

DATE: June 12, 2023

REPORT NO: PD-29-2023

SUBJECT: **Block Plan and Master Environmental Servicing Plan (MESP) Guidelines to Facilitate Development in the Expansion Area**

CONTACT: Dave Heyworth, Manager of Planning
Brian Treble, Director of Planning & Building

OVERVIEW:

- The Block Plan & Master Environmental Servicing Plan (MESP) Guidelines are important to facilitating development in the urban settlement expansion area
- The Guidelines set out the process and expectations for the Block Plan and MESP submissions by developers
- A Block Plan is a non-statutory document which will identify how an area will develop in a coordinated, integrated fashion from land use, infrastructure and ecological perspectives.
- The Block Plan process will provide for an expedited draft plan of subdivision process since much of the work will be done at the Block Plan stage and only certain matters may require more detail at the draft plan stage.
- The Block Plan process is not a process under the Planning Act but the Guidelines set out response timelines and require an application fee.
- Consultants representing property owners in the urban settlement expansion area provided input in to the development of the guidelines.
- Endorsement of the Guidelines will allow landowners to undertake background work at their own risk given the appeal of OPA 63.
- The Block Plan and MESP Guidelines can be updated as necessary

RECOMMENDATION:

1. That, Recommendation Report No. PD-29-2023, relating to the “Block Plan & MESP Guidelines to Facilitate Development in the Expansion Area”, dated June 12, 2023, BE RECEIVED; and,
2. That, Council ENDORSE the Block Plan & MESP Guidelines provided as Attachment 1 to Report No. PD-29-2023; and,
3. That, a copy of Report No. PD-29-2023 be FORWARDED to the Region of Niagara Planning and Development Department, Niagara Peninsula Conservation Authority and consultants that participated in the Block Plan & MESP workshop.

ALIGNMENT TO STRATEGIC PLAN:

Theme #3

- Strategic, Responsible Growth

BACKGROUND:

What is a Block Plan & MESP

A Block Plan is a non-statutory document under the *Planning Act* which will identify how an area will develop in a coordinated, integrated fashion from land use, infrastructure and ecological perspectives. It is expected that the Block Plan process will provide for an expedited draft plan of subdivision process since much of the work will be done at the Block Plan stage and only certain matters may require more detail at the draft plan stage. The Block Plan and MESP process has been outlined by policy in Official Plan Amendment (OPA) 63.

The Master Environmental Servicing Plan (MESP) is an integral component of the Block Plan process. Its role fundamentally is to ensure the infrastructure, being servicing and transportation take place in the most coordinated and efficient manner possible as development moves along from Stage to Stage and Block to Block. Addressing the natural environment is also integral to the MESP. These Block Plan and MESP Guidelines ensure integration between land use, servicing and natural environment planning in keeping with directions from the sub-watershed plan.

Submission Expectation

Within the Smithville Master Community Plan Area, the Township will require a Comprehensive Block Plan (Block Plan) to be prepared by landowners at their expense and submitted to the Township to the satisfaction of the Director of the Planning, Building, and By-law Department (Director), prior to the approval of a development application for any lands located within the Township's Block Plan areas as identified on Schedule E6, of the Township's Official Plan (urban expansion area).

The Block Plan process should address draft plan of subdivision requirements with the intent of not duplicating work. Studies completed for Block Plan submission will not be duplicated at the Draft Plan of Subdivision stage unless the Draft Plan is on the lands of a landowner who did not participate in the Block Plan process. In this case more detailed study work at the Draft Plan stage may be required. Also, in certain circumstances, the Block Plan may identify more specific detailed study work that has to take place at the draft plan of subdivision stage.

The Block Plan & MESP should illustrate the vision of the MCP and analyze the proposed development, demonstrating, where applicable, regard for:

- a mix of land uses;
- the layout and design of public streets and blocks;
- existing and planned adjacent land uses and Block Plan areas;
- pedestrian and cycling connections;
- parks and open spaces;
- public realm and streetscape elements;
- parking and access;

- landscaping;
- natural heritage features, buffers, and enhancements; and,
- built form considerations such as type, location, organization, massing and density distribution.

The Block Plan and MESP Guidelines set out all the various technical planning matters and associated studies which will need to be addressed generally and within the Development Stages composed of various Blocks for servicing infrastructure, transportation and natural environment. These detailed technical requirements can be found in the Appendices of the Guidelines.

The scope and level of detail expected in each Block Plan will be determined through an informed scoping process completed through the Pre-Consultation process, based on this Guideline, including the guidance considerations for each individual Block found in the Appendices in collaboration with the Township, Niagara Region, NPCA and other relevant agencies.

Process & Consultation

The Block Plan & MESP Guidelines establish the process requirements, including consultation, notification of land owners and review timelines. Ultimately the Director of Planning and Building accepts the Block Plans.

Landowner consultation shall occur prior to, beginning, and during, the Block Planning process with all landowners within the Block Plan area and adjacent landowners within Blocks in the same stage. An Open House for all Landowners within the Block and immediately adjacent Landowners is recommended to be conducted by the proponent(s).

The preparation of a Block Plan will generally follow the steps below:

1. Pre-consultation(s) with Township Staff, Region, NPCA (and any other relevant agency);
2. Proponent required to notify all Block Plan landowners (within and immediately adjacent to the Block Plan and others as noted above) and invite them to participate in preparation of the Block Plan;
3. Submission of Scoped Block Plan Terms of Reference by the proponent(s) to the Township for review after the consultation process;
4. Amend Terms of Reference and re-submit (if needed);
5. Acceptance of Block Plan Terms of Reference by the Director (in consultation with Township Staff);
6. Completion of Block Plan by proponent(s) and submission to Township;
7. Circulation of Block Plan by Township Planning Staff to Township Departments and agencies for review and comment;
8. Proponent amends Block Plan and re-submit (if needed); and,
9. Acceptance of Block Plan by the Director

Response Timelines Guidelines

Items	Timelines
Request for pre-consultation meeting	Within 30 days of request by the proponent(s) for Block Plan submission
Staff review and approval of Block Plan Terms of Reference	45 days after complete submission received
Staff circulation and review of each Block Plan submission	90 to 120 days (depending on the level of detail included in the Block Plan); with Director’s Acceptance of the Block within 30 days after the final review.

CURRENT SITUATION:

The Block Plan & MESP Guidelines were developed with the input of consultants representing landowners that participated in the development of the Master Community Plan as well as OPA 63.

Three workshops were held with the consultants between April and the beginning of June with consultants having the opportunity to review drafts in advance of the workshop and then ask questions and provide input at each workshop. Staff made changes where appropriate after each workshop.

Certainly, consultants representing landowners would like to see the Guidelines more generic and less detailed and prescriptive; however, staff are of the opinion that the Guidelines provide the necessary detail to guide pre-consultation requirements to solidify individual Block Plan and MESP Terms of Reference. Consultants were advised that staff would be seeking endorsement of the Block Plan and MESP Guidelines at the June 2, 2003 Planning/Building/Environmental Committee.

