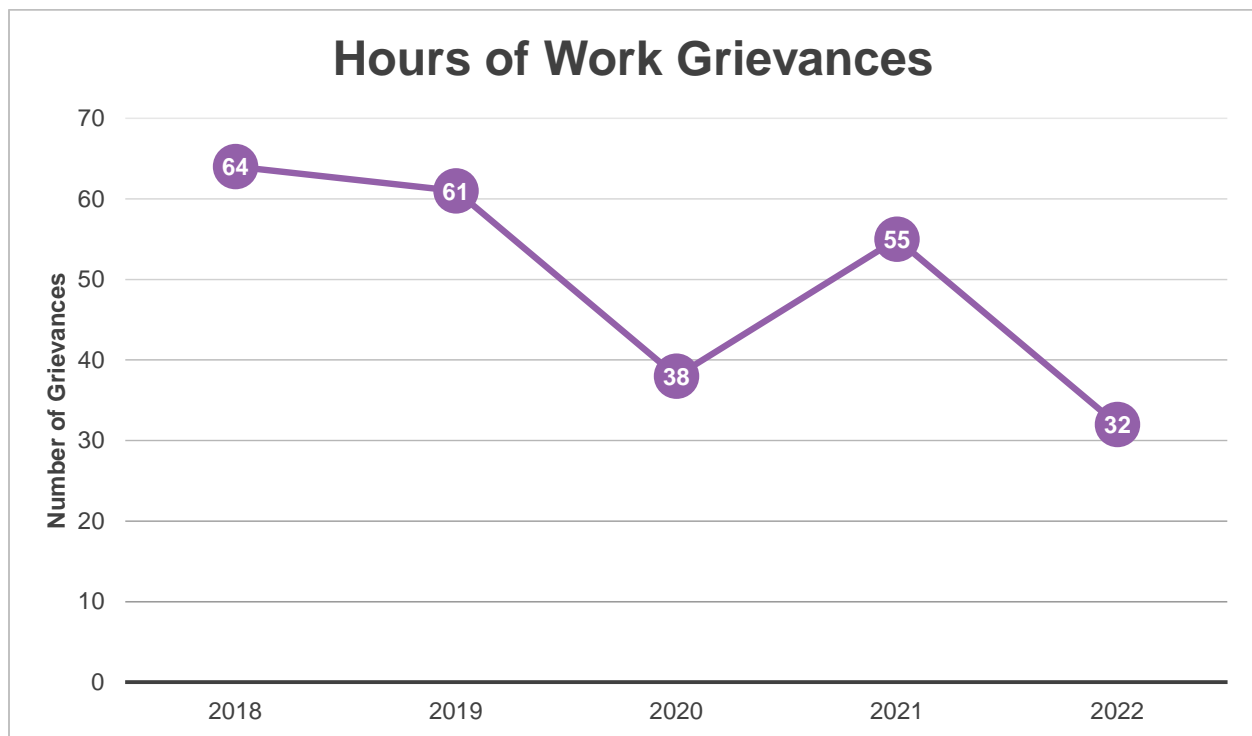
## Chart Data

Corporate Policy Grievances	2018	2019	2020	2022	2022
ATU Local 107	0	5	2	3	3
CUPE Local 1041	1	0	0	2	3
CUPE Local 5167	24	13	9	25	17
CUPE Local 5167 Lodges	0	3	0	2	5
CLAC Local 911 Vol Fire	0	0	0	0	1
HOWEA Water Treatment Plant	1	2	1	0	1
HPFFA Local 288 Fire	0	0	0	4	2
ONA Local 50 Health	0	0	0	0	1
ONA Local 50 Lodges	0	0	0	1	3
OPSEU Local 256 EMS	0	0	0	5	2
<b>Total</b>	<b>26</b>	<b>23</b>	<b>12</b>	<b>42</b>	<b>38</b>



## 7

#### 4. Hours of Work - Overtime, Call-in, Call-out, Standby, Continuation of the work day, shift schedule, hours of work



