FROM OLD MOULD TO FUNCTIONAL GOLD

THE ADAPTIVE REUSE OF SURPLUS HERITAGE SCHOOLS IN HAMILTON, ONTARIO

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EXECUTIVE SUMMARY

In Canada it is currently estimated that one school closes every week across the country (Arnott, 2013). These closures are happening as a result of declining enrolments, changing neighbourhood demographics, cumulative building maintenance expenses and the modernization of education delivery. Schools are closely tied to their surrounding residential neighbourhoods, are a hub for social activity and represent a piece of shared community heritage. Once these community landmarks close, a hole is left in the community and the structure’s perspective use and overall future come into question.

Hamilton, Ontario is no exception to the described phenomena, with over 30 schools at serious risk of closure (Pecoskie, 2012). Of the surplus school building stock in Hamilton, many possess good structural components, prominent heritage characteristics and are located in mature, walkable neighbourhoods. Fortunately, a growing trend for breathing new life into these iconic buildings and communities has emerged – adaptive reuse. With many more properties undergoing the school board disposition process in Hamilton, there is value in taking a closer look into the phenomenon’s dynamics, as building conversions can be a positive and viable alternative to demolition for the surrounding community.

The main purpose of this report is to answer the following research questions:

**PRIMARY QUESTION:** WHAT ARE THE CHARACTERISTICS THAT HINDER OR FACILITATE THE SUCCESS OF A SURPLUS SCHOOL TO RESIDENTIAL CONVERSION PROJECT?

**SECONDARY QUESTION 1:** WHICH TYPES OF SURPLUS SCHOOLS ARE GOOD CANDIDATES FOR THIS TYPE OF DEVELOPMENT AND WHY?

**SECONDARY QUESTION 2:** ARE THE CHARACTERISTICS OF SCHOOL CONVERSION PROJECTS DIFFERENT FROM OTHER POPULAR REUSE OPTIONS, SUCH AS INDUSTRIAL BUILDING CONVERSION, AND WHY?

**SECONDARY QUESTION 3:** WHAT RECOMMENDATIONS CAN BE MADE FOR THE HWDSB, CITY OF HAMILTON AND FUTURE DEVELOPERS TO IMPROVE AND PROMOTE THE SCHOOL TO RESIDENTIAL CONVERSION PROCESS?

**METHOD**

To answer these research questions, a case study approach was used which involved a literature and policy review, interviews with seven professionals with exposure to the process and the examination of three school to residential conversion projects in Hamilton. The literature review was completed to provide an overview of the existing literature, research and findings related to the research question and served as a base for the report’s discussion. A Policy Review was done to deliver a summary of the current relevant policy framework in Hamilton. The interviews were conducted, with experienced planners, developers and architects to get a clear understanding of each project’s redevelopment process and the characteristics that helped or hindered the ultimate outcome. The three former schools examined in Hamilton were: Dundas District Public School, Stinson Street Junior Public School, and McIlwraith Public School.
The common characteristics and themes for this type of development were identified and categorized into a ‘Characteristic Checklist’ grid (Section 6.0), which was divided into broad groups to provide logical structure within the table – Property Elements, Locational, Legislative and Financial. For each of the examined developments, the individual characteristics within the table were identified as being negative, neutral or positive and the frequency and the details of each assessment were discussed below the matrix. The value in such comparison is that it shows patterns of commonality and difference amongst the projects examined, thus providing insight into how these developments materialise in the City of Hamilton. These findings were essential in identifying recommendations for how to improve and facilitate the process of converting surplus school buildings into residential accommodation within the city. Also, the checklist itself can be used as a good initial tool for considering the feasibility of a school building for a reuse project in the future.

**FINDINGS**

**Primary Question:** What are the characteristics that hinder or facilitate the success of a surplus school to residential conversion project?

Across the case studies, the following characteristics were found to facilitate the success of the project: unique architectural features, Giljahn classification compatibility, marketing and presales, the initial acquisition cost, government incentives, neighbourhood support and councillor support. The following characteristics were seen as hindering the project’s success: mediating sound, the cost of development delays, city and commenting agency response times and commenting agency requirements. Other characteristics were considered, however the results show inconclusive results.
SECONDARY QUESTION 1: WHICH TYPES OF SURPLUS SCHOOLS ARE GOOD CANDIDATES FOR THIS TYPE OF DEVELOPMENT AND WHY?

No, not all surplus school buildings make good candidates for a residential conversion. As suggested by the Giljahn’s (1981) Classification, outlined in section 2.6.2, typically schools built during the late 19th century and before the 1950’s are the best contenders. This is because the buildings are structurally sound, are typically in well established, walkable neighbourhoods, possess unique and sought after heritage ornamentation, have high ceilings, many windows and classrooms with a layout ideal for an apartment unit. In contrast, schools built post war aren’t constructed with the same high level of craftsmanship, are in suburban car-oriented neighbourhoods, have low ceilings, few windows, and are not the ideal layout for a residential conversion.

SECONDARY QUESTION 2: ARE THE CHARACTERISTICS OF SCHOOL CONVERSION PROJECTS DIFFERENT FROM OTHER POPULAR REUSE OPTIONS, SUCH AS INDUSTRIAL BUILDING CONVERSION, AND WHY?

School buildings tend to act as community landmarks, are in well-established walkable neighbourhoods, close to amenities making their transition into residences smooth unlike buildings with industrial uses. Often industrial buildings are in areas requiring remediation, set away from residential areas, have few existing windows and shallow floor plates making a residential conversion more challenging.

SECONDARY QUESTION 3: WHAT RECOMMENDATIONS CAN BE MADE FOR THE HWDSB, CITY OF HAMILTON AND FUTURE DEVELOPERS TO IMPROVE AND PROMOTE THE SCHOOL TO RESIDENTIAL CONVERSION PROCESS?

Based on the content analysis, conclusions were drawn and recommendations were made to provide additional insight into the school to residential process for the development community and policy makers alike. The following is a summary of the findings:

THE SCHOOL BOARD:

- Work with the City of Hamilton to rezone school properties with residential redevelopment potential, before the sale, (B, C and D type buildings, see Section 2.6.2), and designate heritage if applicable, to gain a higher return on the sale of the property.

POTENTIAL DEVELOPERS:

- If not already experienced in redeveloping properties in Hamilton, partner with those who do
- Use the Characteristic Checklist in Section 6.0 as a tool for considering the residential potential of a surplus school property

CITY OF HAMILTON:

- Make the entire lower-city a Community Improvement Area to mitigate risk and remove the current disincentive to undertake infill or redevelopment opportunities.
- Modify the system for calculating Development Charges and Parkland Dedication to specifically address infill projects as the current regulations cater to greenfield development
• Create a working group or dedicate a project manager which champions adaptive reuse projects and bridges the disconnect between the demands of the involved departments
• Create a system which requires comments from the developers once their projects are completed to increase City accountability and a method for receiving regular constructive feedback
ACKNOWLEDGEMENTS

This report is dedicated to the late Gilbert Jerome Hutton. He was a Hamilton-born, naval research scientist and heritage enthusiast who dedicated a great deal of his life to educating others about the historical significance of people, places and structures all over Canada. As the President of the Nova Scotia Heritage Trust he was the leading force in saving Halifax’s Heritage Properties. In his struggle to save them, he devoted many hours he didn’t really have; personally drove councillors to Boston to see their Adaptive Reuse successes, gave countless guided historic walking tours to raise community awareness and, as an act of love, personally wrote the winning RFP. The proposal suggested a mixed-use, adaptive reuse approach which ultimately saved the waterfront from an urban renewal scheme, calling for a freeway, and was one of the first of its kind in Canada. Growing up he took me to countless heritage sites, many of which were in Hamilton, and I have him to thank for fostering my love of heritage and cities. For a change, on one of our last outings together, I took him to tour the Stinson School in the pre-construction phase. He thought it was a brilliant project - which in my eyes is the highest praise any development could ever receive.

The two years I spent at the Queen’s School of Urban and Regional Planning (SURP) were absolutely magic and I’d like to especially thank Director Dave Gordon, Jo-Anne Tinlin, my supervisor Professor John Andrew and all my new planning friends, for their overwhelming support throughout my studies and illness.

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“We have 113 schools and if you look at plain numbers, we have enough students for 80-85 schools”
1.0 INTRODUCTION

1.1 PROBLEM STATEMENT

The threat and actuality of school closures has become a strong re-occurring theme in Canadian news. It is currently estimated that one school closes in Canada every week (Arnott, 2013, p.17). These tough decisions come as the combined result of declining enrolments, shifting neighbourhood demographics, mounting building maintenance costs, education delivery modernization and a provincial public policy scheme that effectively supports school consolidations and closures. Once these institutions permanently close their doors, holes are left in the built and social landscape where the schools once operated. Schools play more than simply the role of an educational facility as they are closely tied to their residential neighbourhood, serving as centres for social activity, communal space, recreational facilities and a shared piece of community heritage (Ibid). Once schools their doors, what is to become of these community landmarks?

Hamilton, Ontario is Canada’s sixth largest city and 30 of its schools are at risk of closure. In part, the closure and sale of these properties is to generate funds for new capital projects. Hamilton-Wentworth District School Board (HWDSB) chair Tim Simmons announced in 2012 “We have 113 schools and if you look in plain numbers, we have enough students for 80 to 85 schools” (Pecoskie, 2012). In the case of Hamilton, many of the schools on the chopping block are older, in mature neighbourhoods and possess unique heritage characteristics. While these character-rich schools have been targeted because of their under enrolment and high maintenance costs, they’re especially at risk because of the Ministry of Education’s financing formula which emphasizes the efficient use of space. Pre-WWII schools, with their high ceilings, wide hallways and high student to space ratios are penalized under this financing structure – making them especially vulnerable to closure (Archer, 2009).

On the bright side, a new trend has surfaced breathing new life into City’s older surplus schools, by successfully adapting theirs use. Often this use comes in the form of residential units, however recreation and office space are other alternatives to demolition. With many more school properties undergoing disposition and coming to market in Hamilton, there is value in taking a closer look at this phenomenon’s dynamics, as this may be a viable and important alternative moving forward.

1.2 RESEARCH QUESTIONS & GOALS

The following report addresses the following question as the primary focus of the research:

**PRIMARY QUESTION:** WHAT ARE THE CHARACTERISTICS THAT HINDER OR FACILITATE THE SUCCESS OF A SURPLUS SCHOOL TO RESIDENTIAL CONVERSION PROJECT?

To enhance the potential impact of the report the following secondary questions are also addressed:
SECONDARY QUESTION 1: WHICH TYPES OF SURPLUS SCHOOLS ARE GOOD CANDIDATES FOR THIS TYPE OF DEVELOPMENT AND WHY?

SECONDARY QUESTION 2: ARE THE CHARACTERISTICS OF SCHOOL CONVERSION PROJECTS DIFFERENT FROM OTHER POPULAR REUSE OPTIONS, SUCH AS INDUSTRIAL BUILDING CONVERSION, AND WHY?

SECONDARY QUESTION 3: WHAT RECOMMENDATIONS CAN BE MADE FOR THE HWDSB, CITY OF HAMILTON AND FUTURE DEVELOPERS TO IMPROVE AND PROMOTE THE SCHOOL TO RESIDENTIAL CONVERSION PROCESS?

1.3 RELEVANCE OF THE RESEARCH

This research has been undertaken with the assumption that the adaptation of a surplus school, for residential purposes, can be an appropriate redevelopment alternative to demolition. The research comes at an important juncture for the City of Hamilton’s future as many of its architecturally and culturally significant school properties, and surrounding neighbourhoods, are at risk of permanent loss and change. The concern for the future of these endangered schools stems beyond the preservation of the buildings themselves but also the vibrancy and sustenance of the surrounding neighbourhood and community. This research is important as it fills gaps in existing literature about this unique type of development and also has the potential to inform and direct developers, policy makers and involved stakeholders as they prepare to react to Hamilton’s incoming surge of surplus school properties.

1.4 REPORT OUTLINE

Chapter two provides an overview of the existing literature, research and findings related to the research questions and acts as the foundation for the report’s discussion. It defines ‘adaptive reuse’, provides the history of the phenomena, the perceived benefits and obstacles of this development approach, the role it plays in terms of historic preservation and specifically the details of its application to a school. Chapter three provides a summary of the policies that affect surplus school reuse in Hamilton, including the Ontario Education Act’s Regulation for the Disposition of Surplus Real Property, the HWDSB’s Property Disposition Protocol, the City of Hamilton’s Adaptive Reuse Incentives and heritage designation mechanisms in Hamilton. Chapter four describes the research scope, research approach and limitations. Chapter five outlines and provides background information on the three case studies analyzed in this report. Chapter six provides discussion and analysis of the case studies, literature review and policy review as they relate to the identified characteristics. The final chapter offers the findings from the analysis and draws conclusions regarding each research questions as well as providing recommendations for the future of adaptive school reuse in Hamilton.
2.0 BACKGROUND & LITERATURE REVIEW

The following is an overview of the existing literature, research and findings related to the research question and serves as a base for this report’s discussion. It provides the background and roots of the adaptive reuse phenomena, which are essential for analyzing and understanding the practice as it relates to surplus school redevelopment and reuse.

2.1 ADAPTIVE REUSE DEFINITION

The definition of adaptive reuse (AR), according to the city of Los Angeles is “the process of redeveloping older, often dilapidated or abandoned, structures into buildings that will be used for purposes other than those originally intended for the building” (Young, 2009, p.703). When changing the function of an older structure, inevitably a certain degree of physical change is required, although the quantity varies case by case. The physical changes required can include the reorganization of the structure’s internal space, service upgrades/replacements and other restoration efforts (Bullen & Love, 2009). Generally a building undergoing a reuse undertaking retains its aesthetic integrity while allowing for the differences required to accommodate the new purpose.

2.2 ADAPTIVE REUSE HISTORY

The practice of making a structure more relevant by changing its use is hardly a new idea. Some well-known examples of adaptive reuse are Paris’ Musée D’Orsay; a train station and mail centre turned art gallery (Musée D’Orsay, 2010) and The Highline; a section of the former New York Central Railroad transformed into an elevated, linear recreation space (NY Department of Parks & Recreation, 2014). Although many examples of creative adaptive reuse can be referenced today, we cannot understand this current trend without considering the Modernist movement, which was at its peak in the 1950’s and 60’s, and resulted in the contemporary heritage preservation regulations which have been essential for facilitating many examples of this genre of development.

With attitudes primed for ‘progress’ after the Second World War and a combination of inner city congestion, housing shortages and large wounds in the European urban fabric, the stage was set for changes in cities (Klemek, 2011). The Modernist design principles that the Congrès International d’Architecture Moderne (CIAM) had been advocating since the 1920’s, now had a unique opportunity to impact the urban landscape. The main concepts, as they related to city planning, included the complete separation of uses, large arterial roads for increased speeds and motor vehicle movement, and simple high-rise structures in green space designed to address overcrowding. To put these design principles in place, it was believed that existing areas could not be adapted for fear of obsolete ‘blight’ and that a ‘tabula rasa’ or clean slate was required to successfully implement their new ideas. This style of top-down urban planning was embraced in the form of ‘urban renewal’ schemes and came into popularity and practice in municipalities all over North America. The application of this approach effectively displaced entire communities and caused the demolition of traditional neighbourhoods and streetscapes as iconic, historic buildings came down to accommodate simple, concrete mega-blocks. As Drier (2006) explains it:
“Cities need old buildings so badly it is probably impossible for vigorous streets and districts to grow without them”

- Jane Jacobs
‘The 1950’s was the heyday of urban renewal, the federal program that sought to wipe out urban “blight” with the bulldozer. Its advocates were typically downtown businesses, developers, banks, major daily newspapers, big-city mayors and construction unions. Most planners and architects at the time joined the urban renewal chorus. It was, after all, their bread and butter. Moreover they convinced themselves that big development projects would ‘revitalize’ downtown business districts, stem the exodus of middle-class families to suburbs and improve the quality of public spaces”.

As a response to onset of Urban Renewal and Modernism came Jane Jacob’s, Post-Modernism and Heritage Preservation. In early 1960, New Yorker Jane Jacob released ‘The Life and Death of American Cities’ and her opening line read, “this book is an attack on current city planning and rebuilding” (p.1). As Tyler (1999, p.61) points out “Jacob’s book was an important catalyst in stirring the public’s recognition that more than just saving some landmark structures, preservation dealt with preserving the very fabric of communities. As a result…greater interest in historic preservation arose in the general public”. The following gives a very brief, and by no means comprehensive, outline of historic preservation’s establishment in North America to demonstrate its rise in popularity:

1955 – Historic Sites & Monuments Act (now Ontario Heritage Act) is passed to provide designation due to age and design, representing a new government focus on the designation of Canada’s built heritage.

1956 - Archaeological & Historic Sites Board of Ontario began erecting plaques to celebrate and recognize heritage sites (OHT, 2014)

1964 – First graduate-level course in Historic Preservation offered at Columbia University’s Graduate School of Architecture, Planning and Preservation. (Tyler, 1999)

1966 – US National Historic Preservation Act passed; major provisions established preservation roles for federal, state and local levels of government, which led to the creation of the National Register of Historic Places, local historic districts, State Historic Preservation Offices, and the Advisory Council on Historic Preservation. (Ibid)

By the late 1960’s many Urban Renewal schemes, which outlined the demolition of many neighbourhoods and history, were halted by the growing realization that cities were for people, not just cars, that heritage buildings mattered and that existing neighbourhoods had value and potential. In 1963 Halifax’s Harbouview Drive Proposal, which called for a freeway along the entire downtown waterfront and destruction of countless heritage properties, was halted later that decade “by a group of far-sighted citizens whose actions saved the heart of the city” (Historic Properties, 2014). The proposal which saved the Heritage Properties, was one of the first Adaptive Reuse projects of its kind in North America and the Privateers’ warehouses, situated along the water, were transformed to accommodate restaurants, office and commercial space for which the district has won numerous awards and is one of the city’s most prominent tourist destinations (Ibid).

Despite the contemporary, and official recognition of heritage neighbourhoods, sites and structures, Garder (2013, p.3) points out, “over the last three decades, Canada has lost 23 percent of its historic building stock in urban areas; in rural areas, it has lost 21 percent. Those losses represent parts of the past that are gone forever, yes… and also lost opportunities”.
The reaction to Modernism and the Urban Renewal movement facilitated a new appreciation for the existing urban fabric and heritage preservation, as well as initialized the government policies and tools that have helped facilitate the adaptive reuse and rehabilitation of buildings and districts all over North America. Ontario, and Hamilton’s, Heritage Preservation and Adaptive Reuse tools will be discussed in further details in Section 3.0 as well as how they affect AR projects generally, and schools specifically.

2.3 THE BENEFITS OF ADAPTIVE REUSE

Adaptive reuse projects present many advantages for a wide variety of stakeholders; included in this are developers, community members and cities as a whole. The advantages, as identified by the literature review, can be thought of in these broad categories: environmental, development cost savings, marketability, community development and economic regeneration. Ball, Brand, Cooper, Douglas, Kohler, Hassler & Petersen all argued that, “evidence clearly suggests that the opportunities created by adaptive reuse outweigh those presented by demolition and rebuilding” (Bullen & Love, 2010, p. 216).

2.3.1 ENVIRONMENTAL

The greenest building is almost always the building that already exists; it has less of an impact on the environment than tearing the building down, trashing the debris, clearing the site and using all new materials. A study done by Preservation Green Lab (2009), which quantified the value of building reuse, found that even the ‘state of the art’ eco buildings were not greener than the ones already in existence. The study showed that it can take up to 80 years for a new eco-friendly building to a make up for the impact of its initial construction. School conversion projects were specifically included in their research.

Bullen & Love (2009, p.352) also found that “by extending the useful life of existing buildings there are lower costs in relation to materials, transport, energy and pollution when compared to erecting new buildings”. While this statement speaks mainly to the physical construction of the building, the environmental savings can also be felt citywide, as AR projects inherently embody smart growth components. Such components include: increased land use density and efficiency, greenfield development prevention, less underutilized hard and soft public infrastructure and more walkable communities. Reuse projects also often use existing public infrastructure such as sewers, power lines and public transit which therefore eliminates the expensive need to provide more. Shipley et al. (2006, p.519) state, “those who want to promote re-urbanisation, smart growth, intensification and dynamic place-making should appreciate the role that can be played by heritage development”.

Overall, the reuse of inner city sites reduces the need for greenfield development, urban sprawl, conserves land and promotes walkability, livability and increased transportation efficiency (Lewin & Goodwin, 2013)

2.3.2 DEVELOPMENT COST SAVINGS

The following does not conclude that profits from heritage development or adaptive reuse are automatic, but rather that they often posses certain characteristics that inherently create savings during the development stage.

The Shipley et al. (2006) tackled the misconception that ‘new-build’ is always more economical and renovation, universally more expensive. Through speaking with developers, they found that renovating large existing buildings in some cases allowed for sequential development. In this scenario, tenants can live in a
section of the building, therefore providing income, while other parts are being remodeled to reduce the redevelopment’s financial risk and burden.