The Block Plan and MESP Guidelines are a key component to move the process of developing the expansion area forward. There are landowners who wish to move forward with their Block planning work despite the appeal of OPA 63. Should the Guidelines be endorsed, landowners would be proceeding at their own risk at this point.

FINANCIAL IMPLICATIONS:

The Block plan submission fee will be \$30,900 plus \$1,030 per hectare. This is the approved submission fee as per the Township’s application fee by-law. The amount was established as a placeholder in a sense to allow the Township to develop these Guidelines and determine the staff and/or consultant resources required for Township review.

The Block Plan & MESP submission fee should be reviewed after staff review a couple of Block Plan submissions.

Staff will also review the draft plan of subdivision application fee for adjustments to reduce the fee for applications that were subject to the Block Plan process given less planning work necessary to process the applications. Conversely the draft plan of subdivision fee will be reviewed to increase the fee for development associated with lands that did not participate in the Block Plan process to recoup costs for participating landowners.

INTER-DEPARTMENTAL COMMENTS:

The Township's Public Works Department has participated and monitored the development of the Block Plan and MESP Guidelines

CONCLUSION:

The Block Plan and MESP Guidelines are a key component to move the process of developing the expansion area forward. The Guidelines were developed based on best practices and with input from consultants representing landowners in the expansion area. The Block Plan and MESP Guidelines should not be considered a static document and can be updated as necessary to address changing policy or improve on process or submission requirements or to address concerns where appropriate.

ATTACHMENTS:

1. Block Plan and MESP Guidelines

Prepared & Submitted by:



Dave Heyworth
Manager of Planning

Approved by:



Bev Hendry
CAO

Reviewed by:



Brian Treble
Director of Planning & Building

Township of West Lincoln

Comprehensive Block Plan and MESP Guidelines

Table of Contents

1. Purpose.....	3
1.1. What is a Block Plan.....	3
1.2 General Block Plan Submission Requirements.....	3
1.3 Intent of Block Plan & MESP Guidelines.....	4
1.4 Consultation.....	5
1.5 Block Plan Preparation Scoping Requirements and Studies.....	5
1.6 Response Timelines.....	6
2. Master Environmental Servicing Plan (MESP)- Required Supporting Studies.....	6
2.1. Master Environmental Servicing Plan (MESP) - Infrastructure and Servicing Components	5
2.2. Master Environmental Servicing Plan (MESP) - Environmental Impact Study (EIS)	7
3. Comprehensive Block Plan Components	7
3.1. Introduction.....	8
3.1.1. Vision and Purpose.....	8
3.1.2. Background and Existing Conditions	8
3.2. Township Policy and Design Context	9
3.3. Block Plan Design and Development Considerations	9
Streets and Blocks.....	Error! Bookmark not defined.
4. Deliverables	9
4.1. Block Plan Terms of Reference	9
4.2. Comprehensive Block Plan Submission.....	10
5. Implementation.....	10
6. Block Plan Submission Fee.....	11

1. Purpose

Within the Smithville Master Community Plan Area, the Township will require a Comprehensive Block Plan (Block Plan) to be prepared by landowners at their expense. Submissions to the Township will be to the satisfaction of the Director of the Planning and Building (Director), prior to the approval of a development application for any lands located within the Township's Block Plan areas as identified on Schedule E6, of the Township's Official Plan.

1.1. What is a Block Plan

A Block Plan is a non-statutory document which will identify how an area will develop in a coordinated, integrated fashion from land use, infrastructure and ecological perspectives. It is expected that the Block Plan process will provide for an expedited draft plan of subdivision process since much of the work will be done at the Block Plan stage and only certain matters may require more detail at the draft plan stage.

1.2. General Block Plan Submission Expectations

The Block Plan process should address draft plan of subdivision requirements with the intent of not duplicating work. Studies completed for Block Plan submission will not be duplicated at the Draft Plan of Subdivision stage unless the Draft Plan is on the lands of a landowner who did not participate in the Block Plan process. In this case more detailed study work at the Draft Plan stage may be required. Also, in certain circumstances, the Block Plan may identify more specific detailed study work that has to take place at the draft plan of subdivision stage. It should also be noted that an extended delay in submitting draft plans following the acceptance of a Block Plan could trigger additional work and requirements due to changing policy and review requirements.

It is not expected that Block Plan submission studies will need to replicate existing work found in Wastewater Master Servicing Plan (W/WW MP), Transportation Master Plan (TMP), and Subwatershed Study (SWS). However, studies should refer to the work and add to this work, where necessary, as a part of the specific Block Plan Terms of Reference (ToR) as determined through pre-consultation. Submissions which do not align with this background supportive work should contain a rationale as to why there is a difference and that the change meets the objectives and policies of OPA 63 and direction provided by the various Master Plans.

The Official Plan contains policy flexibility on matters of locations for storm water management facilities and parks and does not require an amendment for Block Plan development out of phase provided certain policy criteria are met.

Submission of a Block Plan to the Township will include a Conceptual Master Plan, graphically illustrating the public and private design elements of the Block Plan area, accompanied by a Block Plan Document which should explain in writing the design rationale for the various elements of the Conceptual Master Plan. These components are further described in Section 3.

The Block Plan is intended to communicate the vision of the Master Community Plan (MCP) and promote comprehensive planning within specific sections of the Township's Designated Greenfield Areas. A Block Plan should demonstrate how the physical form of a proposed development fits within the planned context for each area. It should illustrate the vision of the MCP and analyze the proposed development, demonstrating, where applicable, regard for:

- a mix of land uses;
- the layout and design of public streets and blocks;
- existing and planned adjacent land uses and Block Plan areas;
- pedestrian and cycling connections;
- parks and open spaces;
- public realm and streetscape elements;
- parking and access;
- landscaping;
- natural heritage features, buffers, and enhancements; and,
- built form considerations such as type, location, organization, massing and density distribution.

1.3. Intent of Block Plan & MESP Guidelines

The Comprehensive Block Plan Guidelines have been prepared to standardize the Township's expectation for Block Plan submissions generally, and Block Plan areas specifically, to allow for their efficient preparation and review. The scope and level of detail expected in each Block Plan will be determined through an informed scoping process completed through the Pre-Consultation process, based on this Guideline, including the guidance considerations for each individual Block attached as Appendix 1 & Appendix 2 (Guidance Mapping) to this document. in collaboration with the Township, Niagara Region, NPCA and other relevant agencies.

This Guideline, including more specific guidance by stages in Appendix 1 & Appendix 2 (Guidance Mapping), sets out a process based on the minimum requirements to complete a Block Plan. The pre-consultation process will determine which components

from the guidance in Appendices 1 & 2 for the applicable stage will apply to the specific Block Plan application.. Preparation of the Block Plan may commence once the scoped Terms of Reference is satisfactory to the Director.

It is the intent that Block Plans be undertaken by the proponent(s) of development applications, in consultation with landowners, as identified in Section 2.1, to the best extent possible. Where a Block Plan area includes multiple landowners, the development of a Block Plan should form the basis for a Developer's Cost Share Agreement. All landowners within a Block Plan area should be provided the opportunity to participate in the Block Plan process, and are encouraged to work together to complete the Plan.