#### Chart Data

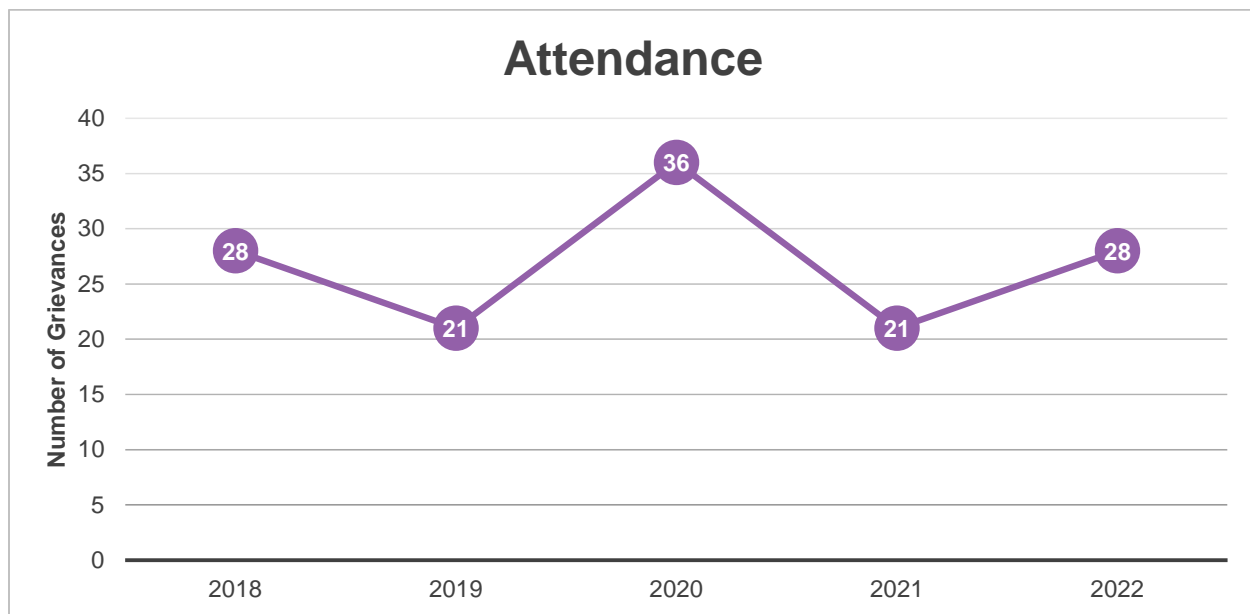
Hours of Work Grievances	2018	2019	2020	2022	2022
ATU Local 107	1	3	5	1	1
CUPE Local 1041	5	5	5	6	2
CUPE Local 5167	33	35	25	30	18
CUPE Local 5167 Lodges	4	8	1	3	5
CLAC Local 911 Vol Fire	0	0	0	0	0
HOWEA Water Treatment Plant	7	7	0	6	6
HPFFA Local 288 Fire	1	0	0	0	0
ONA Local 50 Health	0	0	0	0	0
ONA Local 50 Lodges	1	1	1	7	0
OPSEU Local 256 EMS	12	2	1	2	0
<b>Total</b>	<b>64</b>	<b>61</b>	<b>38</b>	<b>55</b>	<b>32</b>

## Appendix "A" to Report HUR23006

Page 6 of

7

**5. Attendance:** Vacation, Stat Holidays, Absent Without Leave (AWOL), Leave of Absence, Bereavement, Attendance Support Program (ASP), Lieu Bank, Flex Time



## Chart Data

Attendance Grievances	2018	2019	2020	2022	2022
ATU Local 107	0	0	0	0	2
CUPE Local 1041	3	3	7	2	1
CUPE Local 5167	12	13	24	9	13
CUPE Local 5167 Lodges	1	1	1	7	9
CLAC Local 911 Vol Fire	0	0	0	0	0
HOWEA Water Treatment Plant	3	1	1	1	0
HPFFA Local 288 Fire	0	0	0	0	1
ONA Local 50 Health	0	0	0	0	0
ONA Local 50 Lodges	0	0	0	2	1
OPSEU Local 256 EMS	9	3	3	0	1
<b>Total</b>	<b>28</b>	<b>21</b>	<b>36</b>	<b>21</b>	<b>28</b>

