



**urban
Metrics**

TOWN OF CALEDON

Post-Secondary Needs & Feasibility Study

Caledon, Ontario

Prepared for the Corporation of the Town of Caledon

May 5, 2023



This document is available in alternative formats upon request by contacting:

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May 5, 2023

Mr. Ben Roberts
Economic Development Officer

Town of Caledon
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Dear Mr. Roberts:

**RE: Town of Caledon – Post-Secondary Needs & Feasibility Study
(Caledon, Ontario)**

urbanMetrics inc. is pleased to provide our Post-Secondary Needs and Feasibility Study to the Town of Caledon. This report addresses the likelihood of attracting “Academic/Research Campus” type land uses on vacant and “designated” greenfield lands in Mayfield West in accordance with the adopted Mayfield West Secondary Plan Area.

The purpose of this study is to assess long-range post-secondary needs in the Town of Caledon and determine the feasibility (reasonableness) of Academic/Research Campus uses being established on privately-owned lands near Highway 410 and Heart Lake Road. As part of this study, we have also identified “alternative location options” in Caledon which may be suitable for future academic campus development purposes.

It has been a pleasure undertaking this study on behalf of the Town of Caledon. We look forward to discussing the results of our report with you and your colleagues at the Town in the days and weeks ahead.

Respectfully submitted,
urbanMetrics inc.



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Executive Summary

urbanMetrics inc. (“urbanMetrics”, “the Consultants”) has been retained by the Town of Caledon to conduct a post-secondary campus needs and feasibility study for lands located in the Mayfield West Secondary Plan area, situated in the southwest section of Caledon, near its southern boundary with the City of Brampton. These lands are referred to hereafter referred to as “the subject site”.

As per the Town of Caledon Official Plan, the subject site is designated for the purposes of an Academic/Research Campus. At present, this designation does not apply to any other lands in Caledon. This study has been prepared to explore the needs for and the feasibility of developing a new satellite campus on the subject site.

The terms of reference for this study are framed by several key questions articulated by the Town of Caledon.

The Town’s questions and the Consultant’s responses are summarized below and dealt with more fulsomely in the body of the report.

QUESTION 1: Is there an imminent *need* for a post-secondary satellite campus in the Town of Caledon?

ANSWER: Not yet. But need may begin to materialize in the post 2031 period.

Population Growth (15 to 25-year-olds)

The findings of our study suggests that a well-funded post-secondary institution would undoubtedly generate lasting economic benefits in a community such as Caledon.

Caledon today is home to nearly 81,000 residents and is expecting to reach upwards of 300,000 people and 125,000 jobs by 2051. This pattern of growth would create increasing demand for post-secondary education in Caledon. That said, our age-specific cohort projection suggests that while demand from youth groups (age 15 to 24) would be relatively low for the next 10 to 15 years, the Town should expect to see future growth within youth populations – specifically among the 15 to 20-age group after 2031. Sharp increases are expected to be observed amongst youth aged 0 to 4 and 5 to 9 between 2021 and 2031. As such the Town of Caledon should be prepared to expect a surge in local post-secondary education in the post 2031.

Increasing Competition

Our study of the existing competition for post-secondary learning in the proximity of Caledon, including Peel, York, Dufferin suggested that a future campus in Caledon would need to be extremely well-targeted to specific learning programs designed to address specific local gaps. The likelihood of a “general” or “comprehensive” post-secondary campus in Caledon is extremely unlikely based on prevailing academic circumstances, including active post-secondary “satellite” expansions in other communities, coupled with growing interest in virtual learning in the post-pandemic world. Based on the discussion we had with select Ontario college and university administrators, there is relatively little interest in initiating new campus expansions at this time beyond those currently underway.

Looking into the future, further studies would be required to clearly define what specific targeted programs are required in the Town of Caledon to address learning gaps and support local employment growth and economic development. Future work and analysis (five to ten years from now) should closely consider the type of post-secondary learning opportunities that would:

- 1) Meet the demands of local students
- 2) Ensure enrolment goals will be achieved to make the future campus financially feasible
- 3) Plan for programs to ensure job readiness among graduates.
- 4) Engage with local businesses in the town to understand their current and future demands that can be met by training the right labour force and offering them required apprenticeship opportunities.

QUESTION 2: What are the locational requirements for the Town when siting a future post-secondary campus?

ANSWER: Sites that provide: accessibility, flexibility, and scalability.

This study includes an assessment of the subject lands in the context of the Ontario Ministry of Colleges and Universities’ *Major Capacity Expansion Framework*. The following highlights some key outcomes of the evaluation:

Enrolment

- Population growth in the youth age cohort (15 to 24) is expected to materialize beyond 2031. But the current high-school graduation rate would be insufficient to support a post-secondary learning institution in Caledon at this time.
- Foreign and international students are a significant enrolment driver for colleges and universities across Canada. The likelihood of establishing a campus in Caledon with sufficient program offering capable of driving broad international interest would be slim.

- Our analysis of recent and planned satellite campuses in Ontario suggests that the subject site is significantly larger than most prototypical satellite campus facilities. The Town may consider keeping a portion of the subject site within the existing land designation and redesignate the rest of the land to compliment employment lands on the east and residential uses on the west side of the site.
- Proximity of the subject site to multiple other campuses in neighbouring jurisdictions could present risks to established learning institutions, leading to cannibalization of future enrollment, or excess space capacity across the larger college and university learning network in southern Ontario.

Accessible Facilities

- The subject site would necessitate the development of a new greenfield campus or facility. However, prevailing circumstances in the Ontario post-secondary learning environment, including those discussed in the MCU's Major Capacity Expansion Framework, suggest an underlying preference for incremental growth, including the use of leased space - where possible - rather than expensive new buildings. For Caledon, the introduction of post-secondary learning would likely be established, at least initially, in an existing built space, and over time, scaled-up through expansion based on program success.
- A future post-secondary learning facility in Caledon would be better suited to a location within an established node (e.g., the Bolton core), or a location that is within proximity to a major transit station (e.g., a future GO station area).

QUESTION 3: Would it be feasible to establish a post-secondary satellite campus on the subject site?

ANSWER: No.

The likelihood of establishing a new post-secondary campus on the subject lands is unlikely in the near term. While the subject lands are accessible based on existing and future highway improvements around the site, the absence of high-frequency frequent public transit services make the lands less attractive from a student perspective.

The subject lands are quite simply *too large* to support the scale of opportunities available in the foreseeable future. It is unlikely that the entirety of the site (~24 hectares/60 acres) could be fully realized as a post-secondary learning campus.

Based on direct consultation with local and regional post-secondary institutions; the initial phases of a new learning facility in Caledon would likely be limited to something between 3,000 to 25,000 square feet, depending on the type of program. This scale of space would, most reasonably, be sourced through the private commercial/ industrial market through a 5 to 10-year lease deal with a willing landlord rather than a new greenfield capital project financed by an existing post-secondary institution and/or the provincial government.

Perhaps most importantly, the subject lands are currently in private ownership. The likelihood of a post-secondary institution acquiring designated lands within the urban boundary at a reasonable cost is highly improbable. Land prices in the GTA (notwithstanding some pull-back) are exceedingly high. Prevailing shortages of “shovel-ready” and “serviceable” land – for either residential or industrial uses – put these lands well out of reach for cash-strapped universities and colleges in Ontario.

QUESTION 4: Which alternative site(s) – if any - would be more feasible for post-secondary development and realization of maximal benefits to Caledon?

ANSWER: Sites in Caledon with better access (i.e., scalable public transit) and share community amenity (i.e., restaurants/bars/ cafes, affordable rental housing options, and parks and recreation facilities).

Our analysis suggests that development of a post-secondary satellite campus in Bolton, in proximity to the future Caledon GO station would bring more benefits to the Town in the near-to-medium term and would provide greater likelihood for long-term success in terms of enrolment growth and program development and expansions.

We have suggested two potential options for the development of a future post-secondary learning facilities in Caledon:

- Downtown Bolton (within leased non-residential space)
- Knowledge & Information Employment Area (as identified in the Draft Caledon Official Plan, located on Humber Station Road between Healey Road and King Street)

SUMMARY & CONCLUSION

The subject lands are not needed at this time - or in the foreseeable future - for post-secondary learning in accordance with their *Academic/Research Campus* designation.

The need (and opportunity) for post-secondary education in Caledon should be considered a more medium to long-term proposition. While unique opportunities may present themselves sooner, the number of young adults in post-secondary stages (i.e., 15 to 24 years old) living in Caledon is simply

not large enough to support a “general” or “comprehensive” post-secondary satellite campus, capable of utilizing a large site (i.e., 10 or more acres).

Based on the current commitments to expand post-secondary learning in the GTA, the opportunity for a new post-secondary campus in Caledon is unlikely to materialize within the next ten years (i.e., before 2031).

The Town of Caledon should support alternative uses for the lands including specific provisions for prestige industrial, business park and/or other employment-generating uses that successfully leverages the site’s highway access and exposure.

Going forward, the Town of Caledon should continue to support land use and strategic policy directions that recognize and encourage post-secondary learning options to: (a) grow and diversify the local Caledon economy, and (b) implement the *complete community* goals and objectives as per the provincial planning policy direction.

1.0 Introduction

urbanMetrics inc. (“urbanMetrics”) has been retained by the Town of Caledon to undertake a *Post-Secondary Needs and Feasibility Study* to determine the demands for and evaluate the feasibility of establishing a post-secondary campus on lands located within the Mayfield West Secondary Plan Area in the southwest section of Caledon, near its southern boundary with Brampton (the “subject site”).

The subject site is approximately 24 hectares (60 acres) and is currently vacant. The subject site is designated “Academic/Research Campus” in the Mayfield West Secondary Plan (as per Figure 2-3).

1.1 Purpose

This report addresses the following three objectives as stated in the Terms of Reference prepared by the Town of Caledon:

- ✓ To identify the need for additional post-secondary student capacity in the Town of Caledon, and the requirements of the municipality when locating a post-secondary campus in a community.
- ✓ To evaluate the feasibility of establishing a post-secondary campus on the subject lands.
- ✓ To identify alternative lands in Caledon which would be suitable for future academic/research campus purposes.

The results of this Post-Secondary Needs and Feasibility Study will be used to guide strategic investments on the subject site, by understanding the fiscal realities of governments as they navigate a post-COVID recovery, the changing demographic needs of Caledon households, particularly those with young adults 15 to 24 and the increasingly competitive landscape for new investment among select, growth-minded academic institutions.

1.2 Approach

The following section describes the major work tasks undertaken by urbanMetrics in carrying out this needs and feasibility study. The scope of work has been divided into three major sections:

Section One – Site Context

- Review of access to the site, access characteristics and surrounding uses to determine its suitability for post-secondary function.
- Review of the policy basis for pursuing a post-secondary institution (including Caledon Official Plan, Region of Peel Official Plan, Caledon/Peel Strategic Plan, Growth Plan, and Provincial Policy Statement).
- Review of key trends in the delivery of educational programming and the benefits to the local business community and current and future residents.

Section Two – Background Review

- Review of long-term demographic trends and available employment data to confirm demand for post-secondary education and training in Caledon.
- Interviews with Town of Caledon Staff, Council members, Ministry of Colleges and Universities, and Caledon Educators.
- Provide examples of best practices in new satellite campus investment in GGH, including interviews with representatives from select colleges and universities.

Section Three – Feasibility & Evaluation

- Identification of prospective regional partners in the post-secondary space.
- Evaluate the return on investment for delivery of post-secondary education in Caledon.
- Evaluate the suitability of the subject site and the Town as a whole to host a post-secondary school presence.
- Identification of alternative sites suitable to accommodate post-secondary needs.

2.0 Site Context

2.1 Site Access and Land Use

The following subsection provides an evaluation of the subject site from an accessibility and market viability perspective. This includes an overview of the location, existing land uses surrounding the site and the overall access and visibility of the site.

Site Location and Access

Figure 2-1 shows the location of the subject site, on the northwest side of Mayfield Road and Highway 410, in the Town of Caledon, Ontario. The site is located in the Mayfield West Secondary Plan area, in the southwest section of the Town of Caledon, near the boundary with the City of Brampton.

The following provides a brief summary of the location and accessibility characteristics of the site:

- The subject site comprises some 24 hectares (60 acres). The site is located in the southwest corner of Caledon. It is bounded by vacant prestige employment lands bordering Heart Lake Road to the east, vacant prestige employment lands abutting Highway 410 to the south, residential neighborhoods in the Mayfield West Community to the West, and undeveloped agriculturally designated lands to the north.
- The planned Highway 413 (the GTA West Corridor) has recently been included as a new highway in the Provincial Fall Economic Statement. The proposed Highway 413 would connect Highway 401 in Milton to Highway 400 in Vaughan. The proposed alignment for Highway 413 would border the subject site on the south, as well as potentially enhance visibility for a future post-secondary campus. However, while highway access is a benefit, most post-secondary campuses also support transit access, recognizing that students are more limited in their transportation options. Figure 2-2 illustrates the planned route of Highway 413 and its proximity to the subject site.
- Consistent with the recommendation of the Town’s transit feasibility study, a popular route integrating the Mayfield West community with the City of Brampton is now operational and runs between Brampton and Caledon (Mayfield West Community). The service has been contracted and is being operated by Brampton Transit which fully integrates Caledon with rest of the GTA through Transit services.

The opening of Highway 413 would enable buses (and potentially in the future, light rail vehicles) to operate on express schedules. The Highways will include stations at strategic locations and provide transit connections with buses onto major arterial roadways. The future Caledon GO

station would significantly improve access to the town of Caledon. The future station will be at King Street and Humber Station Road.

