

THE CORPORATION OF THE TOWN OF GEORGINA

REPORT NO. DS-2023-0087

**FOR THE CONSIDERATION OF
COUNCIL**

November 22, 2023

SUBJECT: Lake Drive Shoreline Action Plan – Surveyor Services

1. RECOMMENDATIONS:

1. That Council receive Report No. DS-2023-0087, prepared by the Planning Policy Division, Development Services Department, dated November 22, 2023, regarding the Lake Drive Shoreline Action Plan - Surveyor Services;
2. That Council approve the budget for Category 2, survey costs, of the Lake Drive Shoreline Action Plan, based on results of Contract “DSD2023-099 Surveyor Services – Lake Drive”, in the amount of \$655,059.00, along with a 30% contingency of \$196,518.00, totaling \$851,577.00, plus applicable HST of 1.76%; and
3. That Council set the survey costs per lakeside lot for Eligible Property Owners (EPOs) at \$2,476.00, based on an estimated 350 lakeside lots with 100% participation; and
4. That Council allocate funding from the Tax Rate Stabilization Reserve for the Additional Survey Works outlined in the Provisional Item found in Schedule B of Contract “DSD2023-099 Surveyor Services – Lake Drive”, in the amount of \$79,650.00, along with a 30% contingency of \$23,895.00 totalling \$103,545.00, plus applicable HST of 1.76%; and
5. That in accordance with Operational Step #7 of the Action Plan and Recommendations 2 and 4 above, Council approve the contract award for surveying services to IBW Surveyors and authorize the Manager of Procurement Services to execute the agreement between the Town of Georgina and IBW Surveyors, together with any other necessary documents required to give effect to the agreement; and,
6. That staff report back to Council on providing EPOs the option of a payment plan, with a comprehensive outline of the payment plan option, including interest rates, overall structure, duration of payments, and seek authorization for the associated by-law.

2. PURPOSE:

The purpose of this report is to update Council on the results of the engagement process with Eligible Property Owners (EPOs) within the Lake Drive Shoreline Action Plan Area (see Attachment 1), and to seek funding and approval to award a contract for surveyor services.

3. BACKGROUND:

On September 23, 2015, the Lake Drive Shoreline Jurisdiction Ad Hoc Committee was established to gather public input and address the issues surrounding Lake Drive. The Committee met for approximately two years between September 23, 2015 and July 19, 2017, and presented its recommendations to Council (the “Action Plan”). Council resolved to move forward on the Lake Drive Shoreline Jurisdiction Action Plan, which led to a Town position on the divestiture of surplus road allowance lands. However, due to legal issues and resource allocation challenges caused by the pandemic, the project was delayed for nearly three years.

The Council-approved Action Plan consists of a 14 step process aimed at resolving land ownership issues relating to the lands on the lake side of Lake Drive North and Lake Drive East. Its primary objectives were twofold: first, to determine the boundaries of the Town’s road allowance and identify the portions that should be retained and those that could be considered surplus and divested; and second, to establish appropriate land use permissions and development standards for all lakeside lots, including privately owned properties and the road allowance lands to be divested. Ultimately, this project is intended to clear up title along the shoreline of Lake Drive North and Lake Drive East.

March 30, 2022 Council Meeting

On March 30, 2022, Council adopted the following resolutions:

RESOLUTION NO. C-2022-0108

1. That Council delegate authority to the CAO to retain and/or allocate appropriate dedicated personnel and resources to advance the Lake Drive Jurisdiction Action Plan, excluding beach associations, as per the direction provided in the March 30, 2022 closed session of Council.
2. That staff report back to Council with two reports, the first report outlining the price including land costs and actual cost recovery the Town would consider for the divestiture of road allowance lands within the Lake Drive Jurisdiction Action Plan by June 22, 2022, and the second report outlining a schedule to implement the operational and policy steps in the Lake Drive Jurisdiction Action Plan no later than August 10, 2022.

RESOLUTION NO. C-2022-0109

3. That Beach Associations will be addressed through the second report outlining a schedule to implement the operational and policy steps in the Lake Drive Jurisdiction Action Plan no later than August 10, 2022.