It is recognized that not all landowners may choose to participate in the Block Plan & MESP process. Where a non-participatory landowner wishes to go through a draft plan of subdivision later, such landowner will need to confirm Block Plan requirements and appropriate updates prior to submission of the draft plan.

The Block Plan and MESP submission will be signed by those landowners participating in the process.

Individual specifically scoped Terms of Reference will be prepared for each Block Plan that comply with the policies of OPA 63 and this Guideline.

1.4. Consultation

The proponent should consult with Township, Niagara Region, NPCA (and any other relevant agency) as the Block Plan is developed. As part of the Township's review of a submission, staff will circulate the Draft Block Plan to the Township Departments and relevant agencies and inform the Council.

Landowner consultation shall occur prior to, beginning, and during, the Block Planning process with all landowners within the Block Plan area and adjacent landowners within Blocks in the same stage. An Open House for all Landowners within the Block and immediately adjacent Landowners is recommended to be conducted by the proponent(s). Written acknowledgement by a Registered Professional Planner or Engineer will be required to demonstrate all such landowners were notified by mail or e-mail.

1.5. Block Plan Preparation Scoping Requirements and Studies

The preparation of a Block Plan will generally follow the steps below:

1. Pre-consultation(s) with Township Staff, Region, NPCA (and any other relevant agency);

2. Proponent required to notify all Block Plan landowners (within and immediately adjacent to the Block Plan and others as noted above) and invite them to participate in preparation of the Block Plan;
3. Submission of Scoped Block Plan Terms of Reference by the proponent(s) to the Township for review after the consultation process;
4. Amend Terms of Reference and re-submit (if needed);
5. Acceptance of Block Plan Terms of Reference by the Director (in consultation with Township Staff);
6. Completion of Block Plan by proponent(s) and submission to Township;
7. Circulation of Block Plan by Township Planning Staff to Township Departments and agencies for review and comment;
8. Proponent amends Block Plan and re-submit (if needed); and,
9. Acceptance of Block Plan by the Director

1.6. Response Timelines Guidelines

Items	Timelines
Request for pre-consultation meeting	Within 30 days of request by the proponent(s) for Block Plan submission
Staff review and approval of Block Plan Terms of Reference	45 days after complete submission received
Staff circulation and review of each Block Plan submission	90 to 120 days (depending on the level of detail included in the Block Plan); with Director's Acceptance of the Block within 30 days after the final review.

2. Master Environmental Servicing Plan (MESP)- Required Supporting Studies

The preparation of a Block Plan will be supported by a Master Environmental Servicing Plan (MESP) that is informed by a number of required studies. The MESP requirements outlined in the Phase 3 report of the Subwatershed Study (SWS) essentially integrate the components of the Environmental Impact Study (EIS) and MESP as provided in this Guideline. These studies are categorized under two integrated sections being:

- Infrastructure and Servicing-related Studies; and,
- Natural Heritage (Environmental Impact Studies).

The parameters and components of these studies will be confirmed as part of the pre-consultation process and may include, but are not limited to:

2.1. Master Environmental Servicing Plan (MESP) - Infrastructure and Servicing Components

A Master Environmental Servicing Plan (MESP) will be required to determine the appropriate servicing and transportation needs for the Blocks. Any significant modifications to the preferred municipal servicing strategies (to be determined through the Pre-Consultation) would be subject to the Municipal Class Environmental Assessment (MCEA) Planning Addendum Process. This recognizes that the Master Community Plan (MCP) followed the MCEA Integrated Planning Act and MCEA Planning Process which obtained approval for select Schedule B projects (subject to no appeals to OPA 63 or the resolution of appeals process).

The MESP – Infrastructure and Servicing submission will include studies and plans that inform the design of the road network, active transportation network, water and wastewater servicing, and stormwater management facilities.

The MESP – Infrastructure and Servicing submission requirements will be discussed at pre-consultation based on guidance material in Appendix 1 & Appendix 2 (Guidance Mapping) where applicable, and items found in Appendix 3.:

2.2. Master Environmental Servicing Plan (MESP) - Environmental Impact Study (EIS)

An Environmental Impact Study (EIS) will be prepared to address the items outlined in Appendix 4 and in accordance with the approved Block Plan Terms of Reference more specifically guided by individual staging considerations attached as Appendix 1 & Appendix 2 (Guidance Mapping) and scoped appropriately during pre-consultation. The EIS is to be approved by the Township, in consideration of comments from a qualified expert hired by the Township. Also in consideration of comments made by the Region of Niagara based on review in accordance with their EIS guidelines as part of the Block Plan process and will satisfy the Natural Heritage System requirements of the Township's Official Plan to the satisfaction of the Township in consultation with the Region and NPCA.

3. Comprehensive Block Plan Components

The submission of a Comprehensive Block Plan will be informed by supporting studies required through the Pre-Consultation process and will include both a Conceptual Master Plan and Block Plan Document. The Conceptual Master Plan should detail public and private design elements including, but not limited to:

- Proposed residential, commercial and employment areas;
- Neighbourhood Centres and Corridors;
- Conceptual building siting for mixed use buildings, apartment blocks,
- Integration of the Natural Heritage System;
- Identify features and functions which contribute in a positive manner the Township's objectives relating to Greening, Sustainability, and Climate Change. Examples, Natural Heritage Protection, Natural Heritage Restoration, Active Transportation,

Trails, Compact Urban forms, mixed-use development. Note: This checklist may be more specific upon completion of the Township's Greening/Sustainability Plan.

- Proposed parks and open space network;
- Roads and active transportation network; and
- Preliminary servicing considerations.

The Conceptual Master Plan will be accompanied by a Block Plan Document, which should demonstrate in writing how the development proposal and Conceptual Master Plan conform with Official Plan policy and guidance from the Township's Urban Design as part of OPA 63. The document should also demonstrate how the Block Plan is designed to appropriately anticipate community needs and contribute to good planning and urban design. The following should be addressed and identified when developing a Block Plan.

3.1. Introduction

3.1.1. Vision and Purpose

The Block Plan document should provide an overview of the Conceptual Master Plan and an explanation of the vision and purpose of the Block Plan based on the policies of the Smithville Master Community Plan.

3.1.2. Background and Existing Conditions

A brief description and analysis of the existing Block Plan area and surrounding context should be provided in the Block Plan Document. This should include an inventory of existing conditions and physical features of the site and surrounding lands, including but not limited to:

- Natural heritage features, topography and vegetation;
- Any existing buildings and structures within the area;
- Existing or planned landmarks or gateways;
- Existing or planned transportation networks, including vehicular, cycling, pedestrian and on-demand transit. Note: Due to the Smithville Master Community Plan's 30 year time horizon, transit services, beyond on-demand transit, may be required to be addressed in future block plan submissions where substantial time has lapsed and growth has occurred that would necessitate the need for and ability to require the need of transit beyond on-demand transit;
- Existing infrastructure utilities including telecom, electrical, natural gas;
- Existing open space linkages; and
- Any connections or interfaces with adjacent areas.