- The site also is located adjacent to a prominent “Gateway Feature” node. Per section 7.12.16.8.1 of the Town of Caledon Official Plan:

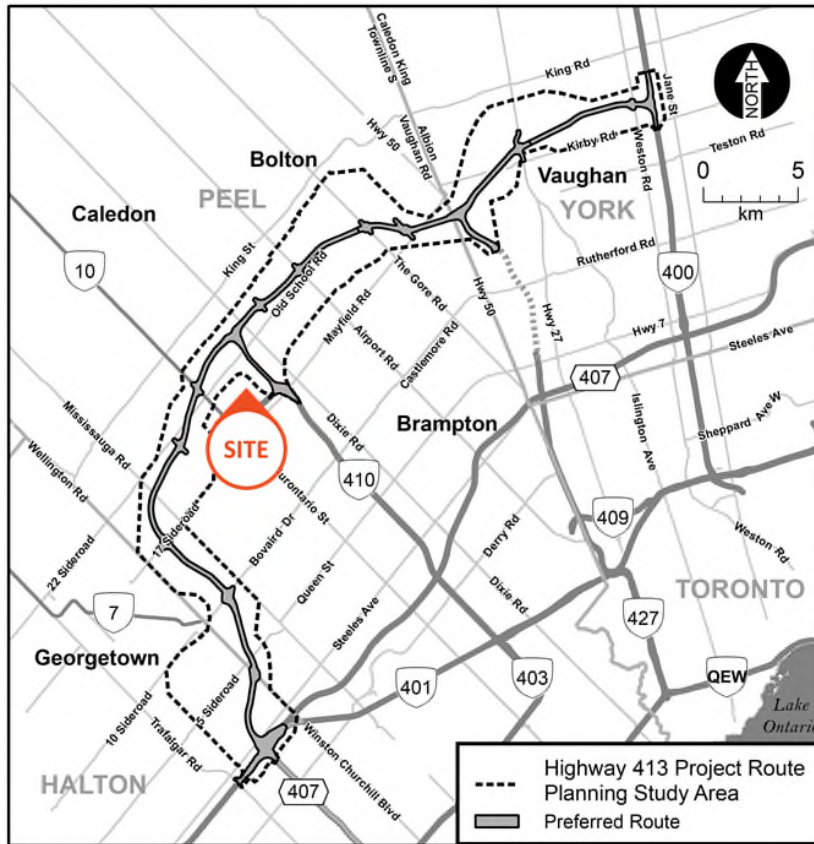
The Town shall require developers to provide gateway features at locations with high visibility and profile, as conceptually shown on Schedule B. The ultimate design and location of the gateway features will be elaborated on in the Community Design Plan, to the satisfaction of the Town, in consultation, where appropriate, with the Ministry of Transportation and Region of Peel.

Figure 2-1: Subject Site Location



SOURCE: urbanMetrics inc.

Figure 2-2: Subject Site Location and the Planned Highway 413 Alignment



SOURCE: urbanMetrics inc. based on Highway 413 proposed map on Highway413.ca

Surrounding Land Uses

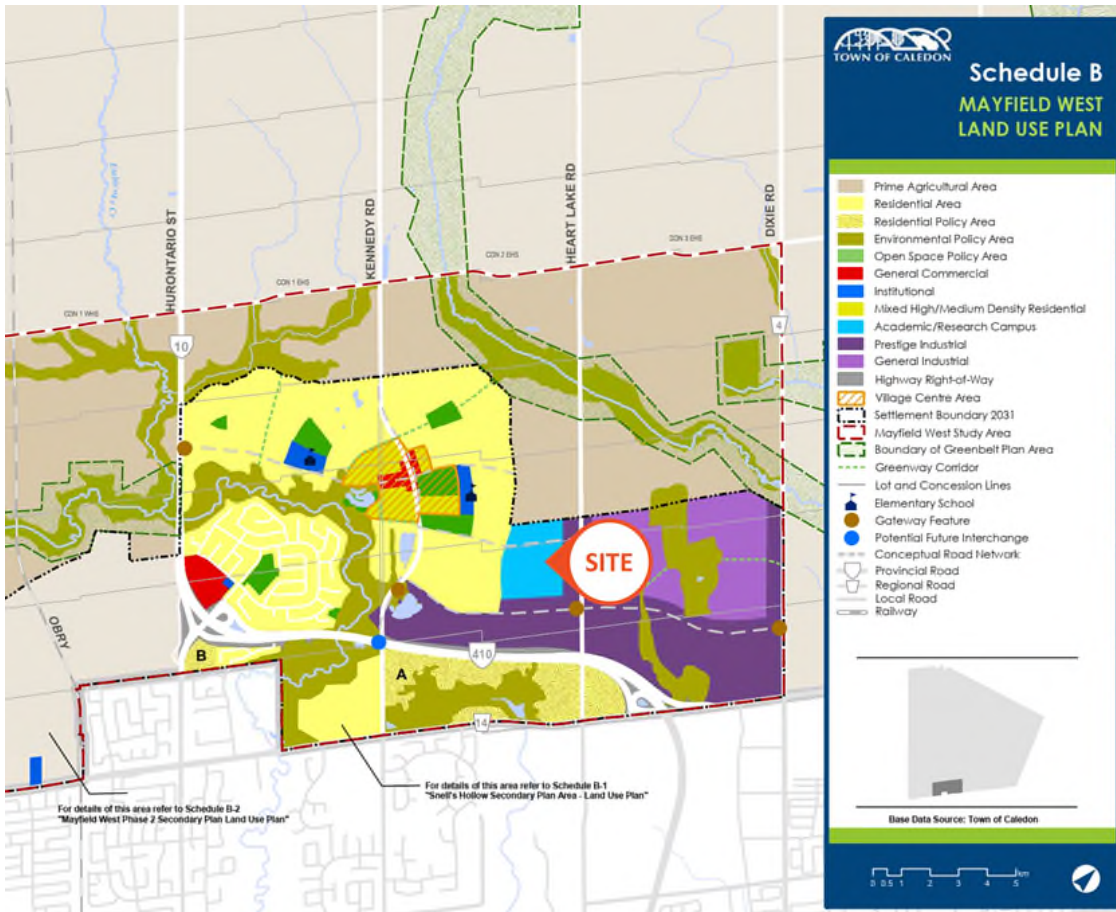
Figure 2-3 illustrates the surrounding land uses, as designated in the Town of Caledon Official Plan. It should be noted that some land uses may change depending on the ultimate alignment of Highway 413.

The following details the land uses surrounding the subject site:

- North** – To the north of the subject site are vacant lands currently designated as prime agricultural lands. Lands north of the subject site are outside of the Settlement Area boundary and a Settlement Boundary expansion would be required for development to occur. The proposed alignment of Highway 413 is located further to the north of the subject site.

- **South** – Immediately to the south of the subject site are currently vacant lands, designated as prestige industrial. Further to the south of the subject site, is Highway 410 and to the south of the highway are mainly residential policy areas. To the south of these lands is the City of Brampton.
- **East** – The lands to the east are vacant but designated for largely prestige industrial and general industrial uses. There are several development applications for large-scale industrial development including warehouses and distribution centres located on the north of Highway 410 on Mayfield Road and on the corner of Mayfield and Dixie Road. As a result, the lands to the east of the subject site are transforming into a hub for logistics facilities.
- **West** – Directly to the west, adjacent to the subject site are newly developed low-density residential neighbourhoods, which are part of the Mayfield West Community. There are also several development applications in the area further west of the subject site to rezone or subdivide lands in order to accommodate multiple residential units in the area.

Figure 2-3: Surrounding Land Uses



SOURCE: urbanMetrics inc. based on Schedule B Map of Mayfield West Secondary Plan (October 2021) of the Town of Caledon Official Plan

Overall, the subject site will benefit from its proximity to existing and future residential uses in its vicinity, as well as the planned Highway 413 alignment. However, the lack of high frequency transit is a major impediment.

2.2 Policy Context

The following review has been undertaken to establish the policy basis for supporting the demand of a post-secondary institution and the various rational to evaluate the feasibility of the objective, including economic development, land use planning, transportation objectives, and others.

Town of Caledon Official Plan

Section 7.12.12.4 of the 2018 *Official Plan of the Town of Caledon* includes detail on land use designation and procedures on reviewing the need for post-secondary uses. As noted, lands designated as Academic/Research Campus are to accommodate a post-secondary education institution such as a community college or university. The following uses are permitted to locate in the Academic/Research Campus designation:

- a) Research and development facilities
- b) Laboratories; and,
- c) Corporate offices, accessory to a research and development facility.

Academic/Research lands and the need for post-secondary institution on the designated lands shall be reviewed at identified intervals as noted on the Official Plan to see the need and feasibility. If a review shows limited prospect of a post-secondary education institution, then the designated lands may be developed in accordance with the Prestige Industrial designation without amendment to the Official Plan.

Mayfield West Secondary Plan

Support for the inclusion of a post-secondary institution has been identified in Section 7.12 Mayfield West Secondary Plan of the Town of Caledon Official Plan. The Settlement Areas of Bolton, Caledon East and Mayfield West are identified as compact, well-integrated rural towns and they are designated as the primary growth areas that will see a majority of new residential and employment growth.

As noted in Section 7.12.3.2, as part of the employment objective for Mayfield West, the area is planned to provide for the establishment of an academic/research campus to accommodate a post-secondary institution such as a university or a community college and research and product development uses.

In accordance with the objectives of the Secondary Plan, approximately 180 hectares (444 acres) of employment lands have been reserved adjacent to and north of the Highway 410 extension. These lands including Academic/Research Campus uses will contribute to the Town's employment targets and live/work opportunities.

Caledon Transportation Master Plan

The Town of Caledon Transportation Master Plan (TMP) is a strategic planning document designed to identify and address the transportation needs of the Town to the year 2031 and beyond. The TMP defines the transportation vision for the Town, to focus on addressing the Town’s mobility needs. By 2031, the Town of Caledon will:

“will have a transportation system that is safe, efficient, reliable, convenient, sustainable and multimodal. The system will balance demand with capacity allowing both intra- and inter-town people and goods movement to support economic growth, respect the natural environment, reflect the urban and rural character of the town and preserve the high quality of life”.

The following highlights the challenges and opportunities regarding transportation in Caledon, which should be considered when planning for a future academic/research campus in Caledon:

- 1) Rapidly increasing population and employment: The rapidly growing population of Caledon places pressure on the transportation network to provide fast, reliable, and sustainable movement routes.
- 2) Goods movement: The Town of Caledon is part of the Peel Region major Canadian goods movement hub. The numerous mineral aggregate resources within Caledon and major warehouses and distribution centres emphasize the need for goods movement and a strong traffic network in Caledon.
- 3) Rural roadway deficiencies: With the increasing population and employment in Caledon, there will be greater demand for use of the rural road network, which is not designed to accommodate such a level of demand.
- 4) Evolving land development: Caledon is planned to intensify and expand in the Settlement Areas (including Mayfield West and Bolton areas). This would place greater pressure on the transportation network, with new residential and commercial developments being added to the Town.

MCU’s Major Capacity Expansion Policy Framework

The Ontario Ministry of Colleges and Universities (MCU) is responsible for directing and managing the delivery of post-secondary education to all Ontarians. As part of its commitment to maintain a well-balanced and responsive network of post-secondary learning options, the Ministry has created an

evaluation framework to assess the merits of major capital expansions and other growth-related proposals that require public, tax-supported funding.

The *Major Capacity Expansion Policy Framework* is a foundational document designed to ensure that Ontario's post-secondary education sector is accountable, accessible, affordable, and aligned to meeting the needs of Ontario's labour market now and in the future.

The ministry uses the following criteria-based framework to evaluate campus expansions and major projects across Ontario. The framework considers :

- A) Enrolment:** any proposed campus will need to represent significant enrolment growth including domestic and international students in medium and long-term.
- B) Facilities:** MCU encourages the use of rented, mixed-use and jointly-used spaces by institutions to maximize the use of existing assets and planned infrastructure, as well as reducing ancillary costs and fees to students.
- C) Jobs and economy:** To prepare students for the future labour market, institutions should align programming to meet local labour market demands and provide work-integrated and experiential learning opportunities.
- D) Student access:** MCU highlights that accessibility of a new campus is a crucial component of any new post-secondary proposal. It is noted that there should be a transportation plan for the proposed location and institutions must indicate how they intend to offer ancillary services and support.

3.0 Background Review

To determine the need and opportunity for a post-secondary institution on the subject site, we have estimated the future population and employment growth that can be accommodated within the Study Area. For the purposes of this study, we have estimated the population and employment growth forecast for the Town of Caledon, to enable a high-level evaluation of short, medium, and long-range growth within the municipality as a whole.

3.1 Population

The Town of Caledon is anticipated to experience significant population growth over the coming years. Fueled by strong employment growth and available lands for development, the Town is anticipated to add over 219,200 people between 2021 and 2051.

Figure 3-1 summarizes the historical, current, and forecast population in the Town of Caledon, benchmarked against the Region of Peel. As detailed, the population of the Town of Caledon has been estimated at 80,800 based on Census 2021 (including undercoverage), or approximately 5.2% of the Peel Region. This percentage is anticipated to grow up to 13.2% by 2051.

In 2021, the population of the Town of Caledon has grown to 80,800 persons, an increase of 12,100 persons since the 2016 census and representing an average annual growth rate of 3.5%. This is comparable to an average annual growth rate of 0.8% between 2006 and 2011 and 2.2% between 2011 and 2016. A strong indicator of growth that is anticipated in Caledon is the average annual growth percentage of 8.8%, which is projected to happen between 2031 and 2041. In future years, the population of the Town of Caledon is expected to increase to an estimated 112,000 persons in 2031 and 210,000 persons in 2041 and 300,000 persons in 2051.