June 22, 2022 Council Meeting

On June 22, 2022, Council considered Report No. [SI-2022-0006](#), which provided financial information to Town Council for its consideration relating to the price, including land costs and actual cost recovery, of the road allowance lands to be divested.

The three primary financial components for implementing the Action Plan were identified as follows:

- Category 1: Project Costs
- Category 2: Lakeside Lot Creation Costs
- Category 3: Land Costs

The Budget for Category 1: Project Costs approved through the passing of Resolution No. C-2022-0108 at the March 30, 2022 Council meeting was as follows:

- Program Manager (\$480,000 over 3 years)
- Planner/GIS Technologist (\$308,000 over 3 years)
- Communications Support (\$75,000)
- Planning Consultant if required (\$100,000)
- External Legal Counsel (\$300,000)
- Total Budget: \$1,263,000

Through the following resolution, Council adopted defining elements outlining how future budgetary Category 2 and 3 associated costs and risks would proceed. Staff were to report back to Council with further recommendations concerning Category 2 and 3 costs as the Action Plan progresses.

RESOLUTION NO. [C-2022-0238](#)

4. That Council set the per lakeside lot survey costs following a formal competitive procurement process for surveying services.
5. That the actual land transfer/closing costs be charged to the transferee(s).
6. That a separate costing process be developed, if required, in instances where multiple parties claim title to a proposed lakeside lot or are disputing a proposed dividing boundary.
7. That a subsequent costing report be brought to Council in advance of any lakeside lot transfers to finalize the costs associated with the transfer.

RESOLUTION NO. [C-2022-0239](#)

2. That the land value rate per square foot (excluding applicable taxes) be set at \$2.00 per square foot to be used to divest the Town-owned, surplus land.

RESOLUTION NO. [C-2022-0240](#)

3. That the appropriate dollar amount (excluding applicable taxes) to be charged per lakeside lot to recover project costs be capped at 100% participation, excluding beach associations.

August 10, 2022 Council Meeting

On August 10, 2022, Council approved a [Project Schedule for implementation of policy and operational steps](#) described within the Action Plan for indirect waterfront properties. Council also approved an update to the Action Plan which revised the definition of “lakeside lands” to clarify that the Town can only deal with “lakeside lands” owned by the Town. This resulted in two resolutions as follows:

RESOLUTION NO. [C-2022-0293](#)

2. That Council endorse the Project Schedule for implementation of the Lake Drive Shoreline Jurisdiction Action Plan for residential indirect waterfront properties, in accordance with Report No. [DS-2022-0069](#);
3. That Council direct staff to draft a potential Interim Policy for indirect waterfront properties within the Lake Drive Shoreline Jurisdiction Action Plan to allow certain works to proceed on lakeside lands, subject to certain conditions, prior to completion of the Action Plan, for submission to Council in September 2022 for consideration;

As Council had directed on March 30, 2022 through Resolution No. [C-2022-0109](#), staff reported back with a second separate report ([DS-2022-0070](#), dated August 10, 2022) outlining a schedule to implement the operational and policy steps for beach associations. Generally, staff were to report back at a later date with more information on beach associations. The Resolutions adopted at that time were as follows:

RESOLUTION NO. [C-2022-0294](#)

1. That Council receive Report No. [DS-2022-0070](#) prepared by the Planning Policy Division, Development Services Department, dated August 10, 2022, respecting a Project Schedule for implementation of policy step #12 in the Lake Drive Shoreline Jurisdiction Action Plan for beach associations; and,
2. That Staff report back in the first quarter of 2023 with a Project Schedule and any budgetary needs respecting the implementation of operational and policy steps in the Lake Drive Shoreline Jurisdiction Action Plan for beach associations.

August 2, 2023 Council Meeting

On August 2, 2023, Council considered Report No. [DS-2023-0071](#), which provided a project update, and included recommendations to further the Action Plan. The following resolutions were adopted by Council:

RESOLUTION NO. C-2023-0278

1. That Council receive Report No. DS-2023-0071 prepared by the Planning Policy Division, Development Services Department, dated August 2, 2023, respecting the Lake Drive Shoreline Jurisdiction Action Plan;
2. That Staff be directed to commence Operational Step #6 of the Action Plan - Town to send out notices to all Eligible Property Owners (EPOs) to determine which EPOs are interested in obtaining legal interest in lakeside lands;
3. That staff report back in November 2023 regarding the EPO participation after gauging results collected through the consultation process; and,
4. That Staff initiate Operational Step #7 of the Action Plan – procure surveying services, and report back in November 2023 with the results for Council’s consideration.