3.2. Township Policy and Design Context

A Block Plan should be designed in accordance with the Township's Official Plan and the Township of West Lincoln Smithville Urban Design Manual or subsequent Urban Design guidelines produced and approved by Township Council, with specific policies and guidance applied to the development of a Block Plan area where applicable. The Block Plan Document should provide a description of the overall character of the proposed development and identify conformity with the planning context for the area.

The Block Plan should be designed to foster a distinct community identity and purpose for each Block Plan area which is to be developed in accordance with specific direction for Smithville's Designated Greenfield Areas. This direction is provided within:

- *Section 6.11.7.5 of OPA 63: Community Design & Sustainability: Urban Design Guidelines for the Smithville MCP Area which includes policy direction for Residential Neighbourhood Areas, Commercial Areas, Mixed use Neighbourhood Nodes; and Urban Employment areas.*

3.3. Block Plan Design and Development Considerations

Both the Conceptual Master Plan and Block Plan document should illustrate urban design and development considerations for elements within the private and public realm of each Block Plan area. Written descriptions along with images and graphics within the Block Plan document should provide a basis for the vision of the community and detailed rationale for the design of the proposed development. Appendix 5 identifies the elements that should be included and graphically shown within a Conceptual Master Plan, and the Block Plan document should explain how each component has been addressed.

4. Deliverables

4.1. Block Plan Terms of Reference

A Block Plan Terms of Reference will be officially received and processed once Planning Staff are satisfied that it is complete. A complete submission will consist of the following:

1. A signed letter of authorization from the landowner(s) of the Block Plan area for applications submitted by an agent;
2. A cover letter that includes: a contact name, address, email and phone number, site addresses (street and number) and legal addresses within the Block Plan area, and date of submission;
3. A completed Block Plan application form and fee provided in accordance with the Development Planning Fee Schedule;
4. Two (2) hard copies and one digital PDF copy of the Terms of Reference.

4.2. Comprehensive Block Plan Submission

A Block Plan will be officially received and processed once the Township is satisfied that it is complete, and conforms to the approved Terms of Reference and the Official Plan. The submission of a Comprehensive Block Plan accompanied by a Block Infrastructure and Servicing Strategy will include a Conceptual Master Plan accompanied by a Block Plan Document. A complete submission consists of the following:

1. A signed letter of authorization from the landowner(s) of the property for those applications submitted by an agent;
2. A letter signed by a Registered Professional Planner / Engineer indicating that the required Notification and Consultation requirements for the Block Plan have been met.
3. A title page that includes: Block Plan identifier, site addresses (street and number) within the Block Plan area, lists the principal author(s) of the Block Plan, the consulting firm(s) and date of completion;
4. Contact information for the principal author(s) of the report(s): address, email and phone number;
5. Two (2) hard copies and one digital PDF copy of the Block Plan;
6. Each of the mapping schedules included in the Block Plan is to be scaled in metric and also provided in an AutoCAD, ESRI shapefile, or ESRI geodatabase format;
7. Two (2) hard copies and one digital PDF copy of all supporting technical and background reports as required. The Township may request a higher number of supporting technical and background reports to accommodate review requirements for Environmental Impact Studies, TIAs, etc.

5. Implementation

Applications for a Draft Plan of Subdivision or implementing Zoning By-law may not be considered complete until the Block Plan and MESP submission has been accepted by the Director as suitable to provide the necessary framework to expedite Draft Plan submission as best possible.

All proponents are required to attend a pre-consultation meeting(s) with Planning Staff (and any applicable agencies) prior to the submission of any development application, in order to identify the studies and/or reports required to carry out the application. The pre-consultation process may commence prior to acceptance from the Director, provided that the Block Plan and Block Servicing Strategy process has reached a point where requirements for a complete application can be determined. If the Block Plan or any supporting documents do not align with the policy direction of the Official Plan or are not to the satisfaction of the Director, the applicant may be required to revise and

resubmit or apply for an Official Plan Amendment (OPA). Where an OPA is requested, the Block Plan process may carry forward simultaneously if the OPA can be supported by staff based on pre-consultation. Approved Block Plans may be included as an Appendix to the Township's Official Plan for transparency and ease of use, however they will not form part of the Official Plan.

It is the intent of this Plan that development in the urban expansion areas identified in OPA 63 will occur in a logical, orderly, coordinated and cost-efficient manner over the planning period of this Plan. The costs to provide growth supportive public infrastructure such as roads, storm water management facilities or the provision of other community facilities identified in OPA 63 and the Transportation and Water and Wastewater Master Plans and Subwatershed studies will be significant over the 30-year planning horizon of OPA 63. While the appropriate costs will be addressed by incorporation and regular updates to the Development Charges By-law (or potentially through debenture or cash-in-lieu), Front-Ending Agreements between the Township or Region and the landowners or Cost-Sharing Agreements amongst the landowners will likely be required as well. The success of Front-Ending Agreements and Cost-Sharing Agreements, and the fruition of development will depend on landowners within each Block working together in a coordinated, logical fashion.

As indicated in the Consultation and Comprehensive Block Plan Submission sections of this Guideline, each Block Plan submission shall contain an acknowledgement or documentation that "best efforts" were made and that all landowners within the Block consent to be part of agreements. Also, that they consent to pay for internal and external infrastructure or lands for community facilities under Front-Ending Agreements (until reimbursed by the Township and/or Region through Development Charge Rebates) or Cost-Sharing Agreements between landowners.

Required communication between the landowners is reflected in the Consultation section of this Guideline. It should be noted that Approval of Block Plans and development applications will be based on the timing of the implementation of required infrastructure and available reserve servicing capacity.

Should a Block Plan & MESP submission be out of phase with the phasing identified in OPA 63, the submission must include a planning justification report which in part indicates how the proposal complies with policy 6.11.7.6.3 (d) of OPA 63.

Individual Block Plan & MESP Terms of Reference and the Block Plans will be accepted by the Director of Planning, Building and By-law Enforcement.

6. Block Plan Submission Fee

The Block plan submission fee will be \$30,900 plus \$1030 per hectare which will be reviewed to determine if an increase is necessary due to staff shortages in the Township from lack of payment from Landowners group.

APPENDIX 1

Detailed Block Plan /MESP Requirements- Key guiding considerations, not inclusive, by individual Stages to be considered for each block as applicable and determined through pre-consultation.

Stage 1

- Smithville By-pass (Land dedication based on OPA 63)
- Survey for Karst
- Trails/linkages as per TMP (i.e. Hydro Corridor)
- CP Rail Line – noise/safety/infrastructure crossings/CP permits/approvals
- Collector roads and junction improvements as per TMP (i.e. construction of Spring Creek Road)
- Trunk sanitary sewer as per W&WWMP (Spring Creek Road, Industrial Park Road)
- 400 mm trunk watermain down Spring Creek Road

Consultants to propose connections to Region's future 400mm watermain on South Grimsby Road 5 and Spring Creek Road. The proposed connection(s) should be identified in accordance to the Region's design guidelines / standards. The proposed connection(s) will be reviewed / approved by the Region and Township

- Collaboration with NW Quadrant and Spring Creek Secondary Plans

Considerations of the future development within existing urban boundary (e.g. Spring Creek Heights Secondary Plan and Northwest Quadrant Developments)

- Water requirements
- Wastewater requirements
- Transportation requirements
- Other utilities (hydro, existing underground infrastructures)

Review technical considerations of the Northeast industrial lands (water system looping requirements, water supply security, fire flow requirements)

- Agricultural Buffer
- Existing Agricultural Uses
-

Stage 2

- Smithville By-pass (Land Dedication based on OPA 63)
- Survey for Karst
- CP Rail Line – noise/safety/infrastructure crossings/CP permits/approvals
- Trunk sanitary sewer as per W&WWMP (St. Catharines Street)

Consultants to propose connections to the Region's future 400mm watermain on Industrial Park Road. The proposed connection(s) should be identified in accordance with the Region's design guidelines/standards. The proposed connection(s) will be reviewed/approved by the Region and Township.