Interestingly, Young (2009) argues that the most obvious contributor to the feasibility of adaptive reuse projects is the low cost of land in urban cores as compared to suburban development. This statement fails to take into consideration the dramatic differences in land prices between cities. In certain urban cores, the price of land is extortionate where as with others (rust belt cities like Detroit), the exact reverse is true. Although many adaptive reuse properties are purchased with as-is price tags, such as Hamilton’s Stinson School Lofts, this does not mean urban core real estate is fundamentally less expensive than it's suburban counterpart. Stinson School was picked up for the staggeringly low figure of 1 million dollars, because its heritage designation was seen as a hindrance to its value (H. Stinson, Personal Communication, November 2012).

Another advantage, especially for smaller scale AR projects, is how many municipalities have recognized the overall benefits of adaptive reuse projects and, in order to facilitate their feasibility, have provided financial encouragement and incentives to act as a loss leader. Municipalities faced with the challenges of intensification, downtown improvement, and brownfield developments often assist potential developers; and the cities reap the benefits of the development’s success as well. Although, not all Canadian municipalities offer these types of incentives; Shipley et al. (2006) found that in Ontario, the incentives were mainly offered in secondary markets such as Brantford, Hamilton and Kitchener. For AR developers in first-rate cities like Toronto, most traditional municipal financial incentives are more-or-less irrelevant in relation to the financial magnitude of their projects, but can be assisted financially via other means such as density bonusing and approvals.

With AR projects quite often the skeleton, such as the walls, roof and floor can be reused and a developer from Shipley et al’s (2006) study estimated that this represented a project savings of up to 20%. Furthermore, if existing heating, plumbing etc. fit the new purpose, this also represents considerable savings, although this is much less common. In the case of school buildings, the property comes with a certain amount of existing parking, making the requirements easier to fulfill, and often the classroom sizes are already the ideal square footage for an apartment unit; this therefore eliminates the expensive need to rearrange existing walls and beams (H. Stinson, Personal Communication, November 2012).

Overall, AR projects can inherently provide development cost savings that would not be possible with new build and should definitely be taken into consideration when evaluating the feasibility of a reuse project.

2.3.3 MARKETABILITY

The unique ornamental qualities of a heritage building that can be retained in the AR process serve as an attractive feature to potential buyers and tenants (Bullen & Love, 2009). Shipley et al. (2006) found that the retail value of heritage loft units is quite often higher than other conventional residential spaces. They also found that over time, the market value of converted heritage properties had increased to even higher price points than initially projected. The increased marketability of these features is directly related to return on investment, which in some cases in Ontario have been cited as being as high as 60% (Ibid). Fortunately for developers, heritage condos and lofts tend to sell out faster and at a higher price tag than new construction (Archer, 2009).
But what is it that makes adaptive reuse projects so desirable to buyers? The people who are likely to pay a premium to live in these unique units are what academic Richard Florida has coined as ‘The Creative Class’. Florida (2012) feels the Creative Class encompasses all of the individuals, organizations, and enterprises that either create, or foster creativity, imagination or innovation. These are people who often choose to relocate to cities that inspire them and have a strong and unique sense of place. As a result, this attracts companies looking for talent, which provide high paying jobs and the spinoff is that the city flourishes (Halifax Regional Municipality, 2013). One of Florida’s colleagues, architect Christian Unverzagt, an Architecture and Urban Planning professor, has developed a specialty in what he calls ‘Creative Class Architecture’ and what most people would call a specialty in Adaptive Reuse and Heritage Restoration Architecture (Schmitt, 2013).

Jacob’s (1961, p.187) pointed out that “cities need old buildings so badly it is probably impossible for vigorous streets and districts to grow without them....new ideas must use old buildings”. To follow up on Jacob’s point, in Van Der Maarel’s (2013) article on The Importance of Sense of Place he points out that the sameness of buildings diminishes a sense of place and makes cities look and feel like every other city, therefore providing less of a reason for people to visit, stay or play. Uniqueness is an important factor to economic sustainability and it needs to be developed at an architectural, as well as a cultural and natural, level.

Every real estate agent’s favourite catch phrase ‘location, location, location’ also applies to remodeled heritage building stock. Shipley et al. (2006) point out that often older buildings, which predate current zoning regulations, are located in existing central neighbourhoods with established, good access to transport and amenities. These factors obviously increase the desirability of such projects.

Overall, the architectural uniqueness and locational advantages that an adaptively reused building provides, by showcasing original assets and new features to compliment the new function, is very marketable – especially for members of the creative class who are willing to pay a premium to be surrounded by such inspiration.

2.3.4 COMMUNITY DEVELOPMENT

In a recent study done by the Strategic Council, three quarters of Canadians hold the sentiment that well preserved historic buildings and older neighbourhoods are important to their communities (Bull et al., 2013). As such, it is no surprise that heritage conservation in Canada has a solid track record for revitalizing Canadian communities. Bull et al (Ibid) argue that heritage is about more than just the buildings themselves but the mutual spirit of place, memories, stories and traditions that these buildings evoke for communities. In essence, AR projects are a tool for protecting a community’s sense of shared history and therefore the neighbourhood’s sense of place, while making the space more relevant to changing demands. An interesting example of this is the small museum, which developer Harry Stinson has incorporated into the Stinson School Lofts redevelopment scheme, that showcases important artifacts from the days of its school function and interesting pieces of the past found during the remodeling phase.
Another advantage of introducing residential units to an AR project is the 24-hour city it creates which often results in reduced crime rates (Bullen & Love, 2009). When buildings remain vacant they can become hotbeds for vandalism and crime as there are no longer ‘eyes on the street’ to police the neighbourhood.

Between strengthening communities by offering sentiments of shared heritage, offering a stronger sense of place and creating safer communities by way of increased activity, adaptive reuse projects do have an important, positive role to play.

**2.3.5 ECONOMIC REGENERATION**

A recurring comment seen in adaptive reuse and heritage building literature is how these projects have the potential to act as an economic and regeneration catalyst for neighbourhoods and cities; especially when a residential component is incorporated. Bullen & Love (2009, p.352) found that “the incorporation of residential units into a regeneration strategy is necessary as it attracts people back to the city, which in theory should attract investment in retail and entertainments outlets”. Similarly, Shipley et al. (2006) confirm that researchers and policy makers alike have recognized the desirability of having more residents in central areas to foster business district revitalization. Simultaneously, these unique developments are attracting the urban workforce back to urban residences.

Baeker & Millier (2013) called it a ‘contemporary synergy’ that is evolving between a city’s cultural heritage assets and creative economy, in which cultural enterprises play an increasingly important role in economic city development. This point runs congruently with Florida’s concept, outlined above, of the Creative Class being essential for a successful modern economy and obviously older buildings and adaptive reuse play a role in attracting such residents. AR projects assist with the municipal vision by taking an eyesore and turning it into an attractive, contributing property (Shipley et al., 2006).

Beaker & Millier (2013) provide the excellent example of West Toronto’s Liberty Village – an area whose character is defined by its wide range of turn of the century manufacturing buildings, which have provided an ideal space for creative enterprise. As a result, the area has exploded in size as 20,000, mostly young professionals call this, once underutilized, heritage area home. This development supports one of Shipley et al’s (2006) points – that not all older buildings are suitable for new uses, however many of Liberty’s older, heritage buildings did become key sites in the renewal schemes. In Liberty Village there was a conscious attempt to keep as much of the area’s authenticity as possible while still facilitating new residential opportunities; and to do this not everything could stay. Basically, to realize the full potential of certain older buildings, sometimes sacrifices need to be made for the sake of renewal at the neighbourhood level.

Also, from a job creation standpoint, the U.S. Department of Commerce Studies found that a preservation or adaptive reuse job which has the same budget as a new build creates roughly double the number of jobs (Giljahn, 1981)

Overall, because of the attractiveness and uniqueness of this type of development, AR projects tend to have a positive local economic spin-off effect for the surrounding neighbourhoods and are a superior source of job creation when compared to new build.

**2.4 THE OBSTACLES OF ADAPTIVE REUSE**
Although every AR project is unique with its own set of circumstances, the following outlines some of the issues, cited in the literature, which were commonly seen with this genre of development. These obstacles can be discussed in the broad categories of: the unknown, funding and market, building requirements and gentrification.

2.4.1 THE UNKNOWN

Many heritage buildings, especially those that no longer suit their initial use, are subject to a certain degree of deferred maintenance. Typically these unaddressed maintenance issues need to be rectified and paid for when rehabilitating the structure (Seaman, 2013). At times developers are aware of these maintenance issues upon purchase, but sometimes they come as a complete surprise, throwing off initial project cost projections. These unknowns can come as the result of poor, or non-existent, building maintenance records. Sometimes a developer is not aware of the hazardous materials within the building before taking on a project and when they are found, the remediation process negatively alters the project’s timeline and monetary budgets (Bullen & Love, 2010).

Shipley et al. (2006, p.514) found “Developers indicated that there are almost always unexpected costs to meet building code…structural repairs, foundation improvements, landscaping and site contamination”. Obviously a building’s costly mysteries are part of the nature of this type of work and can affect the profitability and feasibility of the development.

2.4.2 FUNDING & MARKET

Often large developments require funding from lending institutions such as banks and credit unions. The more certainty and predictability a developer can demonstrate about their project to a lending institution, the more likely they are to receive funding. New construction, that can show very similar, completed, successful, moneymaking examples, receive loans much more easily than those seeking funding for an adaptive reuse project. As we mentioned above, reusing an old building is less predictable, is always a one-of-a-kind, is more complex than new construction and therefore results in greater perceived risk and financing difficulties. This difficulty is cyclical; “Because there are fewer projects being financed, fewer contractors choose to specialize, making it harder to deliver a successful project” (Bull et al, 2013, p.13). Shipley et al. (2006, p.513) reiterate this point:

Project uncertainty is often the result of difficulty in securing financial backing. Banks are particularly hesitant to finance adaptive reuse projects because they believe the level of risk is higher than other real estate investment. In banking [the banker's] experience [with this type of project] seemed to matter little...because the banks’ set ideas did not allow them to see the advantages of heritage development, even for a project directly parallel with those successfully (and profitably) completed.

2.4.3 BUILDING REQUIREMENTS

One of the more obvious struggles that come with adaptive reuse projects is meeting the zoning and building code requirements for a structure assuming a new function e.g. zoning amendments, parking requirements, landscaping, site remediation etc. Less obvious is how important it is that the skilled trades working on the project have previous experience with heritage and adaptive reuse projects; whether this be architects, engineers, project managers or skilled trades (Shipley et al., 2006). Lack of experience presents
a second issue; because those with previous relevant heritage and reuse experience are so hard to come by, their cost inevitably increases (Seaman, 2013).

In terms of the actual building itself, internal changes are often needed to accommodate building code requirements, additional staff, new technology or a change in the functionality of the space (Love & Bullen, 2011). Furthermore, a building’s reuse suitability is affected by the era within which it was constructed. For example, buildings constructed in the 1960’s and 70’s often provide minimal suitability because of the poor quality of their initial construction (Ibid) thus making the age of the building an obstacle, in certain cases.

The heritage designation of a building can often be seen as an obstacle, in terms of building requirements, but also a benefit and will be discussed in section 2.5 and 3.0.

Overall, in terms of compliance issues and skilled trades, an adaptive reuse project can provide building requirement obstacles in a way that a new build would not.

2.4.4 GENTRIFICATION

Successful conversion projects often raise issues surrounding affordability and gentrification. Often conversion projects target more affluent tenants, thus pricing out potential lower income tenants and certainly squatters. Furthermore, a successful project has the ability to increase the property values of everything that surrounds it, again, displacing those of lesser means within the affected area. This is especially common with AR projects given that many properties primed for reuse are often initially derelict, inexpensive or vacant and therefore more accessible to the developer (Young, 2009, p. 712). Love & Bullen (2009, p. 357) in their study of LA noted:

“With nearly all vacant downtown buildings in the process of being converted, developers have begun to buy occupied office buildings and hotels where long-time downtown residents, including homeless people typically lived. When further substantial zoning concessions are proposed housing groups… emphasized the need for incentives for affordable housing rather than more market-rate housing, which was booming prior to the sub-prime crisis”.

While some may argue that the gentrification seen as the result of an AR projects success is a good thing, it is important not to forget how negative this can be for the residents it displaces and the role government has to play in making sure low income residents are not forgotten during redevelopment. An example of how gentrification was achieved without displacement through government intervention was the no-net loss artist space policy negotiated in the aforementioned Liberty Village. Essentially, in exchange for certain zoning amendments, developers had to promise to offer the same number of affordable units to the arts community as existed there in the first place. This was done in an effort to retain the same creative community that had given the area its distinctive creative flavour (Artscape, 2014).

2.5 HISTORIC PRESERVATION

At times heritage designation can be seen as a burden for developers, as designation often comes with strict design requirements in an effort to protect historic authenticity. However, this can conflict with a developer’s intentions for a new project and may also require additional funds. In Ontario, Canada it is often municipal heritage committees, as is the case in Hamilton, that oversee how specific heritage elements are maintained and their ideas can conflict with those of the developer. Shipley et al. (2006) point out that this
inflexibility, by either stakeholder, can compromise an entire project, resulting in a potential ‘lose – lose’ situation. In certain cases the committee’s demands can deter a developer from moving forward with the project, increasing the building’s potential for vacancy and future demolition. Designation does not guarantee a heritage asset’s long-term conservation and only the effective use of a space can protect a building from the threat of disrepair and demolition (Archer, 2009).

Archer (2009) in her article Save Our Heritage Schools, argues that designation is likely the best mechanism a municipality has for managing change in its cultural landscape and therefore for promoting the heritage value of their communities. This point was demonstrated December of 2012, when HWDSB received a demolition permit for the 80-year-old Sanford Avenue School despite being on the city’s ‘List of Buildings and Landscapes of Heritage Interest’ (Nolan, 2012). This municipal list bears no legal weight and unless a property is designated under Part IV and V of the Ontario Heritage Act, its protection is no different than any other property except for the 60-day grace period the City has to decide to designate.

Whether designated or not, as Shipley et al. (2006) point out, it is in the interest of the developers to preserve the aesthetic quality of the building appearance regardless of heritage designation, as those are likely the character elements that attracted them to the project in the first place. They are aware that these unique elements are integral to attaining the market value of the finished product.

Essentially, heritage designation and the conditions that come with it can discourage developers from taking on projects, which in the long-run may put the structure in a more threatening situation. It is important for the both the developer and the heritage committee to make compromises to ensure both the viability of a project and the structure’s unique element’s are honoured.

2.6 ADAPTIVE REUSE & SCHOOLS

The section above outlines the benefits and obstacles of Adaptive Reuse as a practice on the whole, whereas the following addresses some of the characteristics of adaptive reuse as they relate specifically to remodeling surplus schools – with a focus on residential use. It should be noted that there are a limited number of readings and resources that speak specifically to the adaptive reuse of school buildings.

2.6.1 COMMUNITY & SCHOOL BOARD

A school building is a community cornerstone and represents neighbourhood continuity throughout the years. Giljahn (1981) acknowledges that the closing of a school is psychologically very upsetting for an area, and that an empty, boarded up familiar building means to many people that the neighbourhood is changing – and probably not for the best. When incorporated into a reuse scheme, decommissioned schools can be catalysts for community change, “which shifts the concept of ‘closing’ from the calamity column to the opportunity column” (Arnott, 2013, p. 40).

In terms of finances, the reuse of excess school property is beneficial for both the school board and city. The school maintenance costs are eliminated and the value of the property returns to the Board’s budget to be used for capital projects and the land begins contributing again to the municipal tax roll (Gilpin, 1981). If a school is not already designated heritage, and there is concern about the building’s future, the city can implement strategic zoning efforts to help facilitate the preservation of the building.
Heritage schools are often located in older, established neighbourhoods, which are often the same neighbourhoods facing declining enrolment. Despite a pre 1950’s school’s higher level of craftsmanship, they rarely meet fire codes, deeming the schools unsafe as well as underused. Furthermore, the Ontario Ministry of Education’s financing formula emphasizes the efficient use of space which effectively acts as a funding disadvantage for the older schools because of their wide hallways, tall ceilings and increased student space – again making pre WWII schools targets for closure (Archer, 2009). The arrival of so many of these schools on the market represents immense adaptive reuse opportunities for developers.

2.6.2 INFLUENTIAL SCHOOL CHARACTERISTICS & CLASSIFICATION

While many school buildings and their properties are coming to market, not all school buildings represent fantastic redevelopment opportunities. From a structural standpoint school buildings built before WWII generally have ‘good bones’, are iconic buildings with strong architectural style and express the best materials and methods of construction for their time (Arnott, 2013). In contrast, generally, buildings built in the 1960’s and 70’s are seen by adaptive reuse specialists to be unsuitable candidates for this type of project because of their poor quality of construction (Bullen & Love, 2009). A specific advantage of turning a school into a residential use is that schools most often come with existing parking and playgrounds/green space. If additional parking is needed, the green space can be converted. Furthermore the additional land can help the development meet parkland provision regulations and/ or represent additional land that can be developed to increase the return on investment. Also, schools are almost always located in existing residential areas, thus making a school turned residence a highly compatible use for the neighbourhood.

A major design advantage for conversion to residential use projects is that typically classrooms are the perfect dimensions for a one bedroom apartment, with closets, initially for classroom materials, already included. Also basements and attics within schools, that were typically unused, represent ‘found space’ and increase the project’s useable square footage considerably. The tall ceilings that are most often present in schools are an attractive design feature for tenants however may not be overly efficient for heating. Often in older school the single pane, wood double hung windows are also not efficient for heating and cooling and often deteriorating. Replacing these large windows to respect the architectural integrity can be expensive and a major focus for Heritage Committees (Giljahn, 1981).

Giljahn (1981, p. 39 - 62) in his book The Adaptive Reuse of Surplus Schools developed a classification system for school buildings based on their characteristics for the purposes of defining their reuse potential. The following is a simplified summary of his classification system, which considers: floor plan and massing, building size and arrangement, construction type (materials & techniques), fenestration, architectural details and age of the building. These should not be considered rules, for classification but more guidelines. Below are Hamilton examples of each ‘Type’ of school mentioned in Giljahn’s classification system.

Table 1: Giljahn Classification

<table>
<thead>
<tr>
<th>Type</th>
<th>Characteristics</th>
<th>New Use Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type A</td>
<td>Built pre 1840 or very rural if later, Single Room Schoolhouse, Rectangular Plan, Wood &amp; Masonry, Gable Roof, Single Story</td>
<td>Typically demolished or already reused. Most suitable for single-family residential,</td>
</tr>
<tr>
<td>Type</td>
<td>Description</td>
<td>Suitable for</td>
</tr>
<tr>
<td>--------</td>
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<td>-------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Type B</td>
<td>Built between 1840’s-1900, 2-3 storeys, identifying main entrance below gable roof, double hung windows featuring hoodmold-arches-lintels, Masonry bearing walls, wood floor, high ceilings, large attic &amp; basement, wood floor construction, typically Italianate or Georgian stylistic influences, found in inner-city neighbourhoods &amp; often community landmarks</td>
<td>Most suitable for multi-residence, offices or community centre.</td>
</tr>
<tr>
<td>Type C</td>
<td>Built between 1890-1920, 2-3 storeys, steep pitched roofs, wall dormers, double hung windows grouped by hoodmolds, towers to emphasis entrance, high ceilings, wood floors, large attics &amp; basement, wide corridors with stairs at either end, masonry bearing walls, more rectangular than type B, Romanesque or Italianate Influences, found in established neighbourhoods and represent rapid growth during turn of the century.</td>
<td>Most suitable for multi-residence, offices, a community centre or alternative education facility.</td>
</tr>
<tr>
<td>Type D</td>
<td>Built between 1910-1940, 2-3 storeys, flat roof, double hung windows, wide corridors, basement, high ceilings, mason bearing walls, concrete floors, Jacobethan and Renaissance revival influences on unadorned industrial-look exteriors, typically symmetrical with two main entrances, more horizontal emphasis than those that preceded, found in older well-established neighbourhoods</td>
<td>Most suitable for multi-residence, offices, retail or alternative education facility.</td>
</tr>
<tr>
<td>Type E</td>
<td>Built post-war baby during baby-boom1950’s &amp; 60’s, 1-2 storeys, ‘finger-plan’ – low horizontal classroom wings using large amount of land which snake out from the central circulation area, low ceilings, concrete block interiors, narrow corridors, flat roof, no basement, unadorned brick exteriors and metal framed windows found in abundance in suburban areas.</td>
<td>Most suitable for offices, community centre, clinic or alternative education</td>
</tr>
<tr>
<td>Type F</td>
<td>Built 1970 &amp; 80’s, ‘open-plan’ – individualistic architecture with large flexible spaces and decreased window/glass area, 1-2 storeys, predominantly flat roofs, unique shapes and placement of windows, concrete block interiors, high ceilings, wide corridors, bright colours and graphics, typically in suburban areas.</td>
<td>Most suitable for alternative education, clinic or community centre.</td>
</tr>
</tbody>
</table>
Type A is so rare, for the purposes of this study it is not relevant to examine.