September 20, 2023 Council Meeting

On September 20, 2023, Council considered Report No. [DS-2023-0082](#), which outlined some potential strategies for addressing beach associations using Town-owned shoreline land in the Action Plan Area (see Attachment 1). Council recognized that beach associations would need to be registered as incorporated not-for-profit organizations, functioning as legal entities, before engaging in any potential long-term lease or sale agreements with the Town. Council approved the report and directed staff to consult with beach associations for feedback, with a follow-up report to Council in Q1 2024.

RESOLUTION NO. C-2023-0321

1. That Council receive Report No. DS-2023-0082 prepared by the Planning Policy Division, Development Services Department, dated September 20, 2023, respecting the Lake Drive Shoreline Jurisdiction Action Plan Area;
2. That as per Action Plan Policy Step 12, Council receive the reporting letter from Ritchie, Ketcheson, Hart and Biggart LLP dated July 11, 2023;
3. That Council recognize the requirement for beach associations to be registered as incorporated not-for-profit organizations, functioning as legal entities, before engaging in any potential long-term lease or sale agreements with the Town;

4. That staff be directed to engage in a consultation process with beach associations for feedback, and report back to Council in Q1 2024; and,
5. That staff, following the above-mentioned consultation process with beach associations, report back to Council to seek direction on land management options and a cost structure breakdown for beach associations.

4. **ANALYSIS:**

Gauging Resident Interest

Council Directive

On August 2, 2023, Council approved the initiation of an engagement process to determine the interest of Eligible Property Owners (EPOs) in participating in the divestiture process.

2. That Staff be directed to commence Operational Step #6 of the Action Plan - Town to send out notices to all Eligible Property Owners (EPOs) to determine which EPOs are interested in obtaining legal interest in lakeside lands.
3. That staff report back in November 2023 regarding the EPO participation after gauging results collected through the consultation process.

Action Plan: Operational Step #6

The Council-approved 14 step “Action Plan” (see Attachment 2), Operational Step #6, set out the following operational step for the Town to take as part of decision-making process prior to the project proceeding to the surveying stage:

“6. Town to send out Notices to all EPOs (or others as determined by Council) to determine which EPOs are interested in obtaining legal interest in lakeside lots. Possibly collect money from EPOs (or others as determined by Council) for purpose of creating Reference Plans (R-Plans):

- *If insufficient response from EPOs, Town to decide whether to end process; if decision is to conclude process, Town takes no further steps, except as identified in response to NO in Policy Step 1.*
- *If sufficient numbers of EPOs (or others as determined by Council) declare an interest in obtaining a legal interest in a lakeside lot, Town to prepare an RFP to retain qualified Surveyor(s) to create lakeside lots.”*

Effective stakeholder engagement continues to be a key element in the successful implementation of the Lake Drive Shoreline Action Plan. In September 2023, staff began the process of actively seeking feedback from EPOs to gauge interest in the divestiture process. The intent of this interest-gauging exercise was to:

- Determine EPO interest in gaining title to shoreline land through the Lake Drive Shoreline Action Plan;
- Open lines of communications with EPOs and determine preferred methods of engagement for future updates and engagement initiatives; and,
- Increase knowledge and understanding of the Action Plan goals and implementation process.

The interest-gauging process is one element of the overall stakeholder engagement plan being developed by the Town's communications consultant retained for this project. More opportunities to engage will follow as the Action Plan progresses, including sharing property-specific information with EPOs when available.

Methodology

Staff developed a list of residential addresses that may be eligible for inclusion in the Action Plan. Letters were sent to 350 residential addresses along Lake Drive North and East. Based on the current conceptual project design, staff estimate that approximately 350 properties will be eligible to participate in the Action Plan. Eligibility would be confirmed through the surveyor process.

The letter to property owners confirmed that the recipient may be eligible to participate in the Action Plan and invited recipients to provide feedback with the goal of learning more about property owners' interest in taking part in the Action Plan. It also included answers to frequently asked questions and the website address to learn more (georgina.ca/lakedriveplan).