## Appendix "A" to Report HUR23006

Page 7 of

7

## GRIEVANCE ACTIVITY COSTS BY CATEGORY

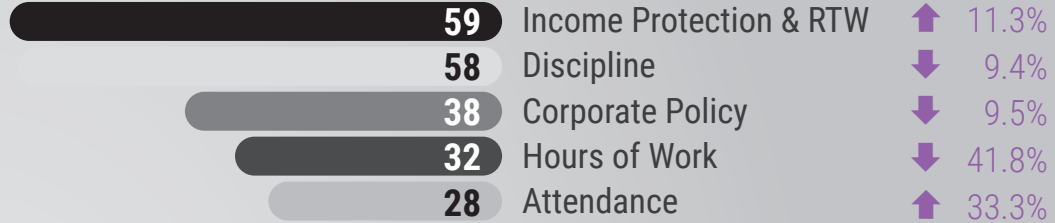
Category	Mediator Fees	Arbitrator Fees	Legal Fees	Total Cost	Percent of Total Cost
<b>Attendance</b>	\$1,382	\$5,673	\$24,463	<b>\$31,519</b>	<b>7.2%</b>
<b>Benefits</b>	\$0	\$0	\$263	<b>\$263</b>	<b>0.1%</b>
<b>Compensation</b>	\$4,198	\$4,834	\$29,479	<b>\$38,510</b>	<b>8.8%</b>
<b>Corporate Policy</b>	\$1,947	\$11,626	\$106,564	<b>\$120,137</b>	<b>27.5%</b>
<b>Discipline</b>	\$8,794	\$0	\$25,362	<b>\$34,155</b>	<b>7.8%</b>
<b>Harassment &amp; Discrimination</b>	\$3,668	\$2,132	\$11,440	<b>\$17,240</b>	<b>3.9%</b>
<b>Hours of Work</b>	\$2,578	\$0	\$296	<b>\$2,874</b>	<b>0.7%</b>
<b>Income Protection &amp; RTW</b>	\$5,665	\$2,722	\$11,118	<b>\$19,505</b>	<b>4.5%</b>
<b>Recruitment</b>	\$4,218	\$2,290	\$9,251	<b>\$15,758</b>	<b>3.6%</b>
<b>Termination</b>	\$6,017	\$26,000	\$85,969	<b>\$117,986</b>	<b>27.0%</b>
<b>Work</b>	\$1,038	\$10,787	\$15,492	<b>\$27,317</b>	<b>6.2%</b>
<b>Workplace Admin &amp; Operations</b>	\$1,250	\$1,145	\$9,808	<b>\$12,202</b>	<b>2.8%</b>
<b>Total (2022)</b>	<b>\$38,618</b>	<b>\$67,208</b>	<b>\$331,641</b>	<b>\$437,467</b>	
<i>Total (2021)</i>	<i>\$45,553</i>	<i>\$47,851</i>	<i>\$264,020</i>	<i>\$357,425</i>	
<i>Percent Change</i>	<i>-15.2%</i>	<i>40.5%</i>	<i>25.6%</i>	<i>22.4%</i>	



