Section 37 of the Planning Act: Community Benefit Guidelines

City of Kingston

Planning, Building and Licensing Services
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City of Kingston– Community Benefit Guidelines 1
1. Introduction

1.1 Policy Framework

1.1.1 Section 37 of Planning Act

Section 37 of the Planning Act allows municipalities to authorize increases in height and density of a development, in a by-law passed under Section 34 of the Planning Act, in return for the provision of facilities, services or other matters (referred to as “Community Benefit(s)” or the “Benefit”) if the municipality has an Official Plan that contains provisions relating to the authorization of increases in height and density of development. The City of Kingston Official Plan (the “Official Plan”) contains policies to allow increases in height and/or density of development in exchange for Community Benefits through the provisions of Section 37 of the Planning Act.

1.1.2 Official Plan

All proposals for an increase in height and/or density must be supportable in their own right. Increases in height and/or density must be justified within its context and supported by a planning justification that meets the intent of the Official Plan and Provincial Policy Statement. Proposals must meet the policies set forth in the Official Plan or, through public process, apply to amend the Plan. The Guidelines must be read in conjunction with all policies of the Official Plan and are in no way replacing the planning review process to determine the compatibility of a proposal. If any conflicts arise between Official Plan policies and the Guidelines, the Official Plan policies shall prevail.

1.1.3 Guidelines

The following Community Benefit Guidelines (the “Guidelines”) are intended to assist in the implementation of the Section 9.5.25 - 9.5.30 in the Official Plan in concert with Section 37 of the Planning Act. The Official Plan policies identify the type of facilities, services or matters that may be considered as Community Benefits and the Guidelines are met as a guide to the negotiation process and to provide more clarity to the process of administration, benefit selection and valuation. The purpose of the Guidelines is to improve clarity, consistency and transparency for the public, land owners, developers, City Staff and Council Members in the process related to negotiating and securing Community Benefits. City Staff and members of Council, the Planning Committee and Heritage Kingston will use the guidelines as they evaluate development applications.

Guidelines are not requirements of the Planning Act, and are not considered policies of the Official Plan, but they are useful tools to provide clarification with respect to the intent of the policies, the procedure to be followed and expectations for all involved.

The Guidelines can be revised through Council adoption of a report from the Commissioner, Community Services or through Council direction. In conjunction with future revisions to the Official Plan by Council or the Ontario Municipal Board, or modifications to any other
governing Provincial legislation, these Guidelines may require revisions through adoption by Council.

1.1.4 Other Requirements

Under provincial legislation, a development triggers two financial obligations: to pay Development Charges intended to offset the extra pressures generated by the development on municipal services; and to dedicate parkland (or provide cash-in-lieu) under Section 42(1) of the Planning Act. As stated in the Development Charges Act, Development Charges are intended “to pay for increased capital costs required because of increased needs for services arising from development of the area to which the by-law applies”. As a component of the Planning Act, the use of Section 37 for Community Benefits is different from that of Development Charges and Parkland Dedication.

The value of the Community Benefits will be over and above what could otherwise be achieved through other Sections of the Planning Act, such as Sections 41, 42 and/or 50. Section 37 Agreements shall not in any way entitle reductions in Development Charges. Minimum requirements to be provided by the Official Plan, the Planning Act, the Ontario Heritage Act or any other relevant federal, provincial or municipal legislation, policy or by-law, are to be provided without credit as a Community Benefit. Community Benefit consideration will only be given where the benefit exceeds that which is already required.

1.1.5 Ontario Municipal Board

In the event that an application is appealed to, and may be approved by, the Ontario Municipal Board (the “OMB”), Planning Staff, at the direction of Council, may request Community Benefits to be applied by the OMB in accordance with the policies of the Official Plan and the Guidelines.

1.2 Application of Community Benefits

The application of community benefits is limited to development requiring a zoning by-law amendment that requests additional height and/or density.

1.2.1 Qualifying Threshold

Community Benefits will apply to every application for a Zoning By-law Amendment for a residential development proposal with more than 3,000 square metres, including the residential component of a mixed-use development proposal, where the proposal requests an increase in the applicable height and/or density limits.