Type B, C & D have similar characteristics in that their acquisition costs are typically low, they often possess unique heritage architectural ornamentation and their basements and attics can be reclaimed space. In terms of location they are usually located along major roads near the central city, have access to many amenities such as shops and public transportation, however they run the risk of being located in neighbourhoods on the decline. Overall, because of their unique character and locational advantages, combined with their availability these types of school buildings hold a great deal of exciting reuse potential.

Type E & F - As these types of school buildings are relatively new, school board's are less likely to put them on the market. As these buildings already afford many specialized spaces such as libraries, gymnasiums, art rooms and music rooms/halls they are ideal for reuse as recreation, community, senior or alternative education centres. Unfortunately, their walls made of concrete blocks make the rearrangement of room sizes a challenge. Many E type buildings are only one floor and present fewer accessibility problems. In terms of location, should a conversion resulting in high traffic volume come forth, this might disturb the surrounding residents. However, should they be turned into something that directly services the surrounding community, the adaptation would be more suitable.

2.6.3 HAMILTON CLASSIFICATION EXAMPLES

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type A</td>
<td>Mohawk Trail School Built 1881</td>
</tr>
<tr>
<td></td>
<td>Retrieved from: <a href="http://www.hamiltonnews.ca">www.hamiltonnews.ca</a></td>
</tr>
<tr>
<td>Type B</td>
<td>Stinson School Built 1894</td>
</tr>
<tr>
<td></td>
<td>Retrieved from: <a href="http://www.stinsonschool.com">www.stinsonschool.com</a></td>
</tr>
<tr>
<td>Type C</td>
<td>Central Public School Extensive Remodel 1890</td>
</tr>
<tr>
<td></td>
<td>Retrieved from: <a href="http://www.historicalhamilton.com">www.historicalhamilton.com</a></td>
</tr>
</tbody>
</table>
As demonstrated by the preceding literature review, a great deal of research pertaining to the adaptive reuse of buildings already exists, even within the Canadian context, however a limited amount of that research addresses the unique process of reusing a school property; this study aims to help fill this research gap and provide useful recommendations for stakeholders facilitating and undertaking this kind of project in Hamilton. A notable exception to the lack of surplus school reuse literature is Giljahn et al.’s A Guide for the Adaptive Reuse of Surplus Schools, however given the book’s 30+ year age and American content, a contemporary and Canadian-oriented gap still exists. The subsequent Chapter reviews the policies which play a role in the AR of the school properties in Hamilton, Ontario.
3.0 POLICY REVIEW

The purpose of this chapter is to provide a summary of the regulations that affect, or are related to, the process of acquiring and redeveloping surplus school properties. This is relevant because these policies greatly affect when and how the properties can be acquired once the disposition process has been initiated. It is also relevant as it explores the municipal financial incentives, which can increase project feasibility, and the role heritage designation can play in the process. Furthermore, one of the primary objectives of this study is to provide recommendations for how to improve policy and the process, and this could not be done without understanding the current context.

3.1 ONTARIO POLICY CONTEXT: ONTARIO REGULATION 444/98

By law, Ontario school boards must follow the policies stated by Ontario Regulation 444/98 Disposition of Surplus Real Property, found within the Education Act, when undertaking the sale of their properties. This policy requires that Ontario school boards sell their surplus property at the assessed market value and that priority, or first pick, be given to preferred agents. These preferred agents are (in order) other local school boards, local educational institutions (colleges and universities), the municipality and other levels of government. The regulation specifically outlines that a circulation notice of the property’s availability must be made known to these agents, for which they have 90 days to respond with a proposal/binding to offer to purchase OR lease the property at the assessed market value. In the event of multiple bone fide offers, the board must evaluate the offers giving priority in the order mentioned above. Also, if an offer is received from a preferred agent and together with the school board, the transaction cannot be finalized within a 60-day negotiation period, the board has the right to list the property for sale on the public market. If a preferred agent shows no interest at all and the Ministry of Education has granted approval, the Board may move forward to put the property on the open market as well. Prior to this administration may look into revenue maximization strategies i.e. amending the Official Plan; rezoning, developing lands to registration of lots; creating an approved plan of subdivision” (Warling et al, 2013, slide 10).

3.1.1 PROVINCIAL POLICY STATEMENT

The Provincial Policy Statement (PPS) provides the policy framework that provides land use planning and development direction province-wide, with the goal of enhancing the quality of life for all Ontarians (MMAH, 2014, p.1). Within the policy it specifically states “within settlement areas, sufficient land shall be made available through intensification and redevelopment and, if necessary, designated growth areas” (p.7). The residential AR of school buildings directly embodies this policy by both redeveloping and intensifying settlement areas – in this case in Hamilton.

In terms of heritage building stock, the PPS promotes conserving well-designed built form and cultural planning, “by conserving features that help define character, including built heritage resources” (MMAH, p.19). As such, “significant built heritage resources and significant heritage landscapes shall be conserved” (p.39).

Provincial Plans such as the Growth Plan for the Greater Golden Horseshoe build upon the policies outlined by the Provincial Policy Statement as it provides land use policies to address issues facing specific geographic areas in Ontario (p.3). This 25-year growth plan for the Greater Golden Horseshoe, which
includes Hamilton, promotes smart growth principles by aiming to revitalize downtowns to become vibrant convenient centres, curbing sprawl to protect farmland/green spaces and reduce traffic gridlock by improving access to alternative transportation options (MMAH, 2006.) The residential AR of residential schools in Hamilton within the urban boundary effectively brings more people into the built up area thus contributing to sprawl reduction and increasing downtown activity, while providing more people access to a great range of transportation options.

3.1.2 HAMILTON URBAN OFFICIAL PLAN

The role of an Official Plan (OP) is a legal document with the aim of initiating vision and guidance for the physical development of a city over a period of 30 years. According to the Planning Act, the concepts detailed within the plan must embody those laid out in the related provincial policies such as the PPS and the Growth Plan for the Greater Golden Horseshoe. The following gives a very brief overview of several policies and goals outlined in the City of Hamilton’s Urban Official Plan, which came into full effect in 2013, and can relate specifically to surplus school redevelopment.

In Section 3.5.5.3 it says that the City shall consider the purchase and adaptive reuse or redevelopment of surplus school sites for public purposes when the resources are available. Furthermore, in Section 3.5.5.5 it states that the redevelopment of surplus school sites for residential and other purposes shall be compatible with the surrounding neighbourhood and comply with sections that address residential intensification, urban design policies and neighbourhood designation. It is quite progressive that the City of Hamilton addresses surplus school redevelopment issues within their OP.

As Hamilton is rich in cultural heritage resources and building stock, it is no surprise that within the OP an entire section is dedicated to Cultural Heritage Policies. Section 3.4 states “cultural heritage resources may include tangible features, structures, sites, or landscapes that, either individually or as a whole, are of historical, architectural, archaeological, or scenic value”. One of the goals mentioned within this section was to “encourage the rehabilitation, renovation and restoration of built heritage resources in order to remain in active use” (S.3.4.14).

In terms of growth policies, the OP calls for compact development, mixed use urban environments that support transit and active transportation (E.1.0.c) and appropriate residential intensification throughout the urban area (E.1.0.g).

Overall many surplus school properties have the potential to embody these goals and policies through residential AR. The OP calls for residential intensification in the urban area that support transit and active transportation use and the restoration of heritage resource to remain in active use, which a great deal of this type of project inherently does.

3.2 HWDSB PROPERTY DISPOSITION PROTOCOL

HWDSB’s Property Disposition Protocol was developed to provide public sector transparency, ensure open and timely communication and to inform all interested parties of the process taken by the school board in the disposal and potential re-use of surplus properties and sites. The protocol is progressive in that it goes above and beyond what is required by law and is one of only 4 boards in Ontario to have a defined protocol (Rasnu, 2012, p.23).
The protocol recognizes and respects that the City of Hamilton is an important community partner in terms of municipal planning as they hold the jurisdictional authority over land use designations. By following the protocol, it eliminates the possibility that individuals or organizations are ‘unaware’ or ‘did not have time’ to respond to a land disposition action. In addition to what is required by Ont. Reg. 444, HWDSB engages in a pre-consultation process or communication period to inform the local community in advance of potential property dispositions, which lasts 60 days. A public meeting is held to seek input from community of the appropriate after-use and administration shares approaches being considered including the highest and best use of the site, possible amendments to the Official Plan or the possibility of maintaining the property for future use. The preferred agents in Hamilton include other local school boards, local colleges (Mohawk & Boreal College) and universities (McMaster University), The Crown and the City of Hamilton. As mentioned, should there be no sale in 90 days and a bone fide offer, the board identifies the land’s ‘Highest and Best Use’, using the recommendations of the city’s Real Estate Section of the Economic Development Division, which the Board’s administration anticipates seeking and undertakes a public tendering bid process (Hamilton Wentworth District School Board, 2013). As with most purchases, it is up to the buyer to ensure compliance with all provincial and municipal planning regulations. Below is a diagram of HWDSB’s Property Disposition Protocol:

3.3 CITY OF HAMILTON ADAPTIVE REUSE INCENTIVES

The City of Hamilton provides a range of financial incentive programs, which have the potential to help make school adaptation projects more feasible. The programs offer a range of financing mechanisms however a
great number of them are specific to community/business improvement areas (CIAs & BIAs), Ontario Heritage Act designated properties, LEED projects or are geared towards brownfield sites. The available financing mechanisms include low and interest free loans, grants in the form of municipal tax forgiveness and matched investment and funding for required studies (Milsome, 2013). According to one developer “the best” program, involves completely waiving all DC’s if a building is designated heritage. Although it is fantastic that the city has these incentives in place, most of Hamilton’s school properties fall outside targeted incentive zones or do not meet necessary criteria, making these risky projects even more difficult to finance despite clear implementation benefits. Perhaps, given Hamilton’s incoming number of surplus school sites, special provisions should be made specifically for school properties – designated, LEED, within an Improvement Area or not. A step in the right direction as already been taken in the new zoning by-law as it encourages residential development, particularly of schools, as the have changed the neighbourhood zoning to allow conversion of industrial to commercial and residential without going through a zoning amendment, which along represented 20 000$ (H. Milsome, Personal Communication, January 2014)

3.4 HERITAGE DESIGNATION IN HAMILTON

In Short, under the Ontario Heritage Act, municipalities are given the power to protect and manage Ontario’s cultural heritage attributes and resources within their boundaries. Their definition of a heritage attributes is: “in relation to real property and the buildings and structures on real property, the attributes of the property, buildings and structures that contribute to their cultural heritage value or interest” (OHA, 2010). Recognition of designation is not necessarily hinged on the age of the building, but rather whether it possesses unique, cultural attributes worthy of protection.

To request designation the process can be initiated by City Council, the Hamilton Municipal Heritage Committee, city staff, the owner of the property or a third party. The request has to outline the cultural significance of the property, meet the appropriate criteria as outlined by the Heritage Act and be approved by the Hamilton Municipal Heritage Committee, the Planning Committee and then finally council. This doesn’t completely protect the building, however it prevents the property from being altered without a permit or demolished without council approval (Hamilton Planning Division, 2013). It should be noted that although parties other than the owner can initiate designation, the owner’s consent is necessary. Often buildings are not put on the list until it is felt they are in danger, to avoid the processes required to undertake any building renovation. It is case specific whether designation is thought to be beneficial towards conversion projects, as mentioned in the literature review. In some cases it saves the building from demolition therefore opening door for future opportunity but in other cases, the designation repels them. Should a developer in Hamilton want the benefits of designation without the process of the official title, the building can be registered on title, between the city or the Ontario Heritage Trust, with a heritage easement agreement. This is alternative tool to ensure a property’s preservation and qualifies in Hamilton for the development charge exemption for heritage projects. The easement agreement are entered into to ensure the heritage characteristics are maintain but may also set out permitted alternations and development.
4.0 METHODS

A methodology was established to analyse the characteristics necessary to facilitate a successful school reuse project in Hamilton, Ontario. The methodology chosen is qualitative in nature as the problem at hand is complex, requires a detailed understanding and quantitative or statistical measures of analysis do not fit the problem, nor do they help inform any recommendation (Universiteit Leiden, 2014). To provide construct validity to this research approach, triangulation was achieved using multiple methods and sources to address the research problem (Denscombe, 2005, p.38) These methods are outlined and explained in further detail below in Section 4.2 ‘Data Collection’.

4.1 SCOPE

Geographically, this study focused on the feasibility of surplus school reuse in Hamilton, Ontario for three primary reasons. The first is that the City has, is and will be facing a large number of school closures as neighbourhood demographics change, maintenance costs mount and funds are required for new capital projects leaving many structures and lands available for new use (Pecoskie, 2012). Secondly, a great number of these closures represent designated and undesignated heritage-building stock that possess design elements ideal for residential conversion. Thirdly, there is a recent track record of successful school-to-residential conversion projects within the city with lessons to be shared with those seeking to participate in such a process. Ideally this report’s findings will give insight into the process triumphs, trials and tribulations of converting a surplus school into a residential use that guides necessary, sound municipal policy development and understanding to developers considering future projects.

4.2 DATA COLLECTION

4.2.1 LITERATURE & POLICY REVIEW

A literature and policy review was completed as initial background research, which included the use of books, journal articles, newspaper articles, graduate-level theses, websites & government documents. This was done to provide an overview of adaptive reuse process in general and to establish which characteristics affect a school to residential project’s success. “The normal starting point for research is to use findings from previous research as a platform for deciding what is worth investigating and how it needs to be investigated” (Denscombe, 115). The findings from the literature and policy review have informed the research direction, gave insight into the process of undertaking AR projects and showed common themes in the process that were essential in the development of the ‘Characteristic Checklist’ found in Section 6.0. The literature findings are discussed at length in Section 2.0 and the Policy Review is found in Section 3.0.

4.2.2 INTERVIEWS

Semi-structured interviews were conducted with professionals to provide further insight into their experiences with school conversion projects in Hamilton, Ontario. The mentioned form of interview was chosen so that the data collected could take on the level of direction a survey or questionnaire would provide, with the flexibility and responsiveness of an in depth interview” (p. 141). Also, like Bullen et al. (2010, p.217) interviews were chosen as a data collection mechanism as it is an effective tool for learning about matters that cannot be directly observed.
For the interviews, the informants were chosen based on their experience with school to residential projects in Hamilton, with one exception. The exception was made for one architect with a great deal of AR experience outside of Hamilton, due to lack of response from initial prospects. A list of specific questions (Appendix B), informed by the literature review, were developed for each category of expertise to bring insight into the characteristics that affect the outcome of a school reuse project.

Table 2 - Interviewees

<table>
<thead>
<tr>
<th>Informant Profession</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developer</td>
<td>3</td>
</tr>
<tr>
<td>Planner</td>
<td>2</td>
</tr>
<tr>
<td>Architect</td>
<td>2</td>
</tr>
</tbody>
</table>

All known Hamilton school redevelopers, their corresponding architects, Hamilton’s Coordinator of Urban Renewal Financial Incentives and the Senior Planner for Urban Renewal, were contacted via email to coordinate interviews. Of those contacted, three developers agreed to be interviewed; both city officials, and an architect who had completed school conversion projects with two of the developers being interviewed. As only one architect agreed to participate, to gain further architectural perspective into this particular process, an architect with adaptive reuse experience outside of Hamilton was contacted to share their expertise.

Interviews were, with consent, digitally recorded as, "qualitative data should, ideally, be captured on a tape or digital recording, which can then be then used to make notes" (Moore, 2006, p.150). Once the interviews were completed, the researcher replayed them and key points from the discussions were noted in a dot jot format (Appendix C).

4.2.3 EXPLANATORY & COMPARATIVE CASE STUDIES

The explanatory case study approach was used as this research sought to clarify and understand the internal dynamics of how and why a particular experience occurred (Yin, 2009). The elements and reuse process of three schools were identified to demonstrate the similarities and differences between the characteristics of their conversions. These schools include Stinson Street Junior Public School, Dundas District Public School and McIlwraith Public School. Further statistics were gathered about each school’s neighbourhood from a local real estate agent to demonstrate neighbourhood demographics and surrounding residential values. The information gathered from developer interviews and the real estate agent was pieced together to provide a summary of each conversion. The summary included: years of construction and reconstruction, original and most recent architects, developers, the building’s area, the quantity, size and price of units, neighbourhood statistics such as household income and average housing values, level of government assistance and a list of what helped and hindered each project. In addition, each structure’s characteristics were cross-examined with the Giljahn AR classification matrix, found in Section 2.6.2, to determine the type and therefore assumed suitability of each conversion. The case study summaries can be found in Section 5.0.
4.3 DATA ANALYSIS

The analysis approach for this research paper was done using a two-part process and partially based on Cory Wilson’s 2010 Master’s report entitled Adaptive Reuse of Industrial Buildings in Toronto Ontario: Evaluating Criteria for Determining Building Selection. Using a ‘Content Analysis’ method, all the main concepts, which arose during the literature and policy review, interviews and case study outline, were identified and categorised into common themes (Wilson, 2010). Ultimately the common themes and patterns identified as contributing, whether negative or positive, to the feasibility of each case study reuse project, were presented in the form of a checklist in Section 6.0. The checklists’ grid was divided into broad groups to provide a logical structure within the table – Property Elements, Locational, Legislative & Financial. Using the table, each case study’s characteristics were noted as being positive, negative or neutral to the redevelopment process and were represented using the following symbols +, -, O. Project obstacles were recorded as negative -, benefits were recorded as positive + and elements that neither presented themselves as being negative or positive were recorded as an O.

The total number of each project's positives, negatives and neutrals was tallied for purposes of comparing the developments overall, and the frequency of commonality or difference between the evaluations of the characteristics. The value of this is that it provides a sense of the characteristics most common to the projects, how the projects differ from one another and which characteristics proved to be hurdles most often. The elements showing the pattern of a common obstacle should be given extra consideration by developers and policy makers for building selection and policy delivery purposes.

The justification behind the status of each of the school’s characteristics was discussed below the matrix. Of secondary value is the checklist itself, as it can be used as a good initial tool for considering the feasibility of a school reuse project.

Based on these findings, the research questions were addressed and recommendations were presented in Section 7.0. Such recommendations provide additional insight into the school to residential conversion process for the development community and policy makers alike.

4.4 LIMITATIONS

The primary constraints of this research were time, the distance between Kingston and Hamilton, the small number of converted surplus schools in the city and the unwillingness of potential key informants to participate. By using only three case studies, all of which represent successes, the research risks unfairly representing the obstacles and benefits of surplus school reuse. Unfortunately, nothing could be done to address this issue, as schools that don’t prove to be feasible projects, wouldn’t likely make it past the preliminary stages. This leaves the possibility that important characteristics, vital to the success, or ultimate failure, of other projects were overlooked.

Furthermore, although each project had its own unique set of characteristics, to compare them an element of standardization required – which failed to provide weight for how positive or negative each characteristic was. In a future study, developing a research method, which could incorporate the level of significance a particular characteristic had for the project’s outcome, would be perhaps more telling.
Generalizability takes a conclusion drawn about a small sample, with time and place specific observations, to create a universal theory or conclusion (IWH, 2014). As it was only possible to assess three schools, it is assumed that the conclusions drawn from them would apply to other surplus school projects in Hamilton. Ideally more of these types of projects would have been studied to increase confidence in the conclusions drawn. Perhaps this can be done in the future should more school reuse projects be completed.

Other limitations are that all of the case studies and recommendations are specific to the city of Hamilton. As such, certain findings that may have been a result of location may not be applicable or generalizable elsewhere. In Hamilton, the incentives that were once offered may not be offered elsewhere or in the city in the future. The real estate market and consumer trends that affected these projects may be radically different or change in the future; property values, interest rates, and consumer tastes are not known for their stagnancy.

As interviews were one of the primary sources of data collection, some of the information provided by the developers, architects and planners could have been heavily biased. As with any human-oriented data source, there are always opportunities and possibilities for bias or skewed responses that may change over time. On the note of bias, the author's should be mentioned as well. While I have made a concerted effort to mitigate my bias by using triangulation in my data collection, there is one worth declaring - I personally believe school to residential adaptation projects are good projects that benefit cities and communities.
5.0 CASE STUDIES

The schools used as case studies are listed below, along with their addresses and a key map to provide locational reference. The purpose of this chapter is to provide a summary of conversion project. A real estate agent provided the GeoWarehouse Demographic Reports and property value data; full copies can be found in Appendix D.

5.1 STINSON SCHOOL LOFTS

STINSON STREET PUBLIC SCHOOL (1894)

Original Architect: Alfred W. Peene

200 STINSON STREET, HAMILTON

STINSON SCHOOL LOFTS (2012)

Developer: Harry Stinson Developments (the school’s name both a coincidence and calling)

Conversion Architect: ICON Architects Inc, Lintak Architects Inc

Size: 93 300 sq. ft., 66 Units

Units Originally Priced At: $179 000 – $699 000

Unit Size Range: 700 – 1735 SF
5.1.1 GILJAHN CLASSIFICATION

TYPE B SCHOOL – Stinson can be classified as a ‘Type B’ school because of the year it was built, masonry bearing wall construction, 3 storey height with basement and large attic, rectangular plan, wood floor construction, high ceilings, Italianate stylistic influences, wood double hung windows, intersecting gable roof, pediment identifying the main entrance and individual openings adorned by hoodmolds and lintels. Its location in an inner city neighbourhood and community landmark status are also defining characteristics (p.25).