# 2022 YEAR IN REVIEW

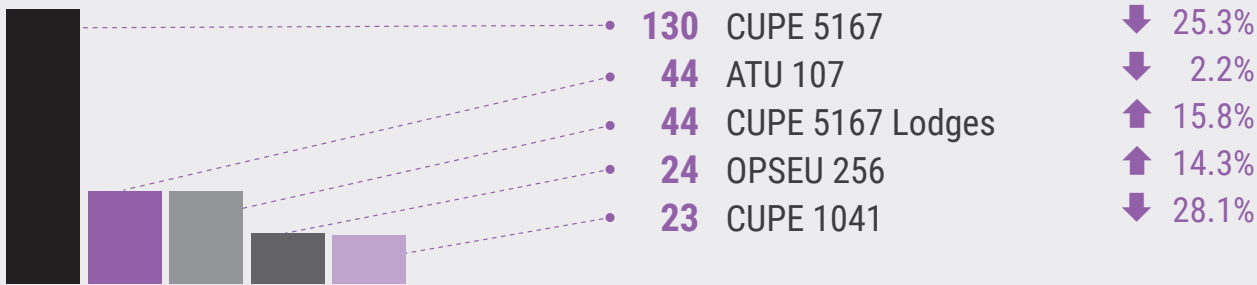
## Labour Relations ACTIVITY REPORT

### TOP 5 GRIEVANCE CATEGORIES



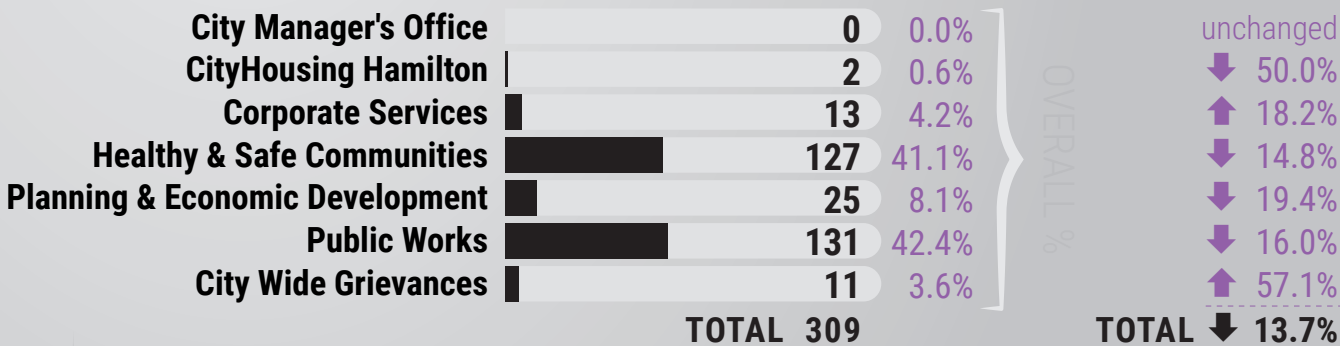
FROM 2021

### TOP 5 BARGAINING UNIT GRIEVANCE ACTIVITY



FROM 2021

### GRIEVANCES BY DEPARTMENT



### 2022 LEGAL COSTS

\$42,250.78	Mediator Fees	↓ 7.2%
\$67,207.78	Arbitrator Fees	↑ 35.3%
\$664,121.26	Legal Fees	↑ 13.6%
<b>\$773,579.82</b>	<b>Total Fees</b>	<b>↑ 13.8%</b>

### 2022 LABOUR RELATIONS SNAPSHOT

250	68	21	3
Grievance Resolutions	Mediation Settlements	Arbitration Resolutions	Arbitration Awards

## Definitions Respecting Grievance Categories

### 1. Income Protection & RTW

Income protection plan (IPP) and return to work related grievances continue to make the top five grievance category list. In 2020, most bargaining unit collective agreements had a change to the Income Protection Plan language, and the timelines for submitting a doctor's note and claim form. Most of the grievances filed in this category are disputes with short-term disability claims. Despite the rise of grievances in this category, it is important to note that the changes to the Income Protection Plan negotiated in most collective agreements in 2020 requiring a doctor's note on day four of an absence have significantly reduced the number of five (5) day absences.

In addition, the City's decision to continue to pay employees when they were isolating due to COVID-19 (i.e. P19/P22 leave of absences) may have assisted in decreasing the number of potential IPP and return to work disputes. Without these leaves with pay, the grievance activity in this category would likely have been higher.

### 2. Discipline

The discipline grievance category encompasses all levels of the progressive discipline process, including verbal, written, and suspension grievances. This category does not include termination grievances as those are recorded in their own category. A discipline grievance is usually filed when the union/employee feels the discipline issued was excessive, a belief the behaviour did not warrant a disciplinary response and/or an attempt to lower the level of discipline.

### 3. Corporate Policy

The increase in corporate policy-related grievances can primarily be attributed to the implementation of the Mandatory COVID-19 Vaccination Verification Policy and Rapid Antigen Testing Program in 2021. These results are not surprising given the current COVID-19 related circumstances. This includes grievances filed regarding unpaid leaves, rapid testing, and the policy itself. With some provisions of the policy suspended in August 2022, the number of related grievances being filed under this category decreased.

In addition, grievances related to "deemed preventable incidents" and are reviewed by the collision review board, are also filed under this category. The City has a driver safety and compliance manual that governs the obligations of all those city employees who operate City of Hamilton vehicles. The purpose of the manual is to ensure compliance with all rules and regulations as well as to improve the city's overall CVOR rating. Any incident involving a city vehicle and/or equipment is reviewed at the collision review board and if deemed a culpable/preventable incident, demerit points and discipline commensurate with those points is issued. Grievances are typically filed where an incident is deemed preventable.

#### **4. Hours of Work**

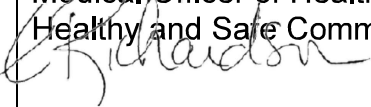
Hours of work-related grievances continue to make the top five grievance category list. This category includes overtime, call-in, call-out, standby, and shift schedule matters. Grievances filed in this category can fluctuate depending on how hours of work are scheduled at the operational level. They are often resolved by management at Step 1 of the grievance process.

#### **5. Attendance**

The attendance grievance category includes grievances related to statutory holidays. In 2021, the federal government recognized the National Day for Truth and Reconciliation as a federal holiday to be observed on September 30<sup>th</sup> each year. This holiday is currently not recognized as a provincial statutory holiday in Ontario; however, we received an increase in group and policy grievances in 2021 and 2022 when the City did not recognize the day as a statutory holiday. Similarly, we received statutory holiday group and policy grievances when the federal government designated September 19, 2022 as a National Day of Mourning to honour Queen Elizabeth.