Recipients were provided with two ways to provide feedback; completing an online survey, or a paper questionnaire to be shared with the Town by return letter.

Information requested included:

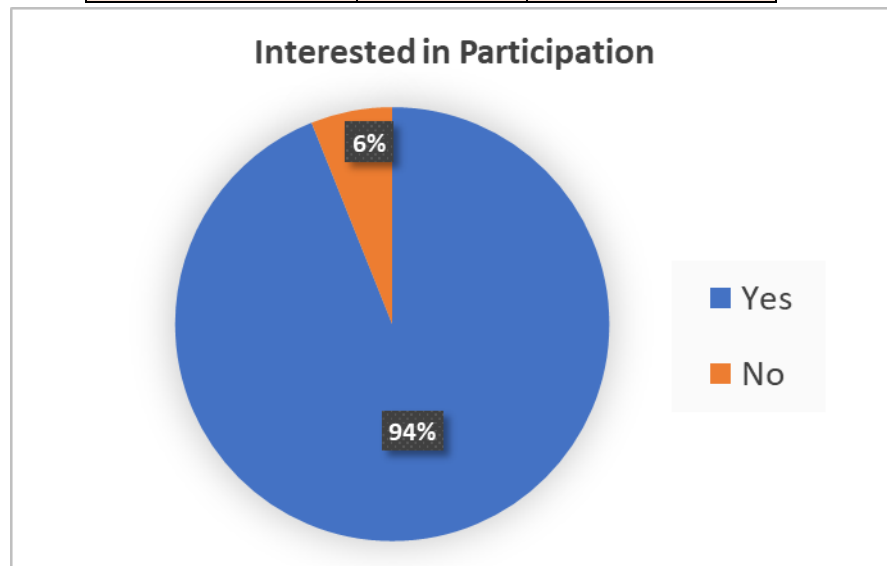
- Name
- Address
- Indication of interest in "gaining clear title to shoreline land adjacent to your residential property through the Lake Drive Shoreline Action Plan" (yes or no answer).
- Those indicating "no" were asked to select a reason for the response.
- Email address for those wishing to receive future communication from the Town by email.

Results from Interest-Gauging Process

The project team received 198 responses to the letter, representing a 57% response rate. Responses were received as follows:

Table 1: EPO Interest Results

Interested in Participating	Count	Percentage
Yes	186	94%
No	12	6%
Total	198	100%



Of the 198 respondents, 186 indicated that they **are interested** in participating in the Action Plan, representing **94% of respondents**.

Of the 198 respondents, 16 also indicated that “I want to participate but costs may be too high”.

Of the 12 respondents who answered “No”, 8 indicated that they believe they already own the shoreline land adjacent to their property.

Analysis of Survey Results

The 57% response rate (198 responses) is a strong indicator of property owners’ interest in and awareness of the Action Plan, and provides a statistically significant result with a high confidence level.

With 94% of respondents expressing interest in participating in the Action Plan, property owners indicated a strong desire to gain ownership of adjacent shoreline land. A small yet significant group (8%) indicated that they want to participate but are concerned about cost.

Next Steps

The interest-gauging process provided valuable insight into EPOs' willingness to participate in the Action Plan. It also opened lines of communication with property owners and established points of contact. Working with the communications consultant, staff will continue to implement a stakeholder engagement process to ensure that EPOs can access information about Action Plan progress and can provide feedback when required.

Payment Plan Option

Feedback from residents has highlighted that the costs associated with land transactions, including potential purchase fees, may create a potential barrier to their active participation in the program for some.

Acknowledging these concerns, it is recommended that Council consider implementing a payment plan option designed to alleviate the financial burden on residents and to encourage their active participation.

The proposed payment plan would offer residents the option to spread the payment costs over time. The exact costs would be determined on an individual basis, taking into account specific property details, including the varying sizes of properties identified through the surveyor results.

It is important to note that the interest rate, security, and duration associated with this payment plan option would need to be further evaluated and decided upon by Council. This will ensure that the terms of the payment plan are fair and reasonable for the residents, providing an additional layer of assurance regarding the financial aspects of the divestiture program.