Consultants to consider the future water and wastewater connections at St. Catharines Street and Industrial Park Road related to Stages 3 & 4 Twenty Mile Creek crossings.

Private sewage pumping station – 2B

Collaboration with East Smithville Secondary Plan

Considerations of the future development within existing urban boundary (e.g. East Smithville Secondary Plan)

- Water requirements
- Wastewater requirements
- Transportation requirements / future road upgrades on St. Catharine Street
- Other utilities (hydro, existing underground infrastructures)

Stage 3

Port Davidson Sewage Pumping Station

Gravity flow in NW corner of 3A

Collector roads and junction improvements as per TMP (i.e. Reconstruction of Townline Road, realignment of Port Davidson Road/Canborough Street intersection)

Off-site Natural Area south of Phase 3A as Restoration Area off-set

Tying into proposed Restoration of Sewage Settling Ponds Restoration Area

Trails/linkages as per TMP (i.e. along North Creek and abandoned Rail Line)

Survey for Karst

Existing Agricultural Uses

Crossing 20 Mile Creek with sanitary sewer main/water main/pedestrian bridge

Cost Sharing with Phase 2/East Smithville SP gravity Trunk Sewer along St Catharines St to SPS

- Consultants to propose connections to Region's future 400mm watermain on Townline Road and future development lands. The proposed connection(s) should be identified in accordance with the Region's design guidelines/standards. The proposed connection(s) will be reviewed/approved by the Region and Township
- Water and wastewater linear infrastructure to be coordinated with future Townline Road widening (also to be captured in future MCEA study)

- Provide a detail design of the future Port Davidson sanitary pump station (SWS 3) and the forcemain. Since the Region will ultimately take over the ownership & operation of the facility, the design of the facility must be in compliance with the Region's design standards
- ✓ Considerations of the future development within existing urban boundary
 - Water requirements
 - Wastewater requirements
 - Transportation requirements
 - Other utilities (hydro, existing underground infrastructures)
- ✓ To maintain the available capacity within the existing system for future infill / intensification growth, the existing sewer line on Townline Road and Anderson Crescent upto the southside of Twenty Mile Creek must be replaced to accommodate the future growth for the Northeast area of Stage 3A. The design of the existing sewerline replacement must secure sufficient easement for construction given that existing sewerline was installed between the two houses. Also, the design of the replacement must provide equivalent available capacity as those provided by the existing system.
- ✓ Watermain and forcemain Twenty Mile Creek crossing. The construction methodology for the Twenty Mile Creek crossing must be trenchless in accordance with the Region's standards. The design of the crossing should also consider the geo-technical conditions (likely in rock) and the future pedestrian bridge in corridor.

Stage 4

- Restoration Areas
- Township Sports Fields – trails/connections/linkages
- Private pumping station – 4A
- Preservation of U-Shaped Woodlot Natural Area
- Crossing 20 Mile Creek with watermain/pedestrian bridge – 4A
- Upgrade of Grimsby Road 6 Collector roads and junction improvements as per TMP (i.e. upgrade of South Grimsby Road 6, Reconstruction of Townline Road)
-
- Survey for Karst

- Consultants to propose connections to the Region's future 400mm watermain on South Grimsby Road 5 and future development lands to the South.

- Twenty Mile Creek Watermain crossing - the construction methodology for the Twenty Mile Creek crossing must be trenchless in accordance with the Region's standards. The design of the crossing should also consider the geo-technical conditions (likely in rock) and the future pedestrian bridge in corridor.

- Private sewage pumping station – 4A

Overall Considerations

- Front Ending for expanded Sewage Pumping Station
- Front Ending for expanded Water Storage

General requirements to satisfy Terms of Reference

- Should any Transportation analysis or Water and Wastewater hydraulic analysis be required to support the Block Plan, the analysis will be undertaken using the approved applicable consultant model as directed by the Township Staff.
- Complete water hydraulic analysis for confirming size requirement of the local distribution systems based on proposed development (population). Hydraulic analysis should also include the hydraulic implications to the existing system due to the proposed development.
- Complete wastewater hydraulic analysis for confirming size requirement of the local collection systems based on proposed development (population)
- Design of any future infrastructures should include the geo-technical survey with considerations of existing Karst topography. Geo-technical TOR must be prepared as part of the Block Plan process.
- Integrated EA process approves planned infrastructure for the 30-year planning period. Since approval is through the planning act, the Municipal Class EA ten-year lapse of does not apply. Any modifications to recommended project design concept will be achieved through the MESP and Municipal Class EA Addendum process as needed

- Municipal Class EA addendum process will include:

Key addendum activity

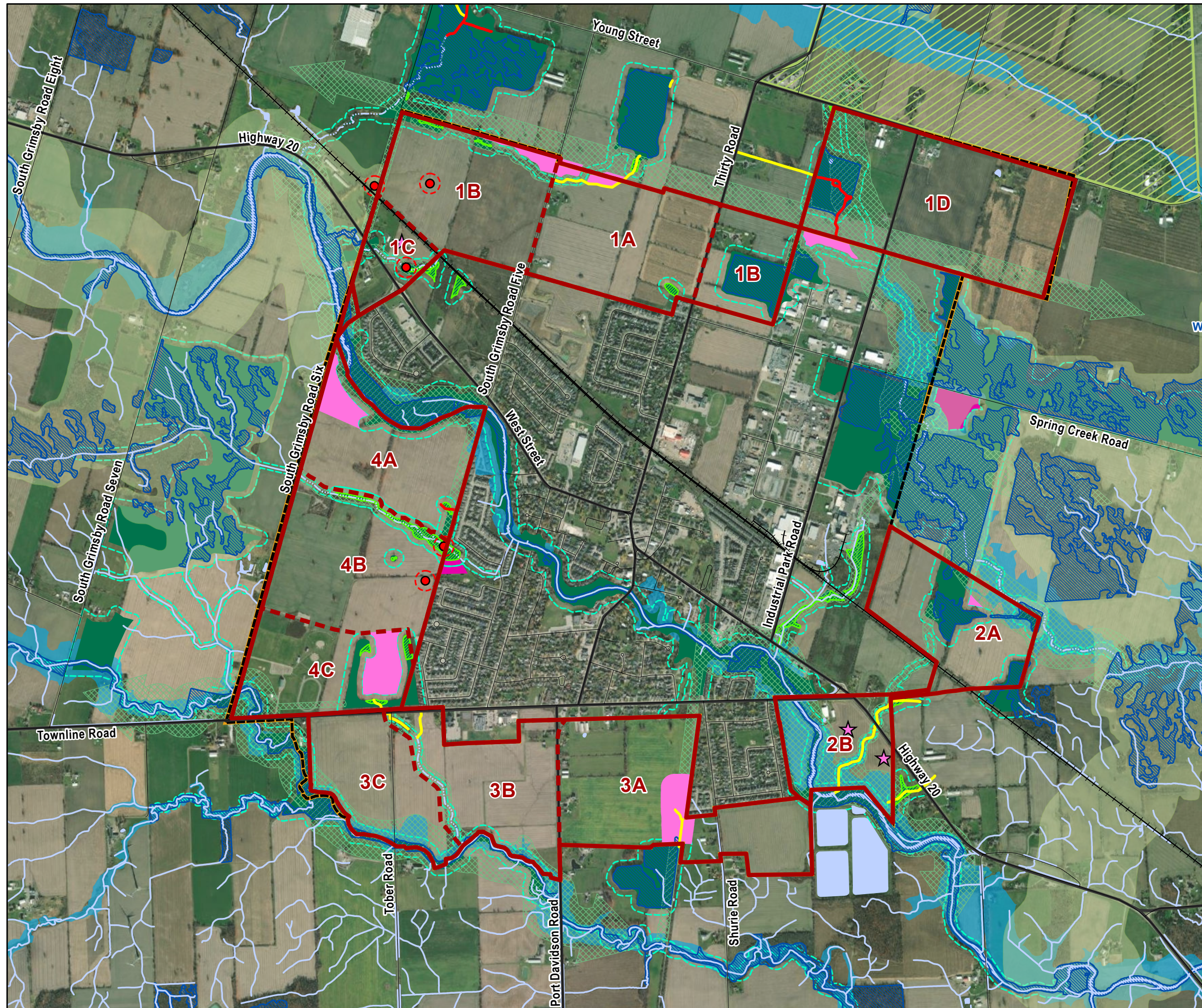
- ✓ Identify the rationale for the MCEA addendum – change in project or environment
- ✓ Review changes to environmental setting based on project description
- ✓ Identify what will be done to mitigate any environmental impacts as a result of the proposed changes to the project
- ✓ Document the planning process in MCEA addendum report
- ✓ Filling of addendum for public and Agency review

Key consultation activity

- ✓ Stakeholder / agency consultation

- ✓ Notice of filling of addendum: 30 day minimum review period to comment on proposed changes to the project
- SWS Considerations
 - ✓ Provide Shape-file with NHS per Block for NHS area query
 - ✓ Assessment of NHS complimentary uses/locations – Township’s upcoming Greening Plan(s) and Trails MP
 - ✓ Assessment of Climate Change implications – mitigation (e.g. - 30% Coverage - GHG emissions reduction) and adaptation (e.g.- adjustments to infrastructure)
 - ✓ SWM Ponds – volume control affecting Karst – consideration of clay liners – Karst Survey required for all Block Plans
 - ✓ LIDS for Karstic Areas – checking overburden for infiltration requirements – depth/composition/vegetated

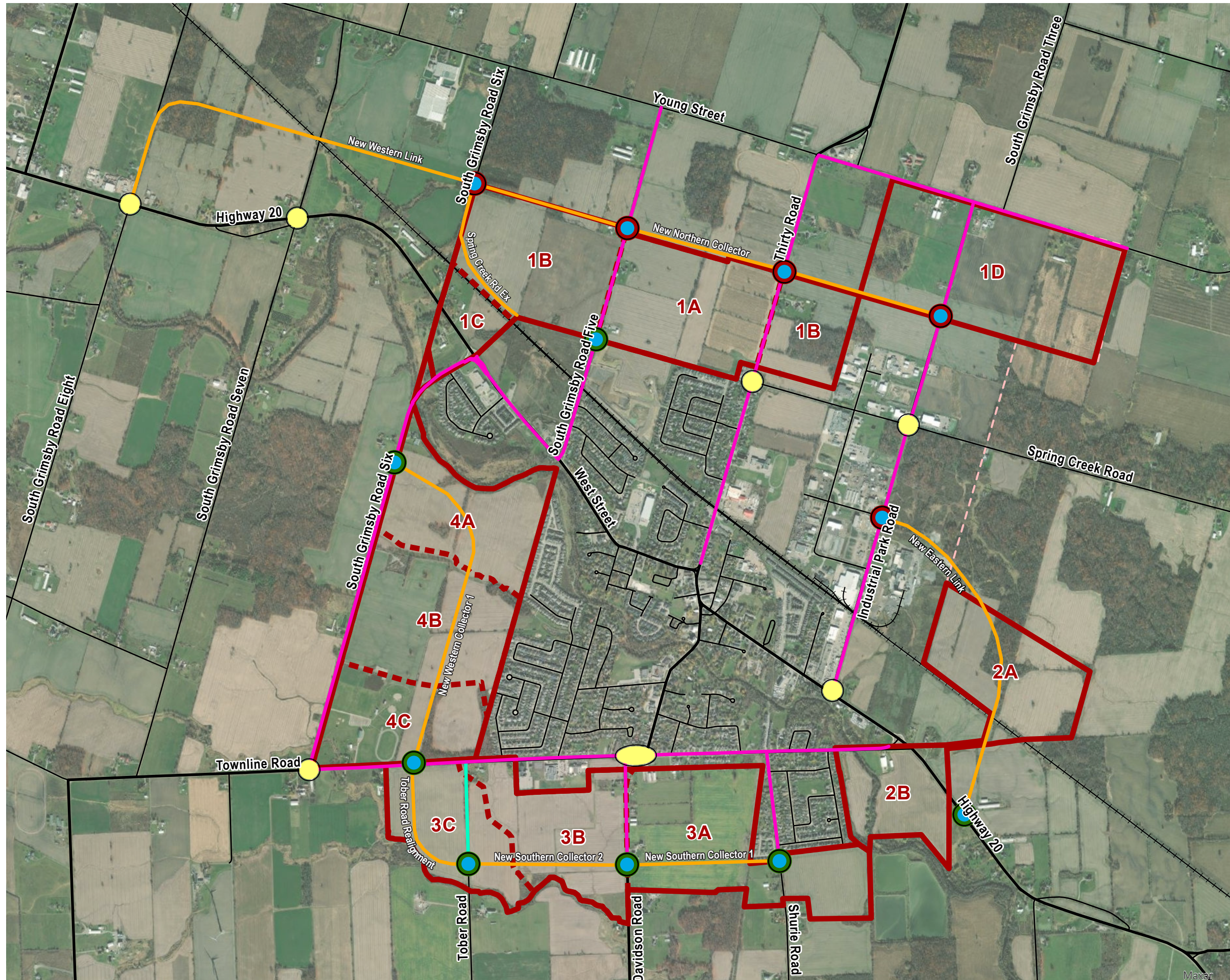
**TOWNSHIP OF WEST LINCOLN –
 SMITHVILLE MASTER COMMUNITY PLAN
 NATURAL HERITAGE SYSTEM**