1.2.2 Development Type

Community Benefits are generally intended for residential developments only. They are not intended to be requested from non-profit developments, non-residential developments or
development projects that do not exceed the threshold identified above, but there may be circumstances where the proposed development may still be a suitable candidate to provide Community Benefits. In such instances, Planning Staff will advise the applicant that Community Benefits may be requested at the pre-application or application stage.

1.2.3 Types of Benefits

Section 9.5.25 of the Official Plan lists appropriate Community Benefits that support broader objectives in the Official Plan. The decision-making framework will be used to select community benefits for a development from this list. Community Benefits requested by City Staff must be selected from the list of facilities, services and matters identified in the Official Plan.

2. Decision-making Framework

2.1 Priority of Benefits

Community Benefits will be considered on the following basis:

a.1 Highest priority will be given to community benefits located on-site or in the immediate vicinity of the site to be interpreted as the surrounding area impacted by the development in the following order of priority:

a.1.1.1 Provision of affordable housing as defined in the Official Plan will be the preferred community benefit where the existing affordable housing stock is impacted by the proposal or where the supply of affordable housing has been identified by the City as being deficient.

a.1.1.2 Provision of in-kind benefits that support the objectives of City-adopted plans applicable to the site or immediate vicinity of the site.

a.1.1.3 Provision of in-kind benefits that are identified in the Official Plan and not detailed in City-adopted plans applicable to the site or immediate vicinity of the site.

a.1.1.4 Other community benefits volunteered by the applicant that are not specifically identified in the Official Plan when deemed appropriate in consultation with the District Councillor and local community.
The overall objectives of the City are outlined in the Official Plan and supporting policy documents adopted by City Council.

When this determination is made, Planning Staff will provide the applicant with a list of any Community Benefits objectives within 400 metres that are identified in City-adopted Plans, previously identified through community consultation or within applicable secondary plans, should this information be readily available in a city-maintained GIS database. If the City does not have this information in a GIS database, the City will advise that the applicant will provide a Community Services and Facilities Study. This may be required as part of a complete application.

Provision of affordable housing as defined in the Official Plan will be the preferred community benefit where the existing affordable housing stock is impacted by the proposal or where the supply of affordable housing has been identified by the City as being deficient.

A Community Services and Facilities Study (CSFS) will be required by the City to assist in determining the appropriateness of a Community Benefit in the event that City-approved plans have not identified Community Benefit needs within the immediate vicinity or when an analysis of Community Benefits identified in City-approved plans is needed to inform the decision-making process. A CSFS provides an inventory of publicly funded or publicly accessible services and facilities, including schools, child care facilities, community centres, recreation facilities, social services, community spaces, parks and libraries. Further, the Study examines demographic trends to identify changes in the demand for community services or facilities. The Study may highlight necessary improvements, services or facilities that may be required to support the health, safety and well-being of future residents.

### 2.2. Public Input

To ensure community benefits respond to community needs, community groups, the Councillor(s) of the local District(s), and the local community will be consulted on the development application and potential Community Benefits as part of the statutory public consultation process.
2.3 Nexus to the development

Community Benefits must demonstrate a clear connection and reasonable planning relationship with the specific characteristics of the proposal. To this end, a nexus between the development and the community benefit must be justified by planning staff, based upon individual existing site features and/or the context of the site. Highest priority will be given to community benefits located on-site or in the immediate vicinity of the site to be interpreted as the surrounding area impacted by the development.

Each individual Benefit has its own unique impact and catchment area. As such, the appropriate location for the Benefit will differ depending on the type of facility, service or matter provided. All off-site locations for Community Benefits will be reviewed on a case-by-case basis to ensure the catchment area positively impacts all properties in the immediate area experiencing the increased height and/or density provision.

When requiring a non-volunteered benefit, the onus is on City Staff to ensure a direct connection between the proposal and the requested Community Benefits through an analysis which will be informed by the decision-making framework.

In order to determine which Community Benefit is appropriate for Planning Staff to request from an applicant, an analysis must be done which works outward from the development and shows a connection between the Benefit and the specific characteristics of the subject property or the development proposal. For example, if the subject property is adjacent to and will increase the use of a transit stop, an appropriate benefit may be upgrades to the transit stop, if it can be shown that the Benefit meets all requirements laid out in the Guidelines.

