



**Town of Oakville  
Council**

**REVISED AGENDA**

Date: Monday, February 26, 2024  
Time: 6:30 p.m.  
Location: Virtual Meeting

Live streaming video is available on <https://www.oakville.ca/town-hall/mayor-council-administration/agendas-meetings/live-stream> or at the town's YouTube channel at <https://www.youtube.com/user/TownofOakvilleTV>. Information regarding written submissions and requests to delegate can be found at <https://www.oakville.ca/town-hall/mayor-council-administration/agendas-meetings/delegations-presentations>.

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	<b>Pages</b>
1. O Canada	
2. Regrets	
3. Declarations of Pecuniary Interest	
4. Confirmation of Minutes of the previous Council Meeting(s)	
<i>Item 4.2 see confidential agenda.</i>	
4.1 Minutes of the Regular Session of Planning and Development Session of Council, JANUARY 22, 2024	6 - 19
4.2 Confidential Minutes of the Closed Session of Planning and Development Council, JANUARY 22, 2024	
4.3 Minutes of the Regular Session of Council January 29, 2024	20 - 26

**\*4.4 Minutes of the Regular Session of Planning and Development Session of Council, FEBRUARY 5, 2024**

27 - 32

Recommendation:

1. That the minutes of the regular session of Planning and Development Council dated January 22, 2024 be approved.
2. That the Confidential minutes of the Closed session of Planning and Development Council dated January 22, 2024 be approved.
3. That the minutes of the regular session of Council dated January 29, 2024, be approved.
4. That the minutes of the Regular session of Planning and Development dated February 5, 2024 be approved.

**5. Public Presentation(s)**

There are no public presentations listed for this agenda.

**6. Standing Committee Report(s)**

*Item 6.2 see confidential agenda.*

**6.1 Minutes of the Committee of the Whole - Midtown Oakville Meeting, JANUARY 30, 2024 Reconvened JANUARY 31, 2024**

33 - 36

**6.2 Confidential Minutes of the Closed Session of Committee of the Whole - Midtown Oakville Meeting, JANUARY 30, 2024 Reconvened JANUARY 31, 2024**

Recommendation:

1. That the minutes of the Midtown Oakville Meeting dated January 30 reconvened January 31, 2024 be approved.
2. That the Confidential minutes of the Closed session of Committee of the Whole - Midtown Oakville Meeting January 30, 2024 Reconvened January 31, 2024 be approved.

**7. Committee of the Whole**

**8. Consent Item(s)**

## 8.1 2024 Budgets for Business Improvement Areas

37 - 43

### Recommendation:

1. That the 2024 Recommended Budget for the Downtown Oakville Business Improvement Area, requiring a levy of \$1,230,450, as shown in Appendix A, be approved;
2. That the 2024 Recommended Budget for the Bronte Village Business Improvement Area, requiring a levy of \$380,364, as shown in Appendix B, be approved;
3. That the 2024 Recommended Budget for the Kerr Village Business Improvement Area, requiring a levy of \$444,198, as shown in Appendix C, be approved;
4. That the relevant Board of Management approve any subsequent revision or reallocation of funds, within these budgets. The resolution shall be provided to the Treasurer, or designate of the town, who shall determine the significance of the change and advise if it requires Council approval.
5. That the Boards of Management ensure that the procurement of supplies and services, within the approved budgets, meet the requirements of the town's Purchasing By-law.

## 8.2 Corporate Policy Update

44 - 57

### Recommendation:

1. That the Occupational Health, Safety and Workplace Violence Policy and related updated Workplace Violence Procedure be approved.
2. That the new Enforcement of Boulevard Parking in Residential Areas Procedure be received.

## 9. Confidential Consent Item(s)

There are no Confidential Consent Items listed for this agenda.

## 10. Discussion Item(s)

### 10.1 OEC Quarterly Update – February 26, 2024

58 - 59

#### Recommendation:

That the presentation from Rob Lister, President and CEO of Oakville Enterprises Corporation (OEC) regarding the quarterly update be received.

## 11. Confidential Discussion Item(s)

*Item 11.2 see confidential addendum to be distributed.*

- 11.1 Judicial Review Application-Ontario Superior Court-Appeal Committee  
Decision-277 Lakeshore Road East -Three Fascia Signs-RAR Litigation
- 11.2 Potential Claim Re: Existing Contract
- 12. **Advisory Committee Minutes**  
There are no Advisory Committee Minutes listed for this agenda.
- 13. **Rise and Report to Council**
- 14. **Information Items (Circulated Electronically)**
  - 14.1 Council Information for January 17, 2024 - February 14, 2024 60 - 63
  - 14.2 INTERNAL MEMO - Economic Development RE: Seasonal Commercial  
Patio Program 64 - 68
  - 14.3 INTERNAL MEMO - Clerk's Department RE: Municipal Clearance for  
Liquor Sales Licence 69 - 69
- 15. **Status of Outstanding Issues**
  - 15.1 Status of Outstanding Issues for February 2024 70 - 97
- 16. **New Business**  
(Notice of Motion, Emergency, Congratulatory or Condolence)
- 17. **Regional Reports and Question Period Regarding Town Boards and Advisory  
Committees**
- 18. **Requests for Reports**
- 19. **Consideration and Reading of By-Laws**  
That the following by-law(s) be passed:
  - 19.1 **By-law 2024-001** 98 - 157  
  
A by-law to establish retention periods for records of the Town of  
Oakville and to repeal By-law 2021-130.
  - 19.2 **By-law 2024-038** 158 - 158  
  
A by-law to confirm the proceedings of a meeting of Council.

## 20. Delegated Authority By-laws

The following by-law was prepared under the authority of amending By-law 2023-021, as amended, a by-law to delegate certain powers and duties under the Municipal Act, S.O. 2001 c.25, the Planning Act, R.S.O. 1990 c. P.13, and other Acts:

- |             |  |           |
|-------------|--|-----------|
| <b>20.1</b> | <b>By-law 2024-003</b>   | 159 - 161 |
|             | A by-law to amend Zoning By-law 2014-014, as amended, to permit a commercial parking area as a temporary use for a period of three years on lands described as 125 Randall Street, Town of Oakville File No.: Z.1614.82. |           |
| <b>20.2</b> | <b>By-law 2024-011</b>   | 162 - 163 |
|             | A by-law to remove the “H10” and “H15” Holding Symbols from Blocks 415 and 418 of Plan 20M-1186, File No. ZH14.23.   |           |
| <b>20.3</b> | <b>By-law 2024-012</b>   | 164 - 165 |
|             | A by-law to remove Holding “H” Provisions on lands described as 3270 Sixth Line, Argo (West Morrison Creek) Ltd., File No.: ZH 20/23.  |           |
| <b>20.4</b> | <b>By-law 2024-013</b>   | 166 - 167 |
|             | A by-law to remove a Holding “H” Provision on a portion of the lands described as Block 22, Plan 20M-1258 and Block 201, Plan 20M-1255, Martillac Estates Inc., File No.: ZH 18/23.                                      |           |

## 21. Adjournment



**Town of Oakville**  
**Planning and Development Council**  
**MINUTES**

**Date:** January 22, 2024  
**Time:** 6:30 p.m.  
**Location:** Council Chamber

Mayor and Council:

- Mayor Burton
- Councillor Adams
- Councillor Chisholm
- Councillor Duddeck
- Councillor Elgar
- Councillor Gittings
- Councillor Grant
- Councillor Haslett-Theall
- Councillor Knoll
- Councillor Lishchyna
- Councillor Longo
- Councillor McNeice
- Councillor Nanda
- Councillor O'Meara
- Councillor Xie

Staff:

- J. Clohec, Chief Administrative Officer
- N. Sully, Commissioner of Corporate Services and Treasurer
- N. Garbe, Commissioner of Community Development
- P. Fu, Commissioner of Community Infrastructure
- D. Carr, Town Solicitor
- G. Charles, Director of Planning Services
- D. Perlin, Assistant Town Solicitor
- P. Barrette, Manager of Planning Services, West District
- K. Biggar, Manager of Policy Planning and Heritage
- K. Parker, Manager of Development Services
- B. Sunderland, Senior Planner
- R. McKnight, Planner
- S. Schappert, Heritage Planner

J. Gomez, Chief of Staff  
A. Holland, Acting Town Clerk  
J. Marcovecchio, Council and Committee Coordinator

**The Town of Oakville Council met in regular session to consider planning matters on this 22nd day of January, 2024 in the Council Chamber of the Oakville Municipal Building, 1225 Trafalgar Road, commencing at 6:30 p.m.**

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**1. Regrets**

There were no regrets.

**2. Declarations of Pecuniary Interest**

No declarations of pecuniary interest were declared.

**3. Committee of the Whole**

Moved by Councillor Lishchyna  
Seconded by Councillor Duddeck

That this meeting proceed into a Committee of the Whole session.

CARRIED

**4. Consent Items(s)**

**4.1 Notice of intention to designate – 2 Holyrood Avenue**

Moved by Councillor McNeice

That a notice of intention to designate be issued under section 29, Part IV of the *Ontario Heritage Act* for the Holyrood House at 2 Holyrood Avenue.

CARRIED

**4.2 Notice of intention to designate – 311-313 Macdonald Road**

Moved by Councillor McNeice

That a notice of intention to designate be issued under section 29, Part IV of the *Ontario Heritage Act* for the Snyder House at 311-313 Macdonald Road.

CARRIED

**4.3 Notice of intention to designate – 323 Macdonald Road**

Moved by Councillor McNeice

That a notice of intention to designate be issued under section 29, Part IV of the *Ontario Heritage Act* for the Cuthbertson House at 323 Macdonald Road.

CARRIED

**4.4 Notice of intention to designate – 429 Macdonald Road**

Moved by Councillor McNeice

That a notice of intention to designate be issued under section 29, Part IV of the *Ontario Heritage Act* for 'Nansidwell' at 429 Macdonald Road.

CARRIED

**4.5 Notice of intention to designate – 383 Spruce Street**

Moved by Councillor McNeice

That a notice of intention to designate be issued under section 29, Part IV of the *Ontario Heritage Act* for the Crossley House at 383 Spruce Street.

CARRIED

**4.6 Notice of intention to designate – 24 Holyrood Avenue**

Moved by Councillor McNeice

That a notice of intention to designate be issued under section 29, Part IV of the *Ontario Heritage Act* for the Holyrood Gate Pillars at 24 Holyrood Avenue.

CARRIED

**5. Confidential Consent Item(s)**



**5.1 Appeal To Ontario Land Tribunal Of Committee of Adjustment Decision CAV A/110/2023 Respecting 571 Stephens Crescent, Oakville**

Moved by Councillor Chisholm

1. That the appeal to the Ontario Land Tribunal (“OLT”) of the Committee of Adjustment (“COA”) Decision CAV A/110/2023, (“The Decision”), 571 Stephens Crescent, be confirmed.
2. That the Town Solicitor or his designate be authorized to pursue this appeal of The Decision in accordance with the position set out in Appendix D attached to this Report.
3. That in consultation with the Director of Planning Services or his designate, the Town Solicitor or his designate, be authorized to negotiate a proposed settlement of the Appeal and execute Minutes of Settlement before or at the OLT Hearing in a manner that addresses the issues and concerns identified in Appendix D attached to this report.

CARRIED

**6. Public Hearing Item(s)**

There were no public hearing items.

**7. Discussion Item(s)**

**7.1 Recommendation Report – Official Plan Amendment (File No. 1715.25) and Zoning By-law Amendment (File No. 1715.25), Format Lakeshore Inc., 42 Lakeshore Road West – By-law 2024-020 and By-law 2024-021**

The following delegates spoke on this item:

Paul Demczak, Batory Planning + Management; Linda Dorrington; Manlio Marescotti; Geoffrey Belcher; Pierre Sauvageot; and Matheus DaSilva

Moved by Councillor Duddeck

That Council resolve into a closed meeting session for the purpose of advice that is subject to solicitor-client privilege, including communications necessary for that purpose, with respect to Item 7.1 - Recommendation Report – Official Plan Amendment (File No. 1715.25) and Zoning By-law

Amendment (File No. 1715.25), Format Lakeshore Inc., 42 Lakeshore Road West – By-law 2024-020 and By-law 2024-021.

CARRIED

**CLOSED SESSION**

*Council resolved into closed session at 7:47 p.m.*

*Council resolved back into open session at 8:25 p.m.*

Moved by Councillor Duddeck

1. That the following recommendations in the staff report regarding an Official Plan Amendment and Zoning Amendment for 42 Lakeshore Road West be refused:
  1. That the Official Plan Amendment and Zoning By-law Amendment for 42 Lakeshore Road West, (File No. OPA.1715.25 and Z.1715.25), as modified to an 8 storey building, be approved on the basis that the amendments are consistent with the Provincial Policy Statement, conform with all applicable Provincial Plans, the Region of Halton Official Plan, the Livable Oakville Plan, have regard for matters of Provincial interest, and represent good planning for the reasons outlined in the report from the Planning Services department dated January 9, 2024.
  2. That By-law 2024-020, a by-law to adopt Official Plan amendment 63, be passed.
  3. That By-law 2024-021, an amendment to Zoning By-law 2014-014, be passed.
  4. That the notice of Council's decision reflect that Council has fully considered all of the written and oral submissions relating to these matters and that those comments have been appropriately addressed.
  5. That, in accordance with Section 34(17) of the *Planning Act*, no further notice is determined to be necessary.

2. That the application File No. OPA.1715.25 and Z.1715.25 for an official plan amendment and zoning by-law amendment for a 10 storey building at 42 Lakeshore Road West be refused.

For (15): Mayor Burton, Councillor Adams, Councillor Chisholm, Councillor Duddeck, Councillor Elgar, Councillor Gittings, Councillor Grant, Councillor Haslett-Theall, Councillor Knoll, Councillor Lishchyna, Councillor Longo, Councillor McNeice, Councillor Nanda, Councillor O'Meara, and Councillor Xie

Carried Unanimously on a recorded vote (15 to 0)

## **7.2 Housing Accelerator Fund Application Update**

The following delegates spoke on this item:

Adam Mills; Geoffrey Belcher; Douglas McKirgan, Trafalgar Chartwell Residents Association (TCRA); Pierre Sauvageot; Matheus DaSilva; Nick Morrison; Fred Dawson; Luca Morgante; and Eric Genier

*Mayor Burton passed the chair to Acting Mayor Gittings to introduce a motion.*

Moved by Mayor Burton

1. In support of the Housing Accelerator Fund Application, as advised by Minister Fraser with due regard for heritage conservation and infrastructure capacity and servicing:
  - a. That staff be directed to bring forward a zoning by-law amendment to permit 4 units per property, as-of-right for Council's consideration within 90 days of the passing of this resolution; and
  - b. That staff be directed to bring forward a zoning by-law amendment permitting 4 storeys within 800m of Sheridan College for Council's consideration within 90 days of the passing of this resolution; and
  - c. That staff be directed to bring forward a zoning by-law amendment for Sheridan College that will bring zoning regulations into alignment with the Town's Official Plan.
2. That the Mayor respond to the Minister of Housing, Infrastructure and Communities' office with any update to the Housing

Accelerator Fund application including the appropriate resolutions of Council by January 24, 2024.

*Mayor Burton assumed the chair.*

**BEYOND THE HOUR**

Moved by Councillor Knoll

That this meeting proceed beyond the hour of 10:30 p.m.

CARRIED

The following amendment was moved by Councillor Haslett-Theall to the main motion:

Moved by Councillor Haslett-Theall

d. That staff engage with the Minister of Housing, Infrastructure and Communities as soon as possible on the Ministry's support for inclusion of a 'gentle density strategy' in our Housing Accelerator application. Developing and prioritizing a gentle density strategy would include: identifying a criterion to assess commercial properties near residential communities suitable for conversion to mixed-use, identifying commercial properties that meet this criterion, determining the potential increase in housing supply and housing mix including rental, condos and affordable, a public consultation plan for identified locations, property owner feedback and any regulation changes that would be necessary to support implementation. Further that Town Staff report back to Council on the feedback received from the Ministry.

CARRIED Unanimously

The Mayor called for a separate vote on clauses 1a, b, c, and d, and 2 of the main motion as amended.

Moved by Mayor Burton

1. In support of the Housing Accelerator Fund Application, as advised by Minister Fraser with due regard for heritage conservation and infrastructure capacity and servicing:

- a. That staff be directed to bring forward a zoning by-law amendment to permit 4 units per property, as-of-right for Council's consideration within 90 days of the passing of this resolution.

For (11): Mayor Burton, Councillor Adams, Councillor Gittings, Councillor Grant, Councillor Haslett-Theall, Councillor Knoll, Councillor Lishchyna, Councillor Longo, Councillor McNeice, Councillor O'Meara, and Councillor Xie

Against (4): Councillor Chisholm, Councillor Duddeck, Councillor Elgar, and Councillor Nanda

CARRIED on a recorded vote (11 to 4)

Moved by Mayor Burton

- b. That staff be directed to bring forward a zoning by-law amendment permitting 4 storeys within 800m of Sheridan College for Council's consideration within 90 days of the passing of this resolution.

For (15): Mayor Burton, Councillor Adams, Councillor Chisholm, Councillor Duddeck, Councillor Elgar, Councillor Gittings, Councillor Grant, Councillor Haslett-Theall, Councillor Knoll, Councillor Lishchyna, Councillor Longo, Councillor McNeice, Councillor Nanda, Councillor O'Meara, and Councillor Xie

Carried Unanimously on a recorded vote (15 to 0)

Moved by Mayor Burton

- c. That staff be directed to bring forward a zoning by-law amendment for Sheridan College that will bring zoning regulations into alignment with the Town's Official Plan.

For (15): Mayor Burton, Councillor Adams, Councillor Chisholm, Councillor Duddeck, Councillor Elgar, Councillor Gittings, Councillor Grant, Councillor Haslett-Theall, Councillor Knoll, Councillor Lishchyna, Councillor Longo, Councillor McNeice, Councillor Nanda, Councillor O'Meara, and Councillor Xie

Carried Unanimously on a recorded vote (15 to 0)

Moved by Mayor Burton

d. That staff engage with the Minister of Housing, Infrastructure and Communities as soon as possible on the Ministry's support for inclusion of a 'gentle density strategy' in our Housing Accelerator application. Developing and prioritizing a gentle density strategy would include: identifying a criterion to assess commercial properties near residential communities suitable for conversion to mixed-use, identifying commercial properties that meet this criterion, determining the potential increase in housing supply and housing mix including rental, condos and affordable, a public consultation plan for identified locations, property owner feedback and any regulation changes that would be necessary to support implementation. Further that Town Staff report back to Council on the feedback received from the Ministry.

For (15): Mayor Burton, Councillor Adams, Councillor Chisholm, Councillor Duddeck, Councillor Elgar, Councillor Gittings, Councillor Grant, Councillor Haslett-Theall, Councillor Knoll, Councillor Lishchyna, Councillor Longo, Councillor McNeice, Councillor Nanda, Councillor O'Meara, and Councillor Xie

Carried Unanimously on a recorded vote (15 to 0)

Moved by Mayor Burton

2. That the Mayor respond to the Minister of Housing, Infrastructure and Communities' office with any update to the Housing Accelerator Fund application including the appropriate resolutions of Council by January 24, 2024.

For (15): Mayor Burton, Councillor Adams, Councillor Chisholm, Councillor Duddeck, Councillor Elgar, Councillor Gittings, Councillor Grant, Councillor Haslett-Theall, Councillor Knoll, Councillor Lishchyna, Councillor Longo, Councillor McNeice, Councillor Nanda, Councillor O'Meara, and Councillor Xie

Carried Unanimously on a recorded vote (15 to 0)

Motion as Carried

1. In support of the Housing Accelerator Fund Application, as advised by Minister Fraser with due regard for heritage conservation and infrastructure capacity and servicing:

- a. That staff be directed to bring forward a zoning by-law amendment to permit 4 units per property, as-of-right for Council's consideration within 90 days of the passing of this resolution; and
  - b. That staff be directed to bring forward a zoning by-law amendment permitting 4 storeys within 800m of Sheridan College for Council's consideration within 90 days of the passing of this resolution; and
  - c. That staff be directed to bring forward a zoning by-law amendment for Sheridan College that will bring zoning regulations into alignment with the Town's Official Plan; and
  - d. That staff engage with the Minister of Housing, Infrastructure and Communities as soon as possible on the Ministry's support for inclusion of a 'gentle density strategy' in our Housing Accelerator application. Developing and prioritizing a gentle density strategy would include: identifying a criterion to assess commercial properties near residential communities suitable for conversion to mixed-use, identifying commercial properties that meet this criterion, determining the potential increase in housing supply and housing mix including rental, condos and affordable, a public consultation plan for identified locations, property owner feedback and any regulation changes that would be necessary to support implementation. Further that Town Staff report back to Council on the feedback received from the Ministry.
2. That the Mayor respond to the Minister of Housing, Infrastructure and Communities' office with any update to the Housing Accelerator Fund application including the appropriate resolutions of Council by January 24, 2024.

**8. Confidential Discussion Item(s)**

There were no confidential discussion items.

**9. Advisory Committee Minutes**

**9.1 Heritage Oakville Advisory Committee Minutes December 19, 2023**

The following delegates were heard on Item 9.1 (Heritage Item 4.1):

Kevin Coleman, Deputy Warden and Robert Clarence, Manager, St. Jude's Anglican Church

Moved by Councillor Gittings

That the following recommendation pertaining to Item 4.1 of the Heritage Oakville Advisory Committee minutes from its meeting on December 19, 2023, be approved as amended and the remainder of the minutes be received:

**4.1 Heritage Permit Application - HP040/23-42.20W - 148 William Street - Replacement of Windows**

1. That Heritage Permit Application HP040/23-42.20W for the replacement of windows at 148 William Street, as attached in Appendix B to the report dated December 5, 2023, from Planning Services, be approved subject to the following:
  - a. That the muntin bars on all windows are full profile and fixed to the exterior of the windows;
  - b. That the three windows on the front elevation be wood, not aluminum-clad wood; and
  - c. That final details on the windows be submitted to Heritage Planning staff for final approval; and
2. That this heritage permit expires two years from the date of final approval by Council.

CARRIED

Moved by Councillor Knoll

That the following recommendation pertaining to Item 4.2 of the Heritage Oakville Advisory Committee minutes from its meeting on December 19, 2023, be approved:

**4.2 Heritage Permit Application HP039/23-42.20S –1042 Sixth Line – Alteration and Removal of Cultural Heritage Landscape Attributes**

That Heritage Permit Application HP039/23-42.20S for alteration and removal of cultural heritage landscape attributes at 1042 Sixth Line as attached in Appendix B to the report dated December 5, 2023 from Planning Services, be denied.



CARRIED Unanimously

**10. Rise and Report to Council**

Moved by Councillor Duddeck

That this committee rise and report.

CARRIED

The Mayor arose and reported that the Committee of the Whole has met and has made recommendations on Consent Items 4.1, 4.2, 4.3, 4.4, 4.5, and 4.6; Confidential Consent Item 5.1; Discussion Items 7.1 and 7.2; and Advisory Committee Minutes 9.1 as noted by the Clerk.

Moved by Councillor Longo

Seconded by Councillor Lishchyna

That the report and recommendations of the Committee of the Whole be approved.

CARRIED

**11. New Business**

(Emergency, Congratulatory or Condolence)

There was no new business.

**12. Consideration and Reading of By-laws**

**12.1 By-law 2024-004**

A by-law to designate the Nightingale House at 265 Watson Avenue as a property of cultural heritage value or interest.

**12.2 By-law 2024-006**

A by-law to designate the Wardell House at 401 Lakeshore Road East as a property of cultural heritage value or interest.

**12.3 By-law 2024-007**

A by-law to designate the Wanless House at 291 Watson Avenue as a property of cultural heritage value or interest.

**12.4 By-law 2024-008**

A by-law to designate the Detmold House at 395 Lakeshore Road East as a property of cultural heritage value or interest.

**12.5 By-law 2024-009**

A by-law to designate the Warcup House at 407 Lakeshore Road East as a property of cultural heritage value or interest.

**12.6 By-law 2024-010**

A by-law to designate the Westwood House at 1072 Tanglewood Court as a property of cultural heritage value or interest.

**12.7 By-law 2024-020 (Not Passed. Planning Application denied under Item 7.1)**

A by-law to adopt an amendment to the Livable Oakville Plan, Official Plan Amendment Number 63 (42 Lakeshore Road West; File No. OPA 1715.25). (Re: Item 7.1).

**12.8 By-law 2024-021 (Not Passed. Planning Application denied under Item 7.1)**

A by-law to amend the Zoning By-law 2014-014, as amended, to permit the development of a mixed-use building on lands described as Lots 10, 12 & 13, Block 68, Plan 1 As Part 1 On 20R22219 – 42 Lakeshore Road West – Z.1715.25. (Re: Item 7.1).

**12.9 By-law 2024-019**

A by-law to confirm the proceedings of a meeting of Council.

Moved by Councillor Elgar  
Seconded by Councillor Chisholm

That the by-law(s) noted above, with the exception of By-laws 2024-020 and 2024-021, be passed.

CARRIED

*The Mayor gave written approval of the by-law(s) noted above that were passed during the meeting.*

**13. Adjournment**

The Mayor adjourned the meeting at 11:44 p.m.

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Andrea Holland, Acting Town  
Clerk



## Town of Oakville

### Council Minutes

**Date:** January 29, 2024  
**Time:** 6:30 p.m.  
**Location:** Council Chamber

Mayor and Council: Mayor Burton  
Councillor Adams  
Councillor Chisholm  
Councillor Duddeck  
Councillor Elgar  
Councillor Gittings  
Councillor Grant  
Councillor Haslett-Theall  
Councillor Knoll  
Councillor Lishchyna  
Councillor Longo  
Councillor McNeice  
Councillor Nanda  
Councillor O'Meara  
Councillor Xie

Staff: J. Clohecy, Chief Administrative Officer  
N. Sully, Commissioner of Corporate Services and Treasurer  
C. Bell, Commissioner of Community Services  
N. Garbe, Commissioner of Community Development  
P. Fu, Commissioner of Community Infrastructure  
D. Carr, Town Solicitor  
V. Tytaneck, Town Clerk  
A. Holland, Manager of Council and Committee Services  
N. Coric, Council and Committee Coordinator  
J. Marcovecchio, Council and Committee Coordinator

**The Town of Oakville Council met in regular session this 29th day of January, 2024 in the Council Chamber of the Oakville Municipal Building, 1225 Trafalgar Road, Oakville commencing at 6:30 p.m.**

**1. O Canada**

**2. Regrets**

There are no regrets for this meeting.

**3. Declarations of Pecuniary Interest**

No declarations of pecuniary interest were declared.

*In accordance with Section 2(8) of the Procedure By-law, the items were considered out of order.*

**10. Discussion Item(s)**

**10.1 Notice of Motion - Commitment to Community and Global Peace**

Mayor Burton ruled 10.1 Notice of Motion – Commitment to Community and Global Peace out of order in accordance with Section 3.4 of the Town of Oakville Procedure By-law.

The following statement was introduced by Mayor Burton at the meeting and made available on the Town's website.

WHEREAS foreign policy and international affairs are under the jurisdiction of the Canadian Government; and

WHEREAS the Town of Oakville Council supports the Canadian Government's continuing management of the Canadian position regarding the conflict in Gaza; and

WHEREAS municipal councils are concerned with more local issues; and

WHEREAS Council is dedicated to ensuring a safe, inclusive, and respectful environment for all residents; and

WHEREAS the Town of Oakville values peace and harmony globally; and

WHEREAS the Town of Oakville Council recognizes the complex and global nature of this conflict and other global issues and their local impact on our residents; and

WHEREAS Council condemns all acts of hatred; and

WHEREAS, Council is committed to the principles of non-violence, mutual respect, and the promotion of understanding among all community members.

THEREFORE, BE IT RESOLVED THAT the Town of Oakville Council supports the Canadian Government's diplomatic efforts as Council remains deeply concerned by the scale of the humanitarian crisis in Gaza and ongoing risks to all civilians;

THAT Council supports the Canadian Government's diplomatic efforts in support of urgent international efforts towards a sustainable ceasefire, humanitarian aid, and release of all hostages;

BE IT FURTHER RESOLVED THAT a copy of this resolution be sent to the Prime Minister of Canada, the Minister of Global Affairs, the Minister of International Development, local Halton Members of Parliament and be made available to the public;

AND BE IT FURTHER RESOLVED that this resolution be entered into the official records of the Town of Oakville Council and be communicated to the public, affirming the Council's commitment to community solidarity.