By approving a payment plan option, Council would demonstrate a commitment to addressing residents' concerns and facilitating their active participation in the divestiture program. This approach aligns with Operational Step #13 of the Action Plan, emphasizing the creation of terms that are conducive to the involvement of EPOs. Granting EPOs the option of a payment plan is a proactive step in ensuring the success and inclusivity of the divestiture program.

It is recommended that Council direct staff to report back with a comprehensive outline of the payment plan option, including interest rates, overall structure, duration of payments, and seek authorization for the associated by-law, ensuring clarity and fairness in the financial aspects of the divestiture program.

Recoverable Land Cost

The recoverable land costs are a key consideration in the sale of lakeside lots to EPOs. At the established rate of \$2 per square foot, a conceptual design anticipates

potentially recoverable costs of roughly \$950,000 from surplus road allowance lands if there is full 100% EPO participation.

It is important to note the possibility of a smaller amount of land exists beyond the original road allowance, possibly due to accretion or fill. These specific areas need confirmation by the surveyor, as they might be owned by the MNRF. The surveyor's role is essential in this process, helping identify and distinguish lands beyond the initial road allowance, and determining their ownership. Any lands belonging to the MNRF are not intended for sale by the Town. The surveyor's findings will provide clarity on which lands fall under Town ownership and which belong to the Ministry.

Role of the Surveyor

Hiring a surveyor for the Lake Drive Shoreline Action Plan is critical due to several key roles they will play in facilitating the divestiture of lakeside lands and resolving land title issues within the Action Plan Area (see Attachment 1):

1. Ownership Verification: The surveyor will conduct title searches and create a comprehensive ownership database. This database will be vital for confirming ownership of parcels on the shoreline, ensuring clear and legally defined property boundaries.
2. Road Allowance and Shoreline Survey: The surveyor's responsibilities include detailed surveying of the Lake Drive road allowance and the shoreline. They will delineate the original road allowance, accretion areas, and fill areas. This information will be pivotal in determining which land belongs to the Town and which to the MNRF.
3. Infrastructure Protection: The surveyor will identify which lands need to be retained for Town infrastructure, including drainage outlets and future reconstruction of existing pipes. This ensures the Town's services continue unimpeded.
4. Utility Company Infrastructure: Utility infrastructure, including gas, hydro, and telecommunications, will be located and placed under easements by the surveyor. This will protect these essential services and ensure that utility companies have access for maintenance and upgrades.
5. Division of Lakeside Parcels: The surveyor will divide the lakeside lots for the EPOs based on existing conditions and the extension of land-side lot lines. In cases where adjustments are needed to match existing conditions, the surveyor will assist in consultations with residents and Town staff.
6. Compliance with MNRF Requirements: All survey work along the shoreline will adhere to the MNRF specifications for surveyor instructions and survey plan requirements. This will ensure that the surveys can be used by residents in the

future if they choose to purchase MNRF parcels through the ministry's separate application process.

7. **R-Plans:** The surveyor's final design for the land divestiture in the Action Plan Area will build upon the conceptual design of proposed lakeside lots created by Town staff. These Reference Plans of Survey (R-Plans) will clearly set out the limits of Lake Drive North and Lake Drive East, and lakeside parcels, including easements.

In summary, the surveyor's involvement is vital in creating accurate, legally sound land divisions, preserving infrastructure, and providing the necessary data and plans to facilitate the divestiture process. They will ensure the project adheres to regulations, protects utility infrastructure, and provides comprehensive R-Plans for future property transactions.

Additional Survey Work

An ongoing challenge within the Action Plan Area involves the lack of a clear and defined demarcation of the road allowance along most sections of Lake Drive. This lack of clarity includes areas with existing lakefront houses and properties not encompassed in the Action Plan for divestiture. Rectifying this issue is important for several reasons as it directly affects the Town's planning and resource allocation. Including this additional survey work will help resolve this issue for the Town. The cost associated with this survey work would be separate from the Action Plan budget.

The proposed additional survey work would be well-timed and strategic for several compelling reasons. First and foremost, it aligns with the comprehensive Action Plan, which includes creating an ownership database, confirming property boundaries, and preparing R-Plans for lakeside parcels and the Lake Drive road allowance. The primary objective of this additional survey work is to resolve the issue of unclear road allowance boundaries in areas with existing lakefront houses.