2.4 Type of Benefit

This may be in the form of in-kind benefits or cash-in-lieu payments that are allocated towards specific facilities, services or matters with priority for In-kind benefits or Cash-in-lieu contributions that result in a tangible benefit in the immediate vicinity by allowing a specific facility, service or matter identified in a City-adopted plan to be implemented. 

Moving pieces: Could emphasize tangible benefit but not specify if this is in-kind or cash-in-lieu to allow for more flexibility in securing the benefit most appropriate to individual cases.

Cash-in-lieu contributions that result in a tangible benefit in the immediate vicinity by allowing a specific facility, service or matter identified in a City-adopted plan to be implemented.

Cash-in-lieu payments that make a general contribution to be held in a reserve fund to be used for specific facilities, services or matters for which funds to implement the project are not available in their entirety but will be collected to fund a larger project that the community has identified as a priority.
The lowest level of priority will be given to the provision of community benefits that are not located on-site or in the immediate vicinity of the site but have the potential to benefit the community at large.

Cash-in-lieu payments that make a general contribution to be held in a reserve fund to be used for specific facilities, services or matters for which funds to implement the project are not available in their entirety but will be collected to fund a larger project that the community has identified as a priority may be accepted.

An applicant may volunteer to provide Community Benefits that are not specifically outlined in the policies of the Official Plan. If the Benefits are deemed to be appropriate following a thorough review by City Staff, in consultation with the District Councillor and local community, and they comply with the intent of the Official Plan policies, they may be considered appropriate to recommend to Council for approval. In this instance, the onus is no longer on City Staff to demonstrate the direct connection, as the Benefits will be provided on a voluntary basis by the applicant.

### 2.5 Location of Benefit

Community Benefits may be located on or off-site. If they are located on-site, they may be provided in-kind as a specific facility, service or matter by the owner. If they are located off-site, they may be provided by the owner in-kind as a specific facility, service or matter, or as a cash-in-lieu payment towards a specific facility, service or matter.

Whether the Community Benefits are to be located on or off-site, Staff will ensure that the requested Community Benefit has a direct connection to the development and that the Community Benefit provides a direct benefit to the immediate area experiencing the development. To this end, Staff may require the applicant to provide supporting rationale to justify the proposal.

### 3. Valuation Procedure

#### 3.1 Guiding Policy

An applicant is entitled to some degree of certainty in ascertaining what Community Benefits they will be required to provide, as guided by established policy. The applicable policy of the Official Plan states:

9.5.26.c “there is an equitable relationship between the established uplift value and the value of the community benefit. The value of the Community Benefit will represent a reasonable proportion of the uplift value, which must be appraised at the applicant’s expense.”

The value of the Community Benefit will represent a reasonable proportion of the uplift value. The value of the increased height and/or density and the Community Benefit must be appraised at the applicant’s expense, on a case-by-case basis, so that there is an equitable
relationship between the established value of the increased height and/or density and the value of the community benefit.

### 3.2 Uplift Value

The value of Community Benefits is established as a percentage of the “Uplift Value”. The “Uplift Value” is the difference between the value of land when a development is built in accordance with the applicable provisions of the Zoning By-law, and the value of land when a development is built with density and/or height provisions that exceed those permitted by the Zoning By-law expressed as a value of gross floor area, measured per square metre. As part of an application for a Zoning By-law Amendment, the applicant will be required to pay for a real estate appraisal, completed in accordance with the Terms of Reference included in Appendix A to the Guidelines, to determine the Uplift Value.

### 3.3 As–of-Right

For the purposes of the calculation of Community Benefits, the “as–of-right” maximum height and density shall be calculated based on the maximum height permission of the applicable Zoning By-law in effect at the time of the submission of the application. The “as–of-right” height will be the maximum height proscribed in the By-law for residential uses, where residential use is permitted. In circumstances where the zoning designation in effect does not permit residential uses, the “as–of-right” height will be interpreted to be the most permissive maximum height prescribed in the zoning designation, regardless of type of use. Where the applicable Zoning By-law does not include a density provision measured as a floor space index or maximum gross floor area in square metres, and the applicant is only requesting an increase in the height of the building, the community benefits will be calculated based on the gross floor area of the building located above the maximum height permission. An example of the gross floor area calculation is illustrated in the examples shown in Figures 3.5A and 3.5B below.
3.4 Appraisal

The applicant will select the appraiser, based on quotes provided from qualified appraisers as determined by the City. The City will be the client, with instructions only to come from the City. The City will provide the applicant with a copy of the final appraisal upon completion.