### **RECESS**

The meeting recessed from 6:41 - 10:20 p.m.

- 4. Confirmation of Minutes of the previous Council Meeting(s)**
  - 4.1 Minutes of the Regular Session of Council, DECEMBER 18, 2023**
  - 4.2 Minutes of the Special Session of Council, DECEMBER 20, 2023**

**4.3 Minutes of the Regular Session of Planning and Development Session of Council, JANUARY 22, 2024**

**4.4 Confidential Minutes of the Closed Session of Planning and Development Session of Council, JANUARY 22, 2024**

Moved by Councillor Lishchyna

Seconded by Councillor Longo

1. That the minutes of the Regular session of Council dated December 18, 2023, be approved.
2. That the minutes of the Special session of Council dated December 20, 2023, be approved.
3. That the minutes of the Regular session of Planning and Development Council and confidential minutes dated January 22, 2024, be approved.

CARRIED

**5. Public Presentation(s)**

There are no public presentations listed for this agenda.

**6. Standing Committee Report(s)**

**6.1 Minutes of the Committee of the Whole - Midtown Oakville Meeting - DECEMBER 12, 2023**

Moved by Councillor Xie

Seconded by Councillor Knoll

That the minutes of the Midtown Oakville Meeting dated December 12, 2023, be approved.

CARRIED

**7. Committee of the Whole**

Council did not proceed into Committee of the Whole.

**8. Consent Item(s)**

**8.1 Corporate Policy Update**

*Under Section 2(10) of the Town of Oakville Procedure By-law, this item has been postponed to a future meeting.*

**8.2 By-law 2024-014 A By-law to Authorize the Temporary Borrowing of Monies for 2024**

Moved by Councillor Haslett-Theall  
Seconded by Councillor Grant

That By-law 2024-014 be passed authorizing the temporary borrowing of monies to meet current expenditures should the need arise in 2024, until taxes are collected and other revenues are received.

CARRIED

**9. Confidential Consent Item(s)**

**9.1 Potential Acquisition of Land**

Moved by Councillor Haslett-Theall  
Seconded by Councillor Grant

That the recommendation contained in the confidential report dated January 16, 2024, from the Legal Department, be approved.

CARRIED

**11. Confidential Discussion Item(s)**

There are no Confidential Discussion Items listed for this agenda.

**12. Advisory Committee Minutes**

**12.1 Accessibility Advisory Committee Minutes - December 14, 2023**

Moved by Councillor Gittings  
Seconded by Councillor Xie



That the Accessibility Advisory Committee minutes dated December 14, 2023 be received.

CARRIED

**13. Rise and Report to Council**

**14. Information Items (Circulated Electronically)**

**14.1 Council Information for December 06, 2023 - January 17, 2024**

**14.2 INTERNAL MEMO - Finance Department RE: Community Benefit Charge and cash-in-lieu of Parkland Funding**

**14.3 INTERNAL MEMO - Clerk's Department RE: 4th Review of the AODA by Rich Donovan**

**15. Status of Outstanding Issues**

**15.1 Status of Outstanding Issues for January 2024**

**16. New Business**

Councillor Lishchyna congratulated Councillor Knoll for being re-elected as Chair of the Halton Police Board and for his appointment as director of the Canadian Association of Police Governance.

**17. Regional Reports and Question Period Regarding Town Boards and Advisory Committees**

**18. Requests for Reports**

There were no requests for reports.

**19. Consideration and Reading of By-Laws**

**19.1 By-law 2024-014**

A by-law to authorize the temporary borrowing of monies for 2024 (re: item 8.2)

**19.2 By-law 2024-018**

A by-law to confirm the proceedings of a meeting of Council.

Moved by Councillor Grant

Seconded by Councillor Longo

That the by-laws noted above be passed.

CARRIED

**20. Delegated Authority By-laws**

The following by-law was prepared under the authority of amending By-law 2023-021, as amended, a by-law to delegate certain powers and duties under the Municipal Act, S.O. 2001 c.25, the Planning Act, R.S.O. 1990 c. P.13, and other Acts:

**20.1 By-law 2023-114**

A by-law to amend Zoning By-law 2014-014 as amended, to remove Holding Provision 1, Part 16 (Bronte Lakeside Ltd., 2432-2452 Lakeshore Road West & 87-99 Bronte Road, Part of Lots 1, 7, 8, 10 and 11 and all of Lots 1A, 2, 3, 4, 5 and 9 PLAN M-8), File No.: Z.1729.60

**21. Adjournment**

The Mayor adjourned the meeting at 10:24 p.m.

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Vicki Tytaneck, Town Clerk



**Town of Oakville**  
**Planning and Development Council**  
**MINUTES**

**Date:** February 5, 2024  
**Time:** 6:30 p.m.  
**Location:** Council Chamber

Mayor and Council: Councillor Adams  
Councillor Chisholm  
Councillor Duddeck  
Councillor Elgar  
Councillor Gittings, Acting Mayor  
Councillor Grant  
Councillor Haslett-Theall  
Councillor Knoll (As of 6:32 p.m.)  
Councillor Lishchyna  
Councillor Longo  
Councillor McNeice  
Councillor Nanda  
Councillor O'Meara  
Councillor Xie

Regrets: Mayor Burton

Staff: J. Clohecy, Chief Administrative Officer  
N. Sully, Commissioner of Corporate Services and Treasurer  
N. Garbe, Commissioner of Community Development  
P. Fu, Commissioner of Community Infrastructure  
D. Carr, Town Solicitor  
G. Charles, Director of Planning Services  
N. Chandra, Assistant Town Solicitor  
P. Barrette, Manager of Planning Services, West District  
K. Biggar, Manager of Policy Planning and Heritage  
K. Cockburn, Senior Planner  
S. Schappert, Heritage Planner  
A. Holland, Acting Town Clerk

J. Marcovecchio, Council and Committee Coordinator

**The Town of Oakville Council met in regular session to consider planning matters on this 5th day of February, 2024 in the Council Chamber of the Oakville Municipal Building, 1225 Trafalgar Road, commencing at 6:30 p.m.**

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**1. Regrets**

As noted above.

**2. Declarations of Pecuniary Interest**

No declarations of pecuniary interest were declared.

**3. Committee of the Whole**

Moved by Councillor Elgar

Seconded by Councillor Lishchyna

That this meeting proceed into a Committee of the Whole session.

CARRIED

**4. Consent Items(s)**

**4.1 Recommendation Report, Draft Plan of Condominium, 1075 North Service Road West, 1000326628 Ontario Inc., 24CDM-23001-1521**

Moved by Councillor O'Meara

That the Director of Planning Services be authorized to grant draft plan approval to the Draft Plan of Condominium (24CDM-23001/1521) submitted by 1000326628 Ontario Inc., and prepared by J.D. Barnes Ltd. dated December 12, 2023 (Sheets 1 and 2), subject to the conditions contained in Appendix A of the Planning Services Report dated January 23, 2024.

CARRIED

**5. Confidential Consent Item(s)**

**5.1 Ontario Land Tribunal Appeal (OLT-22-004519) by Dunpar Developments Inc in respect of Development Charges By-law**

Moved by Councillor O'Meara

That staff be authorized to proceed in the appeal to the Ontario Land Tribunal (OLT-22-004519) filed by Dunpar Developments Inc in respect of the Development Charges By-law, in accordance with the recommendations of the confidential report from the Legal Department dated January 30, 2024.

CARRIED

**6. Public Hearing Item(s)**

There were no public hearing items.

**7. Discussion Item(s)**

**7.1 Old Oakville Heritage Conservation District – Revised Study**

**Memo from Planning Services February 5, 2024**

The following delegate spoke on this item:

Jane Hawkrigg, Oakville Lakeside Residents Association (OLRA) and OLRA Heritage Working Group

Moved by Councillor Haslett-Theall

1. That the 'Old Oakville Heritage Conservation District Revised Study' as attached in Appendix A to the staff report dated January 23, 2024 and revised in accordance with the memo dated February 5, 2024 from Planning Services, be approved.
2. That staff be directed to continue work on the Old Oakville Heritage Conservation District Update to create a revised Plan and Guidelines.

CARRIED

**7.2 Rental Housing Protection Guidelines and Transition Options Report - By-law 2024-022**

The following delegate spoke on this item:

Pierre Sauvageot

Moved by Councillor Adams

1. That the Rental Housing Protection Guidelines and Transition Options Report dated January 23, 2024, from the Planning Services Department be endorsed; and,
2. That By-law 2024-022 – A By-law to amend the Town of Oakville Rental Housing Protection By-law 2023-102 regarding Part 12, Approval by Commissioner under Delegated Authority, attached as Appendix 'B' to this Report be passed.

CARRIED

**8. Confidential Discussion Item(s)**

There were no confidential discussion items.

**9. Advisory Committee Minutes**

**9.1 Heritage Oakville Advisory Committee Minutes January 30, 2024**

Moved by Councillor McNeice

That the following recommendation pertaining to Items 4.1 and 4.2 of the Heritage Oakville Advisory Committee minutes from its meeting on January 30, 2024 be approved and the remainder of the minutes be received:

**4.1 Heritage permit application HP042/23-42.20T 306 Trafalgar Road – Demolition of existing house and decks and construction of new house and decks – January 30, 2024**

1. That Heritage Permit Application HP042/23-42.20T for the demolition of the existing house and decks and the construction of a new house and decks at 306 Trafalgar Road, as attached in Appendix B to the report dated January 16, 2024 from Planning Services, be approved subject to the following:
  - a. That the new siding material be wood;
  - b. That the new windows be either wood or aluminum-clad wood;
  - c. That final details on the new windows, doors, cladding, trim and roofing material be submitted to Heritage Planning staff for final approval; and

2. That this heritage permit expire two years from the date of final approval by Council.

**4.2 Heritage Permit Application HP001/24-42.20N 64 Navy Street –  
New additions, alterations and front porch**

1. That Heritage Permit Application HP001/24-42.20N for new additions, alterations and front porch on the historic house at 64 Navy Street, as attached in Appendix B to the report dated January 16, 2024, from Planning Services, be approved subject to the following:
  - a. That final details on the windows, doors, trim, cladding materials and paint colours be submitted to Heritage Planning staff for final approval; and
2. That this heritage permit expires two years from the date of final approval by Council.

CARRIED

**10. Rise and Report to Council**

Moved by Councillor O'Meara

That this committee rise and report.

CARRIED

The Acting Mayor arose and reported that the Committee of the Whole has met and has made recommendations on Consent Item 4.1; Confidential Consent Item 5.1; Discussion Items 7.1 and 7.2; and Advisory Committee Minutes 9.1 as noted by the Clerk.

Moved by Councillor O'Meara  
Seconded by Councillor Longo

That the report and recommendations of the Committee of the Whole be approved.

CARRIED

**11. New Business**

(Emergency, Congratulatory or Condolence)

There was no new business.

**12. Consideration and Reading of By-laws**

**12.1 By-law 2024-022**

A By-law to amend the Town of Oakville Rental Housing Protection By-law 2023-102 regarding Part 12, Approval by Commissioner under Delegated Authority. (Re: Item 7.2)

**12.2 By-law 2024-032**

A by-law to declare that certain land is not subject to part lot control (Blocks 1, 2 and 3, Plan 20M-1244 – 407 Dundas GP Inc.).

**12.3 By-law 2024-033**

A by-law to confirm the proceedings of a meeting of Council.

Moved by Councillor Lishchyna

Seconded by Councillor Elgar

That the by-law(s) noted above, be passed.

CARRIED

*The Mayor gave written approval of the by-law(s) noted above that were passed during the meeting.*

**13. Adjournment**

The Acting Mayor adjourned the meeting at 7:15 p.m.

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Andrea Holland, Acting Town  
Clerk





**Town of Oakville**  
**Committee of the Whole - Midtown Oakville**  
**MINUTES**

**Date:** January 30, 2024 and January 31, 2024  
**Time:** 6:30 p.m.  
**Location:** Council Chamber

Mayor and Council: Mayor Burton  
Councillor Adams  
Councillor Chisholm (Left at 9:12 p.m. January 30, 2024)  
Councillor Duddeck, Chair  
Councillor Elgar  
Councillor Gittings  
Councillor Grant  
Councillor Haslett-Theall  
Councillor Knoll  
Councillor Lishchyna (Regrets January 31, 2024)  
Councillor Longo, Vice-Chair  
Councillor McNeice  
Councillor Nanda  
Councillor O'Meara  
Councillor Xie

Staff: J. Clohec, Chief Administrative Officer  
N. Sully, Commissioner of Corporate Services and Treasurer  
N. Garbe, Commissioner of Community Development  
P. Fu, Commissioner of Community Infrastructure  
D. Carr, Town Solicitor (January 31, 2024)  
G. Charles, Director of Planning Services  
J. Huctwith, Assistant Town Solicitor  
K. Biggar, Manager of Policy Planning and Heritage  
S. Burrell, Policy Planner  
J. Marcovecchio, Acting Town Clerk  
N. Coric, Council and Committee Coordinator (January 31, 2024)

Others: Sybelle von Kursell, Manager of Midtown Oakville Program  
(January 30, 2024)

**The Committee of the Whole - Midtown Oakville met in regular session, this 30th day of January, 2024, commencing at 6:38 p.m. and reconvened on this 31st day of January, 2024, commencing at 6:30 p.m, in the Council Chamber of the Oakville Town Hall, 1225 Trafalgar Road, Oakville.**

**These minutes will go forward to the Council meeting of February 26, 2024, for approval. Please view those minutes to note any changes Council may have made.**

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**1. Regrets**

As noted above.

**2. Declarations of Pecuniary Interest**

No declarations of pecuniary interest were declared.

**3. Consent Items(s)**

There were no consent items.

**4. Confidential Consent Item(s)**

There were no confidential consent Items.

**5. Discussion Item(s)**

**5.1 Midtown Program – Proposed Land Use Concept**

The following delegates spoke on this item:

Gord Brennan, Director, Oakville Community Association (OCA); Graham Barrett, SGL Planning & Design Inc. on behalf of his client Oak-Lane Park Investments Inc.; Jonathan Sprawson, Matthew Steeves, and Ben Sprawson, DQI on behalf of Oakville Midtown Group (OMG); Harry Shea, President, Bronte Village Residents Association (BVRA); Dorothy Dunlop; Geoffrey Belcher; Carolyn McMinn, Trafalgar Chartwell Residents Association (TCRA); Rick Snidal, Chartwell Maple Grove Residents Association (CMRGA); Jim Goodfellow, Chartwell Maple Grove Residents Association (CMRGA); Anya Cowan and Trish McTavish, Oakville Lakeside Residents Association (OLRA); Pamela Knight, Coronation Park

Residents Association (CPRA); Elizabeth Chalmers, Joshua Creek  
Residents Association (JCRA); Terry Murphy and Michael Johnston; Nick  
Hutchins; John Valley; Eric Genier; Douglas McKirgan.

The Consolidation of Issues listing is available on the minutes webpage  
under 5.1 and the Midtown Oakville webpage.

*Councillor Duddeck, Chair passed the chair to Councillor Longo, Vice-  
Chair.*

*Councillor Duddeck resumed the chair.*

### **RECESS**

*The Chair recessed the meeting at 9:59 p.m. to be reconvened on  
January 31, 2024 at 6:30 p.m.*

*The meeting reconvened at 6:30 p.m. on January 31, 2024.*

### **BEYOND THE HOUR**

Moved by Councillor Longo

That this meeting proceed beyond the hour of 10:30 p.m.

CARRIED

*Councillor Duddeck, Chair passed the chair to Councillor Longo, Vice-  
Chair.*

*Councillor Duddeck resumed the chair.*

### **RECESS**

The meeting recessed at 10:23 p.m. and reconvened at 10:27 p.m.

Moved by Councillor Knoll

That Committee of the Whole resolve into a closed meeting session for  
the purpose of advice that is subject to solicitor-client privilege, including  
communications necessary for that purpose, with respect to Item 5.1 -  
Midtown Program – Proposed Land Use Concept.

CARRIED

### **CLOSED SESSION**

*Committee of the Whole resolved into closed session at 10:28 p.m.*

*Committee of the Whole resolved back into open session at 10:34 p.m.*

Moved by Councillor Longo

That the report entitled "Midtown Program – Proposed Land Use Concept"  
be received for information.

CARRIED

**6. Confidential Discussion Item(s)**

There were no confidential discussion items.

**7. Adjournment**

The Chair adjourned the meeting at 10:52 p.m.

## REPORT

### Council

Meeting Date: February 26, 2024

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**FROM:** Finance Department

**DATE:** February 13, 2024

**SUBJECT:** 2024 Budgets for Business Improvement Areas

**LOCATION:** Town-wide

**WARD:** Town-wide

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#### RECOMMENDATION:

1. That the 2024 Recommended Budget for the Downtown Oakville Business Improvement Area, requiring a levy of \$1,230,450, as shown in Appendix A, be approved;
2. That the 2024 Recommended Budget for the Bronte Village Business Improvement Area, requiring a levy of \$380,364, as shown in Appendix B, be approved;
3. That the 2024 Recommended Budget for the Kerr Village Business Improvement Area, requiring a levy of \$444,198, as shown in Appendix C, be approved;
4. That the relevant Board of Management approve any subsequent revision or reallocation of funds, within these budgets. The resolution shall be provided to the Treasurer, or designate of the town, who shall determine the significance of the change and advise if it requires Council approval.
5. That the Boards of Management ensure that the procurement of supplies and services, within the approved budgets, meet the requirements of the town's Purchasing By-law.

#### KEY FACTS:

The following are key points for consideration with respect to this report:

- The 2024 budgets of the Downtown Oakville, Bronte Village, and Kerr Village business improvement areas (BIAs) have been approved by their respective boards.

- Under the *Municipal Act*, the adopted budgets of the BIAs must be approved by Council.
- The town is required to levy on behalf of the BIAs; the BIA levies will be included in the town's final tax levy by-law for 2024.

**BACKGROUND:**

Under the *Municipal Act*, Council is required each year to adopt estimates of all sums required during the year for its own purposes and those of its local boards. The 2024 budgets adopted by the boards of the Downtown Oakville, Bronte Village and Kerr Village BIAs are now being submitted for Council's approval.

**COMMENT/OPTIONS:**

The following attached schedules are based on the 2024 budgets for the Business Improvement Areas:

- Appendix A Downtown Oakville Business Improvement Area Budget
- Appendix B Bronte Village Business Improvement Area Budget
- Appendix C Kerr Village Business Improvement Area Budget

The 2024 budgets have been adopted by the BIA Boards. The Downtown Oakville BIA approved their budget by their Board of Directors on October 11, 2023, Bronte Village BIA approved their budget by their Board of Directors January 23, 2024 and the Kerr Village BIA approved their budget by their Board of Directors January 25, 2024.

The Town of Oakville is responsible for giving final approval of the BIA budgets and, subsequently, the calculation of the BIA tax rates, which will occur in April 2024 when the final tax levy is submitted for Council approval. The BIA tax rates, as is the case for property taxes in general, are determined by both the amount of the levy requirement and the assessment subject to taxation. Under authority of the *Municipal Act*, any operating fund surplus can be transferred to a reserve fund, and a transfer from a reserve can be used to fund a deficit, with Board approval.

The 2023 actuals included in the appendices are for historical comparisons. These actuals are preliminary unaudited figures.

Appendix A – Downtown Oakville Business Improvement Area Budget

The schedule in Appendix A summarizes the Downtown Oakville BIA 2024 budget approved by their Board of Directors meeting October 11, 2023. The 2024 tax levy requirement of \$1,230,450 is a 3.00% levy increase.

Appendix B – Bronte Village Business Improvement Area Budget

The schedule in Appendix B summarizes the Bronte Village BIA 2024 budget approved by their Board of Directors meeting January 23, 2024. The total tax levy requirement of \$380,364 is a 3.00% levy increase.

Appendix C – Kerr Village Business Improvement Area Budget

The schedule in Appendix C summarizes the Kerr Village BIA 2024 budget approved by their Board of Directors meeting January 25, 2024. The total tax levy requirement of \$444,198 is a 3.00% increase.

General Governance

September 15, 2014 the ASC committee received and approved a report on BIA Best Practices. This report provided the BIAs with a standard constitution, a memorandum of understanding, and financial control guidelines. The documents clarified the responsibilities of the BIAs and established governing regulations with respect to membership, elections, vacancies and financial matters. As well it addressed the role of the board, officers and BIA staff.

The constitution also addressed the *Municipal Act* requirement that the BIAs adopt policies with regard to the sale and disposition of land, hiring, and procurement by defaulting to the Town's policies as the guiding documents for the BIAs. All three BIAs have adopted these documents.

**CONSIDERATIONS:**

**(A) PUBLIC**

Property tax notices for all taxable commercial properties in the Business Improvement Areas will include the BIA levy. Members of the BIA areas have had opportunity to discuss the budget with their Boards of Management and membership.

**(B) FINANCIAL**

The BIA Boards of Management provide for the promotion of the areas as business or shopping areas and for improvement, beautification, and maintenance beyond that provided at the expense of the municipality at large.

**(C) IMPACT ON OTHER DEPARTMENTS & USERS**

NA

**(D) COUNCIL STRATEGIC PRIORITIES**

This report addresses the corporate strategic goal(s) to:

- Enhance our economic environment
- Be fiscally sustainable

**(E) CLIMATE CHANGE/ACTION**

NA

**APPENDICES:**

Appendix A 2024 Downtown Oakville Business Improvement Area Budget

Appendix B 2024 Bronte Village Business Improvement Area Budget

Appendix C 2024 Kerr Village Business Improvement Area Budget

Prepared by:

Mee Ling Honglin  
Accounting Analyst  
Finance

Jade Surgeoner  
Manager of Accounting  
Finance

Recommended by:

Jonathan van der Heiden  
Deputy Treasurer and Director of Finance

Submitted by:

Nancy Sully,  
Commissioner, Corporate Services and Treasurer



2024 BUDGET 2024 (PROPOSED)							
	PROPOSED	APPROVED	CURRENT	2023 to 2024		2023 to 2024	
	BUDGET	BUDGET	FORECAST	% Change	\$ Change	% Change	\$ Change
<b>REVENUES:</b>							
Tax Levy on Downtown BIA	\$1,230,450	\$1,194,612	\$1,194,613	3.00%	\$35,838	3.00%	\$35,837
Property Tax Write-Offs	(30,000)	(40,000)	(892)	-25.0%	\$10,000	3262.7%	-\$29,108
Supplementary Tax Revenue	0	0	0	0.0%	\$0	0.0%	\$0
<b>Total Tax Revenue</b>	<b>\$1,200,450</b>	<b>\$1,154,612</b>	<b>\$1,193,721</b>	<b>4.0%</b>	<b>\$45,838</b>	<b>0.6%</b>	<b>\$6,729</b>
Grants	10,000	10,000	50,000	0.0%	\$0	-80.0%	-\$40,000
Event Revenue	30,000	30,388	34,350	-1.3%	-\$388	-12.7%	-\$4,350
Other Revenues (sponsorship)	40,000	50,000	58,833	-20.0%	-\$10,000	-32.0%	-\$18,833
Transfer from Reserves	25,000	25,000	8,562	0.0%	\$0	192.0%	\$16,438
Prior Year Surplus (if applicable)	0	0	0	0.0%	\$0	0.0%	\$0
<b>Total Non-tax Revenues</b>	<b>\$105,000</b>	<b>\$115,388</b>	<b>\$151,745</b>	<b>-9.0%</b>	<b>-\$10,388</b>	<b>-30.8%</b>	<b>-\$46,745</b>
<b>TOTAL REVENUES:</b>	<b>\$1,305,450</b>	<b>\$1,270,000</b>	<b>\$1,345,466</b>	<b>2.8%</b>	<b>\$35,450</b>	<b>-3.0%</b>	<b>-\$40,016</b>
<b>EXPENSES:</b>							
Administration	\$459,000	\$435,000	\$437,334	5.5%	\$24,000	5.0%	\$21,666
Marketing and Advertising	300,000	300,000	310,601	0.0%	\$0	-3.4%	-\$10,601
Beautification	515,000	495,000	498,387	4.0%	\$20,000	3.3%	\$16,613
Events and Promotions	31,450	40,000	99,143	-21.4%	-\$8,550	-68.3%	-\$67,693
Other	0	0	0	0.0%	\$0	0.0%	\$0
Transfer to Reserves/Surplus/(Deficit)	0	0	0	0.0%	\$0	0.0%	\$0
Prior Year Deficit (if applicable)	0	0	0	0.0%	\$0	0.0%	\$0
<b>TOTAL EXPENSES:</b>	<b>\$1,305,450</b>	<b>\$1,270,000</b>	<b>\$1,345,466</b>	<b>2.8%</b>	<b>\$35,450</b>	<b>-3.0%</b>	<b>-\$40,016</b>
<b>DIFFERENCE:</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>0.0%</b>	<b>\$0</b>	<b>0.0%</b>	<b>\$0</b>

TAX LEVY COMPARISON	2017	2018	2019	2020	2021	2022	2023	2024
Taxation Levy	\$1,106,500	\$1,125,865	\$1,125,864	\$1,125,865	\$1,148,382	\$1,171,180	\$1,194,612	\$1,230,450
% Increase of Tax Levy	24.5%	1.8%	0.0%	0.0%	2.0%	1.99%	2.00%	3.00%

RESERVE CONTINUITY	2017	2018	2019	2020	2021	2022	2023	2024
Balance Beginning of Year	\$64,646	\$127,744	\$174,400	\$100,916	\$170,096	\$312,286	\$349,399	\$340,837
Transfer to Operations	\$0	\$0	(\$29,024)	\$0	\$0	\$0	(\$8,562)	(\$25,000)
Adjustment - temporary impact via asset purchase plan**			(\$44,460)		\$0	\$0		
Transfer to Reserves	\$63,098	\$46,656	\$0	\$69,180	\$142,190	\$37,113		
<b>Balance End of Year</b>	<b>\$127,744</b>	<b>\$174,400</b>	<b>\$100,916</b>	<b>\$170,096</b>	<b>\$312,286</b>	<b>\$349,399</b>	<b>\$340,837</b>	<b>\$315,837</b>

**Notes(s):**

**1. Revenue**

Levy of 3.0% for 2024 from \$1,194,612 to 1,230,450 (+\$35,838)  
 A \$30,000 write down is included as a placeholder based on the 2023 Estimated Loss provided by the Town  
 We have applied to TD Summer series 2024 (\$30,000) as Event Revenue

**2. Expenses**

Admin- Higher investments represents addition of an Account Coordinator to help to support BIA Marketing and Member services  
 Beautification- increase is due to higher cost and demand on streetscape maintenance and waste management costs due to increased traffic throughout the downtown core  
 Event revenue- represents TD summer music series, and Other revenue is from other sponsorships around beautification and activations

**3. Reserves**

Balance of reserves is estimated at the beginning of 2024 to be approx. \$340,000 based on forecasts