5.1.2 NEIGHBOURHOOD DATA

5.1.3 PROJECT DETAILS

APPROACH: Harry Stinson Developments ensured that every unit was unique; this was certainly the case as certain units offer 4 storeys. He also added a large glass structure that links the two original school buildings together affording shared space and additional units. To maintain historic integrity layers of paint were removed to reveal original brickwork, new windows that comply with heritage guidelines were installed; exposed original wooden beams were incorporated, including those in the elaborate roof of the former shooting gallery. Items, which could be salvaged from the building’s teaching days such as blackboards, pull-down, wall maps and books were used as authentic onsite design elements.

GOVERNMENT ASSISTANCE: Under the City of Hamilton Bylaw 09-143 “the adaptive reuse of protected heritage properties is exempted from development charges within the existing building envelope”. This was a new bylaw introduced as a response to this particular project, saving the developer over $750,000. The city also provided over 27,000$ in grants (McLeod, 2013) through programs such as the Hamilton Tax Increment Grant Program, Hamilton Downtown Multi-Residential property Investment Program and the Hamilton Heritage Property Grant Program.
WHAT HELPED THE ADAPTIVE REUSE?

- As the building was designated heritage, this deterred other developers from purchasing the property, which pushed the price down and ultimately facilitated many municipal incentives.
- Unique character allowed developer to ask for premium rates which Stinson neighbourhood typically wouldn’t see
- Structurally the building has ‘good bones’
- Being in a residential neighbourhood (as opposed to industrial area) made rezoning simple
- Easier to get this higher level of density, in a primarily single-detached dwelling neighbourhood, because the building already existed

WHAT THREATENED THE AR?

- Financing was difficult to attain as there was no identical development precedent
- Finding knowledgeable, local, speciality trades for heritage projects is difficult. In the end, the architect had to be switched from a Toronto to a local firm to attain the permit
- Fitting necessary materials into the building was a challenge which resulted in a crane being hired to lift materials through the roof
- City staff at the counter level were unfamiliar with how to process certain permits (unfamiliar with code 11 of the building code) and the department operated in silos
- The traditional values and reputation of the neighbourhood meant sales were slow at first
- Unforseen costs

5.2 DUNDAS DISTRICT LOFTS

DUNDAS DISTRICT PUBLIC SCHOOL (1929)

Original: Architect: William J. Walsh

397 KING ST WEST, DUNDAS, HAMILTON

DUNDAS DISTRICT LOFTS (2013)

Developer: Harry Stinson
Developments (the school’s name both a coincidence and calling)

Conversion Architect: ICON Architects Inc, Lintak Architects Inc

Size: 93 300 sq. ft., 66 Units

Units Originally Priced At: $179 000 – $699 000

Unit Size Range: 700 – 1735 SF
5.2.1 GILJAHN CLASSIFICATION

TYPE D SCHOOL – Dundas District can be classified as a ‘Type D’ school because of the year it was built, masonry bearing wall construction with concrete floors, it’s location in a well-established neighbourhood, the symmetrical façade with two main entrances, horizontal emphasis, large rectangular plan (original) with concrete floors, flat roof, high ceilings, double-hung windows and renaissance revival architectural influences. According the Giljahn “these buildings may possibly have the best reuse potential of any of the categories” (p. 28).

5.2.2 NEIGHBOURHOOD DATA – Dundas West

5.2.3 PROJECT DETAILS

APPROACH: This 3 storey former school building nestled into the Niagara Escarpment was used as a shell for the project. It features 8 to 16 foot ceilings, penthouse suites with private patios, modern condo details such as heated floors, granite countertops, rain showerheads and a separate parking garage. Every unit is unique and the interior is completely modern with little to no exposed brick.

GOVERNMENT ASSISTANCE: Although the school was not designated heritage, it was ‘registered on title’ with Ontario Heritage Trust, therefore qualifying the property for Bylaw 09-143 which waived development fees representing a savings of over $600,000.

WHAT HELPED THE ADAPTIVE REUSE?:

- The inexpensive buying price and DC forgiveness
- The fact that the developers had experience with this type of project
- An excellent location in a walkable, residential neighbourhood with disposable income and excellent views
- The majority of the asbestos had been removed by the school board and what wasn’t, was outlined in a report eliminating the risk of the unknown
- Structurally sound shell
- Large gymnasium able to accommodate 6 units
What Could Have Made the Reuse Unsuccessful?

- The number of studies and actions required by all the commenting agencies once rezoning took place and each individual agency's turn-around times for submissions
- That the development was in a flood plain
- Policies which don't recognize the inherent difference between greenfield and infill development
- A crash wall CN Rail required, despite not having mentioned this in the pre-consultation process and that the previous use was people as well (children in fact)
- The E-shape and wide hallways the school possessed (after subsequent additions to the original school) made it challenging to efficiently use the space for units

5.3 Witton Lofts

50 Murray Street, North End West, Hamilton

Witton Lofts – Named After Architect (2013)
- Developer: Urban Core Inc
- Conversion Architect: Lintak Architects Inc
- Size: 40,600 sq. ft., 36 units
- Units Originally Priced At: $174,900 – $448,000
- Unit size range: 700 – 1400 sf

MCILWRAITH PUBLIC SCHOOL (1925)
- Original: William Palmer Witton

5.3.1 Giljahn Classification

Type D School – McIlwraith School can be classified as a ‘Type D’ school because of the year it was built, masonry bearing wall construction with concrete floors, its location in a well-established neighbourhood, the symmetrical façade, large rectangular plan with concrete floors, flat roof, high ceilings, double-hung windows and renaissance revival architectural influences.
5.3.3 PROJECT DETAILS

APPROACH: This project transformed a former school operating as a mission into a luxury condo development. The design afforded the restoration of the original 3 storey school while adding an additional 3 storeys, constructed out of glass and steel. The eclectic mix of old and new allows the residents in the modern 3 floors enough vertical to have a lovely view of the harbour and surrounding neighbourhood. It should be noted that in 2013 the development won the city’s award for excellence in adaptive reuse.

GOVERNMENT ASSISTANCE: The development took advantage of the City of Hamilton’s Commercial Corridor Housing Loan & Grant Program, Downtown Property Permit Grant Program and Downtown Multi Residential Investment Program.

WHAT HELPED THE ADAPTIVE REUSE?:

- The affordable buying price in an established residential neighbourhood with a moderate reputation
- The ability to ask for higher unit prices due to boutique nature
- Proximity to waterfront and the associated views
- Adequate existing parking for the units
- Local community embraced project and local developer
- Having the sales office placed away from the building on a street frequented by the target market

WHAT COULD HAVE MADE THE REUSE UNSUCCESSFUL?:

- The length of time and money required for rezoning
- Parkland dedication levies
- Inability to measure the load capacity of the existing school. Resulted in an expensive building approach in which the original structure bears no additional weight
- CN Rail’s sound requirement (largest issue)
- Finding skilled trades
6.0 ANALYSIS

6.1 LIST OF CHARACTERISTICS

As mentioned in Section 4.0, the following list of characteristics represents the contributing elements of the adaptive school reuse process that could be identified throughout the literature review, policy review and interviews.

+ ➔ This symbol represents a characteristic that was seen as a beneficial or positive attribute to the project’s development and success.

− ➔ This symbol represents a characteristic that was seen as a hindrance or negative attribute to the project’s development and success.

Ø ➔ This symbol represents a characteristic that was seen as a impartial or neutral attribute to the project’s development and success.

Table 3 - Characteristic Evaluation

<table>
<thead>
<tr>
<th>CHARACTERISTICS</th>
<th>STINSON SCHOOL LOFTS</th>
<th>DUNDAS DISTRICT LOFTS</th>
<th>WITTON LOFTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique Architectural Features</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Use Compatible with Giljahn Classification</td>
<td>-</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Building Code</td>
<td>-</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Condition</td>
<td>+</td>
<td>Ø</td>
<td>+</td>
</tr>
<tr>
<td>Building Layout</td>
<td>-</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Parking/Traffic Considerations</td>
<td>+</td>
<td>Ø</td>
<td>+</td>
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<tr>
<td>Sound</td>
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<tr>
<td>Category</td>
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<td>--------------------------------</td>
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<td><strong>Structural Conditions</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specialized/Skilled Trades</td>
<td>-</td>
<td>+</td>
<td>-</td>
</tr>
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<td><strong>LOCATIONAL</strong></td>
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<tr>
<td>Neighbourhood Demographics</td>
<td>-</td>
<td>+</td>
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<tr>
<td>Neighbourhood Support</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Surrounding Uses</td>
<td>+</td>
<td>O</td>
<td>O</td>
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<tr>
<td>Zoning</td>
<td>+</td>
<td>-</td>
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<td><strong>LEGISLATIVE</strong></td>
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<tr>
<td>Councilor Support</td>
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<td>+</td>
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<tr>
<td>City Response Times</td>
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<tr>
<td>Commenting Agency Requirements</td>
<td>O</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Government Incentives</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Parkland Dedication/Cash-in-Lieu</td>
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<td>-</td>
<td>-</td>
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<tr>
<td><strong>FINANCIAL</strong></td>
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<tr>
<td>Financing</td>
<td>-</td>
<td>+</td>
<td>+</td>
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<td>Delays</td>
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</tr>
<tr>
<td>Acquisition Cost</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Presales &amp; Marketing</td>
<td>O</td>
<td>+</td>
<td>O</td>
</tr>
</tbody>
</table>
6.2 CHARACTERISTIC RESULTS

6.3 CHARACTERISTIC DISCUSSION

The following section contains information collected through interviews with key informants for each project.

6.3.1 PROPERTY ELEMENTS

6.3.1.1 UNIQUE ARCHITECTURAL FEATURES

As one of the interviewees stated “you cannot replace the character of a heritage building with new construction no matter what you do”. This statement largely speaks to the architectural uniqueness a heritage school possesses and it is therefore no surprise that with all three projects, the historic aesthetic and architectural elements of the structures were seen as integral and largely what initially attracted the developers. The architectural features which were seen as desirable included: tall ceilings, many tall existing windows, historic facades and detailing. In the Stinson School, the original ornate entranceway and grand staircase were preserved and exposed brick was incorporated into the units wherever possible. Also, any items from the school’s past that could be incorporated into the units, such as chalkboards and old maps, were kept as a nod to its historic past. At both Dundas District Lofts and Witton Lofts, the historic exterior was respected, however due to sound, utility and configuration issues, much less can be found in the way of exposed brick and signs of the past within their interiors. At Dundas District, the original bricks, that could be salvaged, were used to accent visible areas such as the gateway feature. All three schools possess identifying exterior entranceways, which were respected and restored. At Witton there weren’t many interior heritage features to work with, however the original railings were kept and retrofit with glass to meet the building code. As such, all the unique architectural features of the school were seen as a benefit to the project.

6.3.1.2 USE COMPATIBLE WITH GILJAHN CLASSIFICATION

As outlined in Section 2.6.2, and referenced throughout section 5.0, Giljahn (1981) in his book The Adaptive Reuse of Surplus Schools developed a classification system for school buildings based on their characteristics for the purposes of defining their reuse potential. Each one of the examined case studies fell into what Giljahn classified as a school type well suited to adaptive reuse for a residential purpose. Section
“You cannot replace the character of a heritage building with new construction no matter what you do” - Developer
4.0 describes the details of Giljahn’s system and Section 5.0 details the justification of the case study’s classification. Their reuse compatibility, based on Giljahn’s classification system, was seen as a positive feature for all three schools.

6.3.1.3 Building Code

With Witton, because the project was stripped down to its shell, it was almost as easy to comply with the building code as a new build therefore making it a positive aspect of the process. At Dundas the developers worked slightly more with the existing building divisions than Witton, and as a result ran into some problems with building code in terms of pre-existing layout, making it an obstacle. At Stinson, the least modification was done to the existing layout of rooms (often the perfect size for a unit) that meant the developer ran into many building code compliance issues. That being said, many of the non-compliance issues were due to the counter staff treating the building as if it were new development and being unfamiliar with Part 11 of the Ontario Building Code. This part of the code is specifically for existing buildings and sympathetic to existing compliance challenges. “Part 11 applies to the design and construction of existing buildings, or parts of existing buildings, that have been in existence for at least 5 years” (Ontario Building Code Act, 2012). This difficulty meant this aspect was seen as an obstacle for the Stinson project. These findings regarding additional costs to meet building code are consistent with Shipley et al’s findings referenced in Section 2.4.1.

6.3.1.4 Condition

Unlike many reused historic Industrial properties, the studied properties avoided costs associated with deferred maintenance and remediation. Because the buildings were used as schools for students, chemicals and toxic materials were not part of the everyday routine and any internal problems, such as mould, lead and asbestos, were previously dealt with by the school boards. Furthermore, the buildings were modified to such a degree that most of the internal working parts were removed – which in the case of Stinson included lead piping. In Dundas a small amount of asbestos removal was required, but the majority had previously been removed and a detailed report outlined the asbestos’ whereabouts making it virtually a non-issue. As such, the deferred maintenance situation at Stinson and Witton it can be viewed as positive aspect of the project, and at Dundas a neutral aspect.

6.3.1.5 Building Layout

In Stinson, to maximize the space available every unit had to be unalike. As the architect pointed out “the layout was difficult, because each unit was very different. Which means it takes longer to draw, the mechanical system layout has to be different in each unit and the trades people have to put in extra effort because it’s not at all repetitive”. Another layout issue was trying to fit the necessary building materials into the structure through existing openings. In the end, this could not be done and a crane had to be hired to lift the necessary building materials through a roof cavity. As a result, the layout was seen as a negative characteristic of the project.

According to one interviewee, when working with an existing school building and retrofitting it to accommodate residential units, the ideal shape of a school is a square. In the case of Dundas, after several additions to the original structure, the building was shaped like an E. This paired with very wide corridors
resulted in some ‘tricky-to-use’ dead space – only 65 000 of the 80 000 s.f. was usable for units. Furthermore, the existing elevator is located in the right wing of the school, which ideally would have been centrally located for the new residential use therefore making this element a project obstacle. At Witton the shape of the existing building was a thick rectangle, the top three floors were built for their use and the existing building was gutted to the extent that it was like of a new build, therefore making the layout a positive attribute.

6.3.1.6 Parking/Traffic Considerations

For the Stinson, situation was a project positive; in the buying price of a unit a space was provided and the original property came with a schoolyard easily adapted to provide spaces. At Dundas, the developers ran into a few problems with the city’s traffic department, which were ultimately resolved quite easily and a parking garage was constructed for the tenant’s vehicles, making this a neutral aspect the project Witton had enough existing parking to provide beneficial a one to one, unit to parking space, ratio.

6.3.1.7 Sounds

All 3 properties struggled with sound issues on their property in some way, thus earning it's negative characteristic ranking. At Stinson, the original wood flooring and construction of certain partitions allowed for sound to travel through units quite easily leaving the architects with their work cut out for them. At Dundas a sound engineer was hired to solve sound issues between the units. Witton’s sound issues were not internal. As Witton’s neighbour to the North is a CN Rail yard, CN was demanding sound mitigation techniques that would have compromised the entire project. After a very long drawn out process between CN, the City and the developer the necessary concessions were made by both parties.

6.3.1.8 Structural Conditions

As one of the architects stated “the benefit of reusing a school building is that each room was designed to hold 30+ students plus the associated furniture. Therefore the structure inherently suits residential conversion然而 it is when you add onto them that you run into challenges”. This statement proved true in these case studies as both Stinson and Dundas did not run into any structural issues, therefore making this a positive project component. However Witton, with its additional 3 stories, made from glass and steel did, did present issues. As the load capacity of the existing building could not be calculated, the additional 3 levels needed to be constructed as if they were sitting a top nothing. The soil in the area is quite sandy, so over 250 Helical Piers had to be used to steady the foundation.

6.3.1.9 Specialized/Skilled Trades

Both Stinson and Witton’s developers reported finding skilled trades for these highly specialized projects a bit of a challenge – especially given the uniqueness of the build and the lack of design repetition. The developers at Dundas mentioned that finding good people for these types of projects is usually a challenge, but since this type or restoration development in their niche, they have a regular, local, experienced group on hand, making this a positive component of the Dundas build. The findings indicating the importance and difficulty of securing trades with heritage and adaptive reuse experience are consistent with Shipley et al. (2006) and Seaman’s (2013) conclusions found in Section 2.4.3.
6.3.2 LOCATIONAL

6.3.2.1 Neighbourhood Demographics

As one developer stated “it costs the same amount to convert a school in the worst area of Hamilton as it does in the best – the neighbourhood and market make all the difference”. The average house values and income for each neighbourhood can be referenced in Section 5.0. For Stinson the average household income for the neighbourhood is quite low and almost 1/3 of the city’s average. The average housing price in 2009 was below what the developer was asking for the majority of the units. As such, it isn’t surprising that it took the developer several years to sell enough units to begin construction. Witton’s figures fared even lower than Stinson’s, however the Dundas neighbourhood saw incomes close to the city average and offered units for less than the average selling price in 2009. Overall, the neighbourhood demographics of both Witton and Stinson were not ideal for a luxury boutique condo project, therefore making this a negative characteristic, whereas Dundas’ demographics acted as an advantage.

6.3.2.2 Neighbourhood Support

Often heritage schools are seen as community landmarks, so it is therefore no surprise that all three neighbourhoods supported these developments with their new compatible residential use. One of the developers partially attributed this to being a known local developer, while others saw their transparency and approachability as one of the assets. At Stinson it was also thought that because of the neighbourhood’s high renter population, that perhaps some of the neighbours were indifferent. Overall, this characteristic was seen as a benefit in all three cases. This finding is not surprising given the results of the Strategic Council’s study (Bull et al., 2013), referenced in Section 2.3.4, that three quarters of Canadians hold the sentiment that well preserved historic buildings and old neighbourhoods are important to their communities.

6.3.2.3 Surrounding Uses

All three buildings are in established residential neighbourhoods, thus making the residential developments compatible uses. Unfortunately, both Dundas and Witton also have CN Rail as neighbours, which caused issues. See Section 5.3.3.4 for details. As seen by Bullen & Love (2009) in Section 2.3.5, this incorporation of more residential space attracts more people into the city, which will likely have the ripple effect of attracting retail and entertainment outlets, making this type of development especially compatible and beneficial for surrounding communities.

6.3.2.4 Zoning

At Stinson the “zoning change was a non issue” and therefore a benefit to the project’s success. With Dundas the rezoning process took time and the developer stated, “when you go through rezoning you are subject to every commenting agency’s will and it costs to get through them all”. With Witton, rezoning would have been a non-issue if it weren’t for CN Rail. “CN said they would absolutely not let the building be rezoned and that they had lots of funds available to fight the rezone indefinitely”. As such, both Dundas and
Witton received a negative characteristic rating for zoning, as this represented a difficult, expensive, time-consuming process in both cases.

6.3.3 LEGISLATIVE

6.3.3.1 COUNCILOR SUPPORT

All three developers found upper City management and councilors to be helpful advocates of their cause and often had to be turned to help side-step counter staff working silos and generally speed up the lengthy process of getting a building permit. This was characteristic was therefore evaluated as positive in all three project. This finding is supported by Shipley et al's (2006) statement, found in Section 2.3.5, that researchers and policy makers have recognized the desirability of having elevated numbers of residents in central areas to foster community and business revitalization.

6.3.3.2 CITY RESPONSE TIMES

Although the three developers found the City to be very helpful overall, they all found the process for acquiring the building permit frustrating. The development review committee and other city departments, have 21 days to return what plans have been submitted. Several times a small comment was made on the last day and returned to the developer effectively restarting the clock. In one instance the developer's plan was returned on the last day with no comments because the paper size wasn't the same as the other plans. The trait was therefore evaluated as being a negative component of each project's process.

6.3.3.3 COMMENTING AGENCY REQUIREMENTS

Meeting the commenting agencies’ requirements was a non-issue at Stinson however the same could not be said for Witton and Dundas. At Dundas the property abuts a CN Rail embankment, which Spencer Creek runs through and as a result, put the property within a flood plain. With the rezone CN Rail was demanding a crash wall be built (despite the fact that children were using the school before!) engineering and hydrology studies were required to mediate the flood plain issue and even the Ministry of Fisheries needed a report because of fish migration. " Obviously the ultimate goal is the building permit and if one agency doesn’t like something it stalls the entire project. As a result we had to provide every study under the sun: bird, tree, plantation, water filtration, soil stability, sound, shade, hydrology studies- you name it". Similarly at Witton CN Rail was initially unwilling to cooperate with the zoning change, and if they remained their ground, the project would have been impossible. As a result, Stinson was given a neutral rating, and Dundas and Witton negative ratings in relation to this project trait.