Figure 3-1: Population Forecast

	Historical ¹			Current ¹	Forecast ²		
	2006	2011	2016	2021	2031	2041	2051
Town of Caledon	59,600	61,900	68,700	76,900	112,000	210,000	300,000
Average Annual Growth	460	1,360	1,640	3,510	9,800	9,000	
Average Annual Growth %	0.8%	2.2%	2.4%	4.6%	8.8%	4.3%	
Peel Region	1,210,300	1,349,900	1,428,300	1,541,900	1,769,900	1,969,900	2,280,100
	4.9%	4.6%	4.8%	5.0%	6.3%	10.7%	13.2%

SOURCE: urbanMetrics inc.

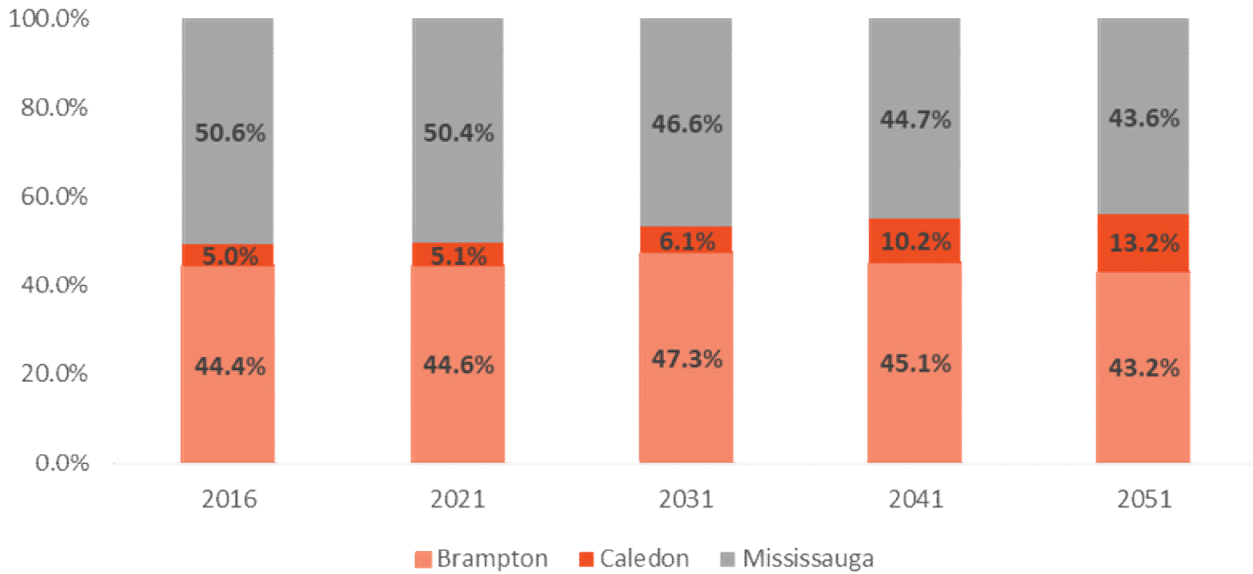
1 Based on Statistics Canada Census Data. Adjusted for net undercoverage.

2 Based on the Region of Peel 2051 Land Needs Assessment Report, 2021



As shown in Figure 3-2, Brampton and Mississauga account for a large share of growth in the Region of Peel. Although a closer look at the growth percentage illustrates that the share of the Town of Caledon is expected to increase over time.

Figure 3-2: Population Growth, 2016 - 2051



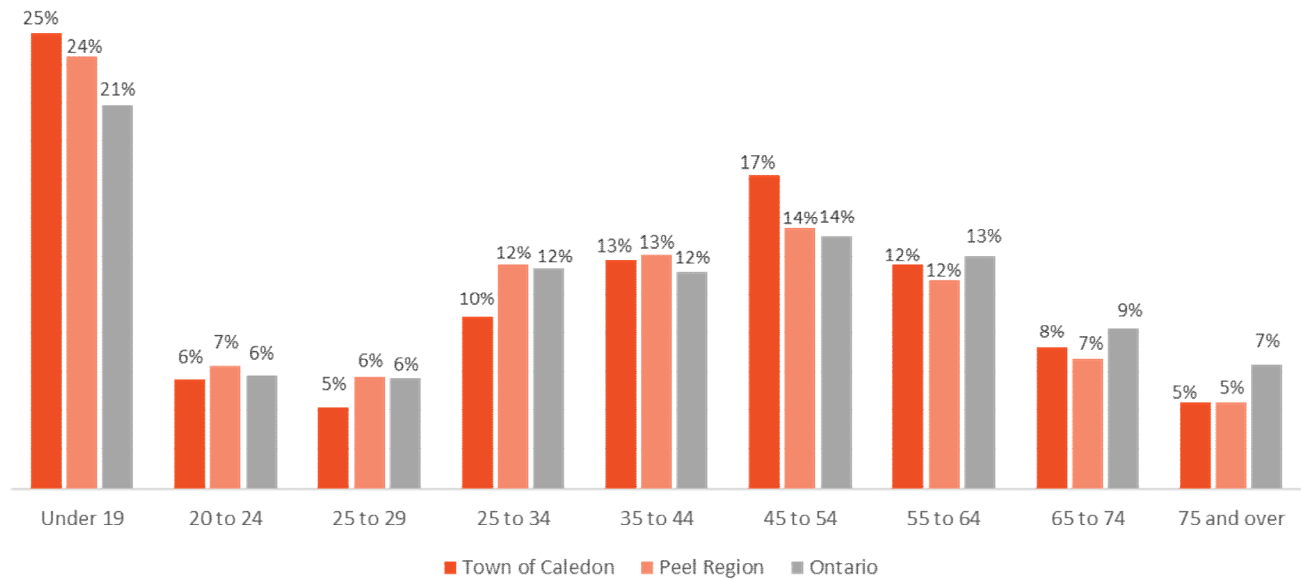
Source: urbanMetrics based on the Region of Peel 2051 Land Needs Assessment Report, 2021

Age Profile

Figure 3-3 summarizes the share of the population in the Town of Caledon by age cohort, benchmarked against the Region of Peel and the province. As shown, the population distribution of residents in Caledon varies from the regional and provincial average in certain age cohorts. The Town of Caledon has a considerably larger share of its population under 19 years of age (i.e., school age) in comparison to the Peel Region and the province. Besides, the age cohorts of 20 to 24 and 25 to 29 (i.e., post-secondary/early career age) account a 6% and 5% of the population, inline with the regional and provincial percentages.

This demonstrates that Caledon will expect a considerable percentage of young people who will join the workforce in the next 20 to 30 years and should prepare for that. The younger age profile will have an impact on the demand for educational and post-secondary institutions.

Figure 3-3: Population by Age Group



SOURCE: urbanMetrics, based on 2016 Census of Canada

3.2 Employment

Based on Hemson’s employment projections as included in Employment Strategy 2051 study for the Peel Region, the region will surpass 1.07 million jobs by 2051.

This represents growth of just over 334,000 jobs between 2021 to 2051. While Brampton leads the way, anticipating adding over 144,000 new jobs (representing 43% share of the total increase), Caledon is expected to add over 93,000 jobs (representing 28% share of the total increase). This is a considerable growth for Caledon as the town is anticipated to hold a similar share of employment growth with Mississauga between 2021 and 2051. See Figure 3-4 for further details.

Figure 3-4: Total Employment Growth

	2016	2021	2031	2041	2051	2021-2051 Growth	% of Growth
Caledon	27,200	31,800	52,100	82,100	125,000	93,200	28%
Brampton	191,400	210,500	273,400	314,100	355,000	144,500	43%
Mississauga	476,800	493,300	537,300	562,800	590,000	96,700	29%
Peel	695,400	735,600	862,800	959,000	1,070,000	334,400	

SOURCE: urbanMetrics inc. based on the Region of Peel 2051 Land Needs Assessment Report, 2021



The Town of Caledon includes several clusters of *Employment Area* lands, and these lands will be a principal driver of future growth. Lands in proximity to major highway infrastructure, i.e., Bolton’s proximity to Highway 427 and the Mayfield West area’s proximity to Highway 410, take on great importance with respect to attracting more jobs and creating more employment. Caledon is projected to account for a significant share of the new Employment Land Employment (ELE) (about 44% of the regional share), which is reflective of the remaining employment land supply in the municipality and the nature of the anticipated growth.

3.3 Trends Affecting Post-Secondary Institutions

Participation in post-secondary education in Canada has been growing strongly in recent decades; in 2016, more than half (54.0%) of Canadians aged 25 to 64 had either college or university qualification, up from 48.3% in 2006. Based on Statistics Canada Post-Secondary enrolments data, released in November 2021, participation in post-secondary education has increased from 1,964,631 in 2010/2011 to 2,183,970 in 2019/2020 in Canada, showing about a 11% increase over ten years. Of these students, in 2019/2020, 37% of the students are registered in colleges in Canada.

In addition, Canada is also witnessing an increase in international students. The number of international students has tripled to almost 600,000, per Canada Bureau for International Education (CBIE) in 2018. Although records have shown significant decreases in the number of international students during the Covid-19 pandemic, due to border and travel restrictions and new online-study trends, the numbers are anticipated to go up in the future as the pandemic eases.

The following section highlights the recent trends and developments in post-secondary education as they related to the type and delivery of programming, recruiting and technology.

Rapid changes in technology and globalization have ensured that education should be one that equips students with the skills, competencies, and knowledge to succeed in the current and future workforce. The delivery of education programs is also following this trend as colleges and universities embrace technology as a tool to manage and deliver courses. In addition to changes in the delivery of post-secondary education programs, current trends indicate a move from traditional methods of teaching. While traditional methods were classroom-based approaches that focussed on memorization and recitation techniques rather than critical thinking and problem-solving skills, modern learning environments focus on blended and experiential learning.

Digital Learning Trends

- **Online and distance education**

Online learning allows students to complete their education “in a timelier fashion” and supports workers needing to upgrade skills or retrain following a layoff.

- **Learning Management System (LMS)**

Post-secondary institutions mandate the use of LMS for each course and are used by both the students and instructors. At a minimal level, it is used as an administrative tool that allows the student to see the course outline, schedule, and the grades and marks awarded during the course. However, the flexibility of the LMS allows instructors to facilitate learning opportunities for students.

- **Electronic and digital resources**

E-textbooks and other open educational resources (OER) such as curriculum, videos and archived web documents provide students with new interactions and functionality to engage with the material. OERs are open licence materials and thus allow students to retain and reuse the material. The increased use of digitisation in the K-12 school system entails that the delivery of educational materials will be highly dependent on online materials rather than physical textbooks.

- **Gamification and Simulation**

Gamification and simulation-based courses are eLearning tools that integrate audio, visual and other interactive elements to explain concepts to students and are therefore advantageous over traditional classroom methods. It enables learners to visualize the training course, perform specific tasks and progress through the training. Simulation-based learning is used to teach manufacturing courses, medical and health sciences to understand the human anatomy and in the creative sector. However, the need for attending in-person classrooms remains strong, but gamification should be thoughtfully integrated into courses.

- **Mobility**

With greater availability of internet connectivity, individuals may be using multiple devices for their communications, increasing the demand for online information, and the functionality of learning platforms, to adapt to mobile screen sizes and specifications. Where the digital divide persists, with a disparity in access to high-speed internet service between urban and rural

environments, offline viewing, notifications, and “synch” capabilities attempt to ease the burden.

Learning Environments

- **Flipped Classroom**

The flipped classroom is a form of blended learning where students are normally introduced to a topic through online delivery followed by an in-class portion. The in-class portion focuses on what the students have learned from the introduction of the online component and how to extend the learning.

- **Adaptive learning**

Adaptive learning allows for the presentation of content that allows students to interact with and follow numerous paths or avenues of learning. The path the student follows is usually based on a comprehension model of previously seen material. Data is collected along the way, and the system or software can then adapt the information given to the student. This adaptation allows the students to comprehend and master the content at their own pace.

- **Experiential learning**

Experiential learning means learning from experience or learning by doing. It first immerses learners in an experience and then encourages reflection about the experience to develop new skills, new attitudes, or new ways of thinking.

Experiential learning can be divided into two major categories: field-based experiences and classroom-based learning:

Field-based learning - includes internships, practicums, cooperative education, and service learning

Classroom-based learning - includes role-playing, games, case studies, simulations, presentations, and various types of group work

In addition to the trends highlighted above, Canadian colleges and Universities are seeing some other trends in the type of programming expected by students, such as:

- Increase in Post-secondary Technical and Vocational Training programs to enable students to gain new skills and enable upskilling to obtain job opportunities and participate in the workforce

- Increase in applied research and innovation
- Raising trends in universities and colleges offering various types of business and entrepreneurship programs to teach students to create their own businesses and job opportunities for others
- Increasing student mobility to make it easier for students to transfer their credits between institutions.
- Growing trend of quality assurance, accreditation of programs and credential evaluation services
- Providing further support for at-risk students
- Putting emphasis on soft skills development

Focus on continuing education and applied research and innovation is crucial to local businesses as they depend on securing talent from local education institutions to grow and remain competitive.