2024 BUDGET (PROPOSED)							
	PROPOSED 2024 BUDGET	APPROVED 2023 BUDGET	CURRENT 2023 FORECAST	2023 to 2024 Budget to Budget		2023 to 2024 Forecast to Budget	
				% Change	\$ Change	% Change	\$ Change
<b>REVENUES:</b>							
Tax Levy on Bronte BIA	\$380,364	\$369,285	\$369,285	3.0%	\$11,079	3.0%	\$11,079
Property Tax Write-Offs	(\$10,000)	(\$10,000)	(\$21,820)	0.0%	\$0	-54.2%	(\$11,820)
Supplementary Tax Revenue	\$0	\$0	\$0	0.0%	\$0	0.0%	\$0
<b>Total Tax Revenue</b>	<b>\$370,364</b>	<b>\$359,285</b>	<b>\$347,465</b>	<b>3.1%</b>	<b>\$11,079</b>	<b>6.6%</b>	<b>\$22,899</b>
Grants	\$20,000	\$0	\$10,000	0.0%	\$20,000	100.0%	\$10,000
Other Revenues	\$29,000	\$4,000	\$17,863	625.0%	\$25,000	62.3%	\$11,137
Transfer from Reserves	\$0	\$30,000	\$746	-100.0%	(\$30,000)	-100.0%	(\$746)
Prior Year Surplus (if applicable)	\$0	\$0	\$0	0.0%	\$0	0.0%	\$0
<b>Total Non-tax Revenues</b>	<b>\$49,000</b>	<b>\$34,000</b>	<b>\$28,609</b>	<b>44.1%</b>	<b>\$15,000</b>	<b>71.3%</b>	<b>\$20,391</b>
<b>TOTAL REVENUES:</b>	<b>\$419,364</b>	<b>\$393,285</b>	<b>\$376,074</b>	<b>6.6%</b>	<b>\$26,079</b>	<b>11.5%</b>	<b>\$43,290</b>
<b>EXPENSES:</b>							
Effective Organization (Admin)	\$188,394	\$212,790	\$173,264	-11.5%	(\$24,396)	8.7%	\$15,130
Vibrant Economy (Marketing)	\$75,970	\$86,732	\$62,585	-12.4%	(\$10,762)	21.4%	\$13,385
Enhanced Experience (Beautification)	\$155,000	\$92,763	\$140,225	67.1%	\$62,237	10.5%	\$14,775
More Livable (Other)	\$0	\$1,000	\$0	-100.0%	(\$1,000)	0.0%	\$0
Transfer to Reserves/Surplus	\$0	\$0	\$0	0.0%	\$0	0.0%	\$0
Prior Year Deficit (if applicable)	\$0	\$0	\$0	0.0%	\$0	0.0%	\$0
<b>TOTAL EXPENSES:</b>	<b>\$419,364</b>	<b>\$393,285</b>	<b>\$376,074</b>	<b>6.6%</b>	<b>\$26,079</b>	<b>11.5%</b>	<b>\$43,290</b>
<b>DIFFERENCE:</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>0.0%</b>	<b>\$0</b>	<b>0.0%</b>	<b>\$0</b>

TAX LEVY COMPARISON	2017	2018	2019	2020	2021	2022	2023	2024
Taxation Levy	\$351,367	\$365,452	\$344,506	\$344,506	\$351,500	\$358,530	\$369,285	\$380,364
% Increase of Tax Levy	2.0%	4.0%	-5.7%	0.0%	2.0%	2.0%	3.0%	3.0%

RESERVE CONTINUITY	2017	2018	2019	2020	2021	2022	2023	2024
Balance Beginning of Year	\$36,192	\$70,345	\$127,690	\$118,760	\$145,187	\$168,820	\$134,744	\$133,998
Transfer to Operations	\$0	\$0	(\$8,930)	\$0		(\$34,076)	(\$746)	\$0
Transfer to Reserves	\$34,153	\$57,345		\$26,427	\$23,633	\$0	\$0	\$0
Balance End of Year	\$70,345	\$127,690	\$118,760	\$145,187	\$168,820	\$134,744	\$133,998	\$133,998

**Note(s):**

**1. Revenue**

3% levy increase on 2023 budget re: increased costs  
 Property Tax Write-Offs - estimate only: a \$10,000 write-down of loss of levy revenue is included as a placeholder  
 Grants: \$20,000 events grant received from Town of Oakville for 2024  
 Other revenues: interest and sub-let rent, launching sponsorship program

**2. Expenses**

Effective Org (Administration & Operations): includes 1 FT staff + 2 PT staff (1 - Communications/Events/Membership + 2 - Summer Public Realm)  
 Vibrant Economy (Marketing): general advertising, Community Investment Program, construction mitigation, member communications/networking  
 Enhanced Experience (Beautification & Events): planters, hanging baskets, seasonal décor, At Home Muskoka Chair project, mural project, BIA-led events, placemaking  
 More Livable (Research): nothing planned in 2024  
 Transfer to Reserve: None anticipated



2024 BUDGET (PROPOSED)							
	PROPOSED	APPROVED	CURRENT	2023 to 2024		2023 to 2024	
	2024	2023	2023	Budget to Budget	Actuals to Budget	Budget to Budget	Actuals to Budget
	BUDGET	BUDGET	FORECAST	% Change	\$ Change	% Change	\$ Change
<b>REVENUES:</b>							
Tax Levy on Kerr BIA	\$ 444,198	\$ 431,260	\$ 431,260	3.00%	\$ 12,938	3.00%	\$ 12,938
Property Tax Write-Offs	-\$ 12,000	-\$ 12,000	\$ 6	0.00%	\$ -	-217098.19%	\$ 12,006
Supplementary Tax Revenue	\$ -	\$ -	\$ -	0.00%	\$ -	0.00%	\$ -
Total Tax Revenue	\$ 432,198	\$ 419,260	\$ 431,266	3.09%	\$ 12,938	0.22%	\$ 932
Grants	\$ 5,170	\$ -	\$ 5,863	0.00%	\$ 5,170	-11.82%	-\$ 693
Sponsorships	\$ 120,000	\$ 50,000	\$ -	140.00%	\$ 70,000	0.00%	\$ 120,000
Event Revenue	\$ 50,000	\$ -	\$ 20,523	0.00%	\$ 50,000	143.63%	\$ 29,477
Other Revenues	\$ -	\$ -	\$ 268	0.00%	\$ -	-100.00%	-\$ 268
Transfer from Reserves	\$ -	\$ -	\$ -	0.00%	\$ -	0.00%	\$ -
Prior Year Surplus (if applicable)	\$ -	\$ -	\$ -	0.00%	\$ -	0.00%	\$ -
Total Non-tax Revenues	\$ 175,170	\$ 50,000	\$ 26,654	250.34%	\$ 125,170	557.20%	\$ 148,516
<b>TOTAL REVENUES:</b>	<b>\$ 607,368</b>	<b>\$ 469,260</b>	<b>\$ 457,920</b>	<b>29.43%</b>	<b>\$ 138,108</b>	<b>32.64%</b>	<b>\$ 149,448</b>
<b>EXPENSES:</b>							
Expenses & Administration	\$ 165,000	\$ 165,000	\$ 173,663	0.00%	\$ -	-4.99%	-\$ 8,663
Marketing and Advertising	\$ 50,000	\$ 50,000	\$ 30,058	0.00%	\$ -	66.35%	\$ 19,942
Beautification	\$ 100,000	\$ 100,000	\$ 100,237	0.00%	\$ -	-0.24%	-\$ 237
Events and Promotions	\$ 262,368	\$ 89,001	\$ 64,182	194.79%	\$ 173,367	308.79%	\$ 198,186
Other	\$ 5,000	\$ -	\$ 2,089	0.00%	\$ 5,000	139.34%	\$ 2,911
Transfer to Reserves/Surplus	\$ 25,000	\$ 12,016	\$ 87,690	0.00%	\$ 12,984	-71.49%	-\$ 62,690
Prior Year Deficit (if applicable)	\$ -	\$ 53,243	\$ -	-100.00%	-\$ 53,243	0.00%	\$ -
<b>TOTAL EXPENSES:</b>	<b>\$ 607,368</b>	<b>\$ 469,260</b>	<b>\$ 457,920</b>	<b>29.43%</b>	<b>\$ 138,108</b>	<b>32.64%</b>	<b>\$ 149,448</b>
<b>DIFFERENCE:</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>0.00%</b>	<b>\$0</b>	<b>0.00%</b>	<b>\$0</b>

TAX LEVY COMPARISON	2017	2018	2019	2020	2021	2022	2023	2024
Taxation Levy	\$ 392,634	\$ 402,450	\$ 412,511	\$ 262,556	\$ 412,511	\$ 418,699	\$ 431,260	\$ 444,198
% Increase of Tax Levy	2.50%	2.50%	2.50%	-36.35%	57.11%	1.50%	3.00%	3.00%

RESERVE CONTINUITY	2017	2018	2019	2020	2021	2022	2023	2024
Balance Beginning of Year	\$ 14,570.00	\$ -	\$ 70,352.00	\$ (14,431.00)	\$ (59,010.00)	\$ (48,279.00)	\$ (82,770.00)	\$ 4,920.42
Transfer to Operations	\$ (14,570.00)	\$ -	\$ (84,783.00)	\$ (44,579.00)	\$ -	\$ -	\$ -	\$ -
Transfer to Reserves	\$ -	\$ 70,352.00	\$ -	\$ -	\$ 10,731.00	\$ (34,491.00)	\$ 87,690.42	\$ 25,000.00
Balance End of Year	\$ -	\$ 70,352.00	\$ (14,431.00)	\$ (59,010.00)	\$ (48,279.00)	\$ (82,770.00)	\$ 4,920.42	\$ 29,920.42



# REPORT

## Council

Meeting Date: February 26, 2024

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**FROM:** Clerk's Department

**DATE:** February 13, 2024

**SUBJECT:** Corporate Policy Update

**WARD:** Town-wide

Page 1

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### RECOMMENDATION:

1. That the Occupational Health, Safety and Workplace Violence Policy and related updated Workplace Violence Procedure be approved.
2. That the new Enforcement of Boulevard Parking in Residential Areas Procedure be received.

### KEY FACTS:

The following are key points for consideration with respect to this report:

- The corporate policy and procedure review is an ongoing process facilitated by the Clerk's department to assist departments in bringing policies forward for Council review as part of Council's governance initiatives.
- All policies and procedures listed in this report have been reviewed by the Policy Review Administration Group.
- Unless otherwise noted, updated policies and procedures included in the appendices of this report have tracked changes to easily identify updates.

### BACKGROUND:

As part of the ongoing policy and procedure review, staff continue to present reports to introduce new policies, update and reconfirm current policies, and recommend the replacement or rescinding of former policies. Current policies and procedures are reviewed in accordance with established review periods and updates are provided to Council, as required. All policies are submitted to Council for approval. Except for those procedures relating specifically to Council and requiring its approval, procedures are submitted for receipt to enable revisions to be implemented as required, to address program changes or administrative requirements.

This report addresses the policies and procedures which have been addressed by the Policy Review Administration Group since the last report to Council in December 2023. All departments are continuing to address policy requirements. Future policy reports will be coordinated through the Clerk's department or submitted departmentally, as required.

## Human Resources

### *Manage*

In accordance with the *Occupational Health and Safety Act* an annual review is required by Council of the Occupational Health, Safety and Workplace Violence Policy (HR-MNG-005) and related Workplace Violence Procedure (HR-MNG-005-002). Staff have reviewed this policy and procedure, and no significant updates have been made. Some minor amendments to wording and a few more definitions have been added to the Workplace Violence Procedure for clarity. Staff note that the companion Respectful Conduct Policy and Procedure linked to the overarching Occupational Health, Safety and Workplace Violence Policy is slated for review in 2024 as part of the multi-year IDEA plan and will return to Council to advise of any changes.

## Municipal Services

### *Regulatory*

Enforcement of Boulevard Parking in Residential Areas Procedure (MS-REG-001-007) has been established to identify how Municipal Enforcement staff will enforce boulevard parking within residential areas in the Town of Oakville.

## **CONSIDERATIONS:**

### **(A) PUBLIC**

Corporate policies and related procedures are posted to the town website for public information. Public notification is issued prior to Council's consideration of policies and procedures having a direct impact on the public.

### **(B) FINANCIAL**

There are no financial considerations with respect to the consideration of policies and procedures. The administration of procedures which relate to financial matters, grants and financial incentives will be subject to annual budget approval.

### **(C) IMPACT ON OTHER DEPARTMENTS & USERS**

Corporate policies and procedures impact all members of Council and staff. Departments are continuing to review existing policies within their departments to ensure, where applicable, that a corporate view is presented in all new or revised policies and procedures.

**(D) COUNCIL STRATEGIC PRIORITIES**

This report addresses the corporate strategic priority of accountable government. The established corporate policy process promotes accountable governance and service excellence, by promoting consistency, minimizing inefficiencies, and ensuring proper controls and compliance.

**(E) CLIMATE CHANGE/ACTION**

This matter does not impact climate change.

**APPENDICES:**

Appendix A – Occupational Health, Safety and Workplace Violence Policy

Appendix B – Workplace Violence Procedure

Appendix C – Enforcement of Boulevard Parking in Residential Areas Procedure

Prepared by:

Andrea Coyne, Manager, Elections, Policy, Print Services

Submitted by:

Vicki Tytaneck, Town Clerk

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# Occupational Health, Safety and Workplace Violence

Policy number:	HR-MNG-005
Section:	Human resources
Sub-section:	Manage
Author:	Human Resources
Authority:	Council
Effective date:	2006-05-29
Review by date:	<i>1 year from Council approval</i>
Last modified:	<i>Council approval date</i>

## Policy statement

The Corporation of the Town of Oakville (town), in the performance of its services, is responsible for promoting health and safety for the protection of its workers and the public alike. Unsafe practices will not be tolerated. The Town will follow the guidelines and directives of the federal, provincial and regional government authorities, including the branches of public health.

Every worker, contract worker and sub-contractor, including every person accessing town property for services, must protect one's own health and safety by complying with the law and with the safe work practices and procedures established and required by the town.

All levels of supervisors will be held accountable for the health and safety of workers under their supervision.

The town provides a safe and healthy workplace by supporting a formal program of education and training, including those required by federal, provincial and regional government authorities (including the branches of public health); by preventing accidents, workplace harassment and violence, including domestic violence in the workplace; and by reducing injuries and occupational illness through accident investigations, follow-up action and the recommendations of the Health and Safety Committees.

## **Purpose**

The purpose of this policy is to ensure that all town workplaces and facilities are in compliance with the *Occupational Health and Safety Act* and regulations and that every reasonable precaution is taken to provide for a healthy and safe work environment. The implementation of this policy, through the establishment of occupational health and safety programs based on shared responsibility of management and employees, will promote health, safety, and prevent workplace illness and injuries, harassment and workplace violence.

## **Scope**

This policy applies to all town employees (including but not limited to full-time, part-time, students, volunteers and interns), contractors, sub-contractors, consultants, workers and every person accessing town property for services.

## **References and related documents**

1. *Occupational Health and Safety Act*;
2. Occupational Health and Safety Responsibilities Procedure;
3. Other Corporate Health and Safety Procedures;
4. Workplace Violence Procedures;
5. Ontario Human Rights Code;
6. Respectful Conduct Policy and related procedures.
7. Employee Code of Conduct policy and procedures



# Workplace Violence

Procedure number:	HR-MNG-005-002
Parent policy number:	HR-MNG-005
Section:	Human resources
Sub-section:	Manage
Author:	Human Resources
Authority:	CAO
Effective date:	2010-06-01
Review by date:	<i>1 year from Council approval date</i>
Last modified:	<i>Council approval date</i>

## Purpose statement

This procedure addresses the prevention and investigation of workplace violence, or threats of workplace violence, including domestic violence against an employee.

## Scope

This procedure applies to town employees, contractors, consultants, and members of the public.

## Procedure

1. The town does not tolerate, ignore, or condone any workplace harassment, violence, or threats of violence.
2. All reported threats or incidents will be considered serious and will be investigated promptly with appropriate action taken.
3. A review of the risks of workplace violence will be conducted annually or as necessary to protect workers. Identified risks will be promptly addressed and measures will be implemented to mitigate such risks.
4. Employees will be notified of identified risks and are required to follow departmental guidelines when working in situations operationally specific to their departments (i.e. working alone, handling cash, dealing with difficult customers).
5. The town will take every reasonable precaution to protect employees from domestic violence where it has been made aware, or where it ought reasonably to have known, an employee is at risk.
6. Frivolous or vexatious complaints will be dealt with seriously and subject to disciplinary action up to and including termination of employment.

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## **Workplace harassment**

All incidents of workplace harassment will be reported, investigated, and resolved through the town's Respectful Conduct Policy.

## **Possibility of domestic violence in the workplace**

1. Any employee who is experiencing domestic violence that exposes themselves or others to physical injury in the workplace or is experiencing domestic violence in the workplace, or believes that domestic violence in the workplace is likely to occur, should seek immediate assistance from their supervisor and/or Human Resources.
2. A safety plan will be developed by the employee, their supervisor and Human Resources.

## **Reporting incidents of violence**

1. Incidents of violence must be reported immediately to the employees' supervisor and/or the police for immediate assistance.
2. If, at any time, an employee feels personally threatened, they are to call the police immediately. Employees are not to place themselves at risk or jeopardize anyone's safety when dealing with any perceived or real situation of violence.
3. All workplace threats of violence or acts of violence, including those by members of the public against town employees, will be addressed under this procedure.
4. If a workplace violence incident results in a worker being disabled, injured, or requiring medical attention, the appropriate joint health and safety committee and the appropriate union must be notified within four days of the incident.
5. If a workplace violence incident results in a person being critically injured or killed, Health, Safety and Wellness Consultant, the Ministry of Labour, the appropriate joint health and safety committee and the appropriate union must be notified immediately, and the Ministry of Labour notified in writing within 48 hours.
6. Incidents must be filed as soon as practicably possible after the incident occurred using the *Respectful Conduct Reporting Form* detailing the nature of the incident, dates, times, places, witnesses, and names of those involved. A supervisor, employee or witness may complete the report.
7. All reports of violence must be forwarded immediately to Human Resources in order to commence an impartial investigation appropriate to the circumstances of the incident.
8. There will be no negative consequences for reports made in good faith.

## **Investigating incidents of violence**

1. All formal complaints must be forwarded to the Director of Human Resources (or designate) who will determine if the complaint falls under the Workplace Violence Procedure and determine what investigation is appropriate in the circumstances.
2. The investigation will be conducted either internally by a town employee or by an external investigator at the discretion of the Director of Human Resources (or designate). Incidents of workplace violence by members of the public against an employee will be investigated and resolved in accordance with this procedure.

3. The *Respectful Conduct Reporting Form* will be kept confidential to the extent possible. Information about the allegation or the investigation itself will only be released to the extent necessary to investigate and respond to the incident, or as required by law.
4. Once the investigation is complete, the investigation outcomes will be reported to the Complainant and Respondent in writing.
5. The *Respectful Conduct Reporting Form* will be on file in the Human Resources department for a minimum of seven years.

## General provisions

**Criminal and Sexual Harassment** - Criminal and Sexual harassment such as stalking, threats, and sexual or physical assault are covered by the Criminal Code and the *Occupational Health and Safety Act*. Supervisors and employees are encouraged to report any criminal behaviour to the Police and Human Resources.

**Reprisals** - No employee will be subject to reprisals for filing a complaint or participating in an investigation under this procedure. Anyone experiencing reprisals should report it immediately to their supervisor or Human Resources.

Any discipline imposed as a result of a frivolous or vexatious complaint is not a reprisal.

## References and related documents

1. Respectful Conduct Reporting Form
2. Respectful Workplace Policy
3. Occupational Health and Safety Policy
4. Respectful Conduct Procedure
5. *Occupational Health and Safety Act*
6. *Ontario Human Rights Code*
7. Criminal Code of Canada
8. Employee Code of Conduct Policy and related procedures

## Definitions

**Workplace harassment:** includes a course of vexatious comment or conduct against a worker in a workplace - behaviour that is known or ought reasonably to be known to be unwelcome. It may include but is not limited to:

- written or verbal insults,
- unwanted remarks or comments on a person's mannerisms or body,
- practical jokes that cause embarrassment or endanger an employee's safety,
- behaviour that undermines or sabotages the employee's job performance,
- behaviour that threatens the livelihood of the employee,

- behaviour, conduct, comments, or activities not directed specifically at an individual, but which nonetheless create a degrading, offensive, "poisoned" work environment. It may include, but is not limited to:
  - circulating or displaying sexually explicit, racist, or derogatory pictures, graffiti or other offensive materials,
  - patronizing behaviour, language or terminology that reinforces stereotypes and undermines self-respect or adversely affects work performance or conditions.

Workplace harassment does not include:

- legitimate, reasonable management actions that are part of the normal work function that may include, but is not limited to appropriate direction, delegation, performance management or discipline;
- professional debate;
- attendance management;
- ~~relationship of mutual consent or mutual flirtation;~~
- ~~stressful events encountered in the performance of legitimate job duties;~~
- occasional disagreements or ~~personality~~ interpersonal conflicts.

**Workplace violence:** includes the exercise of physical force by a person against a worker, in a workplace, that causes or could cause physical injury to the worker; an attempt to exercise physical force against a worker, in a workplace, that could cause physical injury to the worker; a statement or behaviour that it is reasonable for a worker to interpret as a threat to exercise physical force against the worker, in a workplace, that could cause physical injury to the worker. Workplace violence may include hitting a worker, throwing objects at a worker, sexual violence, or threats, whether conveyed verbally, in writing, or through behaviour.

**Domestic Violence:** includes a person who has a personal relationship with a worker – such as a spouse or former spouse, current or former intimate partner or a family member – who may physically harm, threaten or attempt to physically harm, that worker while at work.

**Frivolous** - means lacking a legal basis or legal merit; trivial in nature or does not have a reasonable, proper or justified cause. a matter that has little prospect of success; not serious, not reasonably purposeful.

**Workplace** - includes the working environment and any place employment-related activities are conducted including business travel, work-related social gatherings or any other location that may have a subsequent impact on the workplace.

**Vexatious** - means without reasonable or probable cause or excuse; instituted maliciously or on the basis of improper motives; intended to harass or annoy.

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## Responsibilities

### CAO/Commissioners/Directors

- create, promote and maintain a safe workplace that is free from violence
- provide training and ensure that this procedure is accessible, available to all employees and supported
- review and monitor initial risk assessments and subsequent reviews

### Immediate Managers/Supervisors

- proactively promote and maintain a safe workplace that is free from violence
- intervene immediately when threats or incidents of violence occur
- prevent violence or threats of violence by:
  - communicating and supporting the town's objective to provide and maintain a workplace free from violence
  - not ignoring or condoning behaviour that is contrary to this procedure
  - taking all complaints seriously, conducting an initial assessment of the situation and reporting as required by the procedure
  - not engaging in behaviour contrary to this procedure

### Human Resources:

Shall support and promote a safe workplace through the following measures below:

- provide advice to employees, supervisors, management, and any employee concerned about a threat of or actual violent incident or harassment situation
- promote, advance, support and ensure the effective implementation of this procedure
- provide training to all employees regarding the procedure
- investigate any threats or incidents of violence
- advise the Joint Health and Safety Committee of the outcome of risk assessments and what measures are being implemented to address identified risks
- initiate the annual review of workplace violence procedure and recommend any changes to Council, as applicable

### Joint Health and Safety Committee:

- identify risk of workplace violence in the course of carrying out regular workplace inspection
- make recommendations to the Town regarding workplace violence, as they regularly do, for other occupational health and safety hazards under the *Occupational Health and Safety Act*
- recommend to the Town and the workers the establishment, maintenance and monitoring of programs, measures and procedures respecting the health and safety of the workplace

### Employees:

- do not engage in any behaviours that maybe considered threats or acts of violence
- report acts of harassment, threats of or actual incidents of violence to their supervisor
- inform their immediate supervisor or Human Resources if they are at risk of domestic violence

# Enforcement of Boulevard Parking in Residential Areas

Procedure number: MS-REG-001-007  
Parent policy number: MS-REG-001  
Section: Municipal services  
Sub-section: Regulatory services  
Author(s): Municipal Enforcement Services  
Authority: CAO  
Effective date: 2024-01-29  
Review by date: *5 years from Council/CAO approval*

## Purpose statement

This procedure sets out how boulevard parking will be enforced within the Town of Oakville.

## Scope

This procedure applies to boulevard parking in residential areas within the Town of Oakville.

## Procedure

Figure 1 illustrates the location of the boulevard portion of the driveway apron:

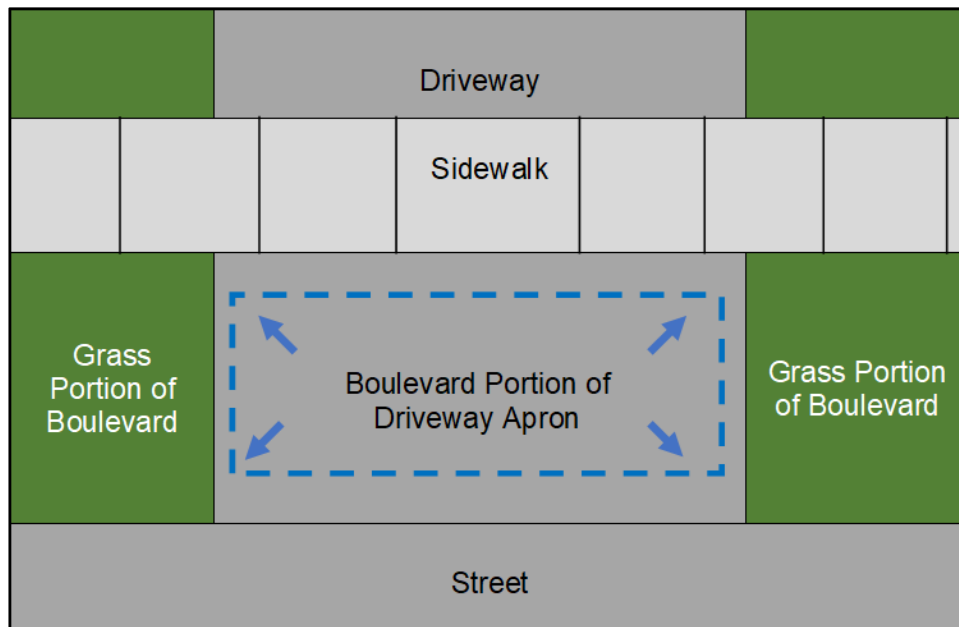


Figure 1

### Enforcement of Boulevard Parking:

1. Boulevard parking is an unsigned prohibition throughout Oakville (signs prohibiting boulevard parking are not required to be posted). Section 2 of this procedure sets out situations where boulevard parking will be enforced. However, subject to Section 2, boulevard parking will generally be permitted in residential areas where parked vehicles are fully contained on the boulevard portion of the driveway apron (all tires fully on the driveway apron). Vehicles may be parked on the driveway apron as shown in Figure 2 and Figure 3 below.

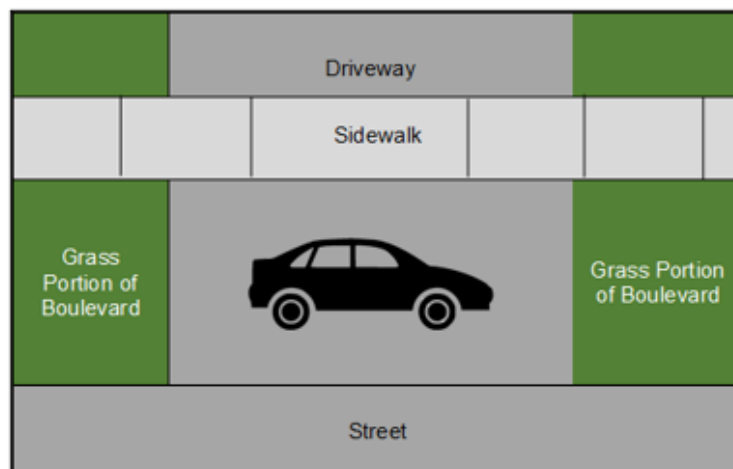


Figure 2

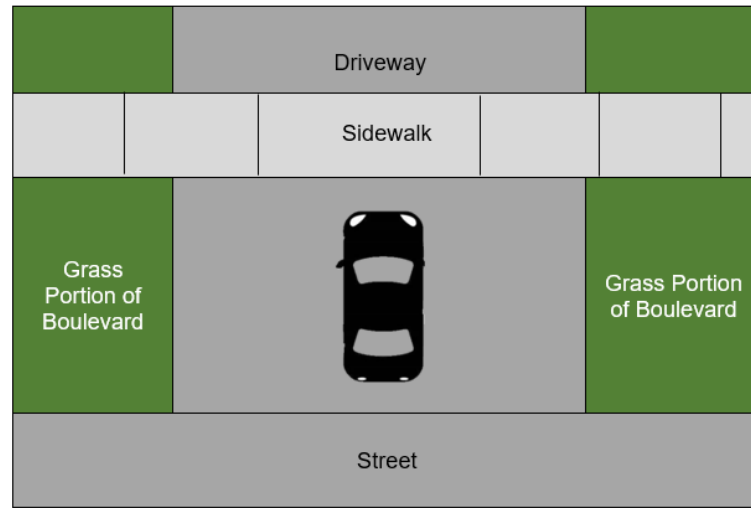


Figure 3

2. Enforcement staff will enforce boulevard parking infractions where a vehicle is parked on a driveway apron so that it:

- subject to review by the Transportation and Engineering Department, causes a visibility or safety issue for vehicles traveling at an intersection (generally only the vehicles parked in the driveway apron immediately adjacent to the intersection could potentially affect sightlines at the intersection);
- obstructs sightlines for drivers pulling in or out of a garage;
- encroaches onto or overhangs the road;
- obstructs services such as snow clearing, snow removal or garbage/recycling collection; or
- encroaches onto or overhangs the sidewalk and/or encumbers the mobility of persons using the sidewalk.