Additionally, this initiative fulfills a specific requirement expressed by the Operations and Infrastructure Department, which emphasizes the importance of a continuous and well-defined Lake Drive road allowance for their daily operations and future planning efforts, particularly Town infrastructure maintenance.

Areas requiring this additional survey work vary in length throughout the Action Plan boundary, totaling over 500 metres of road frontage. To efficiently address this need, staff recommend including and approving this task within the Action Plan's Contract No. "DSD2023-099 Surveyor Services – Lake Drive". Funding for this specific aspect would be allocated separately from the Action Plan budget and is recommended to be funded by the Tax Rate Stabilization Reserve. This approach ensures an economical use of resources and close alignment of the survey work with broader Town objectives.

The decision to survey these gap areas serves multiple purposes:

- It benefits from economies of scale, leveraging a contractor already working on behalf of the Town;
- It ensures consistency throughout the Action Plan, enabling the Town to have comprehensive knowledge of the road allowance boundaries throughout the entire Action Plan Area;
- It aids in future project scoping, allowing for conceptual scoping of projects by leveraging readily available information; and,
- It enhances maintenance planning and execution, which is crucial for stormwater assets, forestry, signs, and road surface maintenance.

It is essential to note that the costs associated with this additional survey work will be separate from the Action Plan finances and is recommended to be funded by the Tax Rate Stabilization Reserve, thereby not impacting those interested in the purchase of lands through the Action Plan.

Contract No. DSD2023-099 Surveyor Services – Lake Drive

On August 2, 2023, Council directed staff to launch the procurement process for surveying services, as detailed in Resolution No. 2023-0278:

4. That Staff initiate Operational Step #7 of the Action Plan – procure surveying services, and report back in November 2023 with the results for Council's consideration.

The Town issued RFP “DSD2023-099 Surveyor Services – Lake Drive” on August 25, 2023, for the Action Plan project surveying services. The RFP was advertised on the Town's Bids and Tender website. The closing date was September 25, 2023, at which time three (3) proposals were submitted successfully, by the following firms;

1. Callon Dietz Incorporated Ontario Land Surveyors
2. IBW Surveyors
3. RS Surveying Limited

Once the Evaluation Committee submitted the final scores for the technical evaluation and the interview / demonstrations, two respondents obtained combined scores meeting the minimum seventy percent (70%) in the technical and interview / demonstration stages of the evaluation. These respondents' financial bid submissions were electronically unsealed and a total bid submission score was calculated. Once the financial bid submission was unsealed a total point score was calculated for all eligible respondents.

Following the completion of the evaluation, a recommendation was made by the evaluation committee that the Town enter into a contract with **IBW Surveyors, Bowmanville, Ontario**. Approval of the award of this contract requires Council's

approval. Details on the contract prices are presented in “Table 2: Survey Costs” below.

It is important to note that a project survey-related budget has not received prior approval from Council. To address this, this report recommends Council’s approval of the survey-related budget, which includes a 30% contingency for unexpected expenses, if needed. This budget approval is separate and distinct from the upcoming 2024 annual budget process.

The total budget amount for the project survey-related expenses, excluding taxes, is \$851,577.00, which also encompasses a 30% contingency for unforeseen costs. The contingency, within this surveyor’s budget, accounts for unforeseen expenses such as fluctuating land conditions, legal implications, or unexpected administrative needs, ensuring flexibility in the project’s financial planning. Approval of this budget is an independent process from the 2024 annual budget.

Table 2: Survey Costs				
	Amount	1.76% HST	Total Cost	Cost per Lakeside Lot
Project Survey Cost				
IBW Surveyors Project Bid Price	\$655,059	\$11,529	\$666,588	\$1,905
Contingency 30%	\$196,518	\$3,459	\$199,976	\$571
Total Project Survey Cost	\$851,577	\$14,988	\$866,564	\$2,476
Additional Survey Works (Provisional Item)				
IBW Surveyors Provisional Item Bid Price	\$79,650	\$1,402	\$81,052	-
Contingency 30%	\$23,895	\$421	\$24,316	-
Total Additional Survey Works Cost	\$103,545	\$1,822	\$105,367	-
Note:				
Costs per Lakeside Lot are divided across 350 Lots, exact number of lots to be confirmed through survey.				
Costs are based on 100% participation (Resolution No. C-2002-0240).				