6.3.3.4 GOVERNMENT INCENTIVES

All three buildings benefited a great deal from the City of Hamilton’s government incentives, therefore making this a positive trait for each project. The details of each incentive can be found in section 5.0. This assessment mirrors Shipley et al’s (2006) findings, which can be referenced in Section 2.3.2, that incentives for adaptive reuse projects were mainly offered in secondary markets such as Brantford, Hamilton and Kitchener.
6.3.3.5 Parkland Dedication/ Cash-in-Lieu

This seemed to be a non-issue at Stinson, as the property possessed a great deal of it already, however a mentionable obstacle at Witton and Dundas. In both cases over six figures had to be paid out in lieu of parkland dedication. With Dundas, had the developer not paid for the necessary studies and mediation efforts, the land would have remained in a flood plain, generating no tax money and likely have to be turned into green space. Furthermore the property sits across from a park and directly in front of the escarpment eliminating any direct need for recreation space. As the developer pointed out "green space provision is more of a greenfield issue. Why are massive parkland fees required when the building is existing and in an area with an abundance of green space?". The Witton developers echoed similar thoughts “with infill there is no opportunity to attain the required ratio, like greenfield, so the developer has to pay. The amounts are a ratio, and they are not capped like DC’s making it a disincentive to do infill projects. Also it is never communicated where the money goes? Why not to some improvement within the neighbourhood of the development?” This characteristic was categorized as a neutral for Stinson as dedicating the parkland was not difficult to provide and as a negative for both Witton and Dundas as it proved to be costly for both developers.

6.3.4 Financial

6.3.4.1 Financing

As one developer put it “you could have all the skills in the world, but if you don’t have financing for a project, you’re done”. One off projects are always more difficult to finance, as they don’t have identical precedents to prove their level of risk. Of the case studies, Stinson had the most difficult time securing financing and ultimately had to go through private lenders, which unfortunately charge more. The developer of Dundas pointed out “traditional banks want 65-70% presale, but that is tough to do with a school because you have to start tearing it apart to actually know what you’re dealing with. You need to know that you can do what you say you’re going to do during the marketing phase”. In the end they secured their financing fairly easily through a credit union. At Witton, they defied what all the AR literature indicated and secured financing through one of the ‘big 5’ banks. Apparently the bank is trying to gain more business and exposure in Hamilton. Witton and Dundas had funding secured through banks and credit unions, so their fees weren’t as high as they would have been through private lenders, therefore categorizing this trait as a positive for them. As Stinson was privately funded, and therefore more costly, this was seen as a negative. These findings are consistent with the literature review and are discussed in Section 2.4.2.

6.3.4.3 Delays

All three schools experienced substantial delays for one reason or another. In the case of Stinson it was a combination of selling enough units to begin construction and getting the building permit from the City. With Dundas, as explained above, the process of rezoning and producing all of the commenting agencies’ requests for the building permit took time. Similarly, Witton experienced significant wait times trying to coordinate with the commenting agencies to successfully rezone as well as building permit delays. Like with
all business, time is money. As a result all three projects were categorized as a negative for this characteristic

6.3.4.4 Acquisition Cost

All three developers were able to purchase these sizable schools at low enough rates to make the project feasible – even with the mentioned headaches. Stinson: $1 million; Dundas $600,000 and Witton $575,000. As such, this characteristic was evaluated as a positive attribute for all three projects.

6.3.4.5 Presales & Marketing

At Stinson the presale took a fair amount of time, however the developer ultimately achieved his goal and secured price points which were thought impossible in that particular neighbourhood. At Dundas the project was barely marketed, as there was sufficient buzz an interest from the news articles alone. With Witton, because of its location in a transitioning neighbourhood, to attract the desired clientele the sales office had to be placed on the well-visited, trendy Lock St several blocks away. As both Stinson and Witton had obstacles to overcome with their marketing and presales, but ultimately overcame them, they were given neutral ratings for this characteristic. Because Dundas’ presales and marketing were such a success, it was categorized as a positive.
7.0 CONCLUSIONS & RECOMMENDATIONS

The following section summarizes the main findings from the preceding analysis, addresses the research questions and provides recommendations to facilitate this type of development.

7.1 SUMMARY OF ANALYSIS

The analysis illustrated that while each project faced its own unique set of advantages and disadvantages, patterns can be seen thus providing an idea of what characteristics are found to be commonly positive or negative. Given that all three projects were successful, it can likely be stated that the characteristics seen as advantages in every case, added to the project’s successful outcome.

In all three case studies the following characteristics were noted as being positive or neutral contributors to the project’s success: helpful architectural features; solid initial structure; positive adaptive reuse compatibility (using Giljahn’s approach); neighbourhood and councilor support; government incentives; low acquisition cost; successful marketing and presale process; little or addressable deferred maintenance issues and easy to provide parking.

In all three case studies the following characteristics were noted as being negative or neutral to the project’s success: construction and permit delays; the expense and large number of required studies expensive parkland dedication fees; commenting agency’s demands; lengthy city staff response times and a building code not sympathetic to infill construction. Although it should be noted that all three developers, regardless of their ease in acquisition, cited securing project financing as a make or break for the task.

7.2 SUMMARY OF RESEARCH QUESTION FINDINGS

PRIMARY QUESTION: WHAT ARE THE CHARACTERISTICS THAT HINDER OR FACILITATE THE SUCCESS OF A SURPLUS SCHOOL TO RESIDENTIAL CONVERSION PROJECT?

The characteristics that hinder or facilitate the success of a school to residential conversion can be thought of in the broad categories of property, locational, legislative and financial elements and are listed and discussed below.

PROPERTY ELEMENTS
- Unique Architectural Features
- Use Compatible with Giljahn Classification
- Building Code
- Deferred Maintenance
- Building Layout
- Parking/Traffic Considerations
- Sound
- Structural Conditions
- Specialized/Skilled Trades

LOCATIONAL
- Neighbourhood Demographics
- Neighbourhood Support
- Surrounding Uses
- Zoning

FINANCIAL
- Financing
- Delays
- Acquisition Cost
- Presales & Marketing

LEGISLATIVE
- Councillor Support
- City Response Times
- Commenting Agency Requirements
- Government Incentives
PROPERTY ELEMENTS

The architectural features of a surplus school building affect the residential reuse potential considerably. Often it is the unique heritage aesthetic of the buildings that initially attract developers and future tenants to the property. Desirable features include original brickwork, high ceilings, identifying main entranceways and staircases, heritage ornamentation such as hoodmolds and adorned exterior brickwork, large windows and stylized openings. These unique features can also justify high price-points and tend to attract the Creative Class. Schools built past the 1950’s typically do not possess the same style of features ideal for such a project.

Giljahn (1981) completed an in depth study to develop a classification system for the purposes of defining the ideal options for different types of surplus schools, based on their inherent features. This is an excellent tool for classifying school buildings to determine their suitability for a proposed new use. Pairing new uses with an unsuitable school building can hamper the success of a project.

The way with which the building code can be applied to the school’s new intended design is an especially important consideration for a non-purpose built project. Many developers found meeting code for their designs to be time consuming, costly and difficult.

The condition of the building and deferred maintenance is an obstacle commonly faced at the outset of adaptive reuse projects. The remediation of dangerous material, whether located within the building or the surrounding grounds, can be very costly. In the case of schools mould, lead and asbestos are common problems but typically dealt with by the school board prior to the sale – however not always.

Certain building layouts lend themselves to a residential conversion better than others. According to interviews with developers the ideal shape for a residential retrofit is a square or wide rectangle. Other shapes make the adaptation more challenging, as can wide hallways and the precarious placement of existing elevators and stairways, resulting in wasted space.

The ability to meet the city’s requirements for parking provision has the potential to be costly and difficult, especially with smaller plots of land. Although, the City of Hamilton is easing up on their former minimum one parking spot to one unit ratio. Furthermore, often with infill projects, the city wants to ensure that the new increased traffic demands are met with the appropriate rights of way, driveways and medians.

Often older buildings, and specifically schools of a certain age, possess wood floors that carry sound easily. Depending on the surrounding uses external noise factors may too require attention. As such sound meditation, and the associated costs are an influential feature of such projects.

Both the literature review and interviews suggested that not all schools are built equally. Those constructed prior to the 1950’s tend to have higher quality craftsmanship than their future counterparts, however should additional storeys be added to even those structures, difficulties ensue. The feasibility of the structural adjustment and repairs need to be considered when deciding to take on an adaptive reuse project.

As both the literature review and interviews show, finding the required specialized trades for such highly unique projects is difficult. It is challenging to find those with experience, those who enjoy and are equipped to take on the challenge of retrofitting structures where each unit is unique, to find them locally and to find them at a good a rate. Securing these trades can have a great affect on the project either way.
LOCATIONAL

The required neighbourhood demographics are important for the sale of a residential project as it can dictate what demographic would typically be attracted to an area, for taste and financial reasons. As one developer stated, the construction costs are virtually the same no matter what neighbourhood the redevelopment takes place in, but the returns can vary radically based on location.

If a neighbourhood does not support a given development, they can rally to prevent the zoning changes and amendments necessary to move forward with the project. This is especially plausible for buildings representing shared community heritage, such as schools, which the community feels an attachment to.

If the necessary zoning is not in place for a project, to rezone the property is costly and uncertain. In Hamilton a zone change costs a minimum of 20,000$ not including the studies and property changes the associated commenting agencies, such as conservation and rail authorities, may require for the amendment. Sometimes the school board will work with the city to rezone the property for an applicable future use.

LEGISLATIVE

City councilors and upper city management can be helpful, or unhelpful, advocates of a given development to help negotiate terms, side step counter staff and generally speed up the process of attaining a building permit. Without their support, or even opposition, a development can take longer or be in jeopardy all together.

City staff response times and staff department silos can be very frustrating for developers and prolong the process of attaining a building permit. This is especially the case when dealing with unusual or unique applications such as adaptive reuse projects, that don’t follow a typical development procedure.

When applying for rezoning, commenting agencies, such as conversation and rail authorities, typically voice their concerns and requirements for a given project foreword during the pre-consultation stage. Each associated agency or department can ask for studies to justify and confirm the effects of the development. These demands and studies can be very costly, time consuming and even prevent the development in certain cases.

Government or municipal incentives have the potential to make a project financially feasible and attract developers to take on a project that normally would present a greater risk. In the case of adaptive reuse projects this can equate to savings of hundreds of thousands of dollars in the form of development charge forgiveness, remediation, taxes and/or required studies.

Parkland (or Cash-in-Lieu) contributions are required with residential development to ensure a sufficient amount of greenspace is being provided for residents. This level of contribution is often dependent on the number of new residential square feet being provided and can be very costly. It has been said that these ratios are more applicable to greenfield development than infill.
FINANCIAL

As was very consistent and prominent throughout the interviews and literature, attaining financing for a project is vital. This can be difficult for one-off adaptive reuse projects, especially in neighbourhoods perceived as transitional or risky.

Delays, whether associated with various city departments, the associated commenting agencies or the lenders, are costly and frustrating.

The acquisition of a school building has to correspond with the level of risk and the estimated cost required to redevelop the property, or else the project will not make sense. Often schools, because of their perceived heightened level of risk, are sold at relatively low prices increasing the financial feasibility of their reuse potential.

Presales are essential for receiving project funding from a lender. To achieve such presales, the marketing campaign has to be successful. The visibility of the marketing strategy can be a challenging for schools not located on busy streets or areas that the target market wouldn’t typically frequent.

All of the described considerations are influential in the realization of a surplus school conversion project and can affect the ease and viability of the development.

For a more detailed discussion of each characteristic and how they affected the case studies examined, refer to Section 5.0.

SECONDARY QUESTION 1: WHICH TYPES OF SURPLUS SCHOOLS ARE GOOD CANDIDATES FOR THIS TYPE OF DEVELOPMENT AND WHY?

Not all surplus school buildings are good residential conversion candidates. Giljahn’s classification system is a good tool for initially examining a school’s reuse potential. The classification system examines, age, structural integrity, architectural features, layout, massing, typical location, ceiling heights and windows among other things. My findings are consistent with those of Giljhan and suggest that E & F type schools are not appropriate for this type of project. Due to their age they typically do not possess the same high quality of workmanship that a school built prior to the 1950’s would. Also, they do not posses the historic architectural features and detailed ornamentation that serve as strong marketing qualities facilitating the premium rates necessary for a viable return on investment. E & F type schools typically don’t possess sought after high ceilings, have awkward layouts for division purposes, fewer windows, are sold at a higher prices by school boards because of their newer age and are less likely to receive municipal incentives because of their location in newer, suburban neighbourhoods. Further proof of this, is that of the converted schools in Hamilton, none of them are the E&F classification of school. This classification does not assume that a building constructed after the 1950’s cannot be seen as a culturally significant resource worthy of heritage designation, but rather that typically the characteristics of this age of building are not usually suited to this type of project.

The following outlines the details and perceived reuse potential of E&F type schools, which does not include a residential use. The full matrix can be found in Section 2.6.2.
TABLE 4 – E&F Type School

| TYPE | Built post-war baby during baby-boom 1950’s & 60’s, 1-2 storeys, ‘finger-plan’ – low horizontal classroom wings using large amount of land which snake out from the central circulation area, low ceilings, concrete block interiors, narrow corridors, flat roof, no basement, unadorned brick exteriors and metal framed windows found in abundance in suburban areas. | Most suitable for offices, community centre, clinic or alternative education |
| TYPE F | Built 1970 & 80’s, ‘open-plan’ – individualistic architecture with large flexible spaces and decreased window/glass area, 1-2 storeys, predominantly flat roofs, unique shapes and placement of windows, concrete block interiors, high ceilings, wide corridors, bright colours and graphics, typically in suburban areas. | Most suitable for alternative education, clinic or community centre. |

SECONDARY QUESTION 2: ARE THE CHARACTERISTICS OF SCHOOL CONVERSION PROJECTS DIFFERENT FROM OTHER POPULAR REUSE OPTIONS, SUCH AS INDUSTRIAL BUILDING CONVERSION, AND WHY?

While there are undoubtedly certain characteristics present in any large-scale adaptive reuse project, such as securing financing and building permits, there are definitely certain features that are unique to schools. Schools often serve as pride evoking, community landmarks and gathering points for social activity in a way that a former bank, store or industrial property would not. As one interviewee put it:

“The detail often found in these structures is expensive to preserve but impossible to achieve in new construction. These buildings were the pride of the community when they were built and preservation honours the generation who sacrificed to make such a beautiful structures possible. Yes it is less expensive to construct spaces with lesser materials and detail, but they tend to be easily discarded, like the planned obsolescence that domestic car manufacturers were accused of”.

In addition to being community landmarks they are typically already in well established residential, walkable neighbourhoods, close to amenities making their transition to a residential use seamless unlike buildings with industrial uses. Industrial buildings tend to be surrounded by other industrial uses and not by the infrastructure, such as retail and green space, complimentary to a residential area like an existing neighbourhood would. The buildings themselves have deep floor plates and fewer windows, unlike classrooms that are typically the ideal size for an apartment unit, making them more difficult to convert. Furthermore, schools typically do not require the same expensive and time-consuming remediation efforts an industrial reuse would.

SECONDARY QUESTION 3: WHAT RECOMMENDATIONS CAN BE MADE FOR THE HWDSB, CITY OF HAMILTON AND FUTURE DEVELOPERS TO IMPROVE AND PROMOTE THE SCHOOL TO RESIDENTIAL CONVERSION PROCESS?

The following recommendations are based on information gathered about the adaptive reuse process generally, and the conversion of schools to residential properties more specifically, from the literature/policy review and interviews. The individuals interviewed all possessed experience with this type of development
in Hamilton and gave very specific information about the process as well as how they saw opportunities for improvement. Patterns that were seen consistently from those interviewed, paired with information from the literature/policy review and the analysis process were compiled into the following recommendations:

**SCHOOL BOARD**

If a school property is to be declared surplus, and also a good candidate for residential reuse (a B, C or D type building), it would be in the board’s best interest to work with the city to rezone the property and designate it prior to putting the building on the market. The developers interviewed found the rezoning process added cost, uncertainty and risk to their projects. In the past, heritage designation made potential purchasers wary, due to heritage compliance limitations. Both of these potentially expensive factors have the potential to add risk to future development and therefore drive down the potential selling price of the given school property. The City of Hamilton’s recent by-law amendment removes development charges for the adaptive reuse of heritage buildings, automatically making a designated surplus school more financially feasibly to take on as a residential reuse project. In summary, pre-zoning the property to suit its potential future conversion use and designating the building heritage, if applicable, would mitigate some of the financial risk for developers. In effect, this would make the school more attractive to purchase and likely providing a higher selling price for the building making it a win-win situation for the school board and developers.

**POTENTIAL DEVELOPERS**

The Characteristic checklist in chapter 6.0 serves as a good tool, or lens, for considering the residential reuse potential of a surplus school. One developer mentioned the importance of using his mental checklist of considerations when assessing the potential for a reuse project giving legitimacy to this recommendation. Secondly, if a developer does not have experience with reuse projects, older building stock or developing in Hamilton, this research suggests partnering with groups who do. In the case of the Stinson School conversion, the architect was switched to a local firm in order to sort out barriers to attaining the building permit the initial out of town architects were struggling with. Another example of why this is advisable was described by one of the interviewees:

“In one case a developer bought an old school in Hamilton because it was cheap. It was one of these developers from North Toronto who had never done a conversion project and had no development experience in Hamilton. After purchasing it, he had no plan for moving forward, ended up consulting with people who had experience in the reuse field and area, and ultimately ended up selling it at a higher price to the people he had consulted”.

In summary, it would be advisable for developers looking to undertake a school reuse project to use the characteristic checklist for initially analyzing the building potential and, if not experienced in the discipline or geographic area, to partner with those who are.

**CITY OF HAMILTON**

*Lower City-Wide Community Improvement Area*

The entire city lower city is full of unrealized potential, old character filled building stock, low property values and perceived risk. Feedback from the interviewees suggests that the entire lower city should be considered
a Community Improvement Area. As one interviewee pointed out “from a developer’s point of view, in most of Lower Hamilton you can’t charge as much rent and there’s a development charge disincentive to develop there. It’s counter intuitive and there is no question of the net benefit the city would see from development there”. As it stands many areas within the lower city do no fall into the boundaries of a CIA and miss out on development incentives, making the area less desirable to invest in than it already is. If the city is truly trying to revitalize its central city, making the entire area below the mountain, which is ripe with heritage and older building stock, a CIA would be an effective way to spur development activity, investment and revitalization. The increased property values, volume and taxes would likely represent greater city earnings that the amounts missed on by reducing or eliminating development charges.

Modified Approach to Development & Parkland Charges for Infill

The system for calculating development charges and parkland dedication was developed with traditional greenfield development in mind, not infill. Typically development charges are used to construct important, necessary infrastructure such as roads and sewers for new development. Similarly, Parkland Dedication is calculated to make sure new development is allocating sufficient area to greenspace, to ensure liveable neighbourhoods when laying out a new subdivision. In said situations DC’s and parkland dedication make sense – but infill projects cannot be painted with the same brush as they are very different in nature. As one developer stated:

“I don’t disagree with DC’s, in a greenfield site as there is a lot of infrastructure to pay for. However with downtown properties, the infrastructure is already there – the roads, the sewers etc. Whatever the city has to pay in terms of infrastructure, have the developer pay that but don’t penalize the developer and take advantage of them. The benefits of having upgraded/infill buildings in the center city from an economic standpoint in the long run is much more beneficial than what they would be making from DC’s”

Similarly, with Parkland Dedication, a floating ratio not capped at 10% like with DC’s, can be a very expensive and an automatic payout for infill/AR projects as they often have no conceivable opportunity to dedicate land, ultimately making the Parkland Dedication a money handout. Furthermore, with this automatic payout, there is never any indication of where the money is being used within the city limits. If the city does not plan to modify how much they charge infill/AR developers for parkland and DC’s, which this research suggests they should, then the city should at least dedicate the funds to improving greenspace within the project’s neighbourhood; examples of this could be a piece of public art or a local park upgrade.

Adaptive Reuse Working Groups or Project Managers

As the characteristic checklist demonstrates, all three developers reported an incapacitating disconnect between different departments and levels of authority at the City of Hamilton. Often to make simple things happen, the developers would have to go to their councilor or department management to solve issues that were often the result of departments operating in distinct silos or being unfamiliar with certain issues pertaining specifically to adaptive reuse projects. One developer mentioned that his experience in Toronto was very different with similar projects, because Toronto’s city employees were familiar with processing development applications for adaptive reuse projects. Perhaps the City of Hamilton should consider creating a working group that specializes in working through permits for AR projects, or a designated employee at the city whose roll is to see projects though from start to finish, bridging the gap between the different
departments. An employee designated to act as the middleman during the permit and regulatory process at the city would be familiar with all the project’s specifics, which would likely make the process more continuous.