Boulevard parking infractions will also be enforced where a vehicle:

- is parked on the grass portion of the boulevard as shown in Figure 1;
- is parked outside the bounds of the driveway apron curb cuts (if the boulevard has been modified/alterd);
- where the driveway apron is shared by adjoining property owners;
- is parked on a hydro vault located on a boulevard;
- is parked on a boulevard behind a garage in areas where there are rear public lanes;
- is a commercial vehicle;
- is inoperable;
- is advertised for sale;
- does not have a valid licence plate; or
- is parked within 3 metres of a fire hydrant.



Penalty notices issued for contravention of boulevard parking regulations in the Traffic By-law and the corresponding penalties, shall be in accordance with Parking Administrative Penalties By-law and Administrative Penalties Procedure.

## References and related documents

Parking Administrative Penalties By-law 2015-071, as amended  
Uniform Traffic By-law 1984-1, as amended  
Municipal Right of Way By-law 2009-072, as amended  
Administrative Penalties Procedure  
Progressive Enforcement Procedure

## Definitions

**Boulevard:** means that part of the highway situated between the curb line and the property line of the lot abutting the highway, but does not include a sidewalk, shoulder or combined facility, if any.

**Boulevard Parking:** means parking on the boulevard portion of the driveway apron as shown in Figure 1.

**Commercial Vehicle:** means a motor vehicle having permanently attached thereto a truck or delivery body and includes ambulances, hearses, casket wagons, fire apparatus, buses and tractors used for hauling purposes on the highways.

**Driveway Apron:** means the portion of a driveway between the sidewalk and the street that is primarily used for vehicular access and that cannot be altered in any way except under Town permit.

**Highway:** includes a common and public highway, street, avenue, parkway, lane, alley, driveway, square, place, bridge, viaduct, or trestle, designed and intended for, or used by, the general public for passage of vehicles.

**Traffic By-law:** means the Town's Uniform Traffic By-law 1984-1, as amended.

## Responsibilities

The Director of Municipal Enforcement Services or designate shall be responsible for the administration of this procedure.]



## REPORT

### Council

**Meeting Date: February 26, 2024**

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**FROM:** Corporate Services Commission

**DATE:** February 13, 2024

**SUBJECT:** OEC Quarterly Update – February 26, 2024

**LOCATION:**

**WARD:** Town-wide

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#### **RECOMMENDATION:**

That the presentation from Rob Lister, President and CEO of Oakville Enterprises Corporation (OEC) regarding the quarterly update be received.

#### **KEY FACTS:**

The following are key points for consideration with respect to this report:

- On a quarterly basis, Council is provided with progress reports from Oakville Enterprises Corporation (OEC).

#### **BACKGROUND:**

The Corporation of the Town of Oakville (“the Town”) is 90% shareholder of Oakville Enterprises Corporation (“Oakville Enterprises, OEC”). The unanimous shareholder agreement requires Oakville Enterprises to make periodic reports to Council.

#### **COMMENT/OPTIONS:**

Oakville Enterprises Corporation President and CEO, Rob Lister, will present the OEC Quarterly Update.

#### **CONSIDERATIONS:**

##### **(A) PUBLIC**

There are no public considerations with this report.

**(B) FINANCIAL**

The town share of Oakville Enterprises Corporation is an important asset of the town.

**(C) IMPACT ON OTHER DEPARTMENTS & USERS**

n/a

**(D) COUNCIL STRATEGIC PRIORITIES**

This report addresses Council's strategic priority/priorities:

- Accountable Government.

**(E) CLIMATE CHANGE/ACTION**

The matter addressed in this report does not directly affect climate change, however, Oakville Enterprises Corporation is an important asset of the town and it is important to ensure its growth as our community grows and energy demands change.

Submitted by:

Nancy Sully

Commissioner, Corporate Services & Treasurer

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# Memo

To: Members of Council  
From: Rebekah Diec Stormes  
Date: January 30, 2024  
Subject: Seasonal Commercial Patio Program

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## Comments

This memo serves to report back to Council on the Seasonal Commercial Patio Program, following the report and presentation provided at the September 6th, 2023 Budget Committee meeting. Following the budget committee meeting, staff continued to work with engineering firm CIMA+ to determine any additional safety equipment required for on-street patios and consulted with the Executive Directors of the Business Improvement Areas regarding the proposed program. All three BIAs are supportive of the program and believe that it has benefitted and will continue to benefit the merchants. There was some concern expressed regarding the implementation of fees and the cost increase to participants who have had fees waived for the past 3 years, while also recognizing that there are costs associated with delivering the program. Staff will continue to work directly with the BIAs to implement the program and share communications.

The costs associated with the associated program were approved through the 2024 budget process. Council approved fees at a 70% subsidized rate in order to keep the program financially viable while at the same time allowing the town to recoup some costs associated with administering the program and staying in compliance with the town's User Fee policy.

The Seasonal Commercial Patio Program is now a permanent program and a new level of service in 2024. This program applies only to patios located on municipal property within the streetscape.

## Administration

The Economic Development department will take on the administration of the Seasonal Commercial Patio Program starting in 2024. Economic Development will coordinate with all internal departments to deliver the program. The department will also begin the work

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to develop an online portal for the patio program, scheduled for implementation in the 2025 season.

## Timing

The Seasonal Commercial Patio Program will run annually from May 1 to November 1. There will be full removal of all patio installations on municipal rights of way between November and April.

## Patio Permits

Participants are required to obtain an annual permit from the Town. User fees, including permit fees and parking space rentals, will be implemented in 2024. Through the 2024 budget process, Council approved partially subsidized user fees to help keep the program financially viable for participants while at the same time allowing the town to recoup some costs associated with administering the program.

Applicants will be required to have a minimum \$2 million liability insurance coverage naming the Town as additional insured. Fees and insurance requirements will continue to be monitored and may be adjusted as necessary in the future. Patio permit fees can be found in the [2024 Rates and Fees Schedule](#) and range from \$54 for an outdoor display to \$414 for a patio with an enclosure on the sidewalk/boulevard or an extended patio with enclosure in a parking space. Rental fees for parking spaces are not shown in the 2024 Rates and Fees Schedule; however, parking spaces will have a user fee of \$562 per space for the entire season.

New to the 2024 program will be an earlier permit application period for on-street patios, from Feb 26<sup>th</sup> – March 22<sup>nd</sup>. This advanced application period will allow for comprehensive planning and coordination in assigning the on-street parking spaces, particularly in the Business Improvement Areas where there is higher demand for the use of on-street parking spaces. Interested participants will still be able to apply for on-street patios after this initial application period, however, their desired location/layout may not be available. Patio applications for all other types of patios (boulevard, bistro, etc.) will open March 22<sup>nd</sup> and can be submitted throughout the duration of the patio season. Communications about the program will be released in early February to the public and will be provided to the BIAs in advance of the public communications.

## Patio Placement

Formalizing guidance and rules for the placement of patios has been a focus of the development of the permanent Seasonal Commercial Patio Program. All patio placements will be reviewed and determined by Transportation and Engineering staff

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with a focus on ensuring accessible and safe patio installations. Table 1 provides an overview of key requirements for the program.

**Table 1: Patio Placement Guidelines**

	<b>Requirements</b>	<b>Additional Information</b>
<b>Patio Placement</b>	Patio to align with frontage of restaurant /café	For on-street patios: minimum of 1 and maximum of 2 parking spaces per restaurant and tied to premises frontage length
<b>Encroachments</b>	No encroachment into pedestrian clearway	This includes patio enclosures, décor, furniture, umbrellas, signage, etc.
<b>Street Furnishings</b>	No removal, blockage or relocation of street furnishings	This includes bike racks, benches, pay and display machines, etc.
<b>On-street parking space use</b>	Maximum of 2 parking spaces per restaurant where space permits	User fee applied Cannot use EV charging, accessible, or loading spaces
<b>Platforms</b>	Required for all on-street patios	Participants to provide and maintain at own cost
<b>Safety equipment</b>	May be required in certain instances	This includes signage, centre line treatments, etc. Town to purchase and deploy

A new user guide will be launched on the patio webpage, providing more detailed information to program participants.

### **Safety Equipment**

In 2023, program participants with patios in on-street parking spaces were required to install planter-box barriers on the exterior corners of the patio to increase safety for patrons. The town rented and deployed the barriers at no cost to program participants.

Staff engaged engineering firm CIMA+ to undertake a review of the installation of on-street patios and associated safety barriers specific to the Oakville context and to provide staff with a set of guidelines to be applied when considering patios located in on-street parking spaces. These guidelines are meant to assist staff in determining the **Town of Oakville** | 1225 Trafalgar Road, Oakville L6H 0H3 | 905-845-6601 | oakville.ca

required level of roadside protection for a patio, based on an assessment of context which includes road classification, operational speeds of the road and the location within the parking bay. Based on their guidelines and review of operational speeds in each of the three BIAs, it was determined that roadside protection (e.g. barrier systems) are not currently required; however, the following traffic calming/safety measures will be applied for the 2024 season:

1. New edge line treatment to create 3.5 metre wide lane for street blocks that have an on-street patio. Based on 2023 applications, staff anticipate adding the edge line to the locations listed below. Should any additional applications come forward, those locations will be added.
  - a. Both sides of Lakeshore Road for all seven blocks in Downtown Oakville
  - b. One block on Bronte Road - Ontario Street to Marine Drive, and
  - c. Three blocks of Kerr Street, from Herald Avenue to Westside Drive; from Westside Drive to Deane Avenue and from Rebecca Street to John Street.
2. New road signs to inform motorists of upcoming patios will be deployed to each block with an on-street patio.
3. Vertical centreline treatment (in-street flexible signs) may be used within the blocks of Kerr Street, north of Rebecca Street, should patio applications be received in this area.
4. Planter-box barriers will continue to be used in 2024.

Operating speeds will continue to be monitored annually to determine if any additional safety measures are required in the future.

In the Budget Committee report, [Seasonal Commercial Patio Program](#), dated August 29, 2023, it was noted that for the permanent Seasonal Commercial Patio Program, the town would purchase the required safety equipment and charge rental fees to program participants. Based on the guidelines from the CIMA+ report, staff will not be charging rental fees as the full barrier systems will not be required in any of the on-street parking locations, but appropriate traffic calming measures (e.g. edge line painting, signage, centre line treatments, etc.) will be purchased and deployed. Following the 2024 program, staff will assess whether any changes need to be made to the user fees for 2025 to ensure the fees capture the cost of delivering the program and are in compliance with the principles of the town's User Fee policy.

### **Church Street Parking Garage Closure**

Staff have assessed the impact of the upcoming Church Street Parking Garage closure and have determined that the closure will not impact the patio program in Downtown Oakville, based on the number of on-street parking spaces used in the 2023 season.

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Should there be a significant increase in the demand for using on-street parking spaces, this situation will be reassessed. The earlier application period for on-street patios will allow staff to identify issues early.

### **Summary – What’s new for 2024?**

Patios continue to be popular and offer multiple benefits to businesses, residents, and visitors. Program participants will see the following changes for the 2024 patio season:

- Dedicated resource in the Economic Development department
- Earlier application period for on-street patios and comprehensive planning of street blocks;
- New temporary traffic calming measures including signage and centre-line treatments, where needed;
- Formalized patio placement guidelines; and
- Implementation of user fees, including permit fees and parking space rentals, at a subsidized rate.

# Memo

To: Mayor Burton and Members of Council  
From: Vicki Tytaneck, Town Clerk  
CC: Jane Clohecy, CAO  
Nancy Sully, Commissioner, Corporate Services & Treasurer  
Date: February 12, 2024  
Subject: Municipal Clearance for Liquor Sales Licence

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The following requests for comment regarding Municipal Clearances for liquor sales licences were received and circulated by the Clerk's department from January 9<sup>th</sup>, 2024, to February 12, 2024, for the following establishments:

- Bo.Vine Burgers and Bar
- Midtown Golf Limited

*Jor: Vicki Tytaneck*

Vicki Tytaneck

Town Clerk

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>MAYOR AND MEMBERS OF COUNCIL</b>						
				No Items		

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>CAO</b>						
<b>1.0 CAO's Office</b>						
1	Regional Governance Review					See Strategy, Policy and Communications Department Item 3.
<b>1.1 Strategy, Policy and Communications Department</b>						
1	Town of Oakville Council Strategic Plan and 2023–2026 Action Plan	Council 07/11/2023	Strategic Initiatives and Communications	2. That staff report back on how green space is measured.	TBD	
2	Climate Emergency Declaration Progress Report	Council 07/11/2023	Strategic Initiatives and Communications	2. That staff explore a ban on small powered gas equipment including but not limited to, leaf blowers, lawn mowers, trimmers and edgers as a priority project in the update to the community energy strategy and options to reduce the need to use those forms of equipment.  3. That staff report on the operation, success and progress of the Guelph local improvement charge program.	TBD	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
3	<b>Request for Report</b> Regional Governance Review		Strategy, Policy and Communications (CAO's Office)	<p>WHEREAS Regional Governance review by the Province has begun and is moving quickly; and</p> <p>WHEREAS the Public and Council require fulsome fact-based information on the potential impact a change in our governance model may have on our finances, services, current priorities and future.</p> <p>THEREFORE staff be directed to prepare a report forthwith on best practices in municipal governance including finances and debt level, potential service changes and service level changes and possible risks in consultation with our Regional Government, and provide it to Council at the next Council meeting.</p>	4th quarter 2023	Update report from CAO's Office to Council November 20, 2023.
4	Draft Inclusion, Diversity, Equity and Accessibility Multi-Year Plan, 2024–2028	Council 12/18/2023	Strategy, Policy and Communications	2. That staff consult the community on the draft plan in the first quarter of 2024 and report back to Council in the second quarter of 2024, with a final Inclusion, Diversity, Equity and Accessibility Multi-Year Plan, 2024–2028 incorporating comments received from Council at its December 18, 2023 meeting and comments received from the community.	2nd quarter 2024	



#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>COMMUNITY SERVICES COMMISSION</b>						
<b>2.0 Commissioner of Community Services</b>						
				No items		
<b>2.1 Oakville Fire Department</b>						
1	<b><u>Request for Report</u></b> Immobility Fire Emergency Escape Plans	Council 01/27/2020	Oakville Fire	That staff report back on the creation of a safety protocol for homeowners/tenants in private residences where they are unable to self-evacuate. That the report includes, but is not limited to, a communication strategy developed in partnership with community agencies serving vulnerable populations on how to develop a personal fire emergency escape plan, information on current subsidies available for renovations, creation of a registry for dwellings that have residents with mobility issues.	3rd quarter 2024	
2	<b><u>Request for Report</u></b> Options for Enhanced Fire Station Signage	Council 05/25/2022	Oakville Fire	That staff report on options for enhanced signage in front of our fire stations to indicate stopping is prohibited for safe egress of the fire vehicles.	2nd quarter 2024	
<b>2.2 Oakville Public Library</b>						
				No items		

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>2.3 Parks &amp; Open Space Department</b>						
1	Urban Forest Strategic Management Plan	P and D Council 05/22/2012	Parks and Open Space	7. That staff report back to Council within 12 months of the approval of the North Oakville Urban Forest Strategic Management Plan, for the purpose of advising Council of the successes, challenges and modifications implemented in meeting the objectives of the plan.	2nd quarter 2024	The NOUFSMP is being reviewed through the Urban Forest Strategic Management Plan which is currently underway. The update will examine the successes and challenges of the north plan and the merit for any necessary modifications as we look to adopt its approach for the lands south of Dundas Street. As such, staff will provide Council an update on the NOUFSMP through the UFSMP update. This work is underway and will be brought to Council upon conclusion.
2	Marina Facility at Bronte Harbour - Oakville Harbours Section	CSC 06/12/2012	Parks and Open Space	1. That the report from the Parks and Open Space department, dated May 22, 2012, entitled Marina Facility at Bronte Harbour - Oakville Harbours Section, be received; 2. That the continued operation of the Marina Facility at Bronte Harbour be approved as identified in Option 1 of the staff report; and 3. That staff be requested to conduct a further analysis of the marina facility in Bronte Harbour in five (5) years and at that time, provide recommendations for the continued operation of the marina facility.	TBD	Parks will report back as part of the Harbours Master Plan.
3	Modifications to Leash Free Area in Post Park	CSC 11/09/2015	Parks and Open Space	8. That staff undertake a review on the hours of use for leash free areas and return to Council no later than 2nd quarter 2016; and	2nd quarter 2024	In progress. Memo to Council Information is coming forward.

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
4	Updated Private Tree Protection By-law 2017-038	CSC 04/24/2017	Parks and Open Space	5. That staff report back to Council in 12-18 months and provide an update on the implementation and metrics regarding By-law 2017-038.	2nd quarter 2024	In progress.
5	Five Year Review of the 2012 Parks, Recreation and Library Facilities Master Plan	Special Council 05/02/2017	Parks and Open Space	3. That staff develop and report back on a Parks and Open Space Strategy.	1st quarter 2024	In progress.
6	Oakville Yacht Squadron License at 97 Forsythe Street	ASC 02/20/2018	Parks and Open Space	That staff review and discuss options for the creation and operation of a waterfront attraction or destination or feature with the Oakville Yacht Squadron and potentially other third parties and that the proposal be a recommendation under the forthcoming Harbours Master Plan.	3rd quarter 2024	Staff will report back as part of the Harbours Master Plan.
7	<b><u>Request for Report</u></b> Maintenance and Design Standards for New and Existing Walkways	Council 09/23/2019	Engineering and Construction; Roads and Works Operations; Parks and Open Space	That staff report on the maintenance and design standards for new and existing walkways including standards for widths, construction, fencing, lighting, safety and security, plantings and landscaping, winter and summer seasonal maintenance and the process for interacting with abutting landowners when changes to walkways occur.	2nd quarter 2024	Reallocated this item to the Community Services Commission - Parks and Open Space from Community Infrastructure Commission.
8	<b><u>Request for Report</u></b> Relocation of TOWARF Headquarters	Council 04/26/21	Parks and Open Space	That staff report back to Council on the relocation of TOWARF Headquarters and operations.	TBD	Currently on hold.

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
9	<b><u>Request for Report</u></b> Sunningdale Tennis Court	Council 05/25/2022	Parks and Open Space	That staff report back on the feasibility and options for the acquisition, leasing, or other forms of acquisition or for entering into an agreement for the management of the Sunningdale Tennis Court located at Sunningdale Public School as a town facility from the Halton Distract School Board with the goal of keeping it open to the public and repairing and maintaining it in accordance with the standards offered at other Town owned and operated tennis courts.	3rd quarter 2024	
10	<b><u>Request for Report</u></b> Potential Park Uses for McCraney Reservoir Park	Council 8/9/2022	Parks and Open Space	That staff report on potential park uses of the McCraney Reservoir Park upon completion of the Region’s Master Plan for the McCraney Reservoir.	4th quarter 2024	
11	Region Pumping Station in Bronte Beach – August 9, 2022	Council 8/9/2022	Parks and Open Space	<ol style="list-style-type: none"> <li>2. That in using a <i>build back better</i> approach, the Region be requested to cost share with the planned Town Phase 2 improvements at Bronte Beach Park that will incorporate the pumping station in a plan that benefits the residents of Oakville.</li> <li>3. That staff report back to Council once discussions have been completed.</li> </ol>	3rd quarter 2024	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
12	TOWARF Vessel Replacement	Council 02/27/2023	Parks and Open Space	2. That Council requests staff to bring back a business plan, in consultation with key stakeholders, with recommendations to ensure the long-term financial viability of Harbours. The recommendations will include the fee requirements to ensure all Harbours infrastructure is maintained in a state of good repair and funding is available to replace all Harbours assets at the end of their useful life, including the current and future replacement TOWARF vessels and fund the new vessel through reserves.	2nd quarter 2024	
13	Fishing from Town Parkland Update	Council 04/24/2023	Parks and Open Space	2. That Council approve an evening fishing pilot program as outlined within the report and staff report back to Council Q1 2024.	2nd quarter 2024	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
14	<b><u>Request for Report</u></b> 48 Bronte Road	Council 11/20/2023	Parks and Open Space	<p>Staff be directed to report on the potential public ownership of the former Greb Property in order to address such issues as:</p> <ol style="list-style-type: none"> <li>1. Potential threats to this section of the Bronte Creek due to extreme weather events/flooding, in consultation with Conservation Halton;</li> <li>2. The role of this property and section of the Bronte Creek to provide protection/climate proofing, reduction in erosion risks and public infrastructure, and loss of top of bank, in consultation with Conservation Halton;</li> <li>3. The strategic role of this property to provide a connection to the Fishermans Park and pier, Bronte Heritage Waterfront Park, the Bronte Inner Harbour lands, with connections to Berta Point and Bronte Beach for recreational purposes in consultation with Conservation Halton and Halton Region;</li> <li>4. A potential role of this property as a cultural heritage landscape and as part of the Harbours portfolio of offerings to boaters and connection to Bronte Road; and,</li> <li>5. The ability to access any available Federal, Provincial, and Regional funding and other programs for climate proofing.</li> </ol>	2nd quarter 2024	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>2.4 Recreation &amp; Culture Department</b>						
1	<b><u>Request for Report</u></b> Recovery of Sport in Oakville	Council 05/25/2021	Recreation and Culture	To support the recovery of sport in Oakville and maximize the use of indoor and outdoor sport facilities, Council requests that staff conduct a review of the Town’s Facility Allocation Policy in consultation with community sports organizations; and report back to Council on recommended policy updates including municipal policy comparator information, summary of consultation results with community sport organizations, identification of any impacts to sports organization access to town assets and alignment with the town’s Recovery Framework by the end of 2021.	2nd quarter 2024	
<b>2.5 Facilities and Construction Management Department</b>						
				No Items		

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>CORPORATE SERVICES COMMISSION</b>						
<b>3.0 Commissioner of Corporate Services</b>						
				No Items		
<b>3.1 Clerk's Department</b>						
1	Procedure By-law Review	Council 05/29/2023	Clerk's	<ol style="list-style-type: none"> <li>1. That the Budget Standing Committee size and composition be amended to reflect a membership of all Council members, and that a Chair be elected annually.</li> <li>2. That revisions to the Procedure By-law reflecting this change be brought forward to a future Council meeting.</li> <li>3. That the Clerk consider the comments of Council in finalizing the draft procedure by-law for consideration by Council.</li> <li>4. That staff report back with a draft version of the Procedure By-law 2023-066 in June 2023.</li> <li>5. Further revisions to be considered 1<sup>st</sup> quarter 2024.</li> </ol>	1st quarter 2024	<p>Clauses 1 and 2 completed at the Council meeting of June 19, 2023.</p> <p>Consultation to begin 1st quarter 2024 and report to Council 2nd quarter 2024.</p>
<b>3.2 Finance Department</b>						
				No Items		
<b>3.3 Human Resources Department</b>						
				No Items		
<b>3.4 Information Technology Systems</b>						
				No Items		



#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>3.5 Legal Department</b>						
1	Deerfield Golf Course Update	Council 9/21/2020	Legal	That staff delay the release of the public tender/RFP for lease proposals for the Deerfield Golf Course until the short term extension with the current tenant expires, and report back to Council with the results of the tender.	4th quarter 2025	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>COMMUNITY DEVELOPMENT COMMISSION</b>						
<b>4.0 Commissioner of Community Development</b>						
				No Items		
<b>4.1 Building Services Department</b>						
				No Items		
<b>4.2 Economic Development Department</b>						
				No Items		
<b>4.3 Municipal Enforcement Services Department</b>						
1	<b><u>Request for Report</u></b> Regulating Pay Day Loan Businesses	Council 9/23/2019	Municipal Enforcement Services	THEREFORE, staff are requested to review opportunities to regulate the number and location of Pay Day Loan businesses as well as determine what other regulatory authority the Town might have to protect consumers from potentially usurious rates and predatory practices and to report back to Council with information and potential methods to regulate these businesses in the interest of consumer protection.	Update report in January 2022  2nd quarter 2024	Resource constraints. To be reviewed as part of Licensing By-law Update in 2024.
2	Expanded Parking Options in Downtown Oakville	CSC 11/11/2019	Municipal Enforcement Services	3. That staff report to Council in the fourth quarter of 2021 on the outcomes of the pilot overnight parking program in downtown Oakville and next steps.	2nd quarter 2024	Program is being launched Q2 2022, so no data available for report.  Will be included in Parking Management Strategy.

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
3	<b><u>Request for Report</u></b> Nuisance Noise	Council 9/21/2020	Municipal Enforcement Services	That staff report on options to enhance our noise by-law to better protect Oakville residents from the nuisance noise associated with modified vehicles such as those with modified mufflers or emission control systems including a review of recent work by the City of Mississauga, as part of the 2021 noise by-law review.	2nd quarter 2024 for final report	Interim report for December 4, 2023 Council.  Final report 4th quarter 2023. Report to Planning and Development Council December 4, 2023 on staff authority to engage in further public consultation to seek input on the draft Noise By-law.
4	<b><u>Request for Report</u></b> EV Charging Stations Installed on Lakeshore Road East (Downtown Oakville)	Council 07/05/2021	Municipal Enforcement Services	That staff report on the feasibility, costs, implications and timing of switching out level 1 EV charging stations installed on Lakeshore Road East (Downtown Oakville) with level 3 fast charging stations. And that staff review the implications and considerations of some or all of the costs of installing level 3 chargers being off-set by sponsors.	2nd quarter 2024	To be included in the Parking Management Strategy.



#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
7	Notice of Motion: Election Sign Regulations	Council 01/30/23	Municipal Enforcement Services	<p>THEREFORE BE IT RESOLVED THAT:</p> <p>No person shall display an Election Sign at any location other than entirely on private property;</p> <p>No person shall display an Election Sign on private property without the permission or consent of the owner of the property;</p> <p>No person shall display, or permit to be displayed, an Election Sign which is in a state of disrepair so as to be unsafe or unsightly; and</p> <p>THAT staff develop a comprehensive set of rules that ensure signs are installed safely so as not to cause harm or hazard to residents on private property</p> <p>That the motion be referred to staff to undertake community consultation and report back, including legal advice, on the existing by-law regulations and availability of election signage, and options to further regulate and prohibit election signage, including third party elections signs on public property and the resources and cost of implementation.</p>	3rd quarter 2024	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
8	<p><b><u>Request for Report</u></b> Usage of Personal Fireworks in Oakville</p> <p>Sale and Discharge of Consumer Fireworks – Response to Staff Direction</p>	<p>Council 05/29/2023</p> <p>Council 11/20/2023</p>	Municipal Enforcement Services	<p>That staff report in the fall of 2023 on lessons learned from the experiences of Brampton, Caledon and any other municipality that has adopted a firework use and/or sale prohibition. In addition, and in consultation with the Legal Department, provide options to reduce the use of personal fireworks in the community.</p> <p>That Council and staff consult with the public on the use and sale of consumer fireworks and report back to Council in the Fall of 2024.</p>	<p>4th quarter 2023 completed</p> <p>Q3/Q4 2024</p>	<p>Initiated.</p> <p>Report to Council November 20, 2023.</p>
9	<b><u>Request for Report</u></b> Teo's Law	Council 08/15/2023	Municipal Enforcement Services	That staff report back to Council on the feasibility of implementing a by-law for pool safety when hosting guests at their home where there is a unsecured pool present.	TBD	
10	<b><u>Noise By-law Update</u></b>	P and D Council 12/04/2023	Municipal Enforcement Services	That staff be authorized to engage in further public consultation to seek input on the draft Noise By-law attached as Appendix A to the staff report dated November 21, 2023, from Municipal Enforcement Services, and report back with a final version of the Noise By-law by the first quarter of 2024.	Q2 2024	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>4.4 Planning Services Department</b>						
1	Midtown Oakville Strategy 2014 and Public Meeting Report, Official Plan Amendment (Livable Oakville) and Zoning By-law Amendment	Special P and D Council 5/27/2014	Planning Services	3. That Planning Services be directed to report back on the implementation initiatives and incentives for Midtown as outlined in the report dated May 13, 2014 (PD-009-14), which includes a Community Improvement Plan, a municipal parking strategy and alternative parkland dedication requirements.	Q4 2025	Report to be completed upon conclusion of OP review.
2	<b>Request for Report</b> Bronte Village Community Improvement Plan	Council 01/26/2015	Planning Services	That staff be requested to report back to Council on the timing and type of Community Improvement Plan, and funding sources, that may be appropriate for Bronte Village following the conclusion of the growth area review and Livable Oakville Plan policy update for Bronte Village.	Q4 2025	Report to be completed upon conclusion of OP review.
3	<b>Request for Report</b> Best Practises for Locating Seniors Residential Developments	Council 04/30/2018	Planning Services	That staff report back to Council on best practice for locating senior’s residential developments in the Town of Oakville. That staff also define the uses occurring within these developments and what additional infrastructure needs may be required to accommodate the needs of the residents.	Q4 2025	As part of the residential policy review in the Official Plan.