# INFORMATION REPORT

<b>TO:</b>	Mayor and Members General Issues Committee
<b>COMMITTEE DATE:</b>	May 3, 2023
<b>SUBJECT/REPORT NO:</b>	Efficacy of the Existing Staff COVID-19 Vaccination Policy (BOH23015) (City Wide) <b>(Outstanding Business List Item)</b>
<b>WARD(S) AFFECTED:</b>	City Wide
<b>PREPARED BY:</b>	Dr. Bart Harvey (905) 546-2424 Ext. 3571
<b>SUBMITTED BY:</b>	Dr. Elizabeth Richardson, MD, MHSc, FRCPC Medical Officer of Health, Public Health Services Healthy and Safe Communities Department
<b>SIGNATURE:</b>	

## COUNCIL DIRECTION

At its meeting on February 8, 2023, Council provided the direction below:

That the Medical Officer of Health provide a report to Council, by end of Q2 2023, on the efficacy of the existing staff vaccination policy that includes a recommendation on whether to:

- a) Renew the policy in its current form;
- b) Update the policy;
- c) Remove the policy for all or certain parts of the organization; or,
- d) Any other recommendation that the Medical Officer of Health sees fit to make.

This report details the response to the direction above, and fulfils the requirement for General Issues Committee Outstanding Business List Item 2023-G.

## INFORMATION

The Medical Officer of Health and Public Health Services provide advice to Council and the community on public health matters, including vaccination. Specific occupational health and safety advice, including vaccination policies for staff, is provided by the Occupational Health & Safety team within Human Resources. Previous reports on the issue of COVID-19 vaccination policies for staff have been provided to Council through the Executive Director of Human Resources.

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OUR Mission: To provide high quality cost conscious public services that contribute to a healthy, safe and prosperous community, in a sustainable manner.

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**SUBJECT: Efficacy of the Existing Staff COVID-19 Vaccination Policy (BOH23015)  
(City Wide) - Page 2 of 3**

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This information report provides further public health perspective on COVID-19 vaccination policies at this point in the pandemic.

Current evidence indicates that vaccination against COVID-19 provides protection against the severe effects of COVID-19 infection, but has little, if any, effect against the risk of being infected by COVID-19. As such, vaccination against COVID-19 is currently believed to have no effect against the transmission of the virus between people but will decrease the severity of a COVID-19 infection.

As a result, from an employer's perspective, vaccination against COVID-19 will not affect the risk of employees becoming infected with COVID-19 or of transmitting the virus to co-workers. However, vaccination against COVID-19 would be expected to decrease the risk of employees experiencing severe consequences when infected with COVID-19. As such, employees vaccinated against COVID-19 would be expected to be off work for shorter periods of time because of a COVID-19 infection and would also be expected to be less likely to require care in-hospital.

From a public health perspective, given that vaccination against COVID-19, even with keeping vaccinations up to date, does not reduce COVID-19 disease transmission, the individual level benefits would not justify the imposition of a COVID-19 vaccine mandate for employees, existing or new, except as required by any provincial guidance or mandate. At this point in time there is no provincial requirement for vaccination against COVID-19 for any staff.

**Conclusion**

Taking into account each of the perspectives above, the Medical Officer of Health recommends:

1. Pausing all COVID-19 vaccine provisions provided for in the Mandatory COVID-19 Vaccine Verification Policy for new staff, existing staff, and staff working in all divisions; and,
2. Suspension of rapid antigen screen testing for asymptomatic staff.

Nonetheless, to support the health and wellness of staff, and reduce pressures on both City of Hamilton services and health care agencies, strong support and encouragement of vaccination against COVID-19 remains important.

As the COVID-19 virus and pandemic continue to evolve, these circumstances may change, and thus continued monitoring of the situation is advisable. Situation monitoring and subsequent decisions related to employee policies is a role that will continue to fall to Occupational Health & Safety within Human Resources to provide ongoing occupational health and safety advice to the corporation, including staff vaccination recommendations. Public Health Services will continue to provide advice to the

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**SUBJECT: Efficacy of the Existing Staff COVID-19 Vaccination Policy (BOH23015)  
(City Wide) - Page 3 of 3**

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community on COVID-19 infection prevention and control measures, including vaccination.

**APPENDICES AND SCHEDULES ATTACHED**

Not Applicable.