EPO Cost for Lakeside Lots

Council’s commitment to the Lake Drive Shoreline Action Plan includes the understanding that the project costs, encompassing dedicated resources and survey expenses, will be charged back to the EPOs, in addition to the costs of the lakeside lots, as part of the recoverable costs. This cost structure involves EPOs purchasing the surplus lakeside lots as previously resolved by Council at a rate of \$2 per square foot (ft²), in addition to covering the land transfer/closing costs. These three cost areas, namely Project Costs, Lakeside Lot Creation Costs, and Land Cost, constitute the overall expenses for EPOs seeking to acquire the lakeside lots.

The recent surveyor procurement process has allowed for a more accurate assessment of costs, guided by Council’s directives. These costs, including the survey expenses, will be paid by EPOs upon property transfer, and notably, staff recommend that EPOs are not required to provide an upfront deposit with the Town before these transactions. Additionally, it is important to highlight that Council has set a cap on all recoverable costs to be billed to individual EPO’s based on the assumption of a 100% participation rate.

Council has previously resolved to determine the per lakeside lot survey costs following a formal competitive procurement process for surveying services. Accordingly, staff recommend that Council set the per lakeside lot survey costs for EPOs at \$2,476 per lakeside lot, based on an estimated 350 lakeside lots and 100% participation.

Furthermore, Council previously directed staff to develop a separate costing process for situations where multiple parties claim title to a proposed lakeside lot or dispute a proposed dividing boundary. While Town staff acknowledge this directive, staff anticipate the need to engage with all EPOs to ensure alignment before the transfer process. In instances of dispute involving multiple parties, the resolution will need to be handled independently of the project, and the Town will not involve itself financially in these discussions. Residents with boundary disputes or specific inquiries will be encouraged to seek assistance from a professional land surveying firm.

Council has already adopted the requirement that a subsequent costing report be presented to Council before any lakeside lot transfers occur, finalizing the costs associated with the transfer. This will ensure transparency and provide a clear understanding of the financial aspects of the transfer process.

The following table, "Table 3: EPO Cost for Lakeside Lots", shows the breakdown of the estimated costs for EPOs.



Town Project Cost

This section provides a summary of the project costs associated with the Lake Drive Shoreline Action Plan, with a focus on the critical factor of EPOs' participation. The findings are presented in accompanying "Table 4: Town Project Cost" (see Attachment 3) for ease of reference.

It is essential to understand that the Town will not be permanently burdened with the full Administrative Cost and Survey Cost. Instead, the Town will initially cover these expenses, allowing the project to move forward efficiently. These costs will subsequently be recovered through the sale of lakeside lots to EPOs.

The degree of EPO participation plays a pivotal role in shaping the Town's financial commitment. The more EPOs who participate, the less financial burden the Town will bear. For instance, if 67% of EPOs (estimated at 350) opt into the process, the Town's costs will break even. Participation rates exceeding 67% will result in a favourable financial outcome, while rates falling below 67% would lead to a financial deficit.

The table accompanying this section, “Table 4: Town Project Cost” (see Attachment 3), offers a comprehensive range of potential financial scenarios, making it easier to grasp the Town’s financial dynamics based on varying levels of EPO involvement.

Project Schedule Update:

An updated project schedule is now available for reference (see Attachment 4). This revised schedule takes into account the comprehensive work plan and timeframes for the upcoming survey works, aiming to provide clarity and transparency regarding project milestones. Several key updates have been made, reflecting both completed tasks and future timelines.

The following project phases have been successfully accomplished: “Current State Analysis”, “Identify Lands/Easements Town to Retain & Define EPOs”, and “Gauging Interest from Identified EPOs”. These milestones mark significant progress in the preparation for the surveying phase. Notably, advancements related to Beach Associations within the Action Plan Area are following a separate course per Council decision, not directly influencing the remainder of the project’s progress.