Legend

Study Area/Expansion Boundary	Provincially Significant Wetland (MNR)
Smithville Boundary	Wetland For Further Review
Overall Staging Areas	Floodline (NPCA)
Staging Sub Area	Karst with 50m Buffer
Primary Road	HDF Protection
Secondary Road	HDF Conservation
Railway	Potential Restoration Area
Watercourse (NPCA)	Natural Heritage System
Intermittent Watercourse	Core Area
Waterbody	Conceptual Buffer
Niagara Escarpment	Linkage
Greenbelt	Recommended Restoration Area
Growth Plan Natural Heritage System	Recommended Restoration Area (outside expansion boundary)

**TRANSPORTATION
 MASTER PLAN**



- OVERALL STAGING AREAS
- STAGING SUB AREAS
- SMITHVILLE URBAN BOUNDARY
- ROAD (ALL CLASSIFICATIONS)
- ++ RAILWAY
- JUNCTION IMPROVEMENTS**
- EXISTING JUNCTION - REVIEW FOR IMPROVEMENT OPPORTUNITIES
- NEW JUNCTION - REVIEW FOR SIGNALIZED POTENTIAL
- NEW JUNCTION - DESIGN TO BE DETERMINED
- PROPOSED NEW ROADS & ROAD UPGRADES**
- PROPOSED NEW ROADS
- PROPOSED UPGRADED ROADS
- POSSIBLE REMOVAL OF ALIGNMENT

APPENDIX 3

Required Minimum level of Engineering Plans and Studies:

Servicing

- Description of Proposed Development and Required Infrastructure;
- Water, Wastewater, and Stormwater Servicing including Servicing Connectivity to adjacent Blocks and hydraulic grade line assessments;
- Establish sanitary and storm drainage area boundaries;
- Confirm capacity of outlets and conveyance systems ;
- Location and preliminary sizing of sanitary sewers, storm sewers and watermains;
- Phasing/Sequencing of Infrastructure with consideration to TMP and W/WW MP and OPA 63;
- Stormwater management strategy including hydrogeological assessment and preliminary design of stormwater management facilities including volumetric sizing, stage/storage/discharge relationship, outlet control calculations, forebay design, length/width ratios, decanting area, access routes. Should the recommendations of stormwater management facilities and overland flow route identified in SWS and OPA 63 not be followed, then a revised secured outlet is required to be obtained with investigation into any necessary agreements/easements.
- Preliminary Grading Plan to a level of detail that ensures that the future subdivision lotting will meet Engineering grading standards;
- Identification of the full transportation network to the local road level, which has reference to the TMP and applicable schedules in OPA 63, including active transportation connections (plan and profile drawings including all road geometrics and intersection requirements and improvements);
- Noise impact analysis to ensure noise sensitive land uses are located away from noise sources, where applicable.
- A Phase I Environmental Site Assessment and subsequent Environmental Study Reports;
- High level cost estimates for engineering works;
- Indication of any private condominium blocks with consideration given to servicing and road connections to future municipal roads and infrastructure
- Parkland/trails;
- Landscaping and Enhancement Plans

Transportation-Roads

If a proponent chooses, additional details could be provided at the Block Plan stage to help streamline the subsequent development applications. Additional details to consider at the Block Plan level include, but are not limited to:

- Road cross-sections that accommodate transportation, servicing needs, and streetscaping requirements, while aiming to avoid locating utilities beneath trees or hardscaped areas- cross sections provided in the TMP with required ROWs
- Road plan and profile drawings including all road geometrics;
- Municipal services with detailed design sheets and plan and profiles;
- Stormwater management strategy/plan including hydrogeological assessment and associated field work to confirm water balance requirements;
- Erosion and sediment control plans;
- Geotechnical report to support the proposed road and pipe design;
- Utility Plans for all other utilities;
- On-street parking spaces to meet criteria in Traffic By-law 89-2000, parking should be provided in addition to meeting any Zoning By-law requirements

A Traffic Impact Assessment (TIA) will be prepared, after being scoped through Pre-consultation, in accordance with the Region's Terms of Reference (TOR) for Traffic Impact Assessment. The TIA will be part of the overall Block Plan TOR and single TIA to be completed for each Block irrespective of the number of landowners/ developers for each Block. The TIA is to be approved by the Township, in consultation with the Region, as part of the Block Plan process.

The Block Plan will include a road schedule that builds upon Schedule 'O' of OPA 63 and Schedule 'E-13' Smithville Transportation Plan: Road Network of OPA 63. Roads shall generally be designed and built in accordance with the Transportation Master Plan prepared for OPA 63. Roads shall generally be designed and built in accordance with the standards set out by Municipal ownership (Smithville TMP, Niagara Region Complete Streets Design Manual). The Block Plan road network shall consider the efficient movement of people and goods by integrating with regional transportation connections and delivery routes and providing connects within neighbourhoods of OPA 63 and outside of OPA 63 and consider access to regional transit and ride-sharing options.

The active transportation network shall be designed in accordance with the approved Transportation Master Plan that informs OPA 63 and associated OPA 63 schedules.

Consultation with Engineering staff with respect to minimum facility design standards is required and the final design will be subject to staff's approval as part of the recommended Block Plan.

A Construction Management Plan (CMP) shall be submitted preferably at the Block Plan stage or if not will be required as part of the Draft Plan of Subdivision submission. The CMP will include: parking locations for contractors; routing of goods/delivery vehicles; measures such as mud mats etc., to minimize damage to existing roads; and identify how public rights of way are managed and operational impacts minimized both during construction hours and outside of them.

If deviation from the Township's Engineering standards is required to achieve the vision, innovative engineering solutions may also be considered, to the satisfaction of the Township Engineer.

APPENDIX 4

Environmental Impact Studies include:

- Field studies to address gaps or updates in subwatershed level information for the applicable catchment or subcatchment areas of the Block Plan;
- Integration of the existing management goals and recommendations of applicable subwatershed studies;
- Completion of an impact assessment and development recommendations for mitigation, restoration and enhancement following the Township's Natural Heritage System policies based on the Block Plan concept and including all related infrastructure, parks, trails, etc.;
- Provide a water balance that is inclusive of natural heritage features and areas based on the Block Plan concept;
- Refine stormwater management plans and recommendations including infiltration targets to support and achieve the overall water balance for the Block Plan area and support maintaining or improving the hydrologic functions of natural heritage features and areas, surface water features and ground water features (refer to engineering requirements in Section 2.3.2), hydrologic verification and refinement to governing unitary sizing criteria;
- Provide recommendations for the enhancement and restoration of existing surface water features, where existing and their riparian areas, and the management of contaminants (i.e. salt) and runoff, in order to support fish habitat and the improvement of water quality and quantity;
- Assess impacts and develop recommendations to mitigate proposed refinements for the trail network and associated alignments including looking at opportunities to collocate trails with other existing or proposed infrastructure. Where trails are proposed within the Natural Heritage System, provide recommendations to ensure compatibility between natural heritage features and areas and the proposed trail network, including the provision of sufficient space for trails, in accordance with the Official Plan Natural Heritage System policies;
- Develop management objectives for stewardship and restoration of natural heritage features and areas, including the provision of recommendations regarding the protection and enhancement of the Township's Forest resources, including the identification of plantable spaces, while also providing opportunities for meadow communities and pollinator habitats;
- Identify and develop monitoring and adaptive management recommendations to ensure long-term sustainability of the Natural Heritage System within the Block Plan area and natural heritage features and areas, surface water features and ground water features.
- Site specific terrestrial field surveys to provide detailed and updated review of MESP study areas, including standard anuran, breeding bird, and vegetation surveys, where appropriate.