Implications for a future campus in Caledon

The above-mentioned trends can be used to help define the framework, and likelihood for campus development in the Town of Caledon:

1. Post-secondary institutions across the Province will need to reassess their physical footprint because of greater demand for online (distant) learning platforms. Successful post-secondary programs in the future will deliver the right mix of in-person and online learning methods. This hybrid form of learning will most certainly impact the total square footage required for each student.
2. Increasing use of online learning methods by post-secondary education institutions may add to the competition between these institutions. Institutions may offer same courses, which may fully or partially be delivered online via available methods, but campuses with better connectivity to the existing infrastructure, community and retail services may become attractive for students. Such campuses would become specifically attractive for international students who are looking to gain a first-hand living experience of their new environment.
3. Post-secondary education is taking new forms and methods with the increasing demand to get students connected to future job opportunities. Experiential learning,

delivered through mentoring and internship, would equip students with skills needed to get connected to the future workforce. In Caledon, delivery of such learning programs would benefit both prospective students and existing businesses. Local students will have the opportunity to get trained locally by the existing businesses. Those businesses will benefit from training the students based on their needs and will be assured that their staffing needs are met locally.

3.4 Insight from the Interviews

urbanMetrics conducted one-on-one interviews with a variety of decision-makers and officials from the Town of Caledon, Ministry of Colleges and Universities, and several post-secondary education institutions, as follows:

- Managers and business analysts at Ministry of Colleges and Universities
- Councillors and Town officials at the Town of Caledon
- Senior Executive Staff from Toronto Metropolitan University, Ontario
- Senior Executive Staff from (confidential university #1), Ontario
- Academic Staff from (confidential university #2), Ontario
- Senior Executive Staff from Sheridan College, Ontario
- Senior Executive Staff from Humber College, Ontario
- Senior Executive Staff from (confidential college #1), Ontario

The interviews provided in-depth knowledge and insight on a variety of questions, including:

- *What are the main factors for colleges and universities when selecting a site for post-secondary campus development?*
- *What are the needs of Caledon in terms of post-secondary education and how they should be targeted to meet the existing/future demands?*
- *How feasible would it be to establish a post-secondary campus in Caledon and on the subject site?*
- *If the subject site is not ideal, what would be the alternative?*

Location

Land ownership/cost: The subject lands are privately owned. Moreover, it appears owners of the subject land do not share the same vision for the lands, in terms of developing the lands for academic or research purposes.

Availability of Land: Available land supply defines the type of post-secondary education institution that could be accommodated. A large vacant parcel may lend itself well to building a suburban campus with a range of ancillary uses, such as recreation facilities, housing, library, and food services provided on-site. A small parcel may require the development of a more focused campus where some or all services are provided by other service providers elsewhere in the community.

In Caledon, as highlighted in our discussion with Town officials, the subject site was explicitly reserved for academic uses to support *complete community* policy considerations. The subject lands were envisioned to act as a “community asset” with enough land set aside to accommodate a large, comprehensive learning campus.

As confirmed through our discussion with key informants in the post-secondary/academic sector, urbanMetrics believes that the subject lands in Mayfield West (comprising 60+ acres) are simply *too large* for a suburban satellite learning campus. Moreover, the current ownership structure (i.e., privately held) and the presumed land value would likely fall well-beyond the acquisition capabilities of any publicly funded institution.

Transit & Connectivity

The absence of a multi-modal transit hub was identified as a challenge that would limit the realization of a large post-secondary learning facility on the site. There was clear consensus that any institution needs to be supported by high-frequency transit connections, including opportunities to support multiple transit platforms (bus, rail) and multiple local and regional transit agencies and partners.

Existing Infrastructure & Facilities

While the Mayfield West Secondary Plan area has successfully grown and developed into a healthy and attractive community, the community was deemed “too suburban” and “too residential” to attract the attention of a large segment of students. Academic officials that were consulted for this

study, thought the subject site lacked the type of nearby amenities and locational characteristics that would draw in and support the day-to-day needs of students.

Academic Programming & Community Alignment

The type of economic impacts will be significantly impacted by the programs offered by the post-secondary institution. Professional programs – e.g., law, medicine, business, nursing, pharmacology, engineering – have a relationship with a specific local business sector. Programs with a heavy orientation to research can have strong relationships with local businesses that invest in research and development activities. Arts programs can influence local cultural institutions.

Learning institutions that deliver continuing education programs provide cascading benefits that extend throughout the community and beyond.

Based on discussions with Town officials, the ideal programs for Caledon would be the ones targeting local demands and serving the staffing needs of local businesses. Some examples of such programs are as follows:

- Caledon, with an aging population base, needs Personal Support Workers (PSWs). Offering a PSW program in Caledon can serve the needs of Caledon residents locally.
- The agricultural sector is a recognized and valued contributor to the Town of Caledon’s economy and a critical cultural-heritage element of the Peel Region. Post-secondary agriculture programs, it was suggested, would help reinforce the vital importance of farming, animal husbandry, food production, conservation, and resource management.
- Considering the increasing volume of new construction in Caledon, trades and apprenticeship-based programs could help alleviate the skills shortages faced across the development sector.
- Caledon has active golf courses and offering golf course management and operations training courses can help meeting the needs of the town locally to fill positions at golf courses and recreational facilities.

Based on our consultations with post-secondary education officials, the Town of Caledon - and more specifically, the subject lands – are not strategically aligned with the stated ambitions and growth mandates for post-secondary learning institutions looking to bolster their offerings in

the Greater Toronto Area. Several representatives indicated that the growing number of new capital projects “on-the-books” would act as a direct impediment to new facilities in Caledon because of a growing risk and fear of “over capacity” within Ontario’s post-secondary sector as a whole.

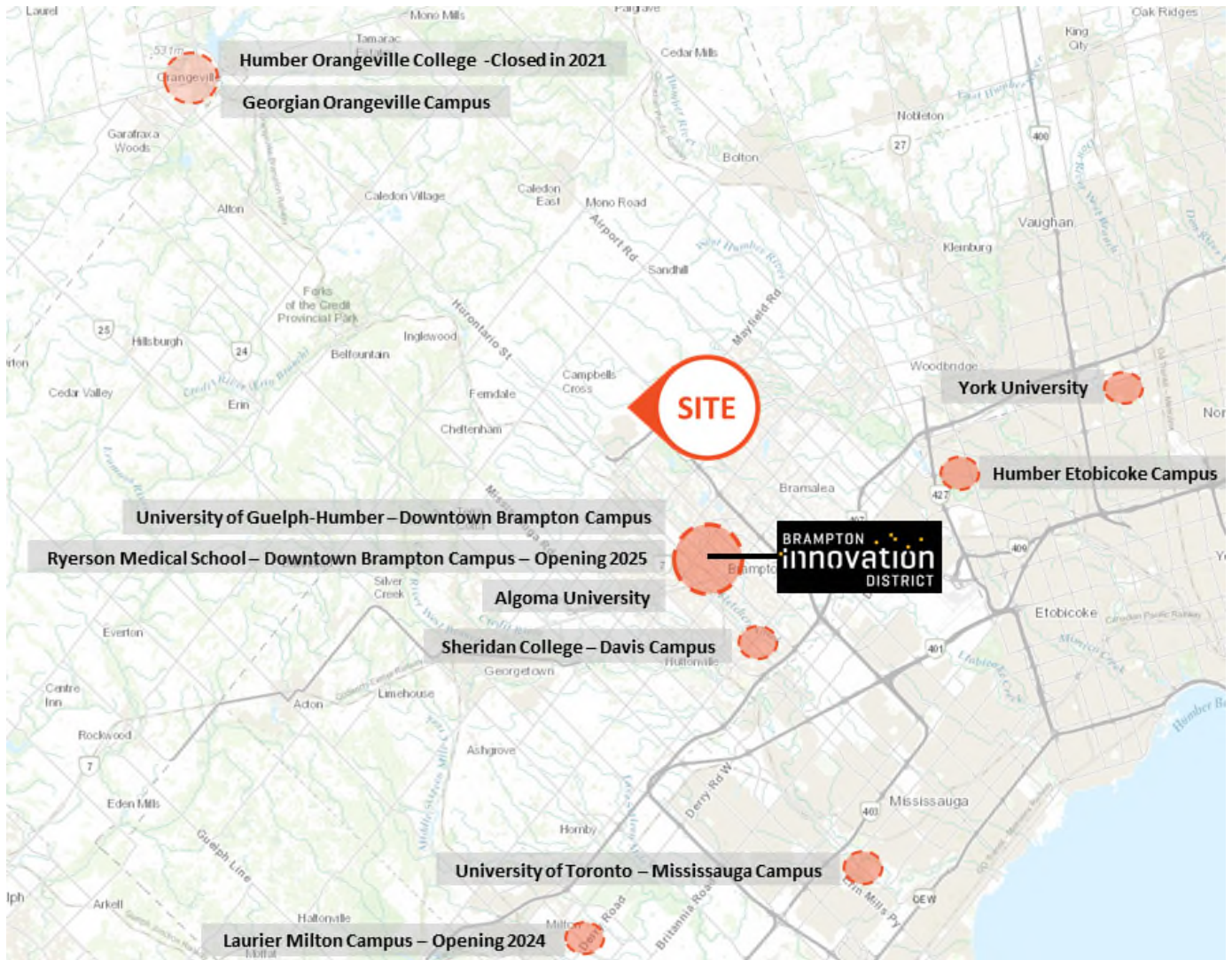
Competitive Post-Secondary Landscape

The competitive landscape of post-secondary planning and expansion needs to be considered in the context of other planned and emerging nodes of development.

The parties interviewed for this study noted that the subject lands will face significant “competition” from other campus expansion projects that are already under way elsewhere in the north-westerly reaches of the Greater Toronto Area.

Figure 3-5 provides a quick snapshot of several new and recent post-secondary campus expansion projects in surrounding jurisdictions (close to the subject site), including projects in: Brampton, Mississauga, Milton, Orangeville, Etobicoke, and North York.

Figure 3-5: Map of Colleges and Universities in proximity of the subject site



Source: urbanMetrics inc.

Figure 3-5 shows a concentration of post-secondary activities in Downtown Brampton. These (future) campuses are in the Brampton Innovation District, where the city of Brampton is working toward investing in tech, business, and education in the downtown core, investing approximately \$20.5 million, with an additional \$55.2 million coming from other partners. This district would act as a major competition to a future satellite campus on the subject site, considering that major institutions such as University of Guelph-Humber, Sheridan College, Ryerson Medical School, and Algoma University have footprints in the area, only 20-minutes drive away from the subject site.

Figure 3-6: Brampton Innovation District Map



Source: The City of Brampton

4.0 Feasibility & Evaluation

4.1 Growth Projection

Town of Caledon comprises ~55% of the total land area in the Region, however most of Caledon is designated for rural, agricultural, and natural heritage purposes.

Caledon has two specific areas that are emerging as important policy nodes. These areas are defined in planning terms as, **Major Transit Station Areas (MTSAs)**.

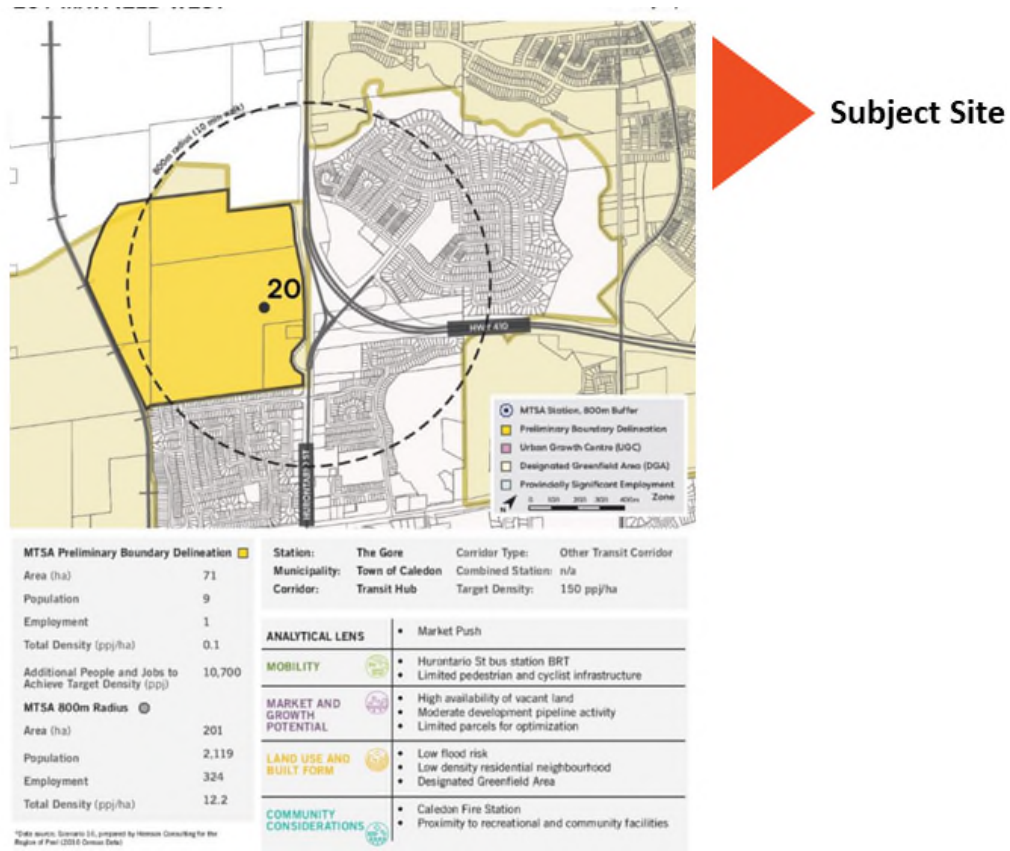
MTSAs are generally defined as lands within an approximate 500-800 metre radius of high-frequency transit station. MTSAs are primarily situated along existing or planned transit corridors such as subway routes and commuter rail lines.