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
4	Public Meeting and Recommendation Report – Deferred Items from OPA 34, North West Area and Palermo Village – OPA 37 and OPA 38 – By-law 2021-096 and By-law 2021-097 – July 5, 2021	P and D Council 07/05/2021	Planning Services	4. That Planning staff report back on potential official plan policy updates with respect to parking for the Palermo Village growth area upon completion of the town-wide Parking Strategy.	Q4 2025	
5	Recommendation Report FCHT Holdings (Ontario) Corporation Z.1612.14 and OPA 1612.14 - 271 Cornwall Road and 485 Trafalgar Road – By-laws 2022-051 and 2022-052	P and D Council 05/16/2022	Planning Services	That the site plan for this application be brought to Council for final approval.	TBD	The site plan has not been submitted.
6	North Oakville Driveway Extensions Report for Information	P and D Council 06/7/2022	Planning Services	That the report titled North Oakville Driveway Extensions Report for Information be received and staff report back in 2023 with any recommended changes to the Zoning By-law or process.	Q4 2024	



#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
7	Council Workshop regarding Implementation of Bill 109 – Amendments to Site Plan Control By-law 2019-114	P and D Council 07/11/2022	Planning Services	That staff arrange for a Council workshop regarding this issue.  (Staff direction)	TBD	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
8	Parks Plan 2031 and Draft Plan Dedication By-law 2022-108	Special P and D Council 09/12/2022	Planning Services, Parks and Open Space, and Finance	<p>6. That Staff conduct public consultation on the Parkland Procedure so that all Members of Council have an opportunity to consult with and hear from their constituents on the comments and concerns by Members of Council at this meeting, including but not limited to:</p> <ul style="list-style-type: none"> <li>• How and when the public is informed of parkland locations and types and/or cash in lieu for each development application, including in SGAs.</li> <li>• How and when Council determines location of parkland and use of cash in lieu for purchase of parkland.</li> <li>• How Council can balance parkland needs of SGAs and the rest of Town.</li> <li>• How often Council should review its Parkland Dedication By-law.</li> <li>• How soon Staff can conduct a review with public consultation of the Design Guidelines for Connecting Links, Sliver parks, Urban Squares, and Promenades to maximize green space standards for Council's review and approval.</li> <li>• What matters should be included in the 2023 Review of the Parks, Recreation, Library Master Plan, in addition to fair distribution of park types, sizes, walking distances, and community services.</li> <li>• Should the Town, and if so, how, develop partnerships for parks with neighbourhood associations and BIAs.</li> </ul>	Q4 2024	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
	Parks Plan 2031 and draft Parkland Dedication By-law	P and D Council 11/13/2023	Planning Services, Parks and Open Space, and Finance	That staff engage in consultation regarding the Town’s Parks Plan 2031 (updated) and draft Parkland Dedication By-law as set out in the report from the Planning Services Department, Parks & Open Space Department and Finance Department, dated October 31, 2023, and report back with a final by-law.	Q4 2024	
9	<b><u>Request for Report</u></b> Community Planning Permit System	Council 12/19/2022	Planning Services	That staff prepares a report that explores the use of the province’s Community Planning Permit System as a planning tool to help support local priorities while still accommodating growth, including where this has been used in Ontario, its benefits, and where it might be applicable in Oakville as a pilot project.	Q4 2025	
10	<b><u>Request for Report</u></b> Bronte Village Revitalization Comprehensive Plan	Council 03/27/2023	Planning Services	That staff prepare a report outlining the terms of reference, workplan, resources, and timing needed to create a comprehensive and integrated plan to better coordinate the vision, revitalization, and investments in Bronte Village, comparable to the approach taken for the Downtown Oakville Plan, their strategic action plan and associated initiatives.	Q4 2025	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
11	Information Report – Warehousing and Distribution Industries Review (File No. 42.15.61)	P and D Council 06/12/2023	Planning Services	<ol style="list-style-type: none"> <li>1. That this item be referred back to staff to seek additional research from other jurisdictions, identify options for definitions that recognize the difference between warehouses and distribution centres in terms of scale, operational impacts, and best practices in land use compatibility requirements for Q1 2024.</li> <li>2. That this will allow staff to identify implications from the 2023 Provincial Planning Statement, and provide residents a greater opportunity to review and comment to Planning and Development Council.</li> </ol>	Q4 2024	Timing is dependent on consultant availability and co-ordination with OP Review program.
12	Housing Strategy and Action Plan including the Housing Accelerator Fund Application	P and D Council 07/10/2023	Planning Services	<ol style="list-style-type: none"> <li>3. That staff undertake a public engagement program on the Housing Strategy and Action Plan, report back to Council on what was heard, and refine the Housing Strategy and Action Plan, as necessary, in coordination with other ongoing provincial initiatives.</li> <li>5. That staff initiate the necessary work programs required to complete the initiatives outlined for the Housing Accelerator Fund application, including undertaking a Housing Needs Assessment Report.</li> </ol>	Q4 2025	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
13	Housing Accelerator Fund Application Update	P and D Council 01/22/2022	Planning Services	<ol style="list-style-type: none"> <li>1. In support of the Housing Accelerator Fund Application, as advised by Minister Fraser with due regard for heritage conservation and infrastructure capacity and servicing:                             <ol style="list-style-type: none"> <li>a. That staff be directed to bring forward a zoning by-law amendment to permit 4 units per property, as-of-right for Council's consideration within 90 days of the passing of this resolution; and</li> <li>b. That staff be directed to bring forward a zoning by-law amendment permitting 4 storeys within 800m of Sheridan College for Council's consideration within 90 days of the passing of this resolution; and</li> <li>c. That staff be directed to bring forward a zoning by-law amendment for Sheridan College that will bring zoning regulations into alignment with the Town's Official Plan; and</li> <li>d. That staff engage with the Minister of Housing, Infrastructure and Communities as soon as possible on the Ministry's support for inclusion of a 'gentle density strategy' in our Housing Accelerator application. Developing and prioritizing a gentle density strategy would include: identifying a criterion to assess commercial properties near residential communities suitable for conversion to mixed-use, identifying commercial properties that meet this criterion, determining the potential increase in housing supply and housing mix including rental, condos and affordable, a public consultation plan for identified locations, property owner feedback and any regulation changes that would be necessary to support implementation. Further that Town Staff report back to Council on the feedback received from the Ministry.</li> </ol> </li> </ol>	Q2 2024	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
14	Old Oakville Heritage Conservation District – Revised Study	P and D Council 02/05/2022		<ol style="list-style-type: none"> <li>1. That the 'Old Oakville Heritage Conservation District Revised Study' as attached in Appendix A to the staff report dated January 23, 2024 and revised in accordance with the memo dated February 5, 2024 from Planning Services, be approved.</li> <li>2. That staff be directed to continue work on the Old Oakville Heritage Conservation District Update to create a revised Plan and Guidelines.</li> </ol>	TBD	

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>COMMUNITY INFRASTRUCTURE COMMISSION</b>						
<b>5.0 Commissioner of Community Infrastructure</b>						
				No Items		
<b>5.1 Transportation and Engineering Department</b>						
1	Traffic Calming and Speed Limit Review	CSC 06/17/2019	Engineering and Construction	8. That staff report to a future Community Services Committee meeting on the advisability of encouraging use of the Local Improvements tool for traffic calming where the warrants are not met but residents still desire traffic calming.	September 16, 2024 Q3 2024	To be included in the next annual Neighbourhood Traffic Safety Program Update Report.
2	<b><u>Request for Report</u></b> Stormwater Management Standards for Ditches and Culverts	Council 05/25/2020	Transportation, Engineering and Development; Strategy, Policy and Communications	<ol style="list-style-type: none"> <li>1. That staff report on what the stormwater management standards are for ditches and culverts in residential areas including the design standards for depth, width and slope of ditches, the accepted materials in ditches such as plantings, stones or retaining walls, the process for property owners to make any changes to adjacent ditches as well as water retention and conveyance standards for ditches.</li> <li>2. That staff update the Town of Oakville web site to include this information in a user friendly and accessible format.</li> <li>3. That staff report on options, such as the use of a standard leaflet distributed to property owners, to improve proactive communications about the Town's standards, maintenance plans and upcoming works for stormwater ditches and culverts particularly on residential streets including for regular inspections.</li> </ol>	June 17, 2024 Q2 2024	Report: Ditch Standards

#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
3	<b>Request for Report</b> Opportunities to allow sports activities on local residential streets in Oakville	Council 11/7/2022	Transportation and Engineering	That staff report to Council on opportunities to allow sports activities (i.e. road hockey, basketball or similar activities) to take place on local residential streets in Oakville, and that the report identify any by-law amendments or other changes that would be required to allow for these activities to happen.	April 29, 2024 Q2 2024	Report: Sports Activities on Municipal Roads
4	<b>Request for Report</b> Traffic Calming on Loyalist Trail	P and D Council 12/05/22	Transportation and Engineering	That staff report back related to traffic safety on Loyalist Trail following assumption of the road.	Q3 2024	
5	<b>Request for Report</b> Streetscape Improvements	Council 02/27/23	Transportation and Engineering	That staff report on options to improve the streetscapes on arterial and collector roads.	TBD	
6	Design of Westminster Drive and Woodhaven Park Drive Improvements	Council 11/20/2023	Transportation and Engineering	2. That the implementation of a sidewalk on Westminster Drive and Woodhaven Park Drive be deferred to the Transportation Master Plan for further review.	TBD	Council directed staff not to install active transportation works and to construct the storm water improvement works as per the 2017 Coronation Park EA.
<b>5.2 Roads and Works Operations Department</b>						
				No Items		
<b>5.3 Oakville Transit</b>						
				No Items		



#	Item	Date of Meeting	Dept. Responsible.	Outstanding	Expected Report Back Date	Status / Explanation
<b>5.4 Asset Management</b>						
	Rainwater Management Financial Plan, Stormwater Fee Development and Consideration of Green Stormwater Infrastructure	Council 09/18/23	Asset Management	1. That staff report back in 2024 with an update on the recommended stormwater fee structure and implementation plan.	March 25, 2024 Q1 2024	Report: Rainwater Management Financial Plan Update



**THE CORPORATION OF THE TOWN OF OAKVILLE**

**BY-LAW NUMBER 2024-001**

A by-law to establish retention periods for records of the Town of Oakville and to repeal By-law 2021-130.

**WHEREAS** subsection 254(1) of the *Municipal Act, 2001*, S.O. 2001, c.25, as amended, ("*Municipal Act*") provides that a municipality shall retain and preserve its records in a secure and accessible manner;

**WHEREAS** subsection Section 255(3) of the *Municipal Act* provides that a municipality may establish retention periods during which its records must be retained and preserved;

**WHEREAS** subsection 255(2) of the *Municipal Act* provides that a municipality's records may be destroyed if a retention period for the record has been established and the retention has expired; and

**WHEREAS** Council authorized staff to submit future amendments to the Records Retention By-law directly to Council for approval without the requirement of a staff report;

**COUNCIL ENACTS AS FOLLOWS:**

**1. Definitions:**

In this by-law,

(1) "**active record**" means a record that is referred to and is stored in the user's office area.

(2) "**archival record**" means a record or record series that has been appraised and is to be preserved for permanent retention because of its historical value.

(3) "**archives**" means a repository for archival records.

(4) "**authoritative record**" means the record that is considered the official town record for evidentiary purposes.

(5) "**disposition**" means the final phase of a record's life cycle meaning:

- a) destruction;
- b) permanent deletion;
- c) designation of record as permanent; or

d) designation of record as archival.

(6) "**current (C)**" refers to current year

(7) "**event trigger (E)**" refers to a specific event or action which initiates the calculation of a retention period.

(8) "**filing system**" means a systematic method of coding and storing records.

(9) "**inactive record**" means a record that is no longer active and is stored in a Records Centre.

(10) "**life cycle**" means the life span of a record from its creation or receipt throughout its active and inactive stage, to final disposition.

(11) "**Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)**" is Ontario legislation which, with some limitations, provides the public with a right of access to records held by the Town and protects the privacy of personal and sensitive information.

(12) "**official record**" means the version of a town record deemed as the authoritative record, which is not a convenience or duplicate copy, but rather the final complete version, as determined by the proper authority, and is the single source of truth.

(13) "**personal information**" means recorded information about an identifiable individual as defined by section 2 of *MFIPPA*.

(14) "**Personal Information Bank (PIB)**" refers to records that contain personal information.

(15) "**record**" has the meaning given to it by section 2 of the *Municipal Freedom of Information and Protection of Privacy Act*, and includes any record of information however recorded and applies equally to paper and electronic records unless otherwise stated.

(16) "**Records Centre**" means a storage facility used to house inactive records.

(17) "**records management**" is the process of planning, organizing, directing and controlling all the steps involved in a record's life cycle.

(18) "**record series**" means a group of specifically related records organized within a primary grouping.

(19) "**responsible department**" is a column heading in the retention table and identifies departmental responsibility.

(20) "**retention**" means the length of time a record is to be retained before its final disposition. Retention descriptions are as follows:

C = Current Year

P = Permanent (When a record is preserved and never destroyed)

S = Superseded (When a record is updated or replaced with a new version)

E = Event Trigger (Example: E+6 = Expiration of a Contract plus the next 6 calendar years)

\* = Archival Records

\*\* = Archival Selection (Records will be reviewed for Archival Value prior to disposal)

(21) "**retention schedule**" means an approved document that authorizes the length of time records are to be retained before their final disposition; Schedule A.

(22) "**retention table**" is the listing of records arranged by primary and secondary groupings, including scope notes, and the retention periods of the records.

(23) "**series code**" is the column heading in the retention table that is represented by an alpha-numeric code.

(24) "**series title and scope notes**" is the column heading in the retention table identifying record series titles and including a brief description of the record series.

(25) "**superseded (S)**" refers to a time at which a record becomes obsolete and/or is replaced with an updated version.

(26) "**scope notes**" means a brief description of the types of specifically related records normally grouped together within a secondary group.

(27) "**town record**" means a record regardless of format created or received in the course of town business or delivery of town services.

(28) "**transitory record**" means a record that has temporary usefulness and is only required for the completion of a routine action, or until superseded.

2. The following principles shall govern the destruction of records:

- (1) No records shall be destroyed unless first classified according to Schedule "A" of this by-law;
- (2) All records shall be destroyed in a manner that preserves the confidentiality of any information contained in such records; and
- (3) Any record pertaining to pending or actual litigation or investigation or a request under privacy legislation shall not be destroyed until such record is no longer required for such purpose.

3. The following by-law is repealed on the day this by-law comes into force and effect: By-law 2021-130.

**4. Title:**

This by-law may be known as "the Retention By-law"

PASSED this 26<sup>th</sup> day of February, 2024

\_\_\_\_\_  
Rob Burton Mayor

\_\_\_\_\_  
Vicki Tytaneck Town Clerk

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Legend: C - Current Year; E - Event; P - Permanent; S - Superseded; \* - Archival Records;  
 \*\* - Subject to Archival Selection; PIB - Personal Information Bank;  
 All numbers in retention columns refer to years unless otherwise specified.

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               \*\* - Subject to Archival Selection; **PIB** - Personal Information Bank;  
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<b>Vehicles and Equipment</b> .....	60
<b>V01 - Fleet Management</b> .....	60
<b>V02 - Mobile and Transportable Equipment</b> .....	60
<b>V04 - Protective and Medical Equipment</b> .....	60
<b>V07 - Ancillary and Other Equipment</b> .....	60

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             \*\* - Subject to Archival Selection; **PIB** - Personal Information Bank;  
             All numbers in retention columns refer to years unless otherwise specified.

### **Transitory Records**

Records and documents with temporary usefulness and no long term value, received or stored in any format. Transitory records may facilitate the completion of insignificant transactions, or be created while preparing an official corporate record. Unless otherwise specified in the schedule, or unless required for legal or legislated purposes, these records may be destroyed when their value ceases as determined by the individual work unit.

Includes:

- a) Duplicate copies
- b) Voice recordings that are not a record of official decisions
- c) Town managed instant messaging, text and SMS applications
- d) Working papers, preliminary drafts, rough notes, similar materials that do not represent an integral part of the official business record
- e) Records that are of insignificant or no value in documenting town business transaction
- f) Records that are not related to town business
- g) Email records that are not official business records and do not support decisions, activities and or transactions related to town business
- h) Unsolicited advertising and promotional material, product catalogues, unrelated to corporate procurement
- i) Training materials not required for a legislated purpose
- j) Town website and social media content

### **Email Records**

Email records include email messages and attachments that are created, received or sent by the town in the course of its business are town records and must be managed in accordance with the Records Retention By-law.

Email records that document and support decisions, activities and transactions related to town business must be saved in the appropriate repository, such as SharePoint or a shared network drive outside of the email system and classified in accordance with the Records Retention schedule.

Email records that do not document and support decisions, activities and transactions related to town business are considered transitory emails. Transitory emails retained within the email system will be deleted from the system after six years.

### **Digitization**

The Town of Oakville is digitizing select groups of physical records (the original record that was used to create the digitized record) for the purposes of:

- a) minimizing risk and exposure resulting from lost documents;
- b) improving staff efficiency finding documents;
- c) enabling greater openness and transparency of town records;
- d) applying document management principles.

Digitizing physical records requires careful analysis and confirmation that digitized versions of the records are legally acceptable representations of the physical records. Digitized versions must be:

- a) subject to a quality assurance process that includes policy and procedure;
- b) accurate and legible reproductions of the source records without alterations to the content or appearance;
- c) described with the appropriate metadata for their management and retrieval.

Digitized versions that are legally acceptable may replace the physical records and be authoritative records. The original physical records may be eligible for destruction if they meet the requirements of the Digitization Procedure.

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**Telephone Conversation Recordings**

Current retention for Mitel Call recording and Station Message Detail Reporting (SMDR) Call Data database and raw data files is 3 years.

**Microsoft 365 Applications**

**SharePoint Project Sites**

SharePoint project sites used by departments are decommissioned by ITS after E+120 days (E=completion of project). Responsible departments have 120 days to transfer town records to the appropriate repository, whether SharePoint or a shared network drive and classify them in accordance with the Records Retention By-law.

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\*\* - Subject to Archival Selection; **PIB** - Personal Information Bank;  
All numbers in retention columns refer to years unless otherwise specified.

<b>Primary Group: Administration</b>					
Includes records regarding routine administration and office services functions.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
A01	<p><b>Associations and Organizations</b></p> <p>Includes correspondence, minutes, agenda, notices and reports regarding organizations and associations to which staff belong or with which they communicate in the course of their duties such as AMCTO, AMO, MEA, OMFPOA, etc.</p>	All Departments	E+1	Y	Excludes: Membership Fees - see F01
A02	<p><b>Staff Committees and Meetings</b></p> <p>Includes records regarding the activities of staff committees and meetings, such as departmental and management meetings. Includes notices of meetings, agenda, minutes, etc. May also include copies of staff activity reports.</p>	All Departments	C+4**		Excludes: Council - see C02 Standing Committees - see C03 Advisory Boards and Committees - see C04 Statutorily Legislated Committees - see C05 Health and Safety Committees – see H04
A03	<p><b>Computer Systems and Architecture</b></p> <p>Includes records regarding all types of information systems in use. Includes computer hardware, computer software, data transmission, system design and implementation, quality control, office automation, and electronic correspondence management. Includes printers, photocopiers and video monitor systems.</p>	All Departments	S+6		Excludes: Acquisitions – see F16 and F17
A04	<p><b>Conferences and Seminars</b></p> <p>Includes approvals, agenda, notes on proceedings, and other records regarding conferences, conventions, seminars and special functions attended by staff, or sponsored by the Town as well as travel arrangements, accommodation, itineraries, reservations, rented vehicles, confirmation of reservations, hotel brochures related to the conference, restaurants, convention sites, etc.</p>	All Departments	C+1**		Excludes: Invoices - see F01 Employee and Council Expenses - see F09 Rental Agreements - see L15 Ceremonies and Events - see M02 Speeches and Presentations - see M08 **Only those sponsored by the Town are subject to archival review.

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 All numbers in retention columns refer to years unless otherwise specified.

<b>Primary Group: Administration</b>					
Includes records regarding routine administration and office services functions.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
A05	<p><b>Consultants</b></p> <p>Includes correspondence, proposals, resumes and other documents regarding the selection, appointment and monitoring of consultants. May include similar records regarding legal solicitors and engineering firms.</p>	All Departments	E+2**		<p>E = project completion date</p> <p>Excludes:</p> <p>Invoices - see F01</p> <p>Quotations and Tenders - see F17</p>
A06	<p><b>Inventory Control</b></p> <p>Includes inventory statements and reports, and all other records regarding the control of supplies, fuel and small equipment stock levels.</p>	All Departments	C+6		<p>Excludes:</p> <p>Assets - see F06</p>
A07	<p><b>Office Equipment and Furniture</b></p> <p>Includes records regarding the design and maintenance of owned and leased office equipment and furniture. Includes chairs, desks, tables, microfiche readers, etc.</p>	All Departments	E+1		<p>E = disposal of item</p> <p>Excludes:</p> <p>Computer Hardware and Software - see A03</p> <p>Assets - see F06</p> <p>Service Agreements - see L12</p>
A08	<p><b>Office Services</b></p> <p>Includes records regarding rates and services provided by courier, mail and postage firms. Also includes records regarding the inter-office mail system, internal printing.</p>	All Departments	C+1		
A09	<p><b>Policies and Procedures</b></p> <p>Includes policy and procedure manuals, guidelines, directives, and standards.</p> <p>Sub-series:</p> <p>(1) Corporate Policies and Procedures</p> <p>(2) Departmental Policies and Procedures</p>	All Departments	<p>P** (1)</p> <p>S** (2)</p>		
A10	<p><b>Records and Information Management</b></p> <p>Includes records regarding the management of corporate records, information, and data, regardless of medium. Specific records include file listings, feasibility studies, and records centre operations.</p>	Clerk's	S		<p>Excludes:</p> <p>Policies and Procedures - see A09</p> <p>Records Disposition - see A11</p> <p>Retention By-Laws - see C01</p>

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<b>Primary Group: Administration</b>					
Includes records regarding routine administration and office services functions.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
A11	<p><b>Records Disposition</b></p> <p>Includes records regarding the disposition of Town records. Includes the disposal method used and forms authorizing and describing the destruction of records.</p>	Clerk's	P		
A12	<p><b>Telecommunications Systems</b></p> <p>Includes records regarding all types of telecommunications systems. Includes telephone systems, facsimile machines, base and mobile stations, towers, antennae, fire communications systems, and 911 emergency systems.</p>	ITS	S		<p>Excludes:</p> <p>Long Distance Call Records - see F01</p> <p>Assets - see F06</p> <p>Agreements - see L11 or L12</p>
A13	<p><b>Uniforms and Clothing</b></p> <p>Includes records regarding uniforms and special clothing used by Town staff members, firefighters' clothing and safety clothing.</p>	All Departments	S*		Only actual artifacts are considered archival records
A14	<p><b>Vendors and Suppliers</b></p> <p>Includes records regarding vendors and suppliers of goods and services as well as information about these goods and services, such as catalogues, price lists, correspondence, and bidders' information sheets.</p>	All Departments	C+2		<p>Excludes:</p> <p>Office Equipment - owned and leased - see A07</p> <p>Purchase Orders and Requisitions - see F16</p> <p>Fleet Management - see V01</p>
A15	<p><b>Intergovernmental Relations</b></p> <p>Includes correspondence and other records of a general nature regarding the relationship between the Town and all other levels of government (such as telephone numbers, contact names, etc.). May include correspondence to and from Boards and Commissions.</p>	All Departments	C+5**		

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<b>Primary Group: Administration</b>					
Includes records regarding routine administration and office services functions.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
A16	<p><b>Information Access and Privacy</b></p> <p>Includes records regarding the Town's responsibilities under the Municipal Freedom of Information and Protection of Privacy Act and records regarding the handling of requests under the Act. Also includes routine disclosure requests and processing, notices of disclosure, responses to FOI requests made to the Town, access request transfer to another institution, Privacy Impact Assessment administration (e.g., questionnaires, guidelines, templates), and privacy breach investigation/processing.</p>	<p>Clerk's</p> <p>All Departments (routine disclosure related records)</p>	E+5	Y	<p>E = completion of Request/Case</p> <p>Excludes:</p> <p>Complaints - see M04</p> <p>IPC Appeals - see L01</p> <p>PIA reports - see A27</p>
A17	<p><b>Security</b></p> <p>Includes reports, requests, logs, and other records regarding the security of offices/facilities and properties such as security passes and control of keys.</p>	All Departments	C+5		<p>Excludes:</p> <p>Computer Security - see A03</p> <p>Vandalism Reports - see P05</p>
A18	<p><b>Facilities Construction and Renovations</b></p> <p>Includes records for the planning and construction of Town facilities such as fire stations, pools, and office buildings. Includes site meetings, consultant's reports, and cost reports. Also includes architectural and engineering drawings.</p>	Facilities and Construction Management	P**		<p>Excludes:</p> <p>Parks Design - see Q01</p>
A19	<p><b>Building and Property Maintenance</b></p> <p>Includes records regarding the maintenance of the Town's buildings and properties, such as bus terminals, garages, libraries, and office buildings. Includes exterior maintenance to buildings, landscaping, grounds keeping and grass cutting. Also includes interior design of buildings, including floor layouts and office cleaning.</p>	Facilities and Construction Management	E+15		<p>E = expiry of contract or service agreement</p> <p>Excludes:</p> <p>Parks Design - see Q01</p>
A20	<p><b>Facilities Bookings</b></p> <p>Includes records regarding the booking and scheduling of town facilities for town related business. i.e. staff meetings, training sessions, etc.</p>	Facilities and Construction Management	C+1		<p>Excludes:</p> <p>Contracts &amp; Agreements - Simple, see L12 (Rental permits and bookings issued to external groups / individuals for the use of town facilities)</p>

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<b>Primary Group: Administration</b>					
Includes records regarding routine administration and office services functions.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
A21	<p><b>Corporate Strategic Planning and Delivery</b></p> <p><b>Sub-series:</b></p> <p>(1) <b>Strategic Planning:</b></p> <p>Includes records concerning strategic planning, goals and objectives, such as shared services and mission statements such as the municipal sustainability plan housing plan, and growth plan submissions prepared for the Ministry.</p> <p>(2) <b>Strategic Initiatives:</b></p> <p>Includes records related to strategic projects and initiatives led by the Strategic Initiatives team. These are aligned with the town's strategic mandate and council plan, reflecting the broader mission and vision. Some may involve the coordination of efforts and resources between different departments to create initiatives, programs, or strategies. Initially driven by Strategic Initiatives, the records of these projects are eventually transferred to the respective responsible department for operation.</p>	All Departments (1) Strategy, Policy, and Communications (2)	C+9** (1) E+5 (2)		<p>E = project completion date</p> <p>(2) For collaboration projects/initiatives, responsible departments to keep final records</p> <p>For physical records, only (1) Strategic Planning sub-series is available in Offsite Records Storage</p>
A22	<p><b>Appointment Calendars and Agendas</b></p> <p>Includes records regarding copies of appointment calendars, phone message log books, daily diary note books, agenda/day planner entries, etc.</p>	All Departments	C+1	Y	
A23	<p><b>Accessibility of Services</b></p> <p>Includes records relating to the accessibility of town buildings, facilities, programs and services. Includes presentations, correspondence and planning.</p>	Clerk's	C+5	Y	<p>Excludes:</p> <p>Construction records such as drawings, inspections - See A18</p> <p>Policy &amp; Procedure – See A09</p>
A24	<p><b>Internal Audits</b></p> <p>Includes records to the internal audits of town programs and processes. Includes working papers, observations, research papers, comparison studies, field work tests, terms of reference, reports.</p>	CAO's Office	C+6	N	<p>Excludes:</p> <p>Financial Audits – See F03</p>

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<b>Primary Group: Administration</b>					
Includes records regarding routine administration and office services functions.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
A25	<p><b>Performance Management/Quality Assurance</b></p> <p>Includes records regarding the performance of the Municipality as a whole and quality assurance programs such as the Ontario Municipal Benchmarking Initiative (OMBI), National Quality Institute (NQI), Benchmarking, Balanced Score Cards, Municipal Performance Measurement Programs. Key performance indicators, etc. would also be included. Types of records included would be reports, statistical analysis, program documentation, correspondence, awards for outstanding organizational achievements, work plans, etc.</p>	CAO's Office	C+5**		Excludes: Employee Records- see H03
A26	<p><b>Travel and Accommodation</b></p> <p>Includes records regarding travel and accommodation arrangements. Includes itineraries, maps, authorizations, reservations, rented vehicles and catalogues and brochures concerning hotels, convention sites and restaurants.</p>	All Departments	C		
A27	<p><b>Privacy Impact Assessments</b></p> <p>Includes documents regarding draft and final Privacy Impact Assessment reports and other supporting materials for the PIA analysis, such as business case, system requirements, project files, templates, and correspondence.</p>	Clerk's	S+2		S = Superseded or discontinued of the subject of the PIA, such as technology, service, or program
A28	<p><b>Information Systems Production Activity &amp; Control</b></p> <p>Includes records relating to computer system operations. Includes activity logs, help desk tickets, change control sheets, change orders, file access control reports.</p>	ITS	C+1		
A29	<p><b>Access Control and Passwords</b></p> <p>Records related to the management of and access to programs. Includes individual access, password management, etc.</p>	ITS	S		

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 \*\* - Subject to Archival Selection; **PIB** - Personal Information Bank;  
 All numbers in retention columns refer to years unless otherwise specified.