- Site specific aquatic field surveys to provide detailed and updated review of MESP study areas, including standard habitat assessments and fish community surveys, where appropriate.
- Assessment and evaluation of “wetlands for further review” and other such areas to determine whether or not they meet the Conservation Authority Act definition of wetland.
- Staking and survey of wetland boundaries with the Township and NPCA. Consultation with NPCA and/or the relevant approval authority around wetlands and potential provincial significance.
- Staking and survey of woodland boundaries with the Township and Region.
- Assessment of Significant Wildlife Habitat (SWH) through more detailed surveys and review of MESP study areas. This is also to include the following, where applicable:
 - ✓ Snake emergence surveys where there is potential for a snake hibernaculum, especially in the area of the rail line and former woodland west of Shurie Road.
 - ✓ Assessment of Raptor Wintering Areas SWH east of Industrial Park Road and north of the rail line within the milieu of woodland, forest, meadow, and thicket habitat.
 - ✓ Assessment of Turtle Nesting Areas SWH along North Creek and Twenty Mile Creek, as well as adjacent to any ponds that provide suitable habitat for turtles.
- Identification of appropriate buffers from natural heritage features, including woodlands, wetlands, and watercourses. Appropriate justification for changes from the buffers recommended through the SWS.
- Consideration of non-significant woodlands and treed areas for retention or compensation.
- Surveys for bat Species at Risk where habitat is proposed for removal, including woodlands and buildings, in accordance with MECP guidance documents.
- Site specific surveys for Species at Risk, including Bobolink, Eastern Meadowlark, and Barn Swallow.
- Address compensation requirements if natural heritage features are proposed for removal.
- Assessment and refinement of Recommended Restoration Areas. Justification for changes from the Restoration Areas recommended through the SWS.
- Assessment and refinement of Linkages. Justification for changes from the Linkages recommended through the SWS.
- Refinement of the Smithville NHS to meet SWS objectives. Justification for changes from the NHS recommended through the SWS ensuring the intent, objectives, and targets of the overall study area are met.

- Monitoring plan for pre-construction, during construction, and post-construction.
- Updated and refined water budget assessment and LID capture targets and general guidance for siting LID BMPs.
- Update formal Regulatory flood line mapping where applicable.
- HDF and watercourse management recommendations where applicable.
- Staked top-of-bank for confined watercourse systems where applicable.
- Establish watercourse/valley crossing locations, and corresponding sizes and geometry of structure for morphological criteria, hydraulic design criteria of freeboard and clearance, regulatory peak flow conveyance, and wildlife passage where applicable.
- Identify general guidance and requirements for holistic monitoring program and principles for developing local monitoring programs.
- Survey for Karstic features within the Block.
- Detailed assessment of karst features NW-3 and SW-2, including dye tracing (to the extent possible), to verify and refine the characterization and management recommendations advanced herein for the features (to the satisfaction of NPCA), and to demonstrate no impacts or hazard to the adjacent development.
- For karst feature NW-1, additional analyses should be completed to demonstrate that the management recommendation advanced in the MESP would not increase flood risk to the adjacent development, and would not increase the risk of structural failure within the adjacent development.
- All identified karst features, as well as any new features identified through the subsequent stages of planning and design, are to be assessed as part of the MESP, and management recommendations established accordingly in consultation with NPCA.

The need for subsequent site-specific environmental studies, their scope and timing will be determined through the pre-consultation process prior to the submission of development applications and will build from and satisfy the recommendations of the applicable Block Plan EIS. Site Specific Environmental impact studies shall follow Region of Niagara EIS guidelines.

APPENDIX 5

Block Plan Design and Development Considerations includes:

Streets and Blocks

- Configuration of blocks
- Pedestrian and vehicle linkages to adjacent areas, including streets, multi-purpose pathways and trails
- Layout and design of development parcels

Public Realm – Streetscape Design

- Streetscape Typologies for:
 - Neighbourhood Corridors
 - Neighbourhood Centres
 - Collector Roads
 - Local Roads
 - Lanes
 - Special Streetscapes
- Existing or new neighbourhood focal points and/or landmarks

Land Use Mix & Distribution

- Distribution of density and land uses that meet the required Block Plan area density target as outlined within the Official Plan
- Mix of housing types and densities
- Distribution and range of employment uses for mixed use areas
- Distribution and range of commercial and retail areas for mixed used areas
- Identification of mixed use areas

Built Form Design and Site Planning

- Site analysis and building types
- Residential building types
- Mixed use and non-residential areas

Natural Heritage System

- As determined by the Block Servicing Strategy, the following should also be included within the Conceptual Master Plan to achieve Township Natural Heritage objectives:
 - Boundaries and Buffers of the Natural Heritage System
 - Location of natural features including mature trees and vegetation
 - Strategies to enhance and protect the Natural Heritage System

- Delineation of restoration areas and enhancement strategies
- Identification of opportunities to enhance the Natural Heritage System through the provision of Green Infrastructure and strategically located parks and community facilities

Parks, Open Spaces, and Community Uses

- Parkland dedication strategy addressing location , size, purpose of parks, contribution to canopy coverage, as well as rationale if parks have a different location than shown in the Secondary Plan.
- Location, orientation, and size of proposed parks, open spaces, and the trail system
- Future public destinations including schools, community facilities, and institutional uses

Transportation Network and Servicing

- As determined by the Block Infrastructure and Servicing Strategy, the following should also be included within the Conceptual Master Plan:
 - Proposed active transportation network, including public sidewalks, bike lanes and trails, walkways through planned parks, and accessible open spaces including midblock connections
 - Proposed transportation and transit network, including new road pattern and key transit areas based on consultation with the Region.
 - A consideration of traffic safety and achieving objectives of Vision Zero;
 - Details for the provision of water, sanitary trunks and sub-trunks as per Smithville MCP Water and Wastewater Master Plan
 - Stormwater management facilities including location and area requirements to support the Natural Heritage System
 - Infrastructure utilities including but not limited to gas, electricity and telecom
 - Where applicable, consideration of Canadian Pacific Railway requirements

Other Uses/Considerations

- Strategies to apply sustainable best practices
- Cultural heritage resources and strategies to protect them
- How the development within the Block Plan will influence and integrate with adjacent and related future development.
- Phasing of development including all relevant information required to evaluate the phasing plan. Relevant information to be considered such as: MCP Staging Plan OPA Schedule 2, Population Projection, Land use type, Water

Wastewater Design Criteria as per MCP Water and Wastewater Master Plan Study, Township and Region Development Charge Studies