Caledon has two potential MTSAs under the Regional Study – **Mayfield West** (located Phase 2 Stage 1 – northeast of the future Spine Road and Highway 410 interchange) and the **Caledon GO station lands** located north of King Street, east side of Humber Station Road.

Mayfield West Area

Mayfield West Area has been identified as a major growth area for the Town of Caledon that will support the anticipated population and employment growth. Mayfield West Community Transportation Master Plan has recommended new transportation infrastructure comprising of a road network, active transportation, and new transit services for the area. The Frequent Rapid Transit Network (FRTN) project # 64 in the Metrolinx Regional Transportation Plan 2041 designated Hurontario (Main) Street north of Downtown Brampton to Mayfield West Community as a Priority Bus Corridor. It is a recognition of the role of this corridor in the regional transportation network and the immense benefits of enhancing a segment of a major north-south transit spine that has the potential to link a number of east-west rapid transit routes. The northerly extension of rapid transit to the Mayfield West Community will improve the potential to attract growth and higher densities even further to support healthy lifestyles and to create a vibrant corridor.

Figure 4-1: Potential Location of Mayfield West MTSA, in proximity of the subject site



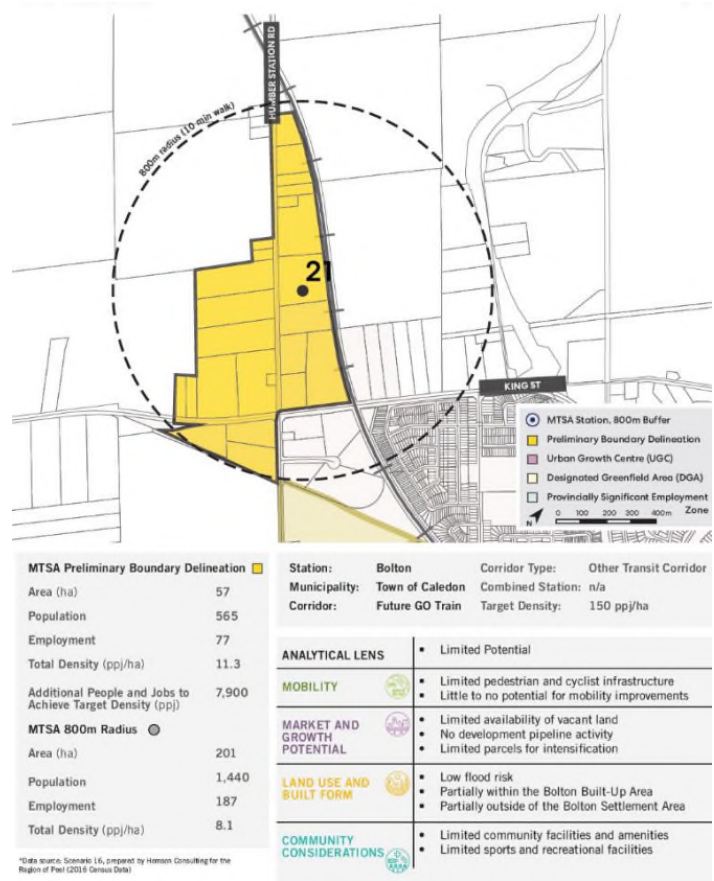
SOURCE: urbanMetrics, based on Peel 2041, Regional Plan Review, Major Transit Station Areas

Bolton – Humber Station Road and King Street

The Town of Caledon has received a commitment from Minister of Transportation of Ontario that the proposed Caledon-Vaughan Go rail line is moving forward. The need for a commuter GO rail service between Caledon and Union Station has been identified and established through many studies, including the Metrolinx Regional Transportation Plan (RTP-2008), MoveOntario 2020 and GO 2020 Strategic Plan as a desired service in the near-to-medium (15 years) timeline.

The Caledon-Vaughan GO line would serve a catchment of approximately 1.3 million people, encompassing an area from Toronto to Caledon, Vaughan, and Brampton. Figure 4-2 illustrates the future location of Caledon GO and the potential Bolton MTSA.

Figure 4-2: Future Location of Caledon GO and MTSA



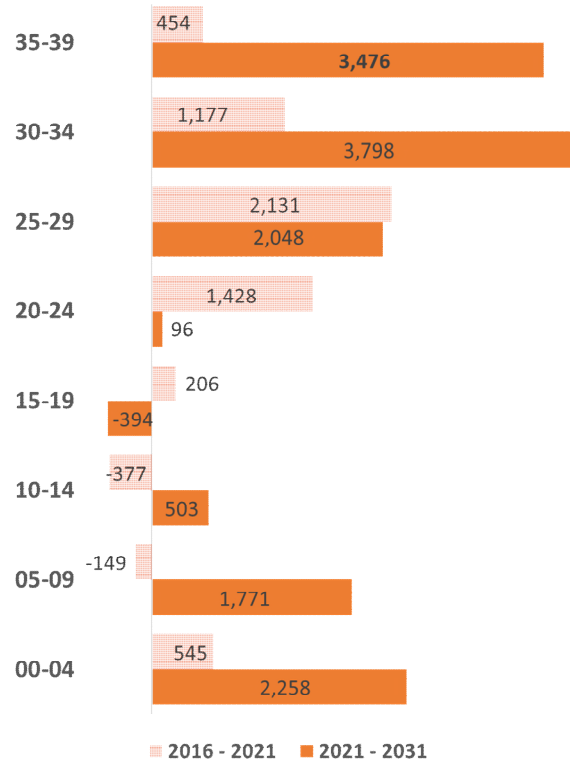
SOURCE: urbanMetrics, based on Peel 2041, Regional Plan Review, Major Transit Station Areas

Population Projection

As highlighted in section 2, Caledon’s population has increased by 15.2% over the last five years, which is well above the Canadian average of 5.2%, according to Statistics Canada. A closer analysis of different age cohorts in Caledon suggests that the level of growth among youth (ages 5 to 24) has been nominal, and some cases negative.

As illustrated in Figure 4-3, a comparison of historic population change between 2016 to 2021 and population projection between 2021 to 2031 suggests that while the Town of Caledon may not see a huge growth in age cohorts of 15 to 24 within the next ten years, but the considerable growth in the age cohorts of 0 to 4 and 5 to 9 projected by 2031 suggests that the town will see a growing demand for post-secondary education beyond 2031.

Figure 4-3: A Comparison of Demographic change in Caledon between 2016 to 2021 and 2021 to 2031




Source: urbanMetrics Inc. based on metro economics projection

4.2 MCU Evaluation Framework

Based on the facts and figures that we have reviewed as part of this study, we believe that there is a strong case for the addition of a satellite campus in Caledon; however, the timing, location and scale of such development would require further attention. The following section presents an evaluation matrix-based Ontario Ministry of Colleges and Universities’ *Capacity Expansion Policy Framework*. The framework defines four specific lenses through which we have evaluated the effects of adding a future satellite campus *on the subject site* and *in the Town of Caledon*. These lenses include *enrollment, facilities, jobs and economy* and *student access*.

Figure 4-4: Evaluation Framework developed based on MCU’s Major Capacity Expansion Framework

	Town of Caledon	The Subject Site
<p>1.</p>  <p>Enrolment</p> <p><i>New post-secondary campuses need to demonstrate significant enrolment growth including domestic and international students in the medium and long-term.</i></p>	<p>Limited Youth Population Growth in Caledon is expected within the next 10 years</p> <p>While the town of Caledon is expected to add upwards of 300,000 new residents and 125,000 new jobs over the next thirty years (2021-2051), our analysis suggests that population growth in youth age cohorts is not expected to happen within the next 10 years.</p> <p>Caledon may face challenges attracting robust domestic and international enrolment interest</p> <p>While Caledon is undergoing considerable growth and development, the Town lacks the urban attributes to attract both <i>domestic</i> and <i>international</i> students.</p> <p>Proximity to existing educational hub in Brampton</p> <p>As presented in Figure 3-5, the Town of Caledon is in proximity to a hub of post-secondary education in Downtown Brampton, including Ryerson, Sheridan College, and Algoma University Campuses. Proximity to those campuses may impose risks to a future campus in Caledon, in terms of meeting their enrollment goals.</p>	<p>Subject site is in a future growth centre</p> <p>Mayfield West is an important urban settlement area in Caledon which will support future residential and employment growth. Added to that, Settlement Area Boundary Expansions are underway to explore the possibility of expansions on the north side of Mayfield West area¹. While the Official Plan recognizes that Mayfield West will grow to the approximate size of Bolton over time, the area lacks the key infrastructure (transit) needed to support a large post-secondary campus. The Town of Caledon should have long-term plans if they decide to keep the land designation as is.</p> <p>Subject site provides a much larger than needed acreage for a satellite campus</p> <p>Our study of multiple satellite campuses in urban and rural areas concludes that the size of the subject site is much larger than what is normally required. To ensure achieving the highest enrolment levels, it is important to adjust the campus size based on the existing/future capacities. Our study suggests that satellite campuses can have an enrolment capacity of between hundreds to thousands of students. The magnitude of spending and spin-off benefits should be closely studied.</p>

¹ 2 See Hemson Consulting, Planning Justification Report, Settlement Area Boundary Expansion Study: Concept Map and Technical Study Findings, December 10, 2020.



Facilities

Rented, mixed-use and jointly used spaces between regional and private partners are encouraged to maximize the use of assets, as well as reduce ancillary costs and fees to students.

Existing and planned assets in Caledon

Asset management plans from a prospective post-secondary institution and the municipality should outline how the institution can benefit from rented, mixed-use and jointly used spaces for the purpose of running the programs. The Town of Caledon, known as a community of communities, has three main settlement areas: Mayfield West, Bolton, and Caledon East. While Mayfield West is still in the process of development, the Bolton community has an adequate level of community infrastructure. That said, Bolton residents are poorly served by public transit.

Existing and planned assets surrounding the subject site

As presented in Mayfield West Land Use Designation plan, the subject site is surrounded by prestige industrial, low to mid-density residential areas, and prime agricultural areas outside the settlement boundary. Overall, the area presents very limited opportunities for a prospective institute to take advantage of opportunities to rent, co-locate or jointly use existing spaces.

Leveraging the use of existing and planned assets

While Mayfield West Area is expected to see a considerable amount of growth, the Town of Caledon has other land assets that are underutilized, and which may be suitable for post-secondary learning purposes. Downtown Bolton, for example, has multiple properties that could be repositioned for the purpose of post-secondary academic programs.



Jobs & Economy

In order to prepare students for the jobs of tomorrow, institutions should align programming to meet local labour market needs and provide work-integrated learning opportunities.

Proponents must meet a demonstrated need and any duplication of programming within the local area will require justification as to why this location/region requires additional capacity in these fields.

Meeting local labour market needs and forming partnerships with local businesses

Future population growth in Caledon supports the need for expanded learning opportunities. Our research indicate there are specific areas of economic growth in Caledon such as construction (trades), agriculture, healthcare, tourism, and hospitality that require greater support from the post-secondary education sector. Academic programs and community-based partnerships in Caledon would help support future labour-market challenges brought about by growth and shifting demographic patterns.

Post-Secondary Campus as an economic engine

The presence of a post-secondary institution would provide an important locational advantage for Caledon. In addition to attracting highly skilled and well-paying jobs, post-secondary institutions provide an important pipeline for employers seeking well-trained graduates.

A future satellite campus on the subject site may offer duplicated programs and should offer extremely targeted programs to ensure success

Existing competition should be closely monitored to ensure financial viability for a campus. Our study highlighted that proximity of the subject site to the Brampton Innovation District, which is home to Sheridan College, Ryerson satellite campuses and Algoma University, would require a future campus to offer extremely targeted programs, to succeed.

4.



Student Access

Institutions must indicate how they intend to offer ancillary services and supports for the primary use of students that support education and training activities.

There should be a transportation plan for the proposed location.

Needs of a future campus should be incorporated in future transportation plans

Town of Caledon has initiated a Multi-Modal Transportation Master Plan (2021) to establish a long-term policy direction aimed at improving the movement of people and goods within and through the Town.

Caledon is committed to building transportation options which support the needs and safety of pedestrians, cyclists, transit riders and motorists for the next 30 years.

The needs of a future satellite campus should be incorporated in the masterplan, considering the scale of a new academic development which would heavily rely on existing urban infrastructure.

Lack of existing services and multiple transportation modes to access the subject site

Based on the Town of Caledon Secondary Plan for Mayfield West Phase II, Transportation Master Plan (2016), the community is envisioned as a compact, pedestrian-oriented, mixed-use community that provides residential, employment and commercial opportunities. Mayfield West Community is also envisioned to be focused on a traditional village centre and to capture the spirit of small-town Ontario. Our study suggests that the area may not be ideal in terms of its ability to offer ancillary services required for education and training, including student housing, and access to transit.

Lack of existing ancillary services around the subject site

Satellite campuses are commonly promoted as tools for urban revitalization and renewal. As the subject site is still many years away from being fully realized, our analysis suggests that development of a satellite campus on the subject site is not ideal. The Town should consider options to re-orient post-secondary planning provisions to a location that is better served by transit.