In cases where the Uplift Value will be calculated on 100 square metres or less, the applicant will be provided with the option to forego an appraisal and voluntarily agree to an Uplift Value of $100 per square metre.

3.5 Reasonable Proportion

The Uplift Value determined through the completion of an appraisal will be used to determine the value of the Community Benefit required. The City of Kingston will seek a value of the Community Benefit that is 20 percent of the Uplift Value. Prior to finalizing the negotiations, the applicant will be required to submit to the City a cost estimate confirming the value of the negotiated Community Benefit(s).

Moving Pieces: Instead of an appraisal for individual properties, the City could apply a set rate, based on geography of the city (placed into two or more zones) that is pre-determined by the Real Estate Division and updated annually.

Moving Pieces: Instead of a set percentage, the City could start with the total uplift value and a reasonable proportion would be based upon the project’s use a list of “draw down” factors. The City is able to negotiate “draw downs” that factor in positive features of the development; however, there is less certainty and consistency of outcome for developers, the public and the City.
4. Administration

4.1 Procedure

Planning Staff will always be involved in the negotiation of Community Benefits. Planning Staff have the responsibility to ensure that Official Plan policies are being complied with and must ultimately recommend which Community Benefits they believe should be secured as part of any approval. Although the order of the steps may vary depending on the nature of each application, in general, the process for negotiating Community Benefits is depicted in the flow chart below.
Pre-application Stage

Step 1: Advise Applicant

If Planning Staff identify that the application may require Community Benefits in exchange for proposed increases in height and/or density, they will advise the applicant as early as possible in the pre-application or application process that Community Benefits may be required if the proposed development is approved.

Step 2: Identification of Potential Benefits

When this determination is made, Planning Staff will provide the applicant with a list of any Community Benefits objectives within 400 metres that are identified in City-adopted Plans, previously identified through community consultation or within applicable secondary plans, should this information be readily available in a city-maintained GIS database. If the City does not have this information in a GIS database, the City will advise that the applicant will provide a Community Services and Facilities Study. This may be required as part of a complete application.

Application Review Stage

The Steps in the application stage will occur concurrently as the application will be reviewed as a whole during the administration of requirements to determine appropriate community benefits.

Step 3: Application Review
Staff will review the application on its own merits with consideration for all applicable policy and regulations.

**Step 4: Real Estate Appraisal**

The Uplift Value will be assessed through a real estate appraisal. Planning Staff will contact the applicant and provide a list of quotes from real estate appraisers. The developer will select their preferred real estate appraiser from the list and provide payment. The City will facilitate the real estate appraisal process and act as the client.

**Step 5: Circulate to Commenting Departments**

Upon receipt of the complete application, Planning Staff will include a description of the potential request for Community Benefits along with the CSFS or list of Community Benefits needs in the technical circulation to commenting departments, agencies and the District Councillor. When the Real Estate Appraisal becomes available, this information will be forwarded to commenting departments.

**Step 6: Consultation with Local Community**

Planning Staff recognizes the value of community input in the selection of community benefits. The public will have an opportunity to comment at the statutory public meeting and via another avenue, as appropriate.

It is the intention of the City to engage the public outside of the development application process to identify in advance community needs and priorities for identified areas (i.e. Districts or identified communities). Any findings through this process will be used to inform the decision-making process by including in the staff-prepared list of potential benefits. This can be through secondary plans, community meetings organized by District Councillors or Staff, community workshops and/or surveys.

In the absence of previously identified priorities through public engagement, Staff will host an additional community meeting or conduct an online survey to gain input from the public. The scope of public consultation will be aligned with the project scale, as deemed appropriate by Staff.