Subject to Council’s approval of the recommendations in this report, surveying activities are scheduled to commence in January 2024 and extend throughout the entire year. This phase will play a pivotal role in property verification, infrastructure delineation, and the creation of R-Plans to define boundaries.

Simultaneously, in early 2024 and continuing throughout the year, the “Official Plan/Zoning/Community Planning” phase will commence. This phase is essential for aligning the project with the Town’s planning and zoning requirements.

Looking ahead, with surveying completed and R-Plans deposited in 2024, the project will transition into the “Road Closure By-laws” and “Transfer Ownership of Lakeside Parcels” phase, which would continue through 2025. These actions are important to the divestiture of lakeside lots and the seamless progression of the Lake Drive Shoreline Action Plan.

5. RELATIONSHIP TO STRATEGIC PLAN:

The following is one of the Goals and Indicators in the current 2023-2027 Corporate Strategic Plan, under the “Proactively Manage Infrastructure and Assets to Ensure Service Continuity” pillar:

- Continue to advance the Lake Drive Shoreline Jurisdiction Action Plan

6. FINANCIAL AND BUDGETARY IMPACT:

The financial and budgetary implications of the Lake Drive Shoreline Action Plan are multi-faceted. As the project progresses, it involves a blend of costs, recoverable expenses, and financial considerations for both the Town and EPOs. The financial dynamics of the plan are detailed in “Table 4: Town Project Cost” (see Attachment 3) and “Table 3: EPO Cost for Lakeside Lots”, with the following key financial components:

1. **Town Project Costs:** The Town initially incurs project expenses, including administrative and survey costs. These costs are later recovered through the sale of lakeside lots to EPOs, which vary depending on EPO participation rates.
2. **EPO Costs for Lakeside Lots:** EPOs interested in acquiring lakeside lots will be charged at a rate of \$2 per square foot, as established by Council. Additionally, EPOs will bear the land transfer/closing costs. These costs are presented in “Table 3: EPO Cost for Lakeside Lots”.
3. **Surveyor Services:** It is recommended that the Town select IBW Surveyors to provide surveying services for the Action Plan. The total survey budget, inclusive of a 30% contingency for unforeseen expenses, amounts to \$851,577.00, excluding HST.
4. **Payment Plan Option:** To address financial concerns raised by residents, a payment plan option is proposed to help ease the financial burden on EPOs, ensuring more widespread participation.
5. **Additional Survey Work:** This report recommends conducting additional survey work to clearly define road allowance boundaries in areas with existing lakefront houses. The costs associated with this work are to be funded by the Tax Rate Stabilization Reserve and are separate from the Action Plan budget.

It is important to emphasize that the financial dynamics are closely tied to the degree of EPO participation. The more EPOs who choose to participate, the less the Town’s financial burden. On the other hand, participation rates below a certain threshold may lead to a financial deficit for the Town.

The financial and budgetary implications of the Lake Drive Shoreline Action Plan are complex, reflecting a balance between cost recovery, financial support for residents, and the Town’s commitment to shoreline divestiture. Council approval of the recommended budget for survey-related expenses is essential for the successful execution of the project.

7. PUBLIC CONSULTATION AND NOTICE REQUIREMENTS:

This report does not fall under any specific legislative notice requirements. It presents an in-depth overview of the outcomes from the EPO interest-gauging process, as per Council's direction, signifying a substantial level of resident interest.

8. CONCLUSION:

The Lake Drive Shoreline Action Plan has garnered remarkable support, with 94% of respondents indicating their willingness to participate. The primary challenge remains financial concerns, prompting the introduction of a payment plan option to alleviate these issues. Surveyors play a critical role in property verification, road delineation, and infrastructure preservation, further supported by essential additional survey work. The issuance of a RFP led to the selection of IBW Surveyors, marking a pivotal progression. The report outlines anticipated costs for residents acquiring lakeside lots and their potential financial implications for the Town. Furthermore, the updated project schedule sets a clear path for the project's progression. Council's approval to award the surveyor contract to IBW Surveyors is instrumental in advancing the project.

APPROVALS

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Attachments:

Attachment 1: Lake Drive Shoreline Action Plan Area Map
Attachment 2: Lake Drive Shoreline Action Plan, "Action Plan"
Attachment 3: Table 4: Town Project Cost
Attachment 4: Project Schedule