4.3 Case Studies

The following section contains case studies for both downtown and suburban campuses. It provides an inclusive review of multiple satellite campuses across Ontario to provide some best practices and set some examples for future campus development in Caledon:

Downtown (Urban) Campuses

There are many examples of satellite campuses in downtowns. This section describes the schools in **Brantford**, **Cambridge**, and **Kitchener** in detail. Other notable examples of downtown post-secondary schools are:

- St. Catharines, Brock University (Marilyn I. Walker School of Fine and Performing Arts)
- Sudbury, Laurentian University (School of Architecture)
- Stratford, University of Waterloo (School of Interaction Design & Business)
- Windsor, St. Clair College (School of Media, Art & Design)
- Windsor, University of Windsor (School of Social Work and Centre for Executive and Professional Education and the School of Creative Arts)

Brantford, Wilfred Laurier (Liberal Arts and Human and Social Sciences)

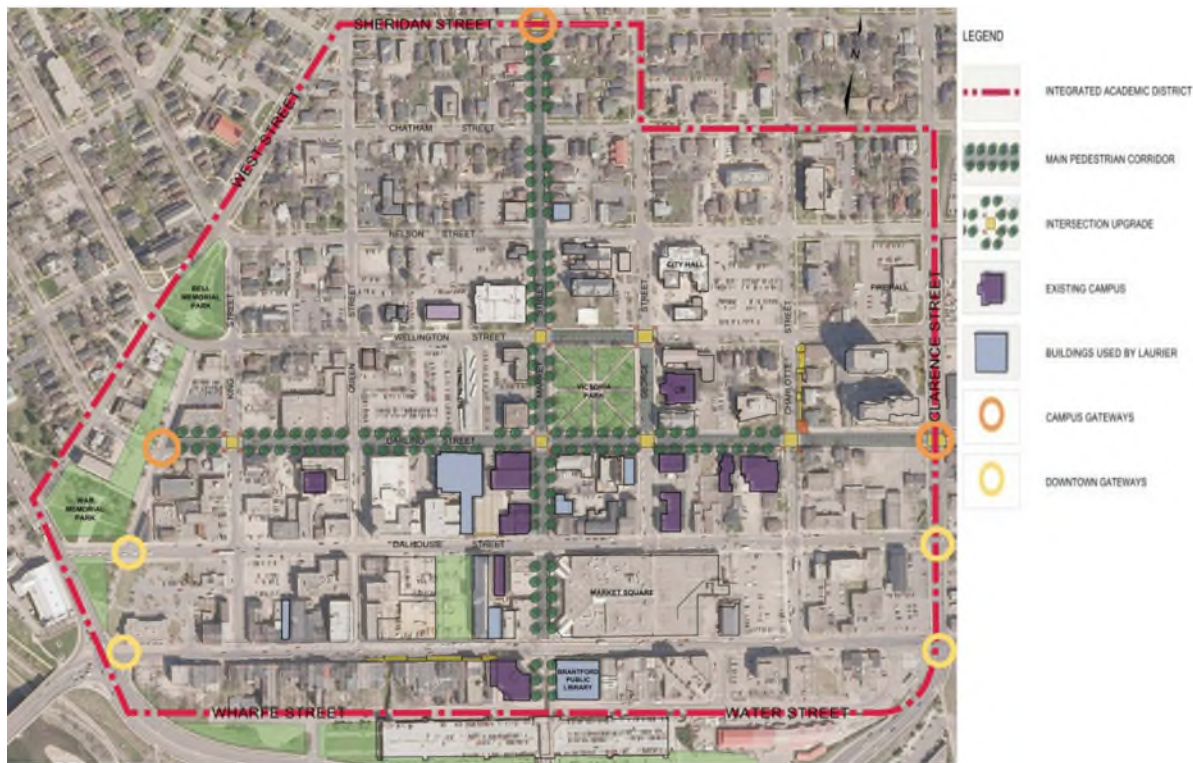
Brantford’s downtown once had the reputation of being one of the worst downtowns in Canada as a result of vacant buildings and crime. In 1998, after a long effort, the City secured the location of a satellite campus of Wilfrid Laurier University (“Laurier”), which has a primary campus in Waterloo. In addition to the Brantford satellite, Laurier University also has a satellite in Kitchener and a proposed campus in Milton, a joint project with Conestoga College. Laurier also has joint programs with the Six Nations Polytechnic school.

City of Brantford has highlighted that there has been a noticeable increase in the presence of students in the downtown as well as student serving retail offerings, upon the opening of the satellite campus. Brantford is viewed as one of the best examples of downtown revitalization resulting from post-secondary investment in the downtown.

In addition to the university, a number of other projects occurred that aided revitalization. The City made investments into other improvements, totalling more than \$21 million. This included

improvements to Harmony Square (a public space) and the downtown YMCA (a \$58.4-million project). The downtown YMCA was a joint project with Laurier to provide recreation space for both students and other community members. A major impact of Laurier on the downtown is that the school is located in a number of heritage buildings, and there are currently 22 buildings owned or leased by Laurier. The campus has expanded significantly since 1999 and has plans to grow around 15,000 students by 2023, a building area growth of an estimated 92,704 square meters (about one million square feet). Laurier is in the process of renovating Eaton Market Place (purchased in 2014) to expand the campus, making room for a tripling of the student population. Figure 4-5 shows the location of campus buildings throughout the downtown.

Figure 4-5: Brantford Laurier Campus Master Plan



SOURCE: IBI, Campus Master Plan, 2010

A summary of the types of programs, campus size, location context, project costs, and economic and community benefits of the Brantford Laurier campus is provided in Appendix A.

Cambridge, University of Waterloo (School of Architecture)

The University of Waterloo Architecture program relocated to the Galt town centre in Cambridge from Waterloo in 2014 because of a need to grow the studio space in the Architecture school. The primary campus did not have room to accommodate this expansion, so the school relocated to the River Silk Mill building, a historic warehouse building. In addition to the Cambridge satellite campus, the University also has satellite campuses in Kitchener (the following case study) and Stratford.

A 2008 University of Waterloo master’s thesis titled “Do downtown university campuses contribute to mid-size city downtown revitalization? A comparative case study of Kitchener and Cambridge, Ontario” found that the development of the Architecture school in Cambridge did contribute to the revitalization of the downtown.² It primarily acted as a stabilizing influence. The success of revitalization was not due to the campus alone. Broader revitalization actions were an essential component of success. Although this project has been largely considered a success and there are plans to expand, there have been some challenges with the location, primarily impacting the ability for architecture students to collaborate with other disciplines.

Figure 4-6: River Silk Mill Building



² Marco Melfi, downtown university campuses contribute to mid-size city downtown revitalization? A comparative case study of Kitchener and Cambridge, Ontario, 2008.

SOURCE: University of Waterloo, About Waterloo Architecture, website.

A summary of the types of programs, campus size, location context, project costs, and economic and community benefits of the University of Waterloo Cambridge campus is provided in Appendix A.

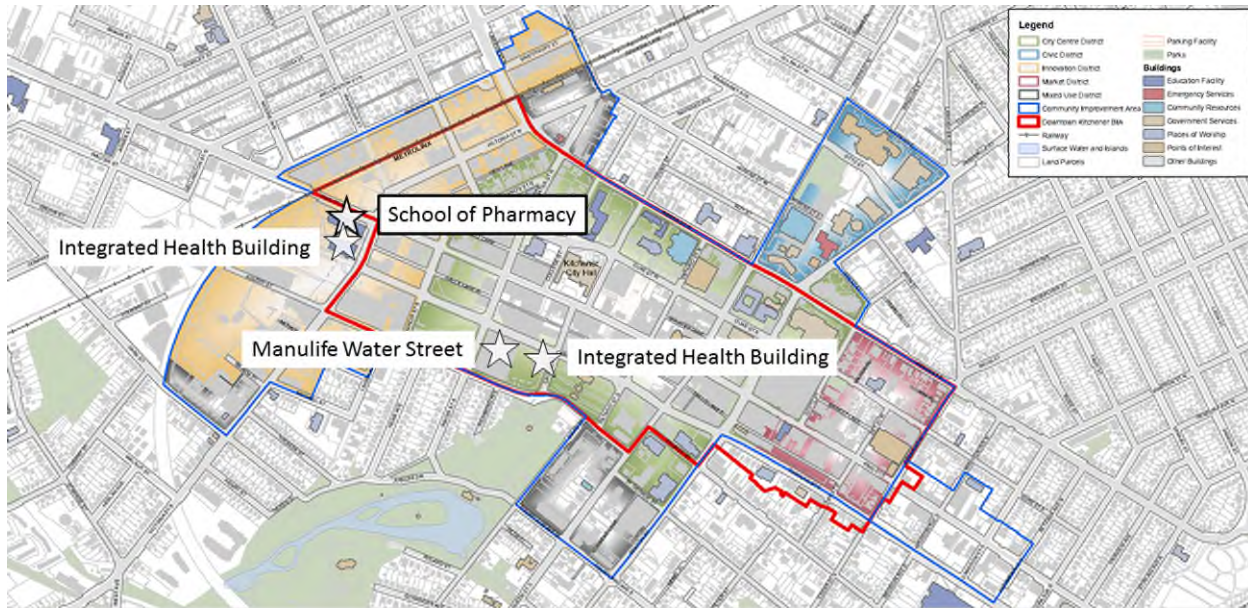
Kitchener, University of Waterloo (School of Pharmacy)

The University of Waterloo moved an existing school from the main campus in Waterloo to a site in downtown Kitchener, about 10 minutes away by transit from the primary campus. The site is located near the Ainslie Street Transit Terminal, an LRT stop and is in a former warehouse district. The city, region and province contributed to this project, with the city providing eight acres of land. In addition to the Pharmacy School, the Wilfred Laurier University Faculty of Social Work located in the St. Jerome's College in 2006. Also located in the downtown is the Velocity Garage free student incubator, which has about 80 start-ups. The Velocity Garage was developed with the support of a \$400,000 investment from the City of Kitchener. This 37,000 square foot facility has workspace, meeting rooms, a science lab, assembly space workshop and prototyping lab, as well as recreation space.

The School of Pharmacy is part of the Downtown Health Services Campus, which also includes a satellite Michael G. DeGroot School of Medicine and an optometry faculty. This life sciences cluster is planned to support the incubation of biotechnology-company start-ups and attract pharmaceutical and biotechnology firms. Companies already located in the area include Unitron Canada (Canadian hearing aid manufacturer), Medicalis (healthcare management technology) and Heine (diagnostic instrument manufacturer). Beyond investment in post-secondary institutions, the City of Kitchener is working to deliver broader public realm improvements to the downtown as part of the Shape DTK 2020 program.³ The LRT ION investment as well as new residential growth is also transforming the downtown.

³ From 2004 to 2012 there were a number of investments made in the downtown, as summarized in the Downtown Kitchener Action Plan 2012-2016 (March 2012). They were: - King Street streetscape, WLU Faculty of Social Work, UW School of Pharmacy, McMaster School of Medicine, Communitech Hub, Kitchener Market & Marketplace, Victoria Park Entrance, Charles & Benton Parking Garage, KPL Main Library expansion (in progress), Consolidated Courthouse (in progress), and Victoria Park Lake (in progress).

Figure 4-7: Kitchener Downtown University of Waterloo Buildings



SOURCE: City of Kitchener

Suburban Campuses

In contrast to a downtown location, case studies of universities and colleges in suburban locations (characterised by vehicle-oriented design and low densities) were reviewed to provide insight for the subject site.

There are a number of reasons why an institution may choose to locate in a suburban area and why a municipality would approve the decision. In the case of the DeGroot school in Burlington, highway access was seen as an advantage for students commuting throughout the region in addition to lower land acquisition costs. A report about Lakehead University in Orillia surmises that the suburban location may have been influenced by the opportunity to initiate servicing to the area and spur development. Suburban areas also tend to have larger parcels and lower land costs.

This section describes the Burlington McMaster, Oshawa University of Ontario Institute of Technology, and Georgian College Collingwood campuses. Other examples of suburban campuses are:

- Laurier Milton Campus with anticipated opening in 2024 (planned to offer various programs in STEAM fields).
- Chatham, St. Clair College (Various programs, including Trades and Technology Centre)

- St. Catharines, Brock University (Various programs)
- Scarborough, University of Toronto (Various programs)
- Mississauga, University of Toronto (Various programs, including Institute of Communication, Culture, Information and Technology)
- Orillia, Lakehead University (Various programs)

Burlington, McMaster University (DeGroot School of Business)

The DeGroot School of Business opened in 2010 on a greenfield site adjacent to the Queen Elizabeth Way (403) Highway. In 2007 the campus was proposed to locate in the downtown, and a year later the campus location changed in part because a greenfield site was donated to the school by an anonymous donor. McMaster also has campuses in Hamilton (the primary campus), Waterloo and St. Catharines.

During the process to secure a school, the Mayor's Post-Secondary Task Force developed the following selection criteria⁴:

- Capital requirements of the project
- Is the proposal aligned with the local need/fit and is the Town aligned or fit with partner's long-term strategy and plan
- A potential partner needs to be flexible and open
- The degree of integration with the community
- Is the proposal open to multiple players at any time
- Does the proposal meet our broad learning objective
- The proposal must contain uniqueness, a distinguishing factor, bring recognition, and set the standard of excellence
- A successful partner must have experience and a successful track record

⁴ Brittney Yates, Post-Secondary Promises: What Do Ontario Municipalities Expect to Realize from University Satellite Campuses? August 2014; City of Burlington, Report to Community Development and Budget & Strategic Planning Committee, M0-02-04, May 21, 2004.

- The proposal elevates the profile of Burlington

Although The DeGroote School of Business is recognized as a successful campus from academic and learning achievements point of view, but it is important to highlight that this campus generates minimum economic contribution to the City of Burlington. This is because of the suburban location of the campus, sitting at the edge of Highway 403. As a result, the opportunity for creating more interaction between students and the city and taking advantage of resources that they may bring is missed only because of the campus location. Caledon may risk similar benefits that can help with revitalization of the town by choosing to designate a highway location satellite campus.