System for Feedback and Accountability

One developer mentioned having a submission returned to him because the paper size of the submission was slightly different than that of the previous. Another developer reported a number of large, expensive issues that certain commenting agencies absolutely required and completely failed to mention in the pre-consultation process. Another mentioned receiving a one-line comment on a submission at the very end of the 21-day period, which once returned effectively restarted the 21-day clock for the city to respond to an updated submission. None of these incidents seem professional or fair and all end up costing the developer both time and money. Perhaps the reason these kinds of incidents are occurring, and reoccurring as the research suggests, is due to a lack of feedback or accountability. It should become routine for a developer to evaluate and give constructive feedback about their experience with the city, much like an employer would do for an employee during a review, or a professor would receive at the end of a semester. This would help the city improve the way development occurs with the city. The legislative section of the Characteristic checklist in Section 6.1 and interview suggests there is room for improvement.

7.3 FUTURE RESEARCH

In terms of future research, as more adaptive school reuse project take place in Hamilton, the research questions could be revisited to include a greater number of case studies to strengthen the validity of the conclusions and to learn more about the process. A next step could be a future study with a larger scope, including projects completed in other Canadian cities to compare and contrast findings. Also, a ‘highest and best use’ study could be conducted in the future to help identify alternative potential uses for school buildings other than residential, condos. A third study could include trying to quantify the benefits of an adaptive school reuse project within the community.

7.4 CONCLUSIONS

This research has provided the school board, city, future developers and interested groups with insight into the process and characteristics that affect the adaptive reuse of a surplus school in Hamilton, Ontario. As one interviewee stated “there is a reason more people aren’t doing these types of progressive projects – there should be more incentive to do them. If you can’t make decent money doing an AR project, what are most people going to chose – headache-free, quick money making greenfield or risky, infill?”. The obvious answer is the latter. Despite all levels of public policy in Ontario calling for Smart Growth, see Section 3.1.2, increased density and infill, certain City of Hamilton actions, policies and incentives effectively do not support these aims. The importance of revisiting and improving the process of adaptively reusing surplus schools is to breath new life into declining neighbourhoods and buildings that represent cultural value to the community while encouraging sense of place.
Stinson School Students 1920’s

Sanford Public School – Demolished April 2013
Retrieved from: http://hamiltonsusualsuspects.blogspot.ca/

Delta Secondary – Closing Summer 2015
Retrieved from: http://hamiltonsusualsuspects.blogspot.ca/
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Ontario Heritage Trust. (n.d.) *Provincial Plaque Program*. Retrieved from [http://www.heritagetrust.on.ca/Programs/Commemoration/Provincial-Plaque-Program.aspx](http://www.heritagetrust.on.ca/Programs/Commemoration/Provincial-Plaque-Program.aspx)


APPENDIX A – CONSENT FORM

FROM OLD MOULD TO FUNCTIONAL GOLD - AN EXPLORATION OF SURPLUS SCHOOL ADAPTIVE REUSE IN HAMILTON, ONTARIO

COMBINED INFORMATION & CONSENT FORM

Shwaan Hutton and Queen’s School of Urban & Regional Planning

11sjh12@queensu.ca

Queen’s University
Kingston, Ontario K7L 3N6

Dear ______________,

By this letter I invite you to participate in my research.

The following form, if signed, will give Shwaan Hutton consent to use your interview feedback for research purposes in her Masters Report entitled: “From Old Mould to Functional Gold – An exploration of Surplus School Adaptive Reuse in Hamilton, Ontario”.

Prior to signing below, please ensure that you have read the following and that the researcher has answered any and all of your questions to your satisfaction. My goal is to gain important insight into your line of work and the development atmosphere in Hamilton Ontario for adaptive reuse projects – specifically schools.

This agreement will signify your understanding, that you will be participating in the mentioned study and that your involvement will consist of answering the researchers questions. That being said, you are not obliged to answer any questions that you find objectionable or make you feel uncomfortable. The interview will take the form of a ‘semi-structured’ interview, which involves answering the prepared questions but feel free to discuss other related trains of
thought as you see fit. Your contributions will be used solely for the use of this report and only accessible by the researcher and her research supervisor—Professor John Andrew. However, the final research report will be made publicly available on the Queen’s School of Urban and Regional Planning website. Should you wish for your identity and project titles to remain anonymous, please indicate this to the researcher. Ultimately it is the hope that this research will contribute to the development of sound policy surrounding the redevelopment of surplus school sites in Hamilton and hopefully North America. I foresee the interview process taking anywhere between a half hour to an hour and half of your time.

You should be aware that if you have any questions or concerns that the researcher, Shwaan Hutton (contact info above) or her research supervisor andrewj@queensu.ca can be contacted at any time. Any ethical concerns about this study may be directed to the Chair of the General Research Ethics Board at chair.GREB@queensu.ca or 613–533–6081. Also, you should be aware that to my understanding there are not any risks to your participation in this research project.

Again, please know that your participation is voluntary and that you are free to withdraw information or your participation within three weeks of the interview. Should you wish for any additional confidentially provisions to be taken, please bring this to the attention of the researcher. This study has been granted clearance according to the recommended principles of Canadian Ethics Guidelines, and Queen’s University policies.

This statement signifies that you have read this ‘Letter of Information’, that your questions have been answered to your satisfaction and that a copy of this letter can be kept for your records.

Thank you again for your participation.

Name: __________________________ Date: ________________

Signature: ______________________

By initialing this statement below,

_____ I am granting permission for the researcher to attribute my name and the name of my projects to any quotes
APPENDIX B – INTERVIEW QUESTIONS

QUESTIONS FOR HAMILTON SCHOOL RE-DEVELOPERS

1) Your school conversion project gave an existing school building a new use. From an economic standpoint, what motivated you to take on a reuse project as opposed to a completely new development?

2) What characteristics attracted you to this property?

3) Often school properties come with existing fitness facilities ie: playgrounds & fitness areas. Do you consider these facilities to be an asset? Why?

4) How did you find out that this property was on the market?

5) Did you find the Neighbourhood to be supportive of your development? What neighbourhood characteristics do you look for when deciding upon a location?

6) Do you believe that school buildings have certain characteristics that lend themselves to a conversion project more than other existing structures, such as factories or other heritage buildings? If so, which characteristics would you identify?

7) Did you ever consider any other use for the property other than condos? Why or why not?

8) Who is your target market buyer?

9) What would you say the expected industry ROI standard is for an adaptive reuse projects of this scale? What had you anticipated and did you reach or exceed your expectations?

10) Did you encounter any problems financing or marketing your project? What factors did or did not contribute to this?

11) Normally, what are the primary costs associated with the conversion of a school into another use – in your case condominiums?

12) Adaptive reuse presents unique building challenges that a new development would not. Were there any unanticipated costs that came your way during the project? If so, what were they? (Ex: Parking requirements, heritage regulations, additional studies, building code technicalities, asbestos, lead piping or remediation to name a few possibilities).

13) What studies and amendments were required for your school property developments to facilitate the conversion?

14) Did your development take advantage of any municipal programs?

15) Did you find the City of Hamilton to be supportive of your development? If at all possible, what could they have further done to promote your development? (ie: speed, clarity of requirements, DC forgiveness, incentives etc.)

16) What specific policies do you feel municipalities, the provincial or the federal government could put in place to promote this type of development?

17) As you may know, in the coming years the City of Hamilton will be closing up to 30 schools deemed as ‘surplus’. After your experience redeveloping a school site in Hamilton, would you take on another school conversion project? If so, would you again stick to condos why or why not?

18) As a developer, do you see a heritage designation as an obstacle or a benefit?

19) What is your opinion of Delta Secondary School as a potential reuse project? From what you know about the school what would you say it’s redeeming features and challenges are?
20) Would a development partnership with either the city or the school board be something of interest to you? Why or why not?
21) Did you find it challenging to find tradespeople with the skills required to undertake a heritage reuse project?

QUESTIONS FOR HAMILTON PLANNERS/CITY OFFICIALS

1) As a planner/city official do you see surplus school conversion projects as beneficial to the city and the former school's communities? Why or why not?
2) As the HWDSB declares properties surplus, the City of Hamilton is considered a preferred agent for purchase. Is the City of Hamilton interested in acquiring such properties for development purposes?
3) Where does the city of Hamilton stand in terms of public-private development partnerships?
4) Based on demographics and existing institutions, what potential do you see for adaptive school reuse projects? I.E. Does Hamilton require more seniors housing? Affordable housing? Community space? Municipal Space? etc
5) In terms of zoning, because so many schools have been deemed surplus, has the city considered any special provisions for dealing with these properties? I.E. special policy areas, development charge & parking forgiveness, rezoning to facilitate use of the property, welcoming to amendments?
6) As a planner are you concerned about the future of these large properties in residential zones? I.E. the effect they might have should they sit empty? The catalyst they could bring should redevelopment be an option?
7) Do you think that special consideration for things such a parking requirements should be reconsidered to facilitate the adaptive reuse of such properties?
8) Although the City's Heritage Inventory is being updated, do you believe that Delta Secondary School will be listed as a building of interest or potentially designated? Why or why not?
9) What do you think is necessary for an adaptive school reuse project to be successful?
10) Do you believe that school buildings have certain characteristics that lend themselves to a conversion project more than other existing structures, such as factories or other heritage buildings? If so, which characteristics would you identify?
11) What municipal programs are currently available which might prove useful to developers looking to take on a surplus school reuse project?
12) What specific policies do you feel municipalities, the provincial or the federal government could but in place to promote this type of development?
13) In past experience do you find projects such as Stinson & Dundas School Loft projects to be well received by the community?
14) To your knowledge what studies and amendments have been required in the past to facilitate school conversion?
15) What is your opinion of Delta Secondary School as a potential reuse project? From what you know about the school what would you say it's redeeming features and challenges are?
QUESTIONS FOR ARCHITECT

1) What experience do you have with adaptive reuse projects?
2) Are you familiar with successful surplus school to loft conversion projects?
3) From a structural standpoint, what characteristics would be ideal for a school to loft reuse project?
4) What obstacles does an architect face when designing residential space within an existing school (generally, obviously every situation is unique)
5) Normally, what are the primary costs associated with the conversion of a school into another use?
6) Do you believe that school buildings have certain characteristics that lend themselves to a conversion project more than other existing structures, such as factories or other heritage buildings? If so, which characteristics would you identify?
7) What markets do you think this type of development would appeal to?
8) Adaptive reuse presents unique building challenges that a new development would not. Were there any unanticipated costs that came your way during past projects? If so, what were they? (Ex: Parking requirements, heritage regulations, additional studies, building code technicalities, asbestos, lead piping or remediation to name a few possibilities).
9) As an architect, do you see heritage designations as an obstacle or a benefit?
APPENDIX C – INTERVIEW NOTES

DEVELOPER 1 COMMENTS

• Obviously the ultimate goal is the building permit – if one agency doesn’t like something it stalls the entire project
• Large existing hallways take away from the sellable square footage
• Traditional banks want at least 65-70% presale and presale is tough to do on schools because you’ have to be able to get in there/tear it apart and see what you’ve got. You need to know you CAN do what you say you’re going to do
• Project has to seem solid enough to lender, that if the developer couldn’t finish it, the lender could and still make money out of it
• Rezoning – when you go through this you are subject to every commenting agency’s will. It costs to get through them all.
• Sound between units because of wood floor- sound engineer required
• Often many variances are required
• Flood plain – hired hydrologist, who indicated that if the nearby creek wall was flared a little more the site would be protected against a hurricane-like event (already big enough to withstand the 100 year flood). Conservation authority reviewed the report and approved it.
• The number of commenting agencies involved are a challenge
• Both an advantage and disadvantage that there was already an elevator. Advantage – we don’t need to pay to put one in. Disadvantage - not in an ideal location for the project (not central)
• Financing is crucial. – You could have all the skills in the world and if you don’t have your financing you’re done
• Getting through all the agencies is a primary cost
• CN wants crash wall strong enough to stop a train– although they have room to have it on their property, they want it to be on ours. Shouldn’t this be a shared cost? We are not even allowed any equipment on their property during the construction of the crash wall as it is a liability, making the task increasingly difficult
• Square rooms are ideal for this type of project 12x12, 13x13 etc
• We have developed a niche and become good at it, which helps our success. We are able to identify challenges because of our experience with Heritage Buildings and Adaptive Reuse
• Although the initial cost of the building may be less, this typically reflects the levels of challenge required to change it into a condominium project
• If the developer is actually a builder too, I believe this extra expertise helps with success
• Our location is in strong market, with historical significance and we can therefore expect premium dollar on reconstruction
• We are hands on developers 1) we know and understand what’s going on with the building and 2) have the same trusted trades people coming back with us project after project
• Typically schools don’t require as much (if any) remediation as an industrial building
• Schools are already in existing neighbourhoods (compatible use) unlike industrial buildings
• Older schools are typically in more walkable, central areas
• Beneficial if existing classroom walls can be used in historic schools; they’re a great size for turning into a unit
• Perfectly square or rectangular shaped schools (layout) perfect for conversion
• School board has an asbestos abatement program so by the time the developer gets it, most of it has been removed
• Location, location, location is SO important for this type of development
• Our school is directly across the street from a piece of land which once served as the school’s play space, however since it’s been severed and turned into city parkland. Good to know residents would have that for pets and for the view. Also good to know that because it is a city owned park, there is little reason it would ever be developed
• School building conversion’s typically have excellent walkability
• Parkland dedication typically 5% of project value – unless high density than it changes. Paid 600 000, valued project at 1.2 million before building permit issued and then they charged us 20% of that for parkland.
• Crash wall required as the school is close to a rain line – this has been a costly attribute
• The property was In a flood plain and therefore an existing non-conforming use (Spencer Creek through CN train embankment) again creating issues
• Builder has direct experience specifically in local market
• The Gym space, with its open rectangular shape and very high ceilings, was used to maximize number of units provided. In the end, 6 units were afforded within the gymnasium space
• People wanted to designate the buildings however the school board didn’t want to because they thought it would reduce the resale value
• A square or rectangular building is perfect for conversions – this school is shaped like an E posing a challenge. Centre corridor design with windows on the outside. Some dead space inside E as it is tricky to use the space effectively
• Flood plain was an issue, because if the problem couldn’t be solved a use involving people wouldn’t be possible and it would have a less risky commercial use like ministorage which wouldn’t have been ideal for a property with such beauty
• Residents wanted residential as opposed to commercial use in their neighbourhood
• Retirees are the target as they appreciate history a little more than other populations
• Having school registered heritage on title waved development levies
• ERASE program couldn’t be used
• 5% of land value at time of purchase required for parkland dedication
• School 80 000 sf of that 65 000 sf that’s usable. The rest is for stairwells and awkward shaped places that you can’t really use.
• Oil tank underground that had to be remediated (typically no remediation needed for school). Plus industrial building close by – had to look to see if anything had migrated across
• Very little asbestos left (only 14 000 $ for final renewal). Also it was great to know where it all was because of the existing report prepared for the school board – with many older buildings you have no idea
• Bird studies, tree studies, plantation studies, water filtration studies, soil stability, sound, noise, train - MANY STUDIES were required
• "Best program" for our development was waving DC charges due to heritage nature of the building – although NOT designated, it's a building of historical interest - we’re registering on title the area of historical interest within the building and this will have the same effect (with a plaque and everything despite not technically receiving designation in the tradition sense. Our request has been approved by heritage committee because the heritage planner explained to the planning committee that the end result has the same effect – so the exemption was granted
• Commenting agencies should be more accountable for issues that they have that they have not mentioned during the pre consultation process
• It is important to work closely with city officials as they can stall a project for a long time. They can give very minor comments and it restarts the clock on how long they have to review your application
• “we do a good job going into neighbourhoods before we develop in them to have informal meetings – we find out who the leaders in the community are – see what the concerns are. A lot of what happens is misinformation – we like to nail it down right away and let them know we’re local”
• Cost sharing (CN, city etc) birm/wall issues
• Given a change of use, if the building remains unchanged they shouldn’t be allowed to impose things that wouldn’t have been on the existing non-conforming use. I.e. there was no greater risk to the kids than there would be to the residents
• Wave parkland dedication fees for areas not required – more of a greenfield issue
• Many city policies don’t recognize the inherent differences between infill and greenfield development – can’t be painted with same brush. Perhaps insert a clause in by-laws that helps facilitate good infill development
• When property is appraised everything should be taken into consideration – evaluator often doesn’t know what they’re dealing with. They didn’t take into consideration the flood plain, CN issue etc which is a huge factor in the value
• Have a look at parkland dedication figures and get that back down to 5%, instead of high density ratio especially considering that this project was a property that paid no taxes alternatively. Without the studies we paid for (re: flood plain & crash wall) it would have had to be parkland. There is a park across the street. A ton of green space in area already.
• Development review committee is very good – firm deadlines in terms of turn around time (small comments, 21 days turns into a lot…)
• Would try public/private partnership in the future if it made sense
• Until you start tearing things apart, you just don’t know. You make allowances for the unknown – but if you do too many you talk yourself out of the project."
• It costs you the same amount, construction wise, to convert a building in the worst area of town or the best – market makes the difference.
• Our love is converting heritage properties”
• We gained our experience on smaller heritage projects and built up
• You could have all the skills in the world, if you don’t have the financing you’re dead
• “Lenders like the fact that we’re on the project all the time and that we’re not vacationing out in the Caribbean on a phone giving orders. And that is comforting to them, because if there is a problem you’re going to know about it right away.”
• When we first produced the report from the engineer there was no additional information coming in. We paid a significant fee to have it reviewed and handed them the report and asked the subject agency to please comment on it. If something needs to be adjusted that’s fine, we’ll make the adjustments right now or if they’re too much we won’t buy the property. What they said in writing is that they’re happy with the report. A full 18 months later when this came up. The agency ten wanted new study done on our dollar, as they decided the methodology of the existing study wasn’t good enough and wanted a particular kind of modeling done that no one in all of Canada has the expertise to do
• “There is a reason more people aren’t doing these type of projects – there should be more incentive to do this. If you can’t make decent money doing this, what are most people going to chose!? Poor greenfield development – despite what our policy documents call for.

• Initially on flood plain. Fresh water creek through runs through the property which adds extra commenting agencies to the process (fisheries)
• Developer drove by the property for years thinking that it would be a good space to convert – never thinking that it would come onto the market and that it would actually be realized
• Delta – even if not designated, if it’s on the city inventory for historic properties the ward councilor will likely push for the removal of DC’s.
• Parkland - you shouldn’t have to pay for and argue that the building didn’t already pay for parkland, and while that is true, the parkland is already here
• Mentally you’re going through a checklist of things you’re looking for: what is the parking like? What is the neighbourhood like? What are the resales going to be like? What are the features like? What are the hallways like? What’s the shape of the building like? What’s the orientation to the street? Does it lend itself to condo conversion? Does it lend itself to a street level application – maybe shops at grade? Could you get balconies? People like outdoor space. Can you use a rooftop terrace? What are the major mechanical systems? Can they be reused? Is there over power? Are there transformers? Do they supply enough power? A transformer could be 100-200 grand. What’s the opposition? Who is the councilor and is he prepared to support you – because you’re going to need it all the way along?

DEVELOPER 2 COMMENTS

• AR Not economically cheaper to do a conversion
• Generally developers lose money in conversion (industry standard)
• Nightmare financing – lenders hate them and the people who do them because they’re typically eccentrics
• Lenders like precedent for financing and AR projects don’t tend to have an identical example
• Trades not knowledgeable and hard to find because it is not simple and it is a niche making them hard and expensive to find
• Making things fit into an existing building is always a challenge (drywall to scaffolding)
• There are always unforeseen costs
• Every unit is different making it a more time consuming to design and build
• Heritage buildings scare off most developers however you can buy the property for less
• You cannot replace the character of heritage buildings with new construction no matter what you do
• Generally schools are in residential neighbourhoods unlike industrial – making the new use compatible in an existing residential environment
• You would not get the same density in a residential area as you would with a school because all the neighbours would fight it
• Shape of school ideal for this type of redevelopment – lots of existing windows vs industrial which tends to have deep floor plates, with long bowling alley units. Schools/classrooms have high ceilings, are well built, well maintained; don’t have the same environmental issue as industrial reuse. A school would have already dealt with remediation needs
• Property screamed character- big part of appeal
• Zoning change were a non-issue
• We can charge more for the units than you typically can in Hamilton, because there is NOTHING like it nearby - boutique
• The marketing was quite easy – the building lends itself to that
• We financed through a private lender. With a private lender you don’t get great rates
• Having experience doing this kind of project is key
• You can get 25$ per sf higher in Toronto for unique conversion project
• Nimby-ism – wouldn’t hold up in the OMB if someone were to try to fight this type of project
• Private lenders are more approachable for financing this type of project – however they charge more
• The only way to finance was to pre sell the units
• On a political level and senior management level, the city of Hamilton was very supportive – at a counter level the city of Hamilton was a mess. They don’t know how to process permits, they’re not talking to one another, they’ve never seen anything like this before. At the counter level they’re not against the idea of the development they just don’t know how to deal with it, making it very difficult
• This is a neighbourhood in transition, lots of renters who don’t care either way what happens – however overall that neighbourhood has been supportive
• Hamilton catch basin is around 1 million people and there are no good/boutique condos in the area making this a great market
• I probably wouldn’t take on a PPP because it doesn’t lend itself to the flexibility that we’re used to being our own boss.
• Meeting with community (held by councilor) saying the building is zoned institutional whether you like it or not, as of right without asking any institutional use can set up here. The halfway house- and other uses the neighbours wouldn’t want can set up without consultation. Or alternatively you can let this developer put in nice residential or fight the developer.
• There needs to be a champion who walks through the department who oversees the project within the city and breaks down the operational silos
• The developers are unaware of building code (part 11) – perhaps special team that deals specifically with conversion should be formed. Toronto city employees have done so many conversions they’re familiar with part 11.
• Make large allowances on a project like this in terms of projected ROI
• Original institutional zoning, while allowing for schools, also allows for halfway homes etc.
• If I had the $ I would’ve kept the units myself and rented them"
• Part 11 of the building code – it addresses non conforming buildings
• I’d love to get the delta secondary school – the façade is terrific. It has the aura – it would work. Without looking at all the details it passes the smell test
• After this is completed, we will have given a clue to other developers and it will be difficult for us to get the same amazing deal and they too will recognize the potential
• Purchased for 1 million but that was twice as high as the next closest bidder
• Nobody believed that that price point could be hit in Hamilton – but we’ve done it
• Target market were people who were looking for interesting residential who weren’t here already.