<b>Primary Group: Council and By-Laws</b>					
Includes records regarding the establishment of policy and by-laws, and the operations of Council and of Boards for which Council is responsible.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
C01	<p><b>By-Laws</b></p> <p>Includes final versions of the Town's by-laws and amendments and attachments that are legally part of the by-laws.</p>	Clerk's	P**		<p>Original signed by-laws are kept permanently on paper by Clerk's.</p> <p>Excludes: Draft by-laws - see C15</p>
C02	<p><b>Council Minutes and Agendas</b></p> <p>Includes notices of meetings, agendas, minutes and records of the proceedings of Council.</p> <ul style="list-style-type: none"> <li>- Planning &amp; Development Council</li> <li>- Council</li> <li>- Inaugural meeting recordings</li> </ul>	Clerk's	P**		<p>Retention period for working notes C+2 years</p> <p>Original signed minutes are bound and are kept permanently on paper.</p> <p>Original agendas are kept in paper format prior to 2003, and in electronic format from April 2003 to present.</p> <p>Retention period for video/audio recordings of Council except for inaugural meetings - Current term of Council</p>
C03	<p><b>Standing Committee Minutes and Agendas</b></p> <p>Includes notices of meetings, agendas and minutes.</p>	Clerk's	P**		<p>Retention period for working notes C+2 years</p> <p>Original signed minutes are kept permanently on paper.</p> <p>Original agendas are kept in paper format prior to 2003, and in electronic format from April 2003 to present.</p> <p>Retention period for video/audio recordings of standing committee - Current term of Council</p>

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 All numbers in retention columns refer to years unless otherwise specified.

<b>Primary Group: Council and By-Laws</b>					
Includes records regarding the establishment of policy and by-laws, and the operations of Council and of Boards for which Council is responsible.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
C04	<p><b>Advisory Committees and Boards</b></p> <p>Includes the terms of reference, membership, notices of meetings, schedules, agendas, and minutes.</p>	Clerk's	P**		<p><b>Remarks:</b></p> <p>Retention period for working notes C +2 years</p> <p>Original signed minutes are kept permanently on paper.</p> <p>Original agendas are kept in paper format prior to 2003, and in electronic format from April 2003 to present.</p> <p>Retention period for video/audio recordings of advisory committees and boards - Current term of Council</p>
C05	<p><b>Legislated Committees with Decision- Making Authority</b></p> <p>Includes minutes, agenda packages, reports and audio records of the proceedings of legislated Committees with decision-making authority.</p>	All Departments	P		<p>Retention period for working notes C +2 years</p> <p>Retention period for video/audio recordings of Legislated Committees – Current term of Council</p>
C06	<p><b>Elections – Administration</b></p> <p>Includes records related to the general administration and management of town elections and by-elections, voting location management, election personnel (appointments and oaths taken and supporting documentation) communications, project management and meeting correspondence.</p>	Clerk's	C+4	Y	<p>To be retained until the members of the council or local board elected at the next regular election have taken office, in accordance with Clerk's Election Procedures.</p>
C07	<p><b>Elections – Ward Boundaries</b></p> <p>Includes records related to electoral wards. Documents may include historical ward maps, ward profiles and Town boundaries.</p>	Clerk's	P**		
C08	<p><b>Elections – Campaign Finance</b></p> <p>Records related to candidate or registered third party financial statements.</p>	Clerk's	C+4		<p>In accordance with Section 88(4) of the <i>Municipal Elections Act, 1996</i>:</p> <p><i>Documents filed under sections 88.25, 88.29 and 88.32 shall be retained until the members of the council or local board elected at the next regular election have taken office.</i></p>

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 All numbers in retention columns refer to years unless otherwise specified.

<b>Primary Group: Council and By-Laws</b>					
Includes records regarding the establishment of policy and by-laws, and the operations of Council and of Boards for which Council is responsible.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
C09	<p><b>Elections – Candidate/Registered Third Party</b> Includes records relating to candidates and registered third parties who filed with the Town of Oakville. Documents may include completed nomination forms, nomination withdrawal, signed oaths, copies of affidavits and all other supporting correspondence.</p>	Clerk's	C+4	Y	<p>To be retained until the members of the council or local board elected at the next regular election have taken office in accordance with Clerk's Election Procedures.</p> <p><i>(Includes all candidate correspondence except financial statement information – see C08)</i></p>
C10	<p><b>Elections – Returns</b> Records related to the town's official voting place documentation and materials (for advance voting and voting day).</p> <p>Documents may include: ballot box, ballot box contents, documents, advance voting sheets and documentation, used and unused ballots, voters' lists, applications to amend.</p>	Clerk's	E+120 Days		<p>In accordance with the <i>Municipal Elections Act, 1996</i>, retention is set at 120 days after official declarations of results unless there is a court order or recount. The retention will then be re-determined if this occurs.</p> <p>In accordance with the <i>Municipal Elections Act, 1996</i>, two witnesses must be present in the destruction (statutory declaration required).</p>
C11	<p><b>Elections – Recount</b> Includes records related to the request for and conduct of town election recount.</p> <p>Documents may include recount requests, associated amendments, affidavits and certifications, recount notices and other supporting documents involved in the recount process.</p>	Clerk's	C+8		
C12	<p><b>Elections – Results</b> Includes record related to the town's official election results including election date, Town Clerk's official declaration of election, poll by poll results.</p>	Clerk's	P*		

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<b>Primary Group: Council and By-Laws</b>					
Includes records regarding the establishment of policy and by-laws, and the operations of Council and of Boards for which Council is responsible.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
C13	<p><b>Elections – Contribution Rebate Applications</b></p> <p>Records relating to contribution rebate applications for individuals who made monetary contributions to candidates seeking Town Council office in the town election.</p> <p>Documents include a completed rebate application, copy of receipts, affidavits and correspondence.</p>	Clerk's	C+4	Y	In accordance with Clerk's Election Procedures, these documents shall be retained until the members of the council or local board elected at the next regular election have taken office.
C14	<p><b>Accountability, Transparency &amp; Governance</b></p> <p>Includes records relating to Council Code of Conduct complaints and related investigations, Integrity Officer appointments and reports (including Integrity Commissioner reports, Ombudsman investigations and reports), closed meeting investigations and initiatives, etc.</p>	Clerk's	C+2	Y	Excludes: FOI requests – see A16 Appeals – see L01
C15	<p><b>By-Laws – Drafts</b></p> <p>Includes records related to by-law development, such as drafts, background, research and supporting documents used to prepare by-laws.</p>	All Departments	E+4		E=4 years after the approval of the by-law

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<b>Primary Group: Development and Planning</b>					
Includes records regarding municipal development and planning. Includes general studies as well as official plans, zoning, etc. Subjects are grouped according to long range vs. developmental planning.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
D01	<p><b>Demographic Studies</b></p> <p>Includes records regarding trends in population growth, census reports, and density studies. Also includes records regarding the type, level and rate of growth of employment, unemployment statistics, composition of the workforce, etc.</p>	Planning Services	C+10**		Excludes: Vital Statistics - see L16
D02	<p><b>Economic Development</b></p> <p>Includes records regarding the growth of the economy. Includes studies, statistics, projections, etc.</p>	Economic Development	C+10**		Excludes: Demographic Studies - see D01 Residential Development - see D04 Tourism Development - see D06 Industrial/Commercial Development - see D21
D03	<p><b>Environment Planning</b></p> <p>Includes records regarding general types of environmental studies with a long-range planning emphasis, such as salt usage impact, storm drainage and flood control, parks and open spaces, pollution prevention and waste management planning. Also includes records relating to studies of environmental issues and impacts. These assessments are required by legislation and are responsible for determining the state of the current environment and the impacts that development activities might have on it. Includes information relating to soil, water, air, and other environmental issues. Documents include studies and reports, environment planning documents, engineering plans, and correspondence. May include Phase 1 and Phase 2 environmental assessments, Municipal Class Environmental Assessments, and soil studies.</p>	Planning Services	C+14**		<p>A document related to environmental assessment may be destroyed by or under the authority of the Minister when it has been completely recorded or copied and the recording or copy is retained for the purposes of inspection under s. 36(6) of the Environmental Assessment Act.</p> <p>Excludes: Environmental Monitoring - see E05 Waste Management - see E07</p>

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Includes records regarding municipal development and planning. Includes general studies as well as official plans, zoning, etc. Subjects are grouped according to long range vs. developmental planning.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
D04	<p><b>Residential Development</b></p> <p>Includes records regarding the availability of housing. Includes general assessments of the need for affordable housing, occupancy rates, housing cost statistics, etc.</p>	Building Services	P		
D05	<p><b>Natural Resources</b></p> <p>Includes records regarding the characteristics of various minerals as well as mineral deposits, and other natural resources information.</p>	Planning Services	C+10**		Excludes: Tree Maintenance – See Q02 Natural Heritage – See Q08
D06	<p><b>Tourism Development</b></p> <p>Includes records regarding the tourism industry and efforts made to promote and encourage tourism such as the use of the Town as a convention site or special event.</p>	Economic Development	C+10**		
D07	<p><b>Condominium Plans</b></p> <p>Includes records regarding the approval of plans of condominiums. Includes drawings, technical reports, and correspondence, written comments, working notes, background information and applications.</p>	Planning Services	P**		
D08	<p><b>Official Plans</b></p> <p>Includes the official plan, exemptions and amendments to the official plan. Also includes secondary plans and amendments, containing detailed objectives and policies concerning the planning, development, and redevelopment of specific planning districts.</p>	Planning Services	P**		Excludes: Official Plan Amendment Applications - see D09 Background Reports - see D24
D09	<p><b>Official Plan Amendment Applications</b></p> <p>Includes applications to amend the official plan or secondary plans, staff reports, notices, resolutions and decisions.</p>	Planning Services	E+5		E = final decision
D10	<p><b>Severances</b></p> <p>Includes records regarding the granting of severances to parcels of land including application for severance.</p>	Building Services	P		

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<b>Primary Group: Development and Planning</b>					
Includes records regarding municipal development and planning. Includes general studies as well as official plans, zoning, etc. Subjects are grouped according to long range vs. developmental planning.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
D11	<p><b>Site Plan Control</b></p> <p>Includes records regarding the provision of services to individual land sites. Includes water, sewage, utility approvals, comments and correspondence. Also includes correspondence regarding parking areas, drainage and driveways.</p>	Planning Services	P**		Excludes: Site Plan Agreements - see L11
D12	<p><b>Subdivision Plans</b></p> <p>Includes records regarding the approval of plans of subdivisions (both residential and commercial). Includes drawings, technical reports, correspondence, written comments, working notes and background information. Includes clearance letters, draft approved plans and "red line" revisions, applications, registered plans, notices of approval, and changes to approved plans.</p>	Planning Services	P**		Excludes: Subdivision Agreements - see L11
D13	<p><b>Variances</b></p> <p>Includes records regarding the pre-consultation and the granting of minor variances in land use including zoning applications from existing zoning regulations. Also includes Committee of Adjustment records, such as Application, notice final decisions, drawings and agency letters.</p>	Building Services	P**		Excludes: Budget Variances - see F05
D14	<p><b>Zoning</b></p> <p>Includes records and standards regarding the designation of zones for land use planning purposes and zoning applications for adjacent municipalities.</p>	Building Services	E+2**		E = final decision Excludes: Zoning By-Laws - see C01 Variances - see D13
D15	<p><b>Easements</b></p> <p>Includes all records on Rights of Way and Easements concerning Town ownership of private lands in order to maintain public service such as water and sewer lines that cross private property. Also, easements granted to other institutions to maintain their services across Town owned property (e.g. Oakville Hydro, Bell Canada, Union Gas, etc.).</p>	Transportation & Engineering	P**		Excludes: Original Agreements - see L11

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<b>Primary Group: Development and Planning</b>					
Includes records regarding municipal development and planning. Includes general studies as well as official plans, zoning, etc. Subjects are grouped according to long range vs. developmental planning.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
D16	<p><b>Encroachments</b></p> <p>Includes all records regarding private properties encroaching on Town lands including encroachment permits. Also includes surveys and any other related documentation.</p>	Transportation & Engineering	P**		Excludes: Original Agreements - See L11 Original Encroachment By-Laws – see C01
D17	<p><b>Municipal Restructuring/Amalgamation</b></p> <p>Includes all records pertaining to the annexing and amalgamating of land adjacent to municipal lands to accommodate growth. May include studies on county restructuring.</p>	Clerk's	P**		
D18	<p><b>Community Improvement</b></p> <p>Includes records, studies, statistics and any required background information on community development programs. Examples include Ontario Neighbourhood Improvement Programs, Community Area Improvement Programs, BIA, BIC, PRID, etc. May also include records on housing rehabilitation programs, ie. RRAP, CMHC.</p>	Planning Services	E+6**		E = completion of project Excludes: Economic Development - see D02
D19	<p><b>Municipal Addressing</b></p> <p>Includes records regarding requests for and assignment of new subdivision and other street names and numbers. May include correspondence, reports, drawings, and copies of related by-laws.</p>	Transportation & Engineering	P		
D20	<p><b>Reference Plans</b></p> <p>Includes Registered Deposit Plans (RD Plans), site plans, M-Plans, property survey plans as received from Registry Office. May include correspondence.</p>	Planning Services	P**		
D21	<p><b>Industrial/Commercial Development</b></p> <p>Includes records regarding promotion and development of industry and commerce. Records include studies, statistics, projections, etc.</p>	Planning Services	C+10**		Excludes: Agricultural Development – see D23
D22	<p><b>Digital Mapping</b></p> <p>Includes all records used to produce maps and updates in a digital format as in a GIS.</p>	Planning Services	S+6		Excludes actual data residing on these systems

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<b>Primary Group: Development and Planning</b>					
Includes records regarding municipal development and planning. Includes general studies as well as official plans, zoning, etc. Subjects are grouped according to long range vs. developmental planning.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
D23	<b>Agricultural Development</b> Includes all records regarding development of agricultural growth.	Planning Services	C+10**		
D24	<b>Background Reports for Official Plan</b> Includes reports pertaining to amendments and changes to the Official Plan.	Planning Services	E+5		E = final decision
D25	<b>SBS Knowledge Base</b> Includes records related to SBS knowledge base project management and deliverables.	Strategic Business Services	E+7		E = project completion date Project deliverables are to be retained by responsible departments with appropriate record retention periods.
D26	<b>Part Lot Control</b> Includes records regarding applications and background material for Part Lot Control exemptions, council decisions, by-law, correspondence, etc. A Part Lot Control application is applied for to allow the conveyance of a portion of a lot without requiring approval of a land division committee (typically used to separately convey semi-detached and townhouse units). Only applicable to parcels of land contained with a registered plan of subdivision.	Planning Services	E+5		E = Final Decision
D27	<b>Building Permits and Review</b> Includes permits issued to builders, contractors, and residents giving them permission to build or renovate. Also includes permits for construction of cell towers and the structure for wind-powered turbines.  Also includes all records pertaining to building permit review including but not limited to applications, revisions, and correspondence.	Building Services	C+15		Excludes: Drawings are kept permanently - see D31
D28	<b>Building Inspections</b> Includes all records pertaining to building inspection services including but not limited to reports, correspondence, violations, complaints and compliance letters.	Building Services	C+15		

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<p align="center"><b>Primary Group: Development and Planning</b></p> <p align="center">Includes records regarding municipal development and planning. Includes general studies as well as official plans, zoning, etc. Subjects are grouped according to long range vs. developmental planning.</p>					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
D29	<p><b>Deeming Process</b></p> <p>Includes records regarding applications and background material for Deeming By-law applications, including Council decisions, by-laws, correspondence, etc. A Deeming By-law application is applied for in order to allow for two or more neighbouring lots on a registered plan of subdivision to merge. Only applicable to parcels of land contained within a plan of subdivision that has been registered for at least 8 years.</p>	Planning	E+2		E = Final Decision
D30	<p><b>Development Charges Study</b></p> <p>Includes records related to the development of and the final Development Charges Study as required under the Development Charges Act. Includes advertising, public meeting notices, responses, stakeholder lists, public meeting information, background information and supporting documentation, consultant reports, notices regarding adoption of the Development Charges By-law, and other records related to requirements for the development of the Development Charges By-law.</p>	Finance	C+9**		
D31	<p><b>Drawings</b></p> <p>Includes architectural and engineering drawings and As-Built drawings and supporting documentation such as specifications required to interpret the drawings and identify the current state of a facility or infrastructure for assessment, rehabilitation and warranty support purposes.</p>	All Departments	P**		Excludes: Town facilities related architectural and engineering drawings - see A18

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<b>Primary Group: Environmental Services</b>					
Includes records regarding provision of public works and other environmental services other than roads. Includes water works, sewers, treatment plants, waste management and environmental monitoring.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
E01	<b>Sanitary Sewers</b> Includes records regarding the design, construction and maintenance of sanitary sewers such as underground conduits that carry off waste matter.	Roads & Works Operations Transportation & Engineering	P		Excludes: Drawings - see D31 Storm Sewers - see E02 Treatment Plants - see E03 Waste Management - see E07
E02	<b>Storm Sewers</b> Includes records regarding the design, construction, inspections and maintenance of storm sewers.	Roads & Works Operations Transportation & Engineering	P**		Excludes: Drawings - see D31
E03	<b>Treatment Plants</b> Includes records regarding the operation of treatment and pumping stations and lagoons.	Transportation & Engineering	P		Excludes: Private Sewage Disposal Systems – see E10
E05	<b>Environmental Monitoring</b> Includes records regarding the routine monitoring of water quality, water quantity, ventilation and air quality as well as responses to interference with quality or quantity. Also includes monitoring and control of creeks and floods, weeds, noise, erosion, top soil and storm water.	Transportation & Engineering Facility Services	P**		Excludes: By-Law Enforcement - see P01 Complaints and Inquiries - see M04
E06	<b>Utilities</b> Includes maps and location drawings provided to the Town from utility companies such as telephone lines, gas mains, power lines, water mains etc.	Transportation & Engineering	P**		Excludes: Site Plans - see D11
E07	<b>Waste Management</b> Includes records regarding the collection and disposal of waste. Includes landfill site records, recycling, energy from waste, source separation, collection services and composting.	Transportation & Engineering	E+10**		E = Closure of landfill sites Excludes: Drawings - see D31 Sanitary Sewers - see E01 Environment Planning - see D03 Private Sewage Disposal Systems – see E10

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<b>Primary Group: Environmental Services</b>					
Includes records regarding provision of public works and other environmental services other than roads. Includes water works, sewers, treatment plants, waste management and environmental monitoring.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
E08	<p><b>Water Works</b></p> <p>Includes records regarding the design, construction and maintenance of water mains, tanks, pipelines and related facilities and equipment. Includes water meter registration numbers.</p>	Transportation & Engineering	P**		
E09	<p><b>Drains</b></p> <p>Includes records regarding the design, construction and maintenance of rural drains, storm ponds, creeks and erosion matters. Also includes engineer reports, petitions, assessments, general specifications and correspondence. May include convenience copies of tenders, bylaws and grants.</p>	Roads & Works Operations Transportation & Engineering	P**		Excludes: Drawings - see D31
E10	<p><b>Private Sewage Disposal Systems</b></p> <p>Includes records regarding the design, construction, maintenance and monitoring of sanitary sewers and septic systems.</p>	Building Services	C+15		
E11	<p><b>Energy Management</b></p> <p>Includes all records relating to the Town's Energy Management Program. Includes published annual energy plans, copies of utility invoices and consumption profiles, commodity procurement strategies, energy related feasibility studies, audit reports and retro-fit project files and reports and records pertaining to the benchmarking of energy cost and consumption and greenhouse gas emissions. Also includes conservation and demand measures information and management of energy consumption and conservation at municipal buildings and facilities.</p>	Transportation and Engineering	E+7		E = end of reporting period, date of publication of data

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<b>Primary Group: Environmental Services</b>					
Includes records regarding provision of public works and other environmental services other than roads. Includes water works, sewers, treatment plants, waste management and environmental monitoring.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
E12	<p><b>Ministry of the Environmental, Conservation and Parks (MECP) Environmental Compliance Approvals</b></p> <p>ECP to the municipality for: municipal drinking water systems, municipal &amp; private sewage works and waste disposal sites, air quality, noise, storm-water management, storm sewers, culverts, etc. to the municipality for: municipal drinking water systems, municipal &amp; private sewage works and waste disposal sites, air quality, noise, storm-water management, storm sewers, culverts, etc.</p>	Transportation & Engineering	E+3		E = expiry of environmental compliance approvals

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<b>Primary Group: Finance and Accounting</b>					
Includes records regarding the management of funds.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
F01	<p><b>Accounts Payable</b></p> <p>Includes records documenting funds payable by the municipality, such as applications, paid invoices, receipts, copies of cheques issued to pay account, rebates, levies payable, reports, telephone bills, membership fees.</p>	Finance	C+7	Y	<p>Excludes:</p> <p>Cancelled Cheques - see F07</p> <p>Employee and Council expenses - see F09</p>
F02	<p><b>Accounts Receivable</b></p> <p>Includes records documenting funds owing to the municipality, such as invoices, billing listings, requests from mortgage companies and recoveries reports. Includes correspondence related to collection tax and supporting documentation.</p>	Finance	C+7	Y	<p>Excludes:</p> <p>Write-offs - see F24</p> <p>Tax Rolls and Records - see F22</p>
F03	<p><b>Financial Audits</b></p> <p>Includes records regarding internal and external audits of accounts.</p>	Finance	C+6**		<p>Excludes:</p> <p>Operation Audits - see A24.</p> <p>Audited Financial Statements - see F10</p>
F04	<p><b>Banking</b></p> <p>Includes records regarding banking transactions and relationships with banks. Includes bank reconciliations and deposit records.</p>	Finance	C+7		<p>Excludes:</p> <p>Banking Statements - see F07</p>
F05	<p><b>Budgets and Estimates</b></p> <p>Includes departmental and corporate budgets, both capital and operating. Includes all working notes, calculations and background documentation. Also includes Budget Variances and records related to the administration and determination of fees and charges.</p>	Finance Asset Management	P**		
F06	<p><b>Assets</b></p> <p>Includes records regarding current and fixed assets. Includes fixed asset inventory including records of initial expenditure, depreciation, amortization, and disposal. Also includes supporting information required for Public Sector Accounting (PSAB) purposes.</p>	Finance Asset Management	E+10**		<p>E = disposal of asset</p> <p>Excludes:</p> <p>Land Acquisition and Sale - see L14</p>

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<b>Primary Group: Finance and Accounting</b>					
Includes records regarding the management of funds.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
F07	<p><b>Cheques</b></p> <p>Includes all cancelled cheques issued. Also includes cheque requisitions, cheque listings, and supporting documents used to authorize issuance of cheques, N.S.F. cheques and bank statements.</p>	Finance	C+6	Y	Excludes: Banking - see F04
F08	<p><b>Debentures and Bonds</b></p> <p>Includes records regarding debentures and bonds issued. Includes information regarding the initial issuance of the debenture or bond as well as all records of payments made to investors.</p>	Finance	E+6		E = debentures surrendered for exchange/cancellation, maturity of bond Excludes: Debenture Registers - see F14
F09	<p><b>Employee and Council Expenses</b></p> <p>Includes travel and meeting expense statements and all receipts submitted by employees or Council and Committee members to substantiate their claims. May include Credit Card information i.e., account numbers and statements etc. May also include employee time sheets combined with travel and expense statements.</p>	Finance	C+7	Y	Excludes: Attendance - see H01 Honoraria and fees to Council - see F28
F10	<p><b>Financial Statements</b></p> <p>Includes the Balance Sheet, Income Statement and Statement of Source and Application of Funds. Also includes all working notes, calculations and background documentation.</p>	Finance	P**		
F11	<p><b>Grants and Loans</b></p> <p>Includes records regarding revenue generated in the form of grants-in-lieu, provincial and federal grants, loans and subsidies such as the Road and Farm Tax Rebate, Waste Management Improvement Program etc.</p> <p>Includes grant applications made to the Town, such as individual requests and requests made to committees.</p> <p>Also includes submissions, acknowledgements, and reports such as market value of assistance report.</p>	Finance	E+6**		E = repayment of loan

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<b>Primary Group: Finance and Accounting</b>					
Includes records regarding the management of funds.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
F12	<b>Investments</b> Includes records regarding the municipality's investments, term deposits, and promissory notes.	Finance	E+6		E = Closure of account, maturity of investment
F13	<b>Journal Vouchers</b> Includes completed journal voucher forms, input forms, and all background documentation used to substantiate journal entries.	Finance	C+7		
F14	<b>Subsidiary Ledgers, Registers and Journals</b> Includes all subsidiary ledgers, registers, and Journals such as Payment and Receipt Journals, Payroll Registers, and Debenture Registers.	Finance	C+7**		Excludes: Documents and vouchers used to support entries - see F13
F15	<b>General Ledgers and Journals</b> Includes all records in the Books of Original Entry.	Finance	P**		
F16	<b>Purchase Orders and Requisitions</b> Includes purchase orders and requisitions, blanket orders, and all background documentation authorizing the procurement of goods and services.	Finance	E+7		E = expiry of contract Excludes: Quotations and Tenders - see F17
F17	<b>Quotations and Tenders</b> Includes records regarding quotations and tenders obtained from suppliers of goods and services. Includes Requests for Proposal, Invitations to Tender, Proposals, Tender Submissions, Pre-qualifications, and all documentation regarding the selection process.	Finance	E+7**		Unsuccessful bids - retain for 1 year from contract award Excludes: Successful quotations and tenders - see Contracts and Agreements, L11
F18	<b>Payment Receipts</b> Includes receipts issued for payment of items such as licenses, rentals and taxes and for charitable donations made to the municipality	All departments	C+6		
F19	<b>Reserve Funds</b> Includes records documenting obligatory and/or discretionary reserve funds such as reserves for working funds, contingencies, future capital projects, and information systems, etc.	Finance	C+6		