Oshawa, University of Ontario Institute of Technology (Various Programs)

The University of Ontario Institute of Technology (UOIT) in Oshawa has two campuses; one is North Oshawa and one in Downtown Oshawa. The suburban campus that opened in 2003. The university has grown to over 10,000 students from the initial 947 students in 2003. There are over 2,000 faculty and staff employed. Plans for the university started in 1980/1990 and funding was confirmed in 2001; a total of \$60 million from the province. The university is co-located with Durham College, which opened in 1967.

UOIT expanded in 2007 north of the original campus. In 2008, a secondary campus opened in downtown Oshawa. The Faculty of Education relocated here, followed by the Faculty of Social Science and Humanities two years later. In 2014, the UOIT-Baagwating Indigenous Student Centre also opened downtown. There are plans to expand the original campus into a 190-acre greenfield area north of the existing suburban campus. With this future growth, UOIT is expected to have 18,500 full-time equivalent students by 2030.

The downtown UOIT campus has resulted in increased vibrancy from the 2,500 students who attend classes. There has been an increase in food services, especially those targeted towards students. The majority of student housing serving UOIT students is near the north campus. A new addition is also developed in 2020, adding 185-unit student residence building downtown. The City of Oshawa is also working on developing an Innovation Hub that would further increase the presence of students and entrepreneurs in the downtown. This is a joint project that is part of Spark Centre programming and involves UOIT, Durham College, Region of Durham, and Durham Workforce Authority.

The primary UOIT campus is in a suburban setting, 2.8 kilometres south of the 407 highway and 6.5km north of downtown Oshawa. The GO Transit and VIA rail station is 11 kilometres south from the campus. Durham Region Transit operates five bus routes that serve the campus. Of the 2,331 senior-year students surveyed not living in residence, 46% commuted to school using a private automobile.

About a third (32%) took public transit.⁵ UOIT is largely a commuter campus that serves students throughout the Durham Region.

UOIT is an important part of the Oshawa and Durham economy. Education was an important driver of diversification of the local economy away from the traditional manufacturing base, and the university is viewed as one of the most important community assets. UOIT, Durham College and Trent University Durham together have about 25,000 students.⁶ There are many examples of UOIT community partnerships, both with the City, businesses and other education institutions. For example, there is the UOIT Automotive Centre of Excellence (ACE) at the UOIT north campus tests the impact of aerodynamic and thermal forces on vehicles and is available for use by private companies. ACE is also home to a provincial Autonomous Vehicle Innovation Network (AVIN) program, and this centre is planned to expand.

Another partnership example is Teaching City, which is a partnership with the City of Oshawa, UOIT and others⁷ to address urban issues through research and development of new technologies.⁸ In May 2018, a Teaching City Hub opened in downtown Oshawa that has offices, classrooms, and lab space. Teaching City has worked on number of projects, including developing a Diversity and Inclusion Plan for the City of Oshawa, a hackathon on rental housing, and the preparation of an application for the Smart Cities Challenge. There are a number of upcoming projects, including the City Idea Lab that aims to provide experiential learning opportunities for students and address urban issues in Oshawa.

⁵ University of Ontario Institute of Technology, National Survey of Student Engagement, 2017.

⁶ City of Oshawa, Community Profile, 2018.

⁷ Other partners are: Canadian Urban Institute, Durham College, Trent University Durham Greater Toronto Area, and the University of Toronto's Faculty of Applied Science & Engineering.

⁸ The aims are to:

- developing practical, scalable, and sustainable solutions to urban issues;
- building research partnerships;
- coordinating experiential learning opportunities, applied research and innovative educational activities;
- developing new technologies; and,
- sharing access to facilities, resources, and equipment.

Figure 4-8: University of Ontario Institute of Technology Downtown and North Oshawa Campuses

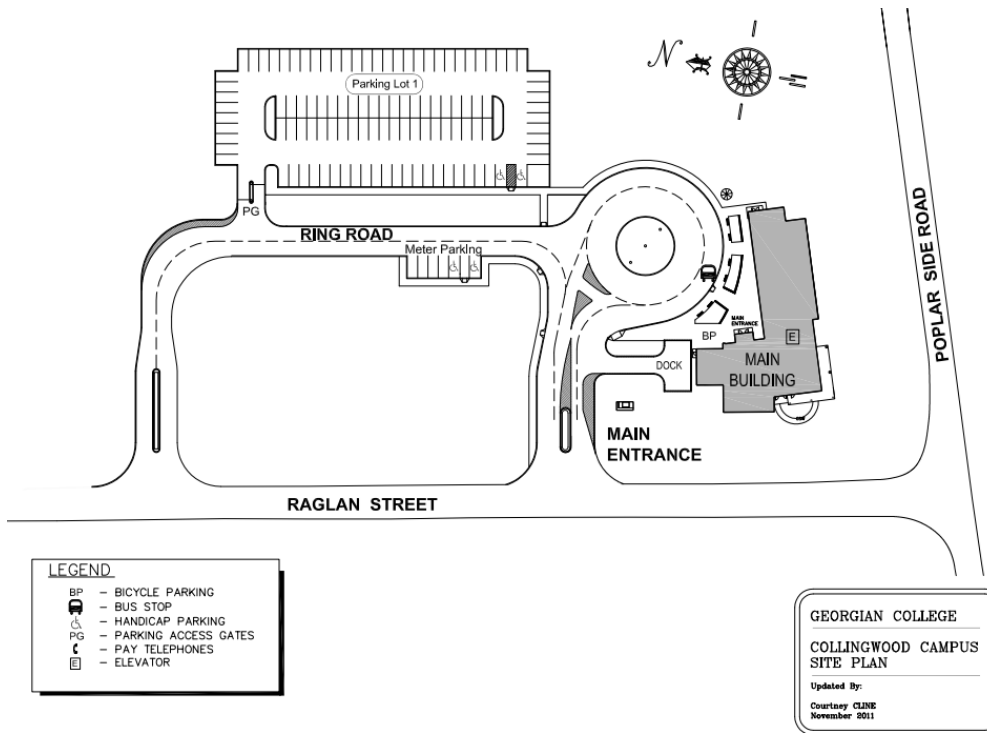


SOURCE: University of Ontario Institute of Technology.

South Georgian Bay Campus, Collingwood

Located on 9.5 Acres of land, Georgian Bay John Di Poce Campus in Collingwood offers a variety of programs including: business and management, health, wellness and sciences, and hospitality, tourism, and recreation. The campus features 20,000 square feet of multi-function classrooms, community room, computer lab, student lounge and other facilities. As reported on the campus factsheet, the campus currently has 160 full-time, credit-seeking, registered students and 540 part-time studies registrations.

Figure 4-9: South Georgian Bay Collingwood Campus



SOURCE: urbanMetrics based on Georgian College Website

Georgian campus established in 1985 in Collingwood, although the campus was located in ten temporary location for 26 years, before permanently settling into their current location by the corner of Ragland Street and Poplar Side Road. Serving the local interests from Collingwood, Blue Mountain and Wasaga Beach, Georgian Collingwood campus is believed to allow local students to live and study close to home. It has been clear for many years that Georgian needed a permanent home for a campus serving the South Georgian Bay region. The catalyst for the creation of the Poplar Road campus was the donation of 10 acres of land by developer John Di Poce.

It is important to note that although there are many examples of successful universities and satellite campuses, there are also examples of locations that were not successful.

- In 2021, **Humber College** closed their satellite campus in Orangeville. The college was co-locating with Alder Street Community Centre in Orangeville and was mainly serving the local students. The Orangeville campus closure is reported to be due to lack of financial viability.

- In 2016, **Laurentian University** decided to close the Barrie campus. This occurred after the Province turned down a proposal for a standalone campus and instead proposed that the Laurentian arts program be taught by Georgian College instructors for the first two years. The restrictions on both the programming and the space initiated the withdrawal from Barrie.
- In 2014, **Nipissing University**, which has a primary campus in North Bay, ended a joint program with Wilfred Laurier university in Brantford as a result of funding loss. The education program had been in operation since 2002.
- **The University of Guelph** closed two satellite campuses in Alfred and Kemptville in 2015. The campuses, which had operated since 1997, were closed to reduce costs – a result of increasing operating costs and decreasing enrolment. The satellite campus in Ridgetown, Ontario was expanded to absorb some of the functions of the two closed campuses.
- After operating for two years starting in 2012, **Algoma University** closed its satellite campus in St. Thomas. The City had provided \$900,000 for renovation costs of a former school.

4.4 Alternative Sites in Caledon

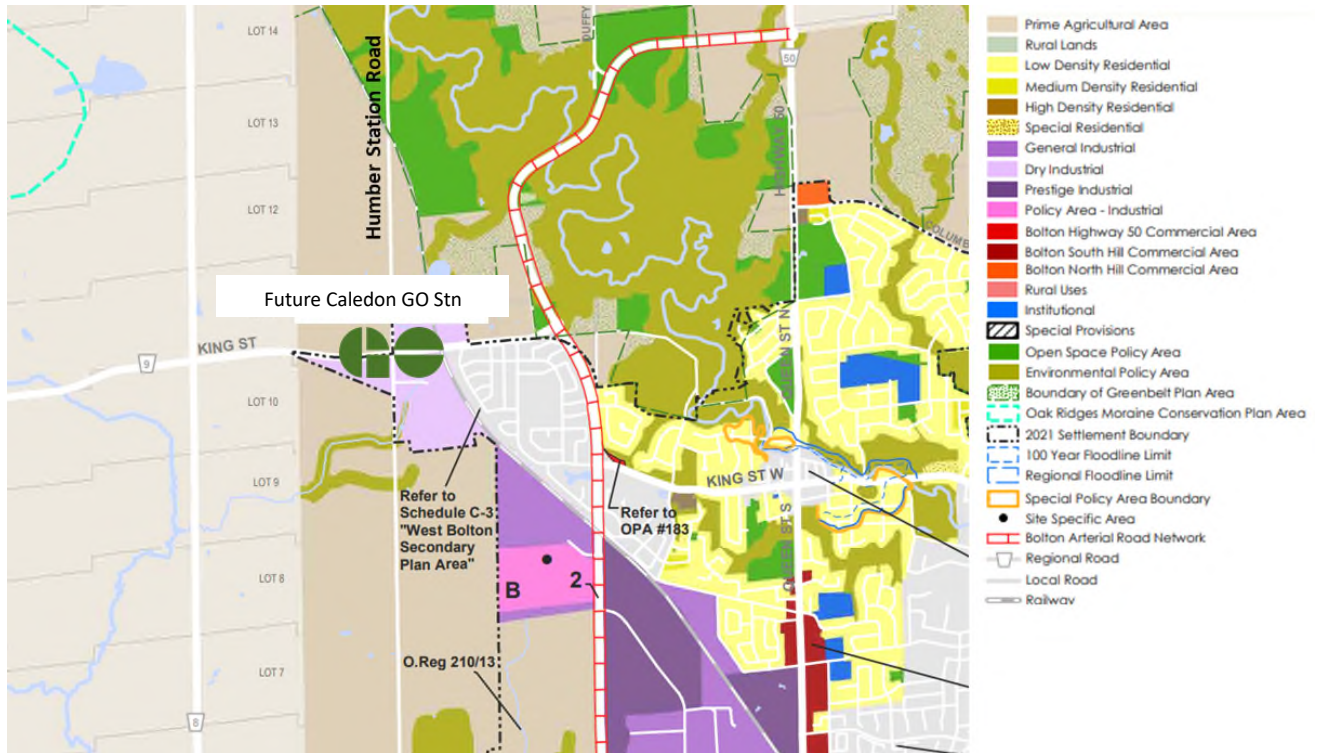
While population and employment projection, in line with the growing pace of developments in Mayfield West would support the fact that the Town of Caledon may keep the designation of only a portion of the subject site for academic/Research Campus, our study suggests the town may want to consider alternative options, depending on multiple factors such as development timeline and availability of land/space.

- **Option One: Bolton Campus closer to the future Caledon GO**

with Bolton being an existing urban core in the Town of Caledon, development of a future campus in proximity of the future GO Station in Bolton, at Humber Station Road and King Street might be another option for the municipality. Further studies are required on availability of land surrounding the future GO station and detailed plans need to be prepared to ensure access to ancillary services and Bolton Downtown.

As shown in Figure 4-10, the lands surrounding the future GO station are designated as “Dry Industrial” and the rest of the lands located outside 2021 Settlement boundary are Prime Agricultural Area.

Figure 4-10: Land Designation Around the future Caledon GO Station



SOURCE: urbanMetrics based on Schedule C, Bolton Land Use Plan, consolidated April 2018

- **Option Two: Co-locating within existing built assets in the Bolton Core (“The Learning Storefront”)**

In line with the Ministry of College and University’s Major Capacity Expansion Policy Framework, locating the future campus closer to the existing infrastructure and mixed-use spaces is encouraged to maximize the use of existing assets (land and buildings), as well as reducing ancillary costs and fees to students.

In our professional opinion, the Bolton Core area would deliver a much better post-secondary learning environment. A future campus in Bolton would provide immediate and lasting benefits for students, staff, and the community as a whole.

Our study suggests that due to limited local student demand combined with high (direct) competition from other colleges and university in the neighbouring jurisdictions, a new Caledon campus would likely not be able to offset the large capital and operating costs associated with a new, purpose-built learning facility. However, co-locating alongside other

existing community assets in downtown Bolton would enable the proponent to scale its growth commensurate with program development and expansion.

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5.0 Summary of Findings

This study has assessed the needs and feasibility of developing a post-secondary satellite campus on a ~60 acre parcel of greenfield land located within the Mayfield West Secondary Plan Area. Simply put, the Town of Caledon is evaluating the market prospects (i.e., the potential) to attract a new post-secondary institution to the subject site.