DEVELOPER 3 COMMENTS

• Traditionally this neighbourhood was not a desirable place to live
• Had to market the project further from the building, because of the transitional nature of the area, the target market wasn’t frequenting surrounding area. Sales office put on Locke Street-destination spot from from Ancaster, Burlington, Waterdown – people with more disposable income
• Soil issues, building never designed to hold three additional storeys- however we knew this going in
• CN rail yard proximity – BIGGEST challenge- trying to mitigate the sound
• Mission services wanted us to buy the building, but warned developer that CN would be an issue. Others tried to convert in the past and CN said they would not absolutely not let the building be rezoned and that they had lots of funds available to fight the rezone indefinitely
• Finally CN agreed, providing some concessions were made. Initially one was to have no windows facing the water (best selling feature!)
• Preserving existing structure while adding additional floors was our approach
• If it was designated heritage and there were no additional benefits other than just a nuisance than I don’t see it as an advantage– as there is no question that you have to deal with more process
• It’s always more difficult to find skilled trades for these projects– more so when project has many restoration components. Ours was mostly new other than the shell, so we ran into fewer problems that way.
• The school is in a great location – close to waterfront and transitioning downtown
• The property came with enough spaces for parking –we required a 1 unit for 1 space ratio
• A lot of existing infrastructure and the bones of the building were in quite good shape
• The view of water with the additional floors was an asset
• Our buyers are making a lifestyle choice to live in a condo – you can ask for higher prices given boutique nature
• Livable sized units, geared towards buyers not renters
• People are drawn to heritage buildings more than new build and willing to pay a premium
• We didn’t have much neighbourhood push back
• We’re collaborative and a Hamilton based company so it takes some of ‘evil developer’ stigma away and they have the city’s best interests at heart – so viewed differently
• Existing infrastructure and walls are an asset
We bought the building at a fraction of the price tag it would take to replace (750,000$!!!) still net-net a cost benefit to use existing structure despite have to replace some beams and columns etc. In CIP zone – reduced DC’s. 36 condo units, 3 story glass addition on top Used commercial corridor housing loan and grant program Also used downtown multi residential investment program Used Downtown property permit grant program (tax increment grant – get tax back the difference between what it would have been before the property improvement – goes down 20% each year to help soften blow) Issues during development = weight of existing building & soils The developer loves the area – they like taking on projects that have the potential to revitalize an area The space was an underutilized space, not for sale, but operating as a glorified soup kitchen so we approached them Iconic building that represents a change in neighbourhood ‘North of Barton’, despite being near water – Property values have typically gone up 100,000$ in the surrounding neighbourhood since the completion of the project Fantastic existing brick work used – then glass addition on top All utilities new. Stripped right down, only shell used For building to be able to hold 3 additional floors, structurally it had to be constructed so that the top 3 floors could stand alone whether the bottom two floor were there or not Foundation system use hilocopiers (250 needed under the building – added to cost) Rezoning required – took a long time, especially given CN’s demands Pavement all around building, no green Over 6 figures for parkland. Supportive neighbourhood, few renters, mostly home ownership Clean, well-kept neighbourhood (mostly Portuguese and Italian) however not necessarily overly desirable. Residential seemed like only option for the building at the time – if the rezoning wasn’t possible would have walked away from the project Units range from 700 sf-1400 sf –big range Even split between empty nesters and young professional. Typically no kids. Leave 10 % for new, 20% for existing in terms of contingency cushioning (ROI). Feel its still cheaper even given the contingency Financing done with TD – he felt they bet on the ‘people’. All to do with relationships and the ability to show positive track record where other developments have made money and been completed on time. Also TD wanted to show there willingness to work in Hamilton and get the word out there CIP zones – reduced DC’s Not designated heritage Not difficult to find trades as using mostly just the shell, no trying to preserve a lot of interior etc. Restructuring old building was tough in terms of trades, finding people to thread steal was difficult, because not many people know how to do that. Overall not bad.
• Parkland contentious point in Hamilton. With infill there is no opportunity to attain the required ratio, like greenfield, so the developer has to pay. DC’s are capped at 10% however not parkland. Therefore the more density you put on a site the more you pay for. It is a disincentive to do an infill project. Floating ratio. How about parkland improvement in neighbourhood. Never communicated where it goes.

• Credit unions more willing to finance the purchase of the building’s shell with the understanding of future plans. TD used a cost consultant to act as middle man with the bank between lender and developer.

• That’s the way it should be, let the market dictate – if the city wants it to be residential then just make it residential. Because there is a lot of risk in rezoning and it takes a long time. On average it’s about 10 months to rezone a property once everything is submitted – forget all the preliminary work that goes into it. If not pre-zoned it is a scary thing. Its time and money – every department checks a box typically saying they’d like a study (sun, traffic etc) 10, 000 each study roughly. Rezoning 6 figures undertaking before you get any clarity that you’re going to be able to do the development or anyone is going to want to buy it.

• Should have planned nodes around LRT that have the necessary/applicable zoning.

• “I don’t disagree with development charges. For greenfield sites there is a lot of infrastructure that the city has to pay for, so for me that is completely fair. However for downtown properties, I would almost prefer it was just the cost. Whatever the city has to pay in terms of infrastructure, have the developer pay that but don’t penalize the developer and take advantage of them. The benefits of having these upgraded/infill buildings in the center city from an economic standpoint in the long run is way more beneficial than what they would be making from the DC’s”.

• “lots of areas within the lower city which are not part of the CIP, so why not just have a huge open the doors to any development that’s proposed along, King, Barton or Main – there’s not a question of the net benefit development has along here for the city. From the developers point of view, in the areas not being incentivized, you can’t charge as much rent in those areas AND there’s a DC disincentive to develop there. It’s counter intuitive. Don’t penalize developers who want to do ANYTHING that is below the mountain. The sewers are already there, the road are there – what’s the cost?”

• Development charges (shouldn’t be a handout but shouldn’t be punitive either) and parkland are huge, the city wants to promote more people working and living downtown than they shouldn’t restrict any development at this point. If there are developers who want to do it get it done. Relief on DC charges has much more benefit than the grants and doesn’t cost the city anything. So if positioned properly, it doesn’t cost the city anything to have new development in lower Hamilton however the benefit is realized immediately.

• I think the tax grant is great.

• If there was somebody that you first talked to, like a liaison, that then was part of that project through the whole process – part of rezoning, part of building – it would be beneficial. You don’t want to have to go above, but sometimes you have to do that, because the staff that is working on it isn’t in a position to look at the whole picture, only their narrow part of it.

• It’s almost like the staff waits until this last day to make a comment. “this paper is not the same size as the rest of the papers so submit it again and we’ll look at it in 20 days” – that actually happened.

• The city as a whole wants development, as individuals they’re all great.
• Found out about the building because the same architect who designed another heritage project of ours
• If we were to do again 3 years later, would likely do the marketing closer to the building because that's how much the area has changed
• “When you give that much money to something that is counter intuitive in the first place, it would be nice to have it actually affect the area that you're investing in”. (parkland fees)
• Traditionally neighborhoods in North end against new development, however with our project the community and neighbourhood supportive. Traffic and noise mediated – overall people happy. Not renters, people who live in neighbourhood.
• “It would be great to see the DC and parkland money spent in the downtown – whether that be a public art piece or landscaping
• After doing this project, he would definitely do it again
• If delta was done well I think it would help the area. Must be rezoned and DC’s and parkland on that property removed to have it make sense. Can only ask for half the rental price in that neighbourhood as opposed to central downtown.
• Heritage designation – it's tough to assume all the risk, its tough to have somebody else dictate what they want. On the other hand we appreciate that built heritage has a communal level of ownership and we want to deal with heritage elements responsibly”.
• “We’re the heritage developer of the year, the last 4 years in the city – but we’ve never done a ‘designated’ heritage building which shows that we do the right thing with heritage property”.
• But some people look at heritage buildings differently and don’t appreciate the uniqueness. They look at straight line costs, easier to build, no variables, no complication, tear it down and we'll do something different. Incentives take away some of the risk or gives a bit of a buffer. If they don’t care about the city, they don’t care about the building; they just care about the bottom line. So whether heritage designation is a good thing or not the answer is a yes and no.
• I’d be happy to partner up with the city or school board if the numbers made sense

ARCHITECT 1 COMMENTS

• Schools with wooden floors instead of concrete and steel. Difficult to mediate ‘squeak’ and acoustics between floors
• Masonry interior walls present challenges for re-configuring
• Historic building regulations and conflict between fire code and preservation community
• Elaborate plaster interiors difficult to alter
• Often historic buildings are poorly insulated
• Tall ceiling bless and curse
• Meeting the parking requirement, however for senior’s housing less is required
• Asbestos can be found in area not overly obvious – caulking, acoustical ceiling tiles etc.
• Lead paint is not unusual and the elimination of this is burdensome
• To preserve historic windows, doors/plaster requires craftsmen which are rare and therefore costly/hard to find
• Adding electrical into existing partitions, if possible, adds expense
• Schools made of concrete and steel
• School to Senior’s housing projects successful and well received by neighbours and communities
• Existing Central corridors typically work well and +/- 900 sf subdivisions (especially for 2 bedroom flats)
• Masonry bearing walls at the perimeter
• High floor to floor height benefit for adding new required infrastructure (mechanical, plumbing etc)
• Seldom find toxic residue in historic schools unlike industrial reuse projects
• Schools tend to be in the heart of the community giving locational advantages such as mass transit and psychological connection to life around the building (especially for seniors housing)
• If school building large enough, there are opportunities to introduce multi-generational uses i.e. daycare, health club, branch library etc
• Market – good for independent senior’s living (especially given the boomers), - also attractive to young urbanites (although more parking required)
• Schools with cafeterias make for wonderful dining spaces for seniors homes, but not all have them. Gymnasiums are a good substitute however the lack or windows or high windows are a disadvantage
• Building code equivalencies often make historic conversion much easier to complete form an administrative standpoint

• The detail often found in these structures is expensive to preserve but isn't achievable in new construction. These building were the pride of the community when they were built and preservation honors the generation who sacrificed to make such beautiful structures possible. It is less expensive to construct spaces with lesser materials and detail but they tend to be easily discarded, like the planned obsolescence that domestic car manufacturers were accused of. “

ARCHITECT 2 COMMENTS

• Local architect hired on to straighten out building permit issues which the Toronto firm failed to do
• Fire rating a difficulty
• Sound traveling through wood floor a difficulty
• Difficult to determine the existing building's capacity to hold additional loads in as [school] is poured concrete
• Size of existing classrooms – ideally you do not want to move walls. Ideally a classroom is a unit
• Also the location of existing windows a benefit
• From an architectural point of view, designation is an obstacle because you need permission to do anything. “ a good architect would know enough not to approach an undesignated heritage building and respect the unique features of it without having hands tied behind their back for designation. You can do some pretty creative things without the designation.”
• Bringing building envelope up to code
• Designed for heavier loads than we put in them. i.e. they were designed to hold 30 kids plus furniture. Therefore buildings themselves are inherently suites, however it is when you try to add on to them that you run into additional challenges
• Location – in older established residential neighbourhood, clean sites
• Asbestos found in pipes, no where else, so no big deal
• Schools have pretty good floor plates in terms of depth as compared to a factory. A factory could have a depth of 125 feet, also factories don’t necessarily have windows. Whereas a school has a shallower footprint
• Original architect did not take advantage of the inherent fire resistant qualities of the building when redesigning the school – part of why we took over
• Great brick walls in between classrooms and the original AR architect covered them with drywall although you didn’t need to because you still got the rating (fire) with the brick itself
• Wood flooring – difficult to mitigate. Ultimately laminate additional layer of drywall to get more mass in the floors.
• Difficult to determine the existing building’s capacity to hold additional loads in [school] as it is poured concrete
• [school] – difficult because the classroom size is narrow so it’s not a perfect unit size. Bedroom not on outside wall where window is. They get natural light through sliding panels – which is a cool look
• [school] has wide hallways but we’re going to keep them wide. Toronto developer who bought the school because it was cheap “one of these guys, from North Toronto who has never done a conversion project before and looks at the price and says’ ooh look how cheap it is’. It’s Hamilton, it’s cheap, I’ll buy it” Then he didn’t have a plan for going forward with it. So we brought in someone with experience to consult, who ultimately bought the building.
• [School] layout was difficult, because each unit was very different, which takes longer to draw because every unit needs to be figured out. Mechanical system layout is different In every unit. Even constructing it is difficult as no unit is the same and the trades people love repetition – they are forced to look at the drawings of every suite. All of this made it take so long.
• Finishes within [school] aren’t that great there weren’t many heritage features to work with – we saved railings from school and retrofit glass into them to meet building code (opening too big)
• [developer] looking into having [future school project] designated heritage to save on development charges
• Building envelope tricky in terms of bringing it up to code for energy efficiency. Because old buildings do not have insulation, that needs to be added to bring it up to code and you have to be careful of how that affects the integrity of the existing building. In the case of the perimeter brick wall, you lose the brick to accommodate insulation and drywall and hope that you can have the exposed brick elsewhere
• Reclaimed brick hard to salvage as you get a lot of breakage, very costly and time consuming to chip off mortar

PLANNER 1 COMMENTS
- Surrounding neighbourhood doesn’t support less parking in a development as it often leads to parking on the street
- If building is not designated, to be exempt of development charges, may have to wait while process is being initiated and then not necessarily guaranteed.
- Sees the projects as being beneficial as they breath new life into empty buildings
- If turned into a residential use, obviously brings more people into the area then they’ve got the demand for the “butcher, the baker, the candlestick maker’. Symbiotic relationship between the neighbourhood/residential and commercial
- Obviously the property has to go through zoning which prevents incompatible reuse
- Many banks will not fund remediation so that city has their brownfields grant to fill the void. This programs is ERASE and it covers the entire urban area
- I believe the city needs mostly affordable housing and seniors housing. New zoning by law does encourage more residential especially of surplus school properties
- Our new zoning does encourage residential development, particularly of schools as we have changed the neighbourhood zoning to allow conversion of industrial to commercial and residential without going through a zoning amendment (was 20 000$ before)
- Sees successful conversion projects as being as catalyst for the neighbourhood
- Prevents the negative effects a massive empty building like a school - would create such safety issues, vandalisms, property values would decline, insurance for surrounding neighbourhoods would increase
- As the preferred agent, the city often purchases surplus school lands for parkland, servers the property so that we get what we need and sells the rest off to developers. Especially if the city is deficient in parkland for the area, the school grounds often come with existing greenspace
- Hamilton Reality Capital Corporation (actually city of Hamilton) works with a developer and matches the developer’s investment. They typically buy anchor projects that normally would be seen as high risk to redevelop downtown such as the Canon Knitting Mills. The way the city sees it even if the project does not make money, they’re making it back in other ways through property tax and spin-off investment etc
- Because of projects like the Stinson school, and other heritage AR projects coming up city wide, the DC bylaw was changed to exempt any designated heritage building from the charge. This was done to promote the preservation of Hamilton’s beautiful heritage stock. This can represent millions of dollars in development fees
- The multi residential property investment program, i.e. converting school to multi residential 0% loan of up to 25% of the cost to construct (CIP zones only)
- Tax back program.
- All the programs can be piggybacked
- If designated, grants for up to 150 000 to restore features and up to 20
- Perhaps we should look at requiring less parking as LRT moves in, if car share provided as bike lanes improve etc.

**PLANNER 2 COMMENTS**
• Parking provision always an issue in infill and AR projects
• It’s beneficial to the city to make use of an existing building (often heritage) and we have plans and policies in place which speak to preserving that heritage
• Advantage that these properties are already serviced
• Intensifies - matches up with places to grow objectives and similar policies
• AR a good thing to get people populated and into those neighbourhoods
• Nobody wants a vacant building – eyesore, magnet for vandalism
• Real estate division looks into whether the city should acquire or not
• Councilor is keen to help facilitate a buyer/use for Delta School
• City partnered with school board – community center and school joint venture
• City wants to see more residential in lower city – resident numbers have not been increasing
• Perhaps relax parking standards to promote residential given proximity to transit
• DC exemption for AR of designated property. (OHT)- must be designated not just a property of interest - depends what designation speaks to (only window etc).
• MURRAY STREET (Witton lofts) used commercial corridor housing loan and grant program
• Downtown multi residential investment program
• Downtown property permit grant program (tax increment grant – get tax back the difference between what it would have been before the property improvement – goes down 20% each year to help soften blow)
• Especially in suburban areas, the site is already pre zoned for residential in the event that they close and it make process flow more smoothly
• Some schools have been zoned for parkland and remained that way after the school closed – a few examples of that in Hamilton
• School sites often used as community park when in use an once the school is closed, the neighbourhood still feels it needs the parkland – sever property to keep green and include housing
• “ maybe you could have a dedicated team within building services that deals with these occurrences when they happen, so they can bring the knowledge the have from previous projects to the next one” – this is the future if Hamilton is to walk their talk. Steps to do this is just a matter of allocating and assigning a working group to deal specifically with AR – “ it wouldn’t be a hard thing to do”
• All day GO service in 2014, grocery store in Jackson Square
• “ We have relaxed parking requirements in the downtown as well, so if an AR of a building downtown you would just need to provide existing parking space you wouldn’t have to add more.”
<table>
<thead>
<tr>
<th>Address</th>
<th>Status</th>
<th>Minimum</th>
<th>Average</th>
<th>Maximum</th>
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</thead>
<tbody>
<tr>
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<td>Low</td>
<td>$1,990,000</td>
<td>$2,174,000</td>
<td>$2,593,000</td>
</tr>
<tr>
<td>51 4TH ST</td>
<td>High</td>
<td>$2,358,000</td>
<td>$2,699,000</td>
<td>$3,193,000</td>
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**Condo Fee**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Price</th>
<th>Size</th>
<th>Lot Size</th>
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</thead>
<tbody>
<tr>
<td>4 TOWNHOUSE</td>
<td>$2,358,000</td>
<td>1,990 sq ft</td>
<td>19 x 50 ft</td>
<td>2,593 sq ft</td>
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<tr>
<td>1 TOWNHOUSE</td>
<td>$1,990,000</td>
<td>1,850 sq ft</td>
<td>19 x 110 ft</td>
<td>2,174 sq ft</td>
</tr>
<tr>
<td>2 TOWNHOUSE</td>
<td>$1,990,000</td>
<td>1,650 sq ft</td>
<td>19 x 110 ft</td>
<td>2,174 sq ft</td>
</tr>
<tr>
<td>7 TOWNHOUSE</td>
<td>$1,990,000</td>
<td>1,500 sq ft</td>
<td>19 x 110 ft</td>
<td>2,174 sq ft</td>
</tr>
</tbody>
</table>

**Condo Garage/Type**

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Price</th>
<th>Size</th>
<th>Lot Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 TOWNHOUSE</td>
<td>$2,358,000</td>
<td>1,990 sq ft</td>
<td>19 x 50 ft</td>
<td>2,593 sq ft</td>
</tr>
<tr>
<td>1 TOWNHOUSE</td>
<td>$1,990,000</td>
<td>1,850 sq ft</td>
<td>19 x 110 ft</td>
<td>2,174 sq ft</td>
</tr>
<tr>
<td>2 TOWNHOUSE</td>
<td>$1,990,000</td>
<td>1,650 sq ft</td>
<td>19 x 110 ft</td>
<td>2,174 sq ft</td>
</tr>
<tr>
<td>7 TOWNHOUSE</td>
<td>$1,990,000</td>
<td>1,500 sq ft</td>
<td>19 x 110 ft</td>
<td>2,174 sq ft</td>
</tr>
</tbody>
</table>

**Search Statistics for Listings**

- **Total Listings:** 80
- **Closed Listings:** 2
- **Pending Listings:** 3
- **Active Listings:** 2
- **Statistical Criteria:**
  - Status: Closed, Pending, Active
  - Minimum Price: $1,990,000
  - Maximum Price: $2,593,000
  - Minimum Size: 1,500 sq ft
  - Maximum Size: 1,990 sq ft

**Commencement Date:** 08/10/2009 and 07/13/2010
Dominant Market Group: Single City Renters

Young, apartment-dwelling urban singles and couples

Population: 273,343 (0.77% of Canada)
Households: 143,455 (1.02% of Canada)
Average Household Income: $42,208
Renters: Mixed
Service Sector & White Collar
Medium
Global Consciousness

Life can be stressful in Single City Renters, a transient world of mostly poor, young singles and single-parent families. In their crowded neighbourhoods, found in mid-sized cities, more than a third of household maintainers are under 35 years old and nearly 90 percent rent apartments in low- and high-rise buildings. Because money is tight, they entertain themselves by engaging in low-cost sports like billiards, bowling, basketball and fitness walking. For a big date, they'll head for a nightclub, motorcycle show or music festival. While such excursions may be infrequent, the residents in Single City Renters don't complain: these Canadians tell researchers that they have little control of events affecting their lives. Instead, they cope by shopping at bulk food stores, skipping costly plays and exhibitions, and doing volunteer work in an effort to improve their community.