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<b>Primary Group: Finance and Accounting</b>					
Includes records regarding the management of funds.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
F20	<p><b>Revenues</b></p> <p>Includes records regarding the generation of revenues other than taxes such as development charges and building code principal authorities authorized fees.</p>	Finance	C+6		<p>Records related to mortgages must be kept for 10 years.</p> <p>Excludes: Accounts Receivable - see F02 Tax Rolls and Records – see F22</p>
F21	<p><b>Development Financing</b></p> <p>Records regarding the maintenance of securities, agreements, financial obligations with committees' of adjustment, land division, subdivision, etc.</p>	Finance	P**		
F22	<p><b>Tax Collection and Assessment Rolls</b></p> <p>Includes taxation records of long-term importance, such as assessment rolls, tax sale records, tax sale deeds, property tax registrations, tax arrears register cards and tax collector's rolls.</p>	Finance	P**		<p>Excludes: Accounts Receivable - see F02 Mortgage Companies - see F02 Assessment rolls are archival Correspondence related to tax issues that are not of long-term importance - see F02</p>
F24	<p><b>Write Offs</b></p> <p>Includes accounts receivable that have been written off as uncollectible. Also includes records of bankruptcies.</p>	Finance	E+6		<p>E = occurrence of making debt uncollectible or date decision made to write off.</p> <p>Excludes: Accounts Receivable - see F02</p>
F25	<p><b>Trust Funds</b></p> <p>Includes records regarding funds established by the municipality for money held in trust, such as bequests, cemetery trust funds, cemetery care and maintenance programs, Homes for the Aged Residents (including authorization, receipts, and statements of withdrawal) and Ontario Home Renewal Program such as fund accounting records, bank statements, banking instructions and fund audit records.</p>	Finance	E+7	Y	E = closure of account

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<b>Primary Group: Finance and Accounting</b>					
Includes records regarding the management of funds.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
F26	<p><b>Security Deposits</b></p> <p>Includes development deposits, letters of credit, certificates of insurance when required and records of monies held as security (i.e. bonds).</p>	Finance	E+6		E = closure of account
F27	<p><b>Payroll Processing</b></p> <p>Includes reports and data used by the Payroll Unit when processing payrolls. Includes information such as timesheets, attendance sheets, job control cards, crew cards, Maintenance Management System sheets, error reports, general ledger reports, pay sheet interfaces, pre-confirmed audit reports, pre-confirmed calculation reports, queries, and pertaining data.</p>	Finance	C+6	Y	Excludes: Payroll Registers – see F28 Subsidiary Ledgers, Registers and Journals - see F14
F28	<p><b>Payroll</b></p> <p>Includes all records of payments of salary, wages and deductions to employees including vacation entitlement and pay, alternative vacation entitlements, notice of garnishment and termination or severance pay. Includes time sheets and vacation taken, pay lists, Blue Cross reconciliations, T4 Slips, Record of Earnings for pension contribution purposes, Records of Employment (ROE) and Statistics Canada reports. Also includes honoraria and fees to Council.</p>	Finance	E+6		E = termination of employment Excludes: Timesheets, control cards, attendance sheets - see F27 All OMERS-related documentation – see H10 Permission to destroy C.P.P. and Employment Insurance records prior to the expiration of their retention period must be obtained from the Minister of Revenue.
F29	<p><b>Regulatory Reporting</b></p> <p>Includes regulatory, financial information returns and government reporting such as HST returns, tax rebate filings, and the Ministry of Municipal Affairs Financial Information Return (FIR) and the Municipal Performance Measurement Program (MPMP) that collects municipal services data on an annual basis as a part of the FIR.</p>	Finance	C+5		Excludes: Performance Management/Quality Assurance - see A25

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<b>Primary Group: Human Resources</b>					
Includes records regarding the Town's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
H01	<p><b>Attendance and Scheduling</b></p> <p>Includes records regarding the planning of employee attendance. This includes dates and times of hours worked and as well as of on-call schedules and any changes made to on-call scheduling including cancellations, (and driver daily logs) and record of on-duty and off-duty time. Includes statements related to public holiday substitution dates.</p>	All Departments	C+6**	Y	Excludes: Individual Time Sheets, attendance reporting sheets - see F27
H02	<p><b>Benefits</b></p> <p>Includes brochures, rates, quotes, correspondence and explanatory documents regarding benefits offered to employees, such as group insurance, dental plans, and general information on Employer Health Tax.</p>	Finance	E+6		E = termination of plan Excludes: Payroll records- see F28 Individual Pension and Benefit records – see H10
H03	<p><b>Employee Records</b></p> <p>Includes records regarding the employment history of Town employees, including temporary, part-time and student employees. Includes initial resumes and applications, performance evaluations, correspondence with the employee, and employee assistance. Also includes records related to criminal background checks.</p>	Human Resources	P	Y	Excludes: Grievances – see H14 Employee medical records - see H19
H04	<p><b>Health and Safety</b></p> <p>Includes records regarding the occupational health and safety of staff, such as lists of designated substances and assessments, designated substance assessments, employee incident/accident reports safety inspections, information on health and safety programs training for staff, and Health &amp; Safety Committee meeting minutes. Also includes records relating to the assessment of confined spaces and written plan and procedures for the control of hazards in confined spaces.</p>	Human Resources	P	Y	Excludes: Incident of the Public - see P05 Lost-time reports and claims – see H03

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<b>Primary Group: Human Resources</b>					
Includes records regarding the Town's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
H05	<p><b>Human Resource Planning</b></p> <p>Includes records of succession planning, executive placement, retirement programs, staff turnover rates, staffing level plans, annual hire/promotion targets, recruitment freezes, employment equity, performance management, employee information reporting and related records.</p>	Human Resources	C+6**		Excludes: Employee Records - see H03
H06	<p><b>Job Descriptions</b></p> <p>Includes job descriptions and specifications as well as background information used in their preparation or amendment.</p>	Human Resources	S+5**		
H07	<p><b>Labour Relations</b></p> <p>Includes records regarding the relationship between labour and management. Includes collective bargaining, correspondence with unions and negotiations.</p>	Human Resources	E+10**		E = expiry of contract period
H08	<p><b>Organization Design</b></p> <p>Includes records regarding reporting relationships, reorganization, organizational analysis, etc. Includes organization charts.</p>	Human Resources	S+6*		Excludes: Job Descriptions - see H06 Archival records
H09	<p><b>Salary Planning</b></p> <p>Includes records regarding the planning and scheduling of salaries, such as job evaluations, job classification systems, compensation ranges, salary surveys and schedules. Also includes any reference material retained regarding issues related to pay equity and compliance.</p>	Human Resources	S+5		Excludes: Employee Records - see H03
H10	<p><b>Pension Records</b></p> <p>Includes records detailing obligations to individuals under OMERS. Includes all pension information of retired employees, including registration and records. Also includes pension plans, annual information returns and waiver forms to decline OMERS membership / buy-back options.</p>	Finance	P	Y	Excludes: Deductions for pensions – see F27 General information on pension plans - H02

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<b>Primary Group: Human Resources</b>					
Includes records regarding the Town's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
H11	<p><b>Recruitment</b></p> <p>Includes records regarding the recruitment of staff. Includes job postings, copies of advertisements, records regarding competitions and unsuccessful applications.</p>	Human Resources	E+4 <sup>**</sup>		<p>E = close of competition</p> <p>Excludes: Successful applications - see H03</p>
H12	<p><b>Training and Development/Employee Certification</b></p> <p>Includes records regarding courses offered to employees, and information on career and professional development programs. Also includes orientation materials.</p> <p>Includes records regarding individual employee certification, credentialing and mandatory training required by legislation or professional standards as a condition of employment. Includes applications, confirmation of mandatory training, certificate renewals and appointment renewals such as fire fighter mandatory training, water quality analyst certificates, sewage works operator certificates and commissioner of oaths appointment.</p>	Human Resources All Departments	E+5 <sup>**</sup>		<p>E = date course last offered/certification expired</p> <p>Only courses developed and presented by the Town are subject to archival selection</p> <p>Excludes: Employee Records - see H03</p>
H14	<p><b>Grievances</b></p> <p>Includes records dealing with grievance complaints filed against the township such as the initial complaint, investigation, reports and final resolution. complaint, investigation, reports and final resolution including arbitration and arbitration awards.</p>	Human Resources	E+20	Y	<p>E = resolution of grievance or separation of employee; whichever event is later.</p> <p>Excludes: Harassment &amp; Violence – see H16</p>
H15	<p><b>Employee Recognition</b></p> <p>Includes all records and correspondence related to employee achievement, awards and honours granted by the town. Also includes the decision-making and evaluation processes.</p> <p>Includes: organized employee events such as staff barbeques, retirement celebrations, service awards, recognition parties, etc.</p>	Human Resources	C+4	Y	

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<b>Primary Group: Human Resources</b>					
Includes records regarding the Town's relationship with its employees. Includes records regarding general staff programs as well as information on specific employees.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
H16	<p><b>Employee Complaints and Investigations</b></p> <p>Includes records dealing with complaints by or against employees of the Town in relation to the <i>Occupational Health and Safety Act</i>, the <i>Human Rights Code</i>, the Town of Oakville's Respectful Conduct Procedure and Code of Conduct. Documents include the initial complaint, investigation, reports, and final resolution.</p>	Human Resources	E+15	Y	<p>E = resolution of complaint or separation of employee; whichever event is later.</p> <p>Excludes: Records relating to policy, procedure or training – See A09</p>
H19	<p><b>Employee Medical Records</b></p> <p>Includes all employee medical records, such as doctor's notes, correspondence, and health reports related to an employee's medical situation.</p> <p>Includes all records related to occupational and non-occupational injuries and illnesses, such as accommodation records related to permanent impairment under the Human Rights Code resulting in permanent accommodation.</p> <p>Includes records regarding claims of injuries and illness, both occupational and non-occupational in nature including claims to WSIB or insurance carriers claims for lost-time incidents, accidents, Short Term Disability or Long Term Disability. Also includes WSIB claim records of exposure to asbestos and other hazardous materials and serious incident and chemical exposure records for firefighters.</p>	Human Resources	P	Y	

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<b>Primary Group: Justice</b>					
Includes records regarding POA, Court activities and administrative penalties.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
J01	<p><b>Certificates of Offence (Part 1 POA)</b></p> <p>Includes Part 1 Certificates of Offence excluding Accident and Careless Driving offences. Records identified as POA schedule # CD-4R1.</p>	Enforcement Services	E+2	Y	E = completion date
J02	<p><b>Control Lists / Justice Reports</b></p> <p>Includes certificate control lists and reports from Municipal and Provincial agencies such as Police, Ministry of Transportation and Ministry of Natural Resources. etc.</p>	Enforcement Services	C+3	Y	
J03	<p><b>Enforcements &amp; Suspensions</b></p> <p>Includes records regarding the suspension of licenses issued by Provincial Government agencies such as RICO-4015 Preliminary Enforcement Report and RICO-4017 Enforcement Review Journal and fine collection efforts. Also includes audit reports provided by the provincial database.</p>	Enforcement Services	C+7	Y	
J04	<p><b>Appeals &amp; Transfers</b></p> <p>Includes records of appeals and of transfers to and from other Courts</p>	Enforcement Services	C+7	Y	Excludes: Appeals & Hearings – See L01
J07	<p><b>Court Dockets</b></p> <p>Includes registers of court activity including POA (trial) dockets, Fail to Respond (FTR) dockets and Walk In Guilty (WIG) dockets detailing case dispositions (completed dockets). Also includes statistics on court activities and disposition of fines.</p>	Enforcement Services	C+7	Y	
J08	<p><b>CRPD / CRC</b></p> <p>Includes Certificates Requesting Plate Denial (CRPD) as well as Certificates Requesting Convictions (CRC) sent to the MTO as well as other fine collection efforts. Also includes automated speed enforcement.</p>	Enforcement Services	C+7	Y	

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<b>Primary Group: Justice</b>					
Includes records regarding POA, Court activities and administrative penalties.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
J09	<p><b>Payment Data Capture</b></p> <p>Records relating to the maintenance, control and management of data captured in and generated from the AIMS system used to administer and control payment activities with respect to parking infractions and charges under Part 1 of the Provincial Offences Act and Part 2 of the Provincial Offences Act, automated speed enforcement, and by-law infractions under the administrative penalty system.</p> <p>Includes data interfaced with the Ministry of Transportation and the Ministry of Attorney General.</p>	Enforcement Services	E+7	Y	E = date of payment or cancellation of parking infraction, by-law infraction or automated speed enforcement infraction
J10	<p><b>Certificates of Conviction (Part 2)</b></p> <p>Includes Court and POA records including Part 2 - Certificates of Conviction.</p>	Enforcement Services	C+5	Y	
J11	<p><b>Screening Dockets</b></p> <p>Includes scheduling of screenings for reviews of penalty notices issued for violations of regulatory by-laws, parking by-laws, and automated speed enforcement, such as reports/briefs prepared by Enforcement Services, and screening decisions.</p>	Enforcement Services	C+7	Y	Excludes: Hearing decisions - see L01

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<b>Primary Group: Legal Affairs</b>					
Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
L01	<p><b>Tribunal/Board Appeals and Hearings</b></p> <p>Includes all transcripts, disclosure, opinions, briefs, final judgments, and related documentation regarding appeals, hearings, and legal proceedings. Includes tax appeals, zoning appeals, official plan appeals, Freedom of Information appeals, Planning Act Appeals, Appeals heard by the Appeals Committee and Property Standards Committee hearings heard by the hearings officer, Committee of Adjustment appeals (planning appeals and hearings), and other tribunal hearings. Also includes orders issued by regulatory bodies and boards.</p>	All Departments	P	Y	Excludes: POA Prosecutions - see L04 Litigation - see L05
L02	<p><b>Opinions and Briefs</b></p> <p>Includes copies of opinions and briefs prepared by the Town's legal counsel on specific issues and by-laws.</p>	Legal	S**	Y	
L03	<p><b>Precedents</b></p> <p>Includes records regarding judgments and decisions which may affect the Town's position in actual or potential legal matters.</p>	Legal	S**		
L04	<p><b>Prosecutions</b></p> <p>Includes records regarding POA prosecutions to enforce by-laws and federal and provincial legislation.</p>	Legal	E+7	Y	E = resolution of prosecution Excludes: Appeals and Hearings - see L01 By-Law Enforcement - see P01

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<b>Primary Group: Legal Affairs</b>					
Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
L05	<p><b>Court Litigation</b></p> <p>Includes disclosure, opinions and briefs, and other records regarding court litigation disputes involving the Town, its employees, and various Town boards and commissions. Also includes claims against or by the Town.</p>	Legal	E+7	Y	<p>E = resolution of resolution/claim and all appeals</p> <p>If claimant is a minor, then E = the later of either the</p> <p><b>a)</b> date the claimant attains age of majority or</p> <p><b>b)</b> resolution of claim + 18 years</p> <p>Excludes:</p> <p>Tribunal/Board Appeals and Hearings- see L01</p> <p>Insurance claims - see L06</p>
L06	<p><b>Risk Management</b></p> <p>Includes records regarding the exposure to and reduction of vulnerabilities. Also includes insurance claims against or by the Town.</p>	Finance	E+15	Y	<p>E = resolution of claim or elimination of specific risk</p> <p>Excludes:</p> <p>Tribunal/Board Appeals and Hearings - see L01</p> <p>Other claims - see L05</p>
L07	<p><b>Insurance Appraisals</b></p> <p>Includes appraisals of Town property for insurance purposes.</p>	Finance	E+15		E = after a new appraisal has been done
L08	<p><b>Insurance Policies</b></p> <p>Includes Town insurance policy documents, such as vehicle, liability, theft, and fire insurance</p>	Finance	E+15		<p>E = expiry of policy</p> <p>Excludes:</p> <p>Employee Group Insurance - see H02</p> <p>Insurance Claims - see L06</p> <p>Third Party Contracts - see L12</p>
L11	<p><b>Contracts and Agreements - Under Seal</b></p> <p>Includes all agreements entered into by the Town which require the signature of the CAO or Mayor and Town Clerk for approval. Includes construction contracts, collective agreements, and subdivision agreements. Also includes agreements regarding easements, encroachments, area ways and laneways.</p>	Clerk's	P		<p>Excludes:</p> <p>Insurance Policies - see L08</p> <p>Contracts regarding Land - see L14</p> <p>Office Equipment Maintenance Agreements - see L12</p> <p>Tenders - see F17</p>

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<b>Primary Group: Legal Affairs</b>					
Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
L12	<p><b>Contracts and Agreements – Simple</b></p> <p>Includes contracts agreements and permits which do not require official signatures such as equipment rental, service contracts, vehicle leases, purchase agreements and records regarding rental permits and bookings issued to external groups / individuals for the use of town facilities.</p>	All Departments	E+6**		<p>E = expiry of contract</p> <p>Excludes: Facilities Bookings - Internal – see A20</p>
L13	<p><b>Deeds</b></p> <p>Originals of deeds of lands held by the Town and copies of deeds of lands sold or exchanged by the Town. Originals held in the Council Support Division.</p>	Clerk's	P**		
L14	<p><b>Land and Property Acquisition and Sale</b></p> <p>Includes records regarding real estate transactions and conveyance of land such as lot sales, alley closings and allowances whether through voluntary transactions or expropriation. Includes agreements, leases, deeds and expropriation plans, purchase letters and appraisals.</p>	Legal	E+20**		<p>E = property disposition</p> <p>Property acquisition records are kept permanent</p>
L15	<p><b>Land and Property Leasing</b></p> <p>Includes records regarding land, buildings and properties owned by the Town, and leased out to others. Also Includes records regarding buildings, land and properties owned by others, and leased or rented by the Town, for Town purposes.</p>	Legal	E+10**		<p>E = termination of lease</p>
L16	<p><b>Vital Statistics - Registers</b></p> <p>Includes registers of births, deaths and marriages. Registers include license or permit serial numbers, date of issue and name of the parties.</p>	Clerk's	P	Y	<p>Excludes: Population Statistics - see D01 Marriage license applications - see L17</p>
L17	<p><b>Vital Statistics – Applications</b></p> <p>Includes applications submitted to register births, deaths and marriages.</p>	Clerk's	C+2	Y	<p>Marriage licence applications 2 years</p> <p>Death registrations forwarded to Office of the Registrar General.</p>

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<b>Primary Group: Legal Affairs</b>					
Includes records regarding legal matters as well as contracts and agreements, insurance and real estate matters.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
L18	<p><b>Corporate Interests</b></p> <p>Includes records regarding the acquisition and protection of intellectual property rights on behalf of the Town. Includes patent, trademark and copyright applications as well as records dealing with the use of the Town's name and/or logo by third parties.</p>	Legal	P**		

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<b>Primary Group: Media and Public Records</b>					
Includes records regarding the Town's relationship with the media and the general public.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
M01	<p><b>Advertising</b></p> <p>Includes records regarding public advertising in magazines, newspapers, radio, television, and transit.</p>	All Departments	C+2**		<p>Excludes:</p> <p>Elections Advertising - see C06</p> <p>Recruitment - see H11</p> <p>News Releases - see M06</p>
M02	<p><b>Ceremonies and Events</b></p> <p>Includes records regarding participation in special events, openings, and anniversaries, such as Remembrance Day and Sister City events. Also includes records regarding the set-up and running of special events.</p>	All Departments	C+5**		<p>Permit to hold event – see P11</p>
M03	<p><b>Charitable Campaigns/Fund Raising</b></p> <p>Includes records regarding the raising of funds and donations for the Town, for Town run programs or for other charitable organizations such as the United Way.</p>	All Departments	E+7**		<p>E = end of campaign</p> <p>Excludes:</p> <p>Receipts - see F18</p>
M04	<p><b>Complaints, Commendations and Inquiries</b></p> <p>Includes records regarding commendations, requests for information, and very general types of inquiries and general complaints related to services provided by the Town. Also includes concerns about services offered by the Town, inquiries about council proceedings and congratulatory letters. May also include compliance letters issued in response to a lawyer's request.</p>	All Departments	C+4**	Y	<p>Excludes:</p> <p>Freedom of Information Requests - see A16</p> <p>Grievances – see H14</p> <p>Harassment or Violence complaints by or against employees – see H16</p> <p>Employee recognition – see H15</p>
M05	<p><b>News Clippings</b></p> <p>Includes clippings from newspapers, information from journals and other printed media.</p>	Strategy, Policy & Communications	P**		
M06	<p><b>News Releases</b></p> <p>Includes background notes and final versions of news releases issued.</p>	Strategy, Policy & Communications	C+4**		

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<b>Primary Group: Media and Public Records</b>					
Includes records regarding the Town's relationship with the media and the general public.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
M07	<p><b>Publications</b></p> <p>Includes typed manuscripts, artwork, printed copies and related records regarding current events, industrial directories, business directories, and maps. May include annual reports of a non-financial nature.</p>	Strategy, Policy & Communications	P**		
M08	<p><b>Speeches and Presentations</b></p> <p>Includes background notes and final versions of speeches, presentations and news conferences given by elected and non-elected officials</p>	All Departments	C+2**		Excludes: Media coverage of speeches/presentations - see M05 News Releases - M06
M09	<p><b>Visual Identity</b></p> <p>Includes records regarding branding and the standards which apply to graphic designs as part of a Visual Identity Program. Includes trademarks, logo and letterhead design, signage, flags, vehicle identification, etc. Also includes records regarding corporation insignia and seals of office.</p>	Strategy, Policy & Communications	S+5*		
M10	<p><b>Corporate Communications</b></p> <p>Includes records regarding communications such as employee newsletters, CAO's Message and any other forms of communication directed to employees.</p>	Strategy, Policy & Communications	P**		
M11	<p><b>Public Relations and Public Awareness Campaigns</b></p> <p>Includes outgoing letters of support, congratulations, greetings, honourable achievement awards, welcome letters, etc. Also includes issues regarding internal/external communications. Includes programs designed for public awareness and engagement.</p>	Strategy, Policy & Communications	C+4**		
M12	<p><b>Tourist Services</b></p> <p>Includes records relating to the planning and development of tourist related services such as Town souvenirs, pins and tourism pamphlets. As well as records relating to the Town Crier and to minor special events.</p>	Strategy, Policy & Communications (Economic Development)	C+6**		

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<p align="center"><b>Primary Group: Media and Public Records</b></p> <p align="center">Includes records regarding the Town's relationship with the media and the general public.</p>					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
M13	<p><b>Proclamations</b></p> <p>All material related to proclamations made by the Town.</p>	Mayor's Office	C+2**		
M14	<p><b>Public Feedback / Survey Responses</b></p> <p>Includes response and feedback received as a result of surveys and questionnaires distributed for the purpose of determining public opinion or soliciting suggestions and/or compiling aggregate data on any given subject.</p>	All Departments	E+1	Y	E = the date of collection.
M15	<p><b>Website and Social Media Management</b></p> <p>Includes records related to the town's website and social media sites management.</p>	<p>Strategy, Policy &amp; Communications</p> <p>ITS</p>	S+2		<p>Web site systems and data backups are performed daily.</p> <p>Website and social media content are defined as transitory records.</p>

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<p align="center"><b>Primary Group: Protection and Enforcement Services</b></p> <p align="center">Includes records regarding the operational functions of law enforcement, licensing, public protection and fire prevention within the community.</p>					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
P01	<p><b>By-law Enforcement</b></p> <p>Includes records of Town efforts to enforce bylaws. Includes order to comply, inspection reports, stop work orders, working notes, correspondence, exhibits, photographs, etc.</p>	Enforcement Services	E+6**	Y	<p>E = infraction settled or file closed</p> <p>Excludes:</p> <p>Health &amp; Fire Inspections - see P07</p> <p>Investigations – see P08</p> <p>Environmental Monitoring - see E05</p> <p>Prosecutions - see L04</p> <p>Animal Control Enforcement - see P14</p>
P02	<p><b>Daily Occurrence Logs</b></p> <p>Includes logs maintained of daily occurrences such as Fire assistance calls.</p>	All Departments	C+5**		
P03	<p><b>Emergency Planning and Response</b></p> <p>Includes records regarding the planning, testing, rehearsal of and response to emergency, safety and contingency measures. May also include records of previous disasters including emergency command centre operation, response reports, press clippings, pandemic planning, etc.</p>	Fire	E+5*		E = expiry of plan
P04	<p><b>Hazardous Materials</b></p> <p>Includes information and reports on chemicals and substances that pose fire or environmental hazards such as PCBs, refrigerants and halocarbons, also includes Material Safety Data Sheets (MSDS) and records dealing with toxic substances control, halocarbon charging records, halocarbon leak tests and release reports, transportation and effects as well as records of pesticide use and environmental spills.</p>	All Departments	E+5		<p>E = action completed to remove hazardous material and PCB material storage records after PCB removed from site</p> <p>Excludes:</p> <p>Staff Safety Training - see H04</p>

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<b>Primary Group: Protection and Enforcement Services</b>					
Includes records regarding the operational functions of law enforcement, licensing, public protection and fire prevention within the community.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
P05	<p><b>Incident/Accident Reports</b></p> <p>Includes incident and accident reports that occur at recreational facilities and other Town properties.</p>	All Departments	E+25	Y	<p>E = the later of either</p> <p><b>a)</b> date of incident or</p> <p><b>b)</b> date victim attains age of majority</p> <p>Excludes:</p> <p>Security - see A17.</p> <p>Accidents of Town Staff - see H04</p> <p>Compensation claims and vehicle accidents – see L09</p>
P07	<p><b>Fire Safety Inspections</b></p> <p>Includes inspection reports conducted or performed by Oakville Fire Department on private, public and commercial properties. Also includes records of fire drill, fire hydrant flushing, chimney test and inspections.</p>	Fire	P		<p>E = date inspection completed</p> <p>Excludes:</p> <p>Routine building and structural inspections – see D28</p>
P08	<p><b>Investigations</b></p> <p>Includes records of investigation pertaining to law enforcement, traffic accidents, firefighting activities, infractions and investigations.</p>	All Departments	P**	Y	<p>Excludes:</p> <p>Harassment &amp; Violence – see H16</p> <p>Respectful conduct policy - see H16</p> <p>By-law Enforcement - see P01</p>
P09	<p><b>Licences</b></p> <p>Includes records regarding licenses administered by or required by the Town, or required by the Province, such as licensing for animals, liquor, businesses, accessible transportation operation and lotteries. All documentation required to apply for a licence such as criminal record checks and insurance.</p>	All Departments	E+7	Y	<p>E = expiry of licence</p> <p>The Humane Society or the 'contracted service provider' is responsible for the licensing of dogs on behalf of the Town. Therefore the records exist to support a Town function and are subject to Town retention requirements.</p> <p>Excludes:</p> <p>Marriage Licences - see L16</p>

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<b>Primary Group: Protection and Enforcement Services</b>					
Includes records regarding the operational functions of law enforcement, licensing, public protection and fire prevention within the community.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
P11	<p><b>Permits, Other</b></p> <p>Includes applications and copies of permits issued by other government bodies within the Town as well as permits issued giving permission to hold special events, transport oversize loads, temporary road closure, parking permits, noise exemption permits, sign permits etc. Also includes cut permits, fill permits and permits for the erection of banners.</p>	All Departments	E+2	Y	<p>E = expiry of permit</p> <p>Excludes: Building Permits - see D27 Encroachment Permits - see D16</p>
P12	<p><b>Warrants</b></p> <p>Includes all issued warrants.</p>	Enforcement Services	E+2	Y	E = execution of warrant
P14	<p><b>Animal Control</b></p> <p>Includes records regarding the control of household pets, strays, livestock and wildlife and livestock evaluation reports. Also includes records of distrained animals and pound animal records.</p>	<p>Enforcement Services</p> <p>Oakville Humane Society (or contracted service provider)</p>	C+7	Y	<p>The Humane Society or the 'contracted service provider' is responsible for the control of animals on behalf of the Town. Therefore, the records exist to support a Town function and are subject to Town retention requirements.</p> <p>Excludes: Dog Licenses - see P09</p>
P15	<p><b>Emergency Services</b></p> <p>Includes records regarding fire and rescue services, fire/emergency responses and reports and records regarding T.O.W.A.R.F.</p>	<p>Fire</p> <p>Parks &amp; Open Space</p>	P		
P16	<p><b>Video Monitor Records</b></p> <p>Includes images that have been recorded using video monitor technology for the purposes of preventing crime and providing security to people and property.</p>	All Departments	14 days	Y	<p>Freedom of Information Requests regarding these records – transfer to A16 – Accessibility of Records.</p> <p>Images related to reported law enforcement and Rzone investigations transfer to P08 – Investigations.</p> <p>Images related to reported incidents and accidents that occur at recreational facilities and other Town properties transfer to P05 – Incidents / Accidents Reports.</p>