With increased growth and development pressure, the Town is weighing up the implications of “releasing” these lands for alternative uses, most notably future employment (industrial, logistics, and warehouse, etc.) uses which are increasing in demand because of changing supply chain circumstances and growing reliance on e-commerce platforms for household consumers.

The Town has retained urbanMetrics to provide an independent evaluation of the lands in the context of changing post-secondary educational priorities across the province of Ontario (in general) and in the Town of Caledon specifically.

This report is intended to provide the Town of Caledon (Council, Staff, and the public-at-large) with an unbiased assessment of the likelihood of attracting a post-secondary learning campus and/or academic research complex to the designated lands near Highway 410 and Heart Lake Road in the community of Mayfield West.

The following key questions have been addressed by the consultant as part of this study:

QUESTION 1: *Is there an imminent need for a post-secondary satellite campus in the Town of Caledon?*

ANSWER: No. Not yet. But post-secondary learning facilities may be warranted in the post 2031-period.

Population Growth (15 to 24-year-olds)

The findings of our study suggests that a well-funded post-secondary institution would undoubtedly generate lasting economic benefits in a community such as Caledon. Caledon today is home to nearly 81,000 residents. By 2051 the Town is expected to support a population of 300,000 people, and 125,000 jobs. This rate of growth is expected to generate future demand for post-secondary education opportunities within and beyond the Town’s municipal boundaries. In the near term, the increase in the size of the local youth population (generally defined as those within the 15 to 24 cohort) would be minimal over the next 10-years (2021-2031). Beyond 2031 however, this same youth segment is expected to see significant growth.

Increasing Competition

Our study of the existing competition in proximity to Caledon and the subject site suggested that a future campus in Caledon should offer extremely targeted programs to address any gaps. Proximity of the subject site to Brampton Innovation District and the increasing interest of multiple post-secondary institutions to add footprints there, would be a major competition for a future campus on the subject site and in Caledon.

Further studies are required to clearly define targeted programs to:

- Meet the demands of local students
- Ensure enrollment goals will be achieved to make the future campus financially feasible
- Plan for programs to ensure job readiness among graduates
- Engage with local businesses in the town to understand their current and future demands that can be met by training the right labour force and offering them required apprenticeship opportunities

QUESTION 2: What are the critical requirements for the Town when locating a post-secondary campus in the community?

ANSWER: Accessibility, Flexibility, Scalability

As outlined in Section 4.2 of the report, we have evaluated the development of a future campus in the Town of Caledon - and on the subject site in particular - against the Ontario Ministry of Colleges & University's *Major Capacity Expansion Framework*.

The following highlights some key outcomes of the evaluation:

Enrolment

- Population growth in the age cohort of 15 to 24, that is expected to see a considerable growth within the next 15 to 20 years in Caledon, would help with meeting enrollment goals of a future institution. The Subject site, located in one of three urban settlement areas is expected to be home to a considerable portion of this growth.
- While domestic enrolment goals can be achieved by detailed planning, prospects for achieving strong international enrolment in a suburban satellite campus is uncertain.

- Our analysis of existing and emerging satellite campuses in the GTA suggests that the subject site is much larger than what is typically needed for a suburban campus development. Therefore, the town may consider keeping a portion of the subject site with the existing land designation and redesignate the rest of the land to compliment and align with employment lands on the east and residential uses on the west side of the site.
- Proximity of the subject site to multiple campuses in the neighbouring jurisdictions would expose risks to achieving enrollment goals for a future campus.

Facilities

- A future campus on the subject site would not be able to take advantage of co-locating with an existing facility or maximize the use of assets, as well as reducing costs for an institution and for prospective students. However, such facilities exist in the currently developed Bolton Core, a future institution could benefit from leasing space in the Bolton core area, or closer to the future GO station. The Town of Caledon Official Plan (Draft) has established a new proposed designation, Knowledge & Innovation Employment Area, on Humber Station Road between Healey Road and King Street. A future post-secondary institution could be established depending on timing and provincial funding circumstances.

Jobs and Economy

- Our study suggests that offering programs to train the workforce in such areas as construction (trades), agriculture, health care, tourism and hospitality would be supported in the Town. The Town of Caledon should conduct further studies on how these programs can attract local students and benefit existing/future businesses in the town.
- Existing competition should be closely monitored to ensure financial viability of a campus. A future satellite campus on the subject site should offer extremely targeted programs to avoid duplication with other institutions.

Student Access

- A detailed plan needs to be prepared to incorporate the needs of a future campus in the town. Such plan should foresee the needs of students for all modes of transportation including active and public transport.

QUESTION 3: Would it be feasible to establish a post-secondary satellite campus on the subject site?

ANSWER: No.

The likelihood of establishing a new post-secondary campus on the subject lands is unlikely in the near term. While the subject lands are accessible based on existing and future highway improvements around the site, the lack of public transit make the lands less attractive from a student perspective.

The subject lands are quite simply *too large* to support the scale of local/regional learning opportunities available in the foreseeable future. It is unlikely that the entirety of the site (i.e., 24 hectares/60 acres) could be fully realized as a post-secondary learning campus within a meaningful timeframe. Based on direct consultation with select post-secondary institution representatives; the initial phases of a new learning facility in Caledon would likely be limited to something between 3,000 to 25,000 square feet, depending on the type of program pursued. This scale of space would, most reasonably, be sourced within the commercial/ industrial real estate market through a conventional 5-to-10-year lease with a willing landlord rather than a new greenfield capital expansion project financed by the institution and/or the provincial government.

Perhaps most importantly, the subject lands are currently in private ownership. The likelihood of a post-secondary learning institution in Ontario acquiring the lands at a reasonable cost is highly improbable. Land prices in the GTA are extremely high. Prevailing shortages of “shovel-ready” and “serviceable” land – for either residential or industrial uses – put these lands well out of reach for cash-strapped universities and colleges operating in Ontario.

QUESTION 4: Which alternative site(s) would be more feasible for post-secondary development and maximize the benefits to the town?

ANSWER: Sites in Caledon with better access (i.e., scalable public transit) and share community amenity (i.e., restaurants/bars/cafes, affordable rental housing options, and parks and recreation facilities).

Our analysis suggests that development of a post-secondary satellite campus in Bolton, in proximity to the future GO station would bring more benefits to the town in shorter term. The existence of ancillary services and transportation options in Bolton is believed to ensure feasibility for the development. We have suggested two options for development of a future campus in Bolton:

We have suggested two potential options for the development of a future post-secondary learning facilities in Caledon:

- **Downtown Bolton** (leased non-residential space)

- **Knowledge and Innovation Employment Area** (as proposed in the Town of Caledon Official Plan. These lands are located along Humber Station Road, between Healey Road and King Street, in the vicinity of the Future Caledon Go Station).

Appendix A Case Studies, Ontario

Summary of Brantford Laurier

Year Established	<ul style="list-style-type: none"> ▪ 1998
Programs Offered	<ul style="list-style-type: none"> ▪ Faculty of Liberal Arts ▪ Human and Social Sciences ▪ LLB (University of Sussex) and BA (Laurier) with specializations in Criminology, Law and Society, or Human Rights and Human Diversity
Size	<ul style="list-style-type: none"> ▪ Almost 3,000 students (started with 39 in 1999) ▪ 132 full-time staff (15 part-time), 58 full-time faculty (73 part-time) ▪ 17,763 square metres (about 190,000 square feet) of buildings, 2009-2010/2011
Location Context	<ul style="list-style-type: none"> ▪ Downtown, occupying 22 buildings, many of which are heritage buildings
Project Cost	<ul style="list-style-type: none"> ▪ Approximately \$80 million
Government Investment	<ul style="list-style-type: none"> ▪ City: \$1.4-million Carnegie Library renovation in 1999 and an estimate \$22 million as of 2014
Economic Impact	<ul style="list-style-type: none"> ▪ Proposed benefits included: youth retention, improvement in university attainment levels, reduced cost, and accessibility of university education for Brantford residents, economic benefits and vitality and reputational impact.
Partnerships and Community Benefits	<ul style="list-style-type: none"> ▪ 200+ community partnerships between Laurier and Brantford businesses and organizations, according to the university and joint access to the performing arts centre, city recreation facilities and the city’s library
Complementary Projects	<ul style="list-style-type: none"> ▪ In 2012, a Globe and Mail article reported that \$130 million had invested in downtown core, \$62 million from the City of Brantford

Summary of University of Waterloo School of Architecture

Year Established	<ul style="list-style-type: none"> ▪ 2004
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Program Offered	<ul style="list-style-type: none"> ▪ Architecture
Size	<ul style="list-style-type: none"> ▪ Students: 289 FTE undergraduate students and 109 graduates, a total of 398 FTE students ▪ Single 85,000 square foot (7,897 square metres) building and a proposal for an 80,000-square foot (74,300 square metres) expansion
Location Context	<ul style="list-style-type: none"> ▪ Downtown location with transit access (e.g., a GO station) and other transportation options (e.g., parking)
Project Cost	<ul style="list-style-type: none"> ▪ Initial cost of \$27.2 million and \$24 million proposed expansion
Government Investment	<ul style="list-style-type: none"> ▪ City of Cambridge: \$7.5 million and proposed expansion contribution of \$8 million ▪ Federal and provincial government: \$4.1 million each
Economic Impact	<ul style="list-style-type: none"> ▪ \$8.80 in impact for every one dollar of investment by the Ontario government
Partnerships and Community Benefits	<ul style="list-style-type: none"> ▪ Riverside Gallery, a 3,000 square foot space that is an Ideas Exchange location (one of six in Cambridge) and includes a printmaking studio
Complementary Projects	<ul style="list-style-type: none"> ▪ Gaslight District, a major new development in Galt, has an innovation centre (called Grand Innovations) in partnership with Conestoga College in a heritage building, the Tiger Brand Knitting Company building

Summary of University of Waterloo Pharmacy School

Year Established	<ul style="list-style-type: none"> ▪ 2008
Program Offered	<ul style="list-style-type: none"> ▪ Health Sciences Campus, School of Pharmacy (Undergraduate, Masters and PhD)

- Size**
 - Students: 502 FTE undergraduate students, 12 graduates and 21 doctoral, a total of 535 FTE students
 - 30 faculty members
 - Single building (54,000 square feet) on an eight-acre parcel provided by the City

- Location Context**
 - Downtown location with a VIA Rail station and Greyhound bus station within walking distance

- Project Cost**
 - \$34 million

- Government Investment**
 - City of Kitchener: \$30 million, which includes land value for 8 acres
 - Region of Waterloo: \$15 million
 - Province: \$8 million for capital costs and \$70 million for operating costs

- Complementary Projects**
 - City of Kitchener invested 32.5 million in the Kitchener Public Library as part of broader revitalization initiatives

- Other**
 - Co-located with the School of Pharmacy is the McMaster University’s DeGroote School of Medicine

Summary of McMaster University DeGroote School

- Year Established**
 - **2009, opened 2010**

- Programs Offered**
 - DeGroote MBA (2 year full-time, part-time and co-op options)
 - Executive Education
 - Executive MBA in Digital Transformation
 - Health Leadership Academy
 - Directors College

- Size**
 - Was expected to grow to 800 students and 80 faculty/staff members
 - Graduate student enrollment in the Business Faculty was 605 FTE students in 2016/2017; however, these students are not all regularly attending class at the Ron Joyce Centre
 - Single 8,393 net square metre (about 90,000 square feet), four storeys building with 281 rooms on a 4.5-acre site

- Location Context**
 - Suburban location next to highway with good vehicle access and limited alternative transportation modes
 - McMaster shuttle available that connects to the primary McMaster campus and the Appleby GO station

- Project Cost**
 - Approximately \$30 million

- Government Investment**
 - City of Burlington and Halton Region: \$10 million

- Partnerships and Community Benefits**
 - McMaster Digital Transformation Research Centre, which focuses on the leadership and management of the digital transformation
 - Deloitte report anticipated* benefits:
 - Positively impacting Burlington’s/Halton’s ability to develop, attract and retain talent.
 - Positively impacting Burlington’s/Halton’s abilities in the area of innovation.
 - Facilitating Burlington’s/Halton’s ability to develop economic clusters; and
 - Positively supporting and driving Burlington’s and Halton Region’s economic development agenda.

** Whether these impacts have been realized is unclear because a follow-up impact assessment has not been completed.*

Summary of University of Ontario Institute of Technology, Oshawa

Year Established	<ul style="list-style-type: none"> 2002 (2003 first year with students)
Program(s) Offered	<ul style="list-style-type: none"> Various: business, education, energy systems and nuclear science, engineering, health science, humanities, information technology, science, and social science.
Size	<ul style="list-style-type: none"> Students: +10,000, of which 2,500 are located downtown Facility and staff: +1,550 The total building area: 73,355 square metres (about 790,000 square feet) in 2013 between the shared Oshawa campus and the downtown campus Windfields Farm expansion land: 131 hectares (324 acres)
Location Context	<ul style="list-style-type: none"> Suburban location with some transit access, but predominately vehicle oriented
Government Investment	<ul style="list-style-type: none"> Province: \$60 million in 2001 City of Oshawa and Durham Region: \$17.5 million

- Economic Impact⁹**
 - Spending impact: \$204.7 million to Ontario’s GDP in 2014-15, growing to \$247 million in 2019-20
 - Job impact: 1,949 in Ontario with nearly 1,335 in Durham Region and Northumberland County, growing to 2,300 provincial jobs in 2019-20
- Partnerships and Community Benefits**
 - Teaching City: City of Oshawa and UOIT (and other