**Step 7: Assess Community Benefits**

Planning Staff will assess the appropriate type of Community Benefits in accordance with the decision-making framework and supporting documentation for the identification of potential benefits.

**Step 6: Determine the Cost Estimate of the Community Benefit**

The applicant will be required to provide a cost estimate to confirm the value of the agreed-upon Community Benefit. Planning Staff will work with the appropriate City departments to ensure the appraisal and cost estimate are satisfactory.
Step 7: Assess the “Uplift Value” against the Community Benefit

Planning Staff will compare the value of the Community Benefit against the Uplift Value to ensure that there is an equitable relationship between the established value of the increased height and density and the value of the Community Benefit in terms of financial cost and community importance.

Step 8: Negotiate with Applicant

Planning Staff will negotiate the Community Benefit with the applicant based on the comments received, the interests of the applicant and the estimated Uplift Value, involving the District Councillor where appropriate.

Step 9: Detail the Community Benefit in a Report

Planning Staff will include a detailed section regarding the Community Benefits in any report to the Planning Committee and Council where they recommend approval of a development.

Legal Requirements

Step 10: Incorporate into By-law and Legal Agreement

Community Benefits must be set out in the site specific zoning by-law authorizing the increases in height and/or density and they will be secured in a legal agreement that will be registered on title.

4.2. Section 37 Agreements

The Agreement will identify the timing of the provision of the Community Benefit. If the Community Benefit is a cash-in-lieu payment, the Agreement will detail where the funds will be allocated and may also secure other matters as a legal convenience that are normally secured in the development process but do not form part of the Community Benefits.

4.2.1 Timing of Contribution

The Section 37 Agreement will specify the timing of the provision of the Community Benefit. The Benefit may be secured within a defined number of days of the site specific by-law becoming final and binding, prior to the issuance of the first building permit, prior to the issuance of the first above-grade building permit, prior to the first occupancy permit for the development or on a phase by phase basis if the development will be constructed in phases. The timing of the provision of the Benefit in-kind or as a cash-in-lieu payment will be assessed on a case-by-case basis and will be dependent on the type of Community Benefit.

4.2.2 Cash-in-lieu

Cash-in-lieu payments received from a Section 37 Agreement will be collected by the Planning, Building and Licensing Services Department and held in a Section 37 Reserve Fund
set up for that specific purpose. This fund will be managed by Financial Services who will work with other City departments to oversee related expenditures in accordance with an executed Section 37 Agreement. The funds will be spent only on the Community Benefits specified in the Section 37 Agreement and associated By-law.

Financial Services may invest the money in the Section 37 Reserve Fund in securities in which the City of Kingston is permitted to invest under the Municipal Act, 2001, and earnings derived from the investment shall be paid into the Section 37 Reserve Fund. The activities and status of the Section 37 Reserve Fund will be audited and reported out annually, as required.

The Treasurer of the City of Kingston shall each year, on or before the date specified by Council, give Council a financial statement relating to the Section 37 Reserve Fund. The statement shall include all matters identified in Section 37(8) of the Planning Act, a copy of the statement shall be given to the Minister on request and Council shall ensure the statement is made available to the public.

4.2.3 Sunset Clause

4.2.3.1 Provisions for Agreement Modifications

To ensure that tangible benefits are received within a reasonable time period of when the development occurs, all Section zoning amendment bylaws with community benefits and 37 agreements will include a clause to allow for changes to previously secured benefits or unspent or unallocated funds.

4.2.3.2 Changes to previously secured benefits

In circumstances where the previously secured benefits is no longer fulfilling a community need (i.e. similar work has been done in the interim), changes to an existing agreement can be made to modify the selected community benefit. The City and all parties to the agreement or their successors on title, must approve the change and execute an amending agreement. The District Councillor’s concurrence is required.

4.2.3.3 Unspent Funds

In circumstances where allocated funds have not been spent within a three-year period after receipt of the funds, changes to an existing agreement can be made to modify the allocation of funds to be redirected to a different community benefit. The City and all parties to the agreement or their successors on title, must approve the change and execute an amending agreement. The District Councillor’s concurrence is required.

Moving pieces: This section has been added based upon concerns about funding not being used and changing circumstances.
Description

The real estate appraisal is intended to provide a comprehensive evaluation of a development proposal demonstrating the increase in land value between the as-of-right height and density permission on a property and the land value of the height and density of a development proposal; this is referred to as the “Uplift Value”. The real estate appraisal will be used in the negotiation process related to community benefits under Section 37 of the Planning Act.

When Required

A real estate appraisal is required in conjunction with an application for a Zoning By-law Amendment, only where Staff have identified that a proposal will be subject to Community Benefits under Section 37 of the Planning Act, and where Staff have specifically requested a real estate appraisal from the applicant.

Applicable Legislation

Section 37 of the Planning Act gives a municipality the ability to authorize increases in height and density of development otherwise permitted by the by-law in return for the provision of such facilities, services or matters as are set out in the by-law, referred to as Community Benefits. In order to use this authority, the municipality’s official plan must contain provisions relating to the authorization of increases in height and density of development.

Qualified Persons

A real estate appraisal must be completed by an appraiser with AACI designation granted by the Appraisal Institute of Canada (AIC).

Required Contents

A real estate appraisal shall be a narrative report based on Real Property Appraisal Standards of the Canadian Uniform Standards of Professional Appraisal Practice (“CUSPAP”). A real estate appraisal must include and/or address all points listed below:

1. Executive summary;
2. Identification of the subject property and its ownership;
3. Statement that client is the “City of Kingston” with instructions only to come from the City;

4. Purpose and intended use of the appraisal which is to estimate the increase in land value resulting from an increase in development density and/or height which may be permitted through a Zoning By-law Amendment in accordance with the provisions of Section 37 of the Planning Act, the City’s Official Plan and the City’s Community Benefits Guidelines;

5. The “Uplift Value”, shall be defined as the difference between the value of land when a development is built in accordance with the applicable provisions of the Zoning By-law, and the value of land when a development is built with density and/or height provisions that exceed those permitted by the Zoning By-law.

6. City Staff will provide the appraiser with the “as of right” maximum height/density, the “as proposed” height/density as provided by the applicant and methodology to assist the appraiser to determine equivalent numbers for comparable sales;

7. Effective date of the appraisal as provided by City Staff;

8. Definition of market value;

9. History of property including last conveyance. If the property was acquired in the past year and there is a difference between the purchase price and the appraised value resulting from the appraisal, the appraiser must provide comments on differential;

10. Analysis of building conditions, Official Plan designation and zoning permissions;

11. Assumption that property is clean relative to environmental conditions;

12. Description of the proposed development including site plan, development statistics and schematics and zoning and/or official plan amendments required to achieve “proposed” height/density;

13. Discussion and rationale for methods of valuation used and those not used;

14. Analysis of the neighbourhood and comparable properties;

15. For comparable properties, Narrative analysis of each. Include confirmation for source of sales information, adjustments for time, size and location and other influences as appropriate, zoning designation and permitted height and density at time of purchase and any zoning amendments post purchase;

16. Location maps, site plans, and photographs of subject property and comparable properties;

17. Statement that highest and best use analysis not applicable for this real estate appraisal;

18. Analysis and statement of limiting conditions and assumptions;

19. Reconciliation is required when estimate of value is derived from using two or more approaches to valuation;
20. Reconciliation should include clear explanation of how final estimate was achieved including discussion and rationale for which method of valuation is more appropriate; 

21. Reconciliation should include other comparables found that were not included and why so that City can be assured that the appraiser has considered all sales found; and 

22. Appraisal to be signed by AACI appraiser confirming that they have inspected the subject property, the method used to complete the work, and the conclusions presented therein, and that they accept the final “Uplift Value” offered to the City and proponent.

Submission Requirements

Three (3) hard copies and one electronic PDF copy of the real estate appraisal shall be provided directly to the contact in the Planning, Building and Licensing Services Department who requested the appraisal.

Additional Information

For additional information, please contact the City of Kingston Planning, Building and Licensing Services Department at:

1211 John Counter Boulevard, Kingston
Phone: 613-546-4291 extension 3180
Email: planning@cityofkingston.ca

Or, visit the Ministry of Municipal Affairs and Housing website at:
http://www.mah.gov.on.ca/index.htm