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<b>Primary Group: Parks and Open Space</b>					
Includes records regarding the management and preservation of town cemeteries, harbours and parks and open spaces assets.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
Q01	<p><b>Parks Design and Construction</b></p> <p>Includes records regarding the design and construction of infrastructure including equipment, playgrounds, structures and buildings within town-owned parks and properties. Includes correspondence, descriptions, reports and other records.</p>	Parks & Open Space	P**		Excludes: Facilities Construction and Renovation – see A18 Building and Property Maintenance – see A19
Q02	<p><b>Tree Maintenance</b></p> <p>Includes records of general grounds keeping, brush and tree removal, tree planting, trimming, pruning, stumping, management and preservation measures taken.</p>	Parks & Open Space	C+10		
Q03	<p><b>Cemetery Records</b></p> <p>Includes burial permits, maps, plot ownership records, interment registers, and indexes for Town cemeteries and abandoned cemeteries</p>	Parks & Open Space	P**	Y	Excludes: Facilities Construction and Renovation – see A18 Building and Property Maintenance – see A19
Q04	<p><b>Harbour Facilities Operation</b></p> <p>Includes correspondence, descriptions, reports and other records dealing with the management, operation of specific Town harbour facilities. More specific information is filed by subject.</p>	Parks & Open Space	C+5**	Y	
Q05	<p><b>Parks Grounds Maintenance</b></p> <p>Includes records regarding the maintenance of the town's parks and properties. Includes maintenance to buildings in town parks, landscaping, grounds keeping and grass cutting.</p>		C+5**		Excludes: Facilities Construction and Renovation – see A18 Building and Property Maintenance – see A19
Q06	<p><b>Parks Infrastructure Maintenance</b></p> <p>Includes records regarding the ongoing operational maintenance of town-owned equipment, playgrounds, structures, and buildings in town-owned parks and properties.</p>		E+15**		E = Date the equipment/structure is removed Excludes: Facilities Construction and Renovation – see A18 Building and Property Maintenance – see A19

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<b>Primary Group: Parks and Open Space</b>					
Includes records regarding the management and preservation of town cemeteries, harbours and parks and open spaces assets.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
Q07	<p><b>Harbour Facilities – Design, Construction and Maintenance</b></p> <p>Includes design, floor plans, architectural and engineering drawings, specifications, grading plans and historical information of the physical assets and property, including records of dredging activity.</p>		P**		
Q08	<p><b>Natural Heritage</b></p> <p>Includes records regarding green lands, municipal forests and forestry including tree by-law preparation and enforcement records. Also includes records relating to the management and preservation of parks, harbours and beaches and plans to manage, control or eradicate invasive species or prevent release.</p>		E+3		<p>E=end of plan or designated year</p> <p>Excludes:</p> <p>Natural Resources Planning – see D05</p> <p>Tree Maintenance – see Q02</p> <p>Conservation district plans – see R01</p> <p>Archaeological and heritage site investigation reports – see R01</p>

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<b>Primary Group: Recreation and Culture</b>					
Includes records regarding the provision of recreational and cultural services to the community.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
R01	<b>Heritage Preservation</b> Includes records regarding heritage and historical development, including designations of buildings, districts, and cemeteries.	Planning Services	E+5*	Y	E = designate heritage property Excludes: Original By-Laws - see C01
R02	<b>Library Services</b> Includes circulation lists, recommendations for additions to library collections, information searches, inter-library loan requests and more general records regarding the operation of libraries. May include subscription renewals of magazine, receipts from book sales, and copy logs.	Oakville Public Library	C+5	Y	
R03	<b>Museum and Archival Services</b> Includes registers of holdings, museum programming, activity reports, historical society holdings, archival operations, conservation information and related records.	Recreation & Culture Clerk's (Archival Services)	P**		Excludes - Record Centre Operations - see A10
R06	<b>Recreational Facilities</b> Includes correspondence, descriptions, reports and other records dealing with the management, operation and design of specific Town recreational facilities, such as arenas, rinks, pools, and fitness centres. Includes floor plans, architectural and engineering drawings. More specific information is filed by subject.	Recreation & Culture	C+5**		Excludes: Facilities Construction and Renovation – see A18 Building and Property Maintenance – see A19
R07	<b>Recreational Programming</b> Includes correspondence, applications, registrations and general information regarding the development and delivery of recreational programs to the community such as youth, sport and fitness, adult education, crafts and other programs. Also includes Rock Climbing Waivers.	Recreation & Culture	C+5**	Y	Program registration = 1 Year Program development and evaluation records are subject to archival selection.

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<b>Primary Group: Recreation and Culture</b>					
Includes records regarding the provision of recreational and cultural services to the community.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
R09	<p><b>Arts and Cultural Programming</b></p> <p>Includes records regarding plays, workshops, showings and events put on at the Oakville Centre for the Performing Arts, Gairloch Gardens and other Town locations. Also includes records regarding external Cultural Agencies.</p>	Recreation & Culture	C+5**	Y	

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<b>Primary Group: Transportation</b>					
Includes records regarding the development and improvement of transportation systems (roads and public transit).					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
T01	<p><b>Illumination</b></p> <p>Includes records and studies regarding the installation and repair of equipment used to illuminate roads such as street lights, pedestrian crossover lights, etc. Also includes records on power consumption.</p>	<p>Transportation &amp; Engineering</p> <p>Roads &amp; Works Operations</p>	P**		
T02	<p><b>Parking</b></p> <p>Includes records and studies regarding Town parking issues such as accessible parking, lot and garage operations, fire routes and employee parking.</p>	<p>Enforcement Services</p> <p>Facility Services</p>	E+6		<p>E = closure of lot or space</p> <p>Excludes: Parking tickets, Infraction notices; see J09</p>
T03	<p><b>Public Transit Operations</b></p> <p>Includes records regarding public transit systems. Includes schedules, routes, maps and similar information. Also includes project records regarding the construction of bus shelters and similar facilities, route administration and planning, fare policies, intergovernmental transit co-ordination and access for people with disabilities.</p>	Transit	E+6**	Y	<p>E = closure of route/shelter/stop</p> <p>Excludes: Driver scheduling – see H01 Applications for Care-A-Van eligibility – see T04</p>
T04	<p><b>Care-A-Van – Client Records</b></p> <p>Includes correspondence, applications, and registrations for participation in Oakville Transit’s Care-A-Van program.</p>	Transit	E+6	Y	<p>E = termination of provision of service to client</p>
T05	<p><b>Care-A-Van – General</b></p> <p>Includes correspondence and general information regarding the development and delivery of Oakville Transit’s Care-A-Van program.</p>	Transit	C+5		
T06	<p><b>Road &amp; Sidewalk Construction</b></p> <p>Includes records and studies regarding construction projects on roads. Includes the construction of new roads and major improvements to existing roads, such as resurfacing, widening, bridges, etc.</p>	<p>Transportation &amp; Engineering</p>	P**		<p>Excludes: Design and Planning - see T07 Routine maintenance and minor improvements to road systems - see T08 Drawings - see D31</p>

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<b>Primary Group: Transportation</b>					
Includes records regarding the development and improvement of transportation systems (roads and public transit).					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
T07	<p><b>Road &amp; Sidewalk Design and Planning</b></p> <p>Includes estimates, studies and other records regarding the design and planning of specific road construction projects. Also includes design of curbs and sidewalks, cycle ways, footpaths, walkways, etc.</p>	<p>Transportation &amp; Engineering</p> <p>Asset Management</p>	P**		
T08	<p><b>Road &amp; Sidewalk Maintenance</b></p> <p>Includes records and studies regarding the inspection and maintenance of roads. Minor repair maintenance includes the installation of culverts, minor repairs to the road surfaces, curbs and side-walks, cycle-ways, footpaths, walkways, etc. Routine maintenance includes grading, ploughing, salting and sanding of roads, and snow removal and cleaning.</p>	<p>Roads &amp; Works Operations</p>	P		
T09	<p><b>Signs and Signals</b></p> <p>Includes records and studies regarding the manufacture and installation of signs and signals.</p>	<p>Transportation &amp; Engineering</p> <p>Roads &amp; Works Operations</p>	E+2		<p>E = Removal of sign/signal</p> <p>Excludes:</p> <p>Corporate or Visual Identity Program - see M09</p> <p>Sign Permits - see P11</p>
T10	<p><b>Traffic</b></p> <p>Includes records and studies regarding the flow of traffic on roads. Includes intersection drawings, pedestrian crossovers, crossing guards, traffic counts, accident statistics, and traffic protection plans and related records. Also includes records regarding impacts of temporary road closures for special events.</p>	<p>Roads &amp; Works Operations</p> <p>Transportation &amp; Engineering</p>	C+10 **		<p>Excludes:</p> <p>Permits for temporary closure - see P11</p>
T11	<p><b>Roads and Lanes Closures</b></p> <p>Includes records on roads and lanes closed on a permanent or regular basis. Records include reports, appraisals, correspondence and district court applications. As well as records related to requests to open road and street allowances.</p>	<p>Transportation &amp; Engineering</p>	P**		<p>Excludes:</p> <p>Road Closing By-Laws - see C01</p> <p>Temporary road closures - see T10</p> <p>Land Sales - see L14</p>

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<b>Primary Group: Transportation</b>					
Includes records regarding the development and improvement of transportation systems (roads and public transit).					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
T12	<p><b>Field Survey/Road Survey Books</b></p> <p>Includes engineering field survey notes as well as Oakville's Book of Standards.</p>	<p>Transportation &amp; Engineering</p> <p>Roads &amp; Works Operations</p>	P		
T13	<p><b>Bridges, Culverts and Structures</b></p> <p>Includes estimates, studies and other records regarding projects specifically for bridge, culvert and retaining wall construction. Also includes repairs and maintenance.</p>	<p>Transportation &amp; Engineering</p> <p>Asset Management</p> <p>Roads &amp; Works Operations</p>	P**		

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<b>Primary Group: Vehicles and Equipment</b>					
Includes records regarding Town vehicles and equipment. Includes records on fleet management, mobile equipment, and protective equipment and related maintenance activities.					
Series Code	Series Title and Scope Notes	Responsible Departments	Retention	PIB	Remarks
V01	<p><b>Fleet Management</b></p> <p>Includes records of all vehicles currently leased or owned, operated and maintained by the Town. This includes plate permits, CVOR certificates, operating manuals, routine/daily inspections, vehicle history files, ignition interlock device installation, and vehicle maintenance, registration and disposal.</p>	All Departments	E+2		<p>E = disposal of vehicle</p> <p>Excludes:</p> <p>Insurance Policies - see L08</p> <p>Accident Claims - see L09, L10</p> <p>Leases/Contracts - see L11, L12</p>
V02	<p><b>Mobile and Transportable Equipment</b></p> <p>Includes records regarding mobile equipment used in conjunction with vehicles and transportable equipment used by the Town. Also includes maintenance and history files on equipment such as generators, pumps, snow-blowers, sanders, field survey equipment, lawnmowers, hoses, weed-eaters, drills, and rescue equipment, etc.</p>	All Departments	E+1		E = disposal of equipment
V04	<p><b>Protective and Medical Equipment</b></p> <p>Includes operating manuals and records regarding protective and medical equipment used by the Town. Also includes routine inspections, maintenance and history files on equipment such as portable fire extinguishers, rescue equipment, breathing apparatus, breathing tanks, down alarms, first aid, etc.</p>	All Departments	E+1**		<p>E = disposal of equipment</p> <p>Excludes:</p> <p>Uniforms and Clothing - see A14.</p>
V07	<p><b>Ancillary and Other Equipment</b></p> <p>Records regarding fixed equipment which is non-vehicle and non-office in nature. Includes equipment such as appliances, water heaters, garbage compactors, industrial shredders, etc. Includes correspondence, warranty, maintenance and history records. Also includes records regarding technical and maintenance equipment and tools.</p>	All Departments	E+1**		E = disposal of equipment

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**THE CORPORATION OF THE TOWN OF OAKVILLE**

**BY-LAW NUMBER 2024-038**

A by-law to confirm the proceedings of a meeting of Council.

**COUNCIL ENACTS AS FOLLOWS:**

1. Subject to Section 3 of this by-law, every decision of Council taken at the meeting at which this by-law is passed and every resolution passed at that meeting shall have the same force and effect as if each and every one of them had been the subject matter of a separate by-law duly enacted.
2. The execution and delivery of all such documents as are required to give effect to the decisions taken at the meeting at which this by-law is passed and the resolutions passed at that meeting are hereby authorized.
3. Nothing in this by-law has the effect of giving to any decision or resolution the status of a by-law where any legal prerequisite to the enactment of a specific by-law has not been satisfied.

PASSED this 26th day of February, 2024

\_\_\_\_\_  
Rob Burton

\_\_\_\_\_  
MAYOR

\_\_\_\_\_  
Vicki Tytaneck

\_\_\_\_\_  
CLERK



**THE CORPORATION OF THE TOWN OF OAKVILLE**

**BY-LAW NUMBER 2024-003**

A by-law to amend Zoning By-law 2014-014, as amended, to permit a commercial parking area as a temporary use for a period of three years on lands described as 125 Randall Street, Town of Oakville  
File No.: Z.1614.82

**WHEREAS** By-law 2023-083 delegates powers and duties with authority from Council to the Commissioner of Community Development to approve by-laws of a minor nature under section 34 of the *Planning Act* with respect to certain matters, including the temporary use of land, buildings or structures under section 39 of the *Planning Act*;

**WHEREAS** the Commissioner of Community Development is satisfied that notice of the intention to pass a by-law to authorize a temporary use was given in accordance with the requirements of the *Planning Act*;

**THE CORPORATION OF THE TOWN OF OAKVILLE, BY THE COMMISSIONER OF COMMUNITY DEVELOPMENT ACTING UNDER DELEGATED AUTHORITY, ENACTS AS FOLLOWS:**

1. Map 19(8a) of By-law 2014-014, as amended, is further amended by applying a "T5" prefix to the lands depicted on Schedule 'A' to this By-law.
2. Part 18, Temporary Use Permissions, of By-law 2014-014, as amended, is further amended by adding a new Section 18.5 as follows:

<b>T5</b>	<b>125 Randall Street</b>	Parent Zone: CU
Map 19(8a)	(Part of Lots 5 and 6 on Block 86 on Plan No. 1)	(2024-003)
		Expires: <b>January 30, 2027</b>
<p>The lands subject to Temporary Zone 5 may be used for the <i>uses</i> permitted in sections 11.2 of this By-law subject to the regulations provided for such <i>uses</i> and, in addition, the following <i>use</i> subject to the regulations set out herein:</p>		
<b>18.5.1 Additional Permitted Uses</b>		

The following additional <i>use</i> is temporarily permitted for a maximum of three years from the date of the passing of this by-law:	
a)	<i>Commercial Parking Area</i>
18.5.2 Zone Provisions	
The following regulation applies to the additional <i>use</i> permitted in Section 18.5.1:	
a)	Section 5.3.1 shall not apply.

3. This By-law comes into force in accordance with Section 34 of the *Planning Act*, R.S.O. 1990, c. P.13, as amended.

PASSED this 30<sup>th</sup> day of January 2024



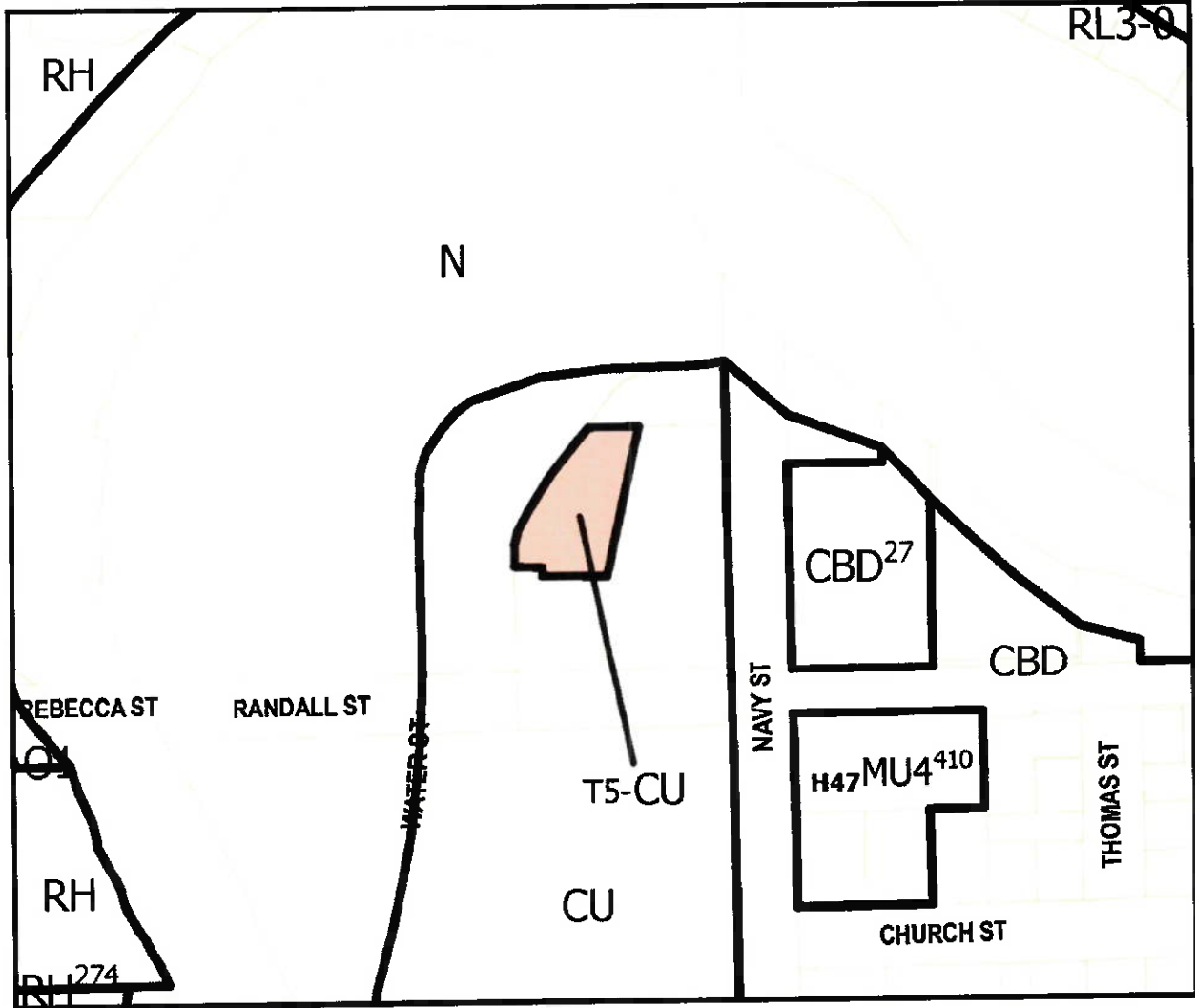
Neil Garbe  
Commissioner of Community Development  
as delegate for Council



Andrea Holland  
Acting Town Clerk



SCHEDULE "A"  
To By-law 2024-003



AMENDMENT TO BY-LAW 2014-014

 T5 is added to the subject lands

EXCERPT FROM MAP  
19 (8A)



SCALE: 1:2,000



OAKVILLE

THE CORPORATION OF THE TOWN OF OAKVILLE

BY-LAW NUMBER 2024-011

A by-law to remove the "H10" and "H15" Holding Symbols from Blocks 415 and 418 of Plan 20M-1186, File No. ZH14.23

**WHEREAS** By-law 2023-083 delegates powers and duties with authority from Council to the Commissioner of Community Development, or designate to approve by-laws of a minor nature under section 34 of the *Planning Act* with respect to certain matters, including the removal of holding symbols under section 36 of the *Planning Act*;

**WHEREAS** the Commissioner of Community Development has delegated the authority to approve by-laws removing holding symbols to the Director of Planning Services;

**WHEREAS** the Director of Planning Services is satisfied that the conditions for the removal of the holding symbol set out in Sections 9.8 and 9.12 of the Zoning By-law 2009-189, have been satisfied, and that notice of the intention to remove the holding symbol was given in accordance with the requirements of the *Planning Act*;

**THE CORPORATION OF THE TOWN OF OAKVILLE, BY THE COMMISSIONER OF COMMUNITY DEVELOPMENT ACTING UNDER DELEGATED AUTHORITY, ENACTS AS FOLLOWS:**

1. Map 12(5) of By-law 2009-189, as amended, is further amended by removing the holding symbols from the lands depicted on Schedule "A" to this By-law.
2. Section 9.10 Holding Provision, of By-law 2009-189, as amended is further amended by deleting H10 in its entirety and replacing it with the following:

"H10- Removed by By-law 2024-011"

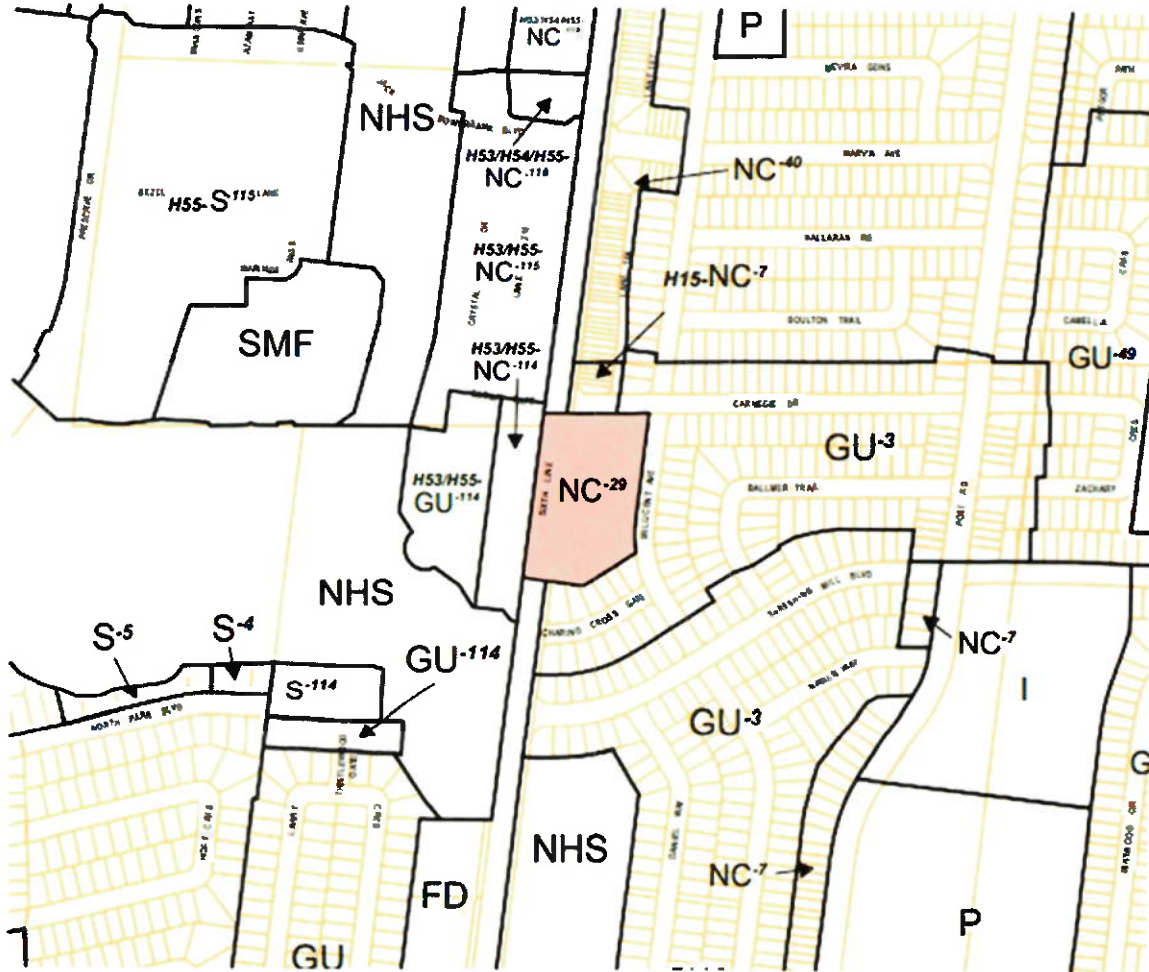
3. This By-law comes into force upon the day it is passed.

PASSED this 30th day of January 2024

Neil Garbe  
Commissioner of Community Development  
as delegate for Council

Andrea Holland  
Acting Town Clerk

**SCHEDULE "A"**  
**To By-law 2024-011**



**AMENDMENT TO BY-LAW 2009-189**



H10: and H15 is removed from the subject lands

**EXCERPT FROM MAP  
 12 (5)**



**SCALE: 1:5,000**



**THE CORPORATION OF THE TOWN OF OAKVILLE**

**BY-LAW NUMBER 2024-012**

A by-law to remove Holding "H" Provisions on lands described as 3270 Sixth Line, Argo (West Morrison Creek) Ltd., File No.: ZH 20/23

**WHEREAS** By-law 2023-083 delegates powers and duties with authority from Council to the Commissioner of Community Development, or designate to approve by-laws of a minor nature under section 34 of the Planning Act with respect to certain matters, including the removal of holding symbols under section 36 of the Planning Act;


**WHEREAS** the Commissioner of Community Development is satisfied that notice of the intention to pass a by-law to authorize the removal of Holding Provision "H53" and "H55" was given in accordance with the requirements of the Planning Act;

**WHEREAS** the Commissioner of Community Development is satisfied that the condition for the removal of the holding symbol set out in Section 9 of the Zoning Bylaw 2009-189, have been satisfied;

**THE CORPORATION OF THE TOWN OF OAKVILLE, BY THE COMMISSIONER OF COMMUNITY DEVELOPMENT ACTING UNDER DELEGATED AUTHORITY, ENACTS AS FOLLOWS:**

1. Map 12(4) of By-law 2009-189, as amended, is further amended by removing the holding symbols from the lands depicted on Schedule 'A' to this By-law.
2. This By-law comes into force upon the day it is passed.

PASSED this 30<sup>th</sup> day of January 2024

  
 \_\_\_\_\_  
 Neil Garbe  
 Commissioner of Community Development  
 as delegate for Council

  
 \_\_\_\_\_  
 Andrea Holland  
 Acting Town Clerk

**SCHEDULE "A"  
To By-law 2024-012**



**AMENDMENT TO BY-LAW 2009-189**



H53; and, H55 is removed from the subject lands

**EXCERPT FROM MAP  
12 (4)**



**SCALE: 1:5,000**



OAKVILLE

**THE CORPORATION OF THE TOWN OF OAKVILLE**

**BY-LAW NUMBER 2024-013**

A by-law to remove a Holding "H" Provision on a portion of the lands described as Block 22, Plan 20M-1258 and Block 201, Plan 20M-1255, Martillac Estates Inc., File No.: ZH 18/23

**WHEREAS** By-law 2023-083 delegates powers and duties with authority from Council to the Commissioner of Community Development, or designate to approve by-laws of a minor nature under section 34 of the Planning Act with respect to certain matters, including the removal of holding symbols under section 36 of the Planning Act;

**WHEREAS** the Commissioner of Community Development is satisfied that notice of the intention to pass a by-law to authorize the removal of Holding Provision "H46" was given in accordance with the requirements of the Planning Act;

**WHEREAS** the Commissioner of Community Development is satisfied that the condition for the removal of the holding symbol set out in Section 9 of the Zoning Bylaw 2009-189, has been satisfied;

**THE CORPORATION OF THE TOWN OF OAKVILLE, BY THE COMMISSIONER OF COMMUNITY DEVELOPMENT ACTING UNDER DELEGATED AUTHORITY, ENACTS AS FOLLOWS:**

1. Map 12(3) of By-law 2009-189, as amended, is further amended by removing the holding symbol from a portion of the lands depicted on Schedule 'A' to this By-law.
2. This By-law comes into force upon the day it is passed.

PASSED this 30<sup>th</sup> day of January 2024

Neil Garbe  
Commissioner of Community Development  
as delegate for Council

Andrea Holland  
Acting Town Clerk

**SCHEDULE "A"**  
**To By-law 2024-013**



**AMENDMENT TO BY-LAW 2009-189**

 H46 is removed from the subject lands

**EXCERPT FROM MAP  
 12 (3)**



**SCALE: 1:3,000**