Young and mobile, one-third of Single City Renters residents have moved into their neighborhoods in the past year. But their mixed levels of education belie their modest incomes; about 40 percent have gone to college or university but still earn low incomes from entry-level jobs in sales and service. In their apartments, they like to wind down watching TV sitcoms, crime dramas, cartoons and nature shows. And they'll tune in a classic rock station while preparing dinner. But mostly these young, tech-savvy consumers find their entertainment online. In Single City Renters, residents have high rates for logging online to blog, download music, spend time on Facebook and YouTube, search for jobs and buy products—preferably at auction sites where they can snag a deal.

Where They Live

London (ON), Edmonton (AB), Winnipeg (MB), Halifax (NS), Kitchener (ON), Ottawa (ON), Kingston (ON), Saint John (NB), Windsor (ON), St. Thomas (ON), Hamilton (ON), Peterborough (ON), St. Catharines (ON), Regina (SK)

How They Think

In their values as in their mobile, apartment-dwelling lifestyles, members of Single City Renters are somewhat rootless. They're more likely to describe themselves as citizens of the world (Global Consciousness) than residents of their own cities (low Community Involvement). Many are searching for meaning in a life, pursuing Religion and Spiritual Quest in their hunt for answers. They tend to be open-minded on many social issues, supporting Flexible Families, Sexual Permissiveness and Equal Relationship with Youth. And despite their modest means and frequent mobility, they express a sense of Financial Security and believe they have Personal Control over their destiny and day-to-day life. These young Canadians look to an Active Government to solve larger social issues, but their own sense of Duty indicates they feel an obligation to help others. Before themselves. And they tend to be discriminating consumers in the marketplace, basing their decisions on logic and reasoning over emotion and feelings (Emotional Control) and seeking products that help them express their personality (Personal Expression).
Households (continued)

Age of Home

Owned / Rented

Socio-Economic

Employment

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<thead>
<tr>
<th>Employment Rate</th>
<th>62.61%</th>
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<td>Occupations in Sales and Service 41.07%</td>
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<tr>
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<td>Occupations in Trades, Transport, Operators 17.36%</td>
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<td></td>
<td>Service Sector &amp; White Collar</td>
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</table>

Average Household Income

<table>
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<tr>
<th>NBHOOD</th>
<th>FSA</th>
<th>City</th>
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<tbody>
<tr>
<td>$37,736</td>
<td>$40,223</td>
<td>$92,086</td>
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</table>

Highest Level of Education

- University: 10.43%
- College: 11.3%
- High School: 25.22%
- Other: 53.05%
### Cultural

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<th>NBHOOD</th>
<th>FSA</th>
<th>City</th>
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<td>English 87.26%</td>
<td>English 66.77%</td>
<td>English 75.95%</td>
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<td>French 3.47%</td>
<td>Other Languages 3.61%</td>
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<td>Dominant Language #3</td>
<td>Other Languages 2.70%</td>
<td>Chinese n.o.s 3.12%</td>
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<td>Tagalog 2.78%</td>
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<td>NBHOOD</td>
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<td>City</td>
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<tr>
<td>Immigrant Population</td>
<td>24.32%</td>
<td>37.61%</td>
<td>25.14%</td>
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<tr>
<td>Non-immigrant Population</td>
<td>75.68%</td>
<td>62.39%</td>
<td>74.86%</td>
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</table>

### Report Parameters

**Demographics**

NBHOOD=Neighbourhood, FSA=Forward Sortation Area, CITY=Census Metropolitan Area

The Neighbourhood is based on the Dissemination Area for the Subject Property, which is a small area composed of one or more neighbouring dissemination blocks, with a population of 400 to 700 persons.

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*Currency of Information. Data contained in the Geowarehouse reports are not maintained real-time. Data contained in reports, other than the Parcel Register, may be out of date ten business days or more from data contained in POLARIS.*

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*Completeness of the Sales History Report. Some Sales History Reports may be incomplete due to the amount of data collected during POLARIS title automation. Subject properties may also show nominal consideration or sales price (e.g. $2) in cases such as transfers between spouses or in tax exempt transfers.*

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Search Criteria
Search Name: Copy of RES Simple Search
Date: August 25, 2014 9:08:59 PM

Search Criteria Field
Status is
Commencement Date is between 08/01/2009 and 07/31/2010
Property Type is

Search Statistics 5 Listings
5 Sold Listings

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<td>95 %</td>
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<td>99 %</td>
<td>27</td>
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<tr>
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<th>Price</th>
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<th>Garage/Dr/Wy</th>
<th>Condo Fee</th>
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<td>477,700 05/12/2010</td>
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<tr>
<td>2</td>
<td>74 ROBINHOOD DR</td>
<td>SO</td>
<td>2STRY</td>
<td>395,000</td>
<td>389,000 02/26/2010</td>
<td>59.02 X 118.9</td>
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<td>4</td>
<td>DGAR,DRIV,RENT,PSURF</td>
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<td>48 TWEEDSMUR AV</td>
<td>SO</td>
<td>1.5</td>
<td>279,900</td>
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<td>3DRIV,GARG</td>
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<td>3DRIV,SDRV</td>
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</table>

Handwritten notes:
- "August 25, 2014"
Dominant Market Group: Money & Brains

Upscale, educated couples and families

Population: 633,377 (1.79% of Canada)
Households: 244,084 (1.73% of Canada)
Average Household Income: $133,212

Housing Tenure: Homeowners
Education: University
Occupation: White Collar
Ethnic Presence: Medium
Sample Social Value: Introspection and Empathy

The residents of Money & Brains seem to have it all: high incomes, advanced degrees, and sophisticated tastes to match their credentials. Many of these Canadians are empty-nesters or married couples with university-aged children who live in older, fashionable homes in urban neighbourhoods. With about 40 percent holding university degrees, Money & Brains consumers exhibit cultured sensibilities in the marketplace. They have high rates for going to the theatre, symphony, art galleries, and the ballet. At home, they read lots of books, listen to classical music radio stations and subscribe to business, news, and travel magazines. A politically active cluster, residents here rank high for working on community projects, serving as volunteers and writing letters to public officials. They also support a long list of philanthropic causes, exercising their well-developed social conscience with both their time and money.

Money & Brains is one of the top clusters for buying financial products. These savvy Canadians invest in virtually every kind of mutual fund available. But these households are also home to a significant proportion of young adults living with their parents, as surveys reveal the popularity of a number active pastimes enjoyed by all family members, from skiing and doing aerobics to patronizing nightclubs, community theatres and rock concerts. To reach Money & Brains consumers, marketers typically place ads in business and travel publications, during TV golf shows and in the programs of jazz festivals. The residents of Money & Brains like to cultivate both mind and body.

Where They Live

Ottawa (ON), Oak Bay (BC), Saanich (BC), North Saanich (BC), London (ON), North Vancouver (BC), Burlington (ON), Beaconfield (QC), Hudson (QC), Pointe-Claire (QC), Regina (SK)

How They Think

With a name like Money & Brains, it’s no surprise that Intuition and Impulse is the lowest ranking social value for this group. These family-focused, upscale residents are keen to maintain an egalitarian relationship within their households, holding an Equal Relationship with Youth above all other values. Their belief in Flexible Families also reflects their open-minded attitude toward family structure and traditional authority (high for Rejection of Authority). But while they have some progressive ideas toward social interaction, they also show a competitiveness that has allowed them to achieve their place among the socioeconomic elite of Canada, with high scores for Personal Challenge and Vitality. Confident and ambitious, they draw on their Personal Creativity in their work and personal lives and express a need to be in charge (Personal Control). But these residents are open to self-reflection and Introspection and Empathy. And they look for connections while considering themselves both proud Canadians (National Pride) and citizens of the world (Global Consciousness). With a high score for Ecological Concern, they worry jobs and the economy are taking precedence over environmental protection measures; indeed their Ecological Fatalism indicates they feel that an industrialized society will inevitably damage the environment.
Households (continued)

Age of Home

 Owned / Rented

Socio-Economic

<table>
<thead>
<tr>
<th>Employment</th>
<th>NBHOOD</th>
<th>Average Household Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Rate</td>
<td>61.78%</td>
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<tr>
<td>Dominant Profession #1</td>
<td>Business Finance Administration 26.94%</td>
<td>FSA $112,934</td>
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<tr>
<td>Dominant Profession #2</td>
<td>Management 17.51%</td>
<td>City $92,086</td>
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<tr>
<td>Job Type</td>
<td>White Collar</td>
<td></td>
</tr>
</tbody>
</table>

Highest Level of Education

- University: 48.0%
- College: 22.86%
- Other: 19.75%
- High School: 13.98%
### Cultural

<table>
<thead>
<tr>
<th>Language</th>
<th>NBHOOD</th>
<th>FSA</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dominant Language #1</td>
<td>English 96.24%</td>
<td>English 85.65%</td>
<td>English 75.95%</td>
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<tr>
<td>Dominant Language #2</td>
<td>Italian 2.20%</td>
<td>Other Languages 1.90%</td>
<td>Other Languages 2.65%</td>
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<tr>
<td>Dominant Language #3</td>
<td>Other Languages 1.76%</td>
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<tr>
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<tr>
<td>Dominant Language #5</td>
<td>Multiple Languages 1.17%</td>
<td>French 1.06%</td>
<td>French 1.52%</td>
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<table>
<thead>
<tr>
<th>Immigration Status</th>
<th>NBHOOD</th>
<th>FSA</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immigrant Population</td>
<td>17.57%</td>
<td>16.24%</td>
<td>25.14%</td>
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<tr>
<td>Non-Immigrant Population</td>
<td>82.43%</td>
<td>83.76%</td>
<td>74.86%</td>
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</tbody>
</table>

### Report Parameters

**Demographics**

NBHOOD=Neighbourhood, FSA=Forward Sortation Area, CITY=Census Metropolitan Area

The Neighbourhood is based on the Dissemination Area for the Subject Property, which is a small area composed of one or more neighbouring dissemination blocks, with a population of 400 to 700 persons.

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Reports Not the Official Record. Reports, other than the Parcel Register, obtained through Geowarehouse are not the official government record and will not necessarily reflect the current status of interests in land.

Currency of Information. Data contained in the Geowarehouse reports are not maintained real-time. Data contained in reports, other than the Parcel Register, may be out of date ten business days or more from data contained in POLARIS.

Coverage. Data, information and other products and services accessed through the Land Registry Information Services are limited to land registry offices in the areas identified on the coverage map.

Completeness of the Sales History Report. Some Sales History Reports may be incomplete due to the amount of data collected during POLARIS title automation. Subject properties may also show nominal consideration or sales price (e.g. $2) in cases such as transfers between spouses or in tax exempt transfers.

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Parcel Mapping shown on the site was compiled using plans and documents recorded in the Land Registry System and has been prepared for property indexing purposes only. It is not a Plan of Survey. For actual dimensions of property boundaries, see recorded plans and documents.

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### Search Statistics 29 Listings
29 Sold Listings

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<th>Baths</th>
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<th>LP</th>
<th>LP/SqFt</th>
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<th>Price</th>
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### Condo Fee
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- 2: $318.0
- 3: $1.0
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<th>#Beds</th>
<th>Garage/DrWy</th>
<th>Condo Fee</th>
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<td>SO</td>
<td>1STORY</td>
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<td>360,000</td>
<td>COMMON ELEMENT</td>
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<td>1</td>
<td>PSURF,SDDRV</td>
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<td>25</td>
<td>50 Murray ST</td>
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<td>250,000</td>
<td>240,000</td>
<td>common element</td>
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<td>438 BAY ST N</td>
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<td>1STORY</td>
<td>250,000</td>
<td>240,000</td>
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<td>2</td>
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### Search Criteria

**Search Name:** RES Simple Search  
**Date:** August 25, 2014 5:55:49 PM

**Search Criteria Field** | **Operator** | **Criteria**  
--- | --- | ---  
Status | is |  
Selling Date | is between | 08/01/2009 and 07/31/2010

### Search Statistics 23 Listings

**23 Sold Listings**  

| High | 5 | 2 | 0 | $750,000 | $690,000 | 127 % | 78 |  
| Average | 2 | 1 | 1 | $202,859 | $91,100 | 84 % | 5 |  
| Median | 3 | 1 | 1 | $186,950 | $195,333 | 97 % | 30 |  

### als_cma grid

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<thead>
<tr>
<th>#</th>
<th>Address</th>
<th>Status</th>
<th>Style of Dwelling</th>
<th>Price</th>
<th>Selling $ SD</th>
<th>Lot Size</th>
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<td>225,000 06/18/2010</td>
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<td>259,000</td>
<td>220,000 06/18/2010</td>
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<tr>
<td>4</td>
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<td>2STRY</td>
<td>220,000</td>
<td>220,000 06/08/2010</td>
<td>18.83 x 80</td>
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<td>2STRY</td>
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<td>OTHER</td>
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### Footnotes

- #FB:  
- #Beds:  
- Garage/DrWy:  
- Condo Fee:  

**Footnotes:**  

- 1 3  
- 0 2 DDIV  
- 0 2 DDIV  
- 1 2 OTHER  
- 1 3  
- 0 4 SDDRV,DDIV  
- 2 3 DDIV  
- 1 2 SDIV  
- 2 2 OTHER  
- 1 3  
- 1 3 SDIV  
- 2 3 FDRV  
- 1 2 FDRV,PSURF  
- 1 3 OTHER  
- 1 3 SDIV  
- 1 2 PSURF  
- 0 3 OTHER  
- 2 3 NDRV  
- 1 3 OTHER  
- 1 3  
- 1 5 NDRV

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**August 25, 2014**
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<th>Condo Fee</th>
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Dominant Market Group: Mobility Blues

Young, mobile downscale citydwellers

Population: 546,791 (1.55% of Canada)
Households: 238,278 (1.69% of Canada)
Average Household Income: $57,348
Housing Tenure: Homeowners & Renters
Education: Grade 9/High School
Occupation: Service Sector & Blue Collar
Ethnic Presence: Low
Sample Social Value: Interest in the Unexplained

Located throughout English Canada in cities as well as small towns, Mobility Blues present a working-class portrait: a population of young singles, families, and single parents who are often on the move, to the point of sometimes feeling rootless. Residents here not only tend to move often, they also have a high rate of employment in transportation, in addition to manufacturing and sales. No one's particularly well off in Mobility Blues, but residents live decently on downscale incomes. They like to go to the movies, attend music festivals, gamble at casinos and take the occasional trip within Canada, often staying in their campsers or at a hotel. At home, they enjoy cooking, sewing, going online to download podcasts or watch YouTube videos and listening to the radio; country, mainstream rock and classic hits are favourite genres. With many working at tiring industrial jobs, they admit that they're happy just to relax at home at night.

The residents of Mobility Blues may be modest consumers but they score high as TV fans. Surveys show that they're eclectic in their TV preferences — enjoying sitcoms and reality shows. But they're not hardcore couch potatoes. These young Canadians also like mobility when it comes to athletics and have high rates for playing hockey, jogging, swimming and skiing. However, some of their biggest thrills come as spectators of racing sports, and they enjoy attending motorcycle shows, air exhibitions and horse races. Even their kids get into the spirit, playing with racing sets and riding toys.

Where They Live

Cornwall (ON), Brantford (ON), Niagara Falls (ON), Oshawa (ON), Kitchener (ON), Owen Sound (ON), Belleville (ON), Orillia (ON), Welland (ON), Woodstock (ON), Brandon (MB), Mission (BC), Cambridge (ON), Windsor (ON)

How They Think

The young urban dwellers of Mobility Blues express values that promote personal discovery and a search for meaning in life. Their Interest in the Unexplained indicates a tendency to reject the assumption that all valid knowledge must be rational or scientific. They willingly accept non-traditional definitions of what constitutes a family (low on Traditional Family) and believe emotional connections, rather than legal formalities, are what bind individuals together. Living in less affluent urban areas, these Canadians often harbour a Fear of Violence, where they accept a certain amount of physical danger in their daily lives, without letting this reality overwhelm them. They look to work that allows them to express their Personal Creativity and exert Personal Control over their futures, which they feel will improve their situation. And using their Personal Expression, they seek to connect in an authentic and sincere manner with others while they develop their own personalities. Not surprisingly, there is little room for Sexism or Xenophobia in their lives; they are more interested in reaching out and moving forward.
Population

<table>
<thead>
<tr>
<th>Male / Female</th>
<th>NBHOOD</th>
<th>FSA</th>
<th>City</th>
<th>Family</th>
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<th>FSA</th>
<th>City</th>
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<td>506</td>
<td>33,339</td>
<td>763,464</td>
<td>% &gt;15 Years, Married with Children</td>
<td>21.82%</td>
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<tr>
<td>Males</td>
<td>44.07%</td>
<td>50.97%</td>
<td>49.28%</td>
<td>% &gt;15 Years, Single with Children</td>
<td>44.24%</td>
<td>21.23%</td>
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<tr>
<td>Females</td>
<td>55.93%</td>
<td>49.03%</td>
<td>50.72%</td>
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</tr>
</tbody>
</table>

Marital Status

- Other: 1.52%
- Separated/Divorced: 12.42%
- Married: 32.73%
- Single: 53.83%

Age Distribution

- 0-9: 22.02%
- 10-14: 11.86%
- 15-19: 12.05%
- 20-29: 19.78%
- 30-44: 18.58%
- 45-54: 9.09%
- 55-64: 4.74%
- 65-74: 0.99%
- 75+: 0.0%

Households

Structure Details

- Total Number of Occupied Private Dwellings: 125
- Dominant Year Built: 1946-1960

Neighbourhood

- NBHOOD: 1946-1960
- City: 1946-1960

FSA

- 13,642
- Before 1946

City

- 300,711

Structural Type

- Single Detached
- Row House
- Semi-Detached
- Mobile Dwelling
- Apartment
Socio-Economic:

<table>
<thead>
<tr>
<th>Employment</th>
<th>NBHOOD</th>
<th>FSA</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Rate</td>
<td>44.55%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dominant Profession #1</td>
<td>Occupations in Sales and Service 72.11%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dominant Profession #2</td>
<td>Business Finance Administration 20.41%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Type</td>
<td>Service Sector &amp; Blue Collar</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Average Household Income:

- NBHOOD: $32,890
- FSA: $49,313
- City: $92,080

Highest Level of Education:

- University: 1.82%
- College: 6.36%
- High School: 32.12%
- Other: 69.7%
### Cultural

<table>
<thead>
<tr>
<th>Language</th>
<th>NBHOOD</th>
<th>FSA</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dominant Language #1</td>
<td>English 52.57%</td>
<td>English 71.46%</td>
<td>English 75.95%</td>
</tr>
<tr>
<td>Dominant Language #2</td>
<td>Multiple Languages 9.09%</td>
<td>Portuguese 5.08%</td>
<td>Other Languages 2.65%</td>
</tr>
<tr>
<td>Dominant Language #3</td>
<td>English &amp; Non-Official 8.89%</td>
<td>Other Languages 3.50%</td>
<td>Italian 2.56%</td>
</tr>
<tr>
<td>Dominant Language #4</td>
<td>Bengali 8.50%</td>
<td>Italian 2.58%</td>
<td>Multiple Languages 1.69%</td>
</tr>
<tr>
<td>Dominant Language #5</td>
<td>Other Languages 5.73%</td>
<td>Spanish 2.52%</td>
<td>French 1.52%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Immigration Status</th>
<th>NBHOOD</th>
<th>FSA</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immigrant Population</td>
<td>42.89%</td>
<td>29.54%</td>
<td>25.14%</td>
</tr>
<tr>
<td>Non-Immigrant Population</td>
<td>57.11%</td>
<td>70.46%</td>
<td>74.86%</td>
</tr>
</tbody>
</table>

### Report Parameters

**Demographics**

NBHOOD=Neighbourhood, FSA=Forward Sortation Area, CITY=Census Metropolitan Area

The Neighbourhood is based on the Dissemination Area for the Subject Property, which is a small area composed of one or more neighbouring dissemination blocks, with a population of 400 to 700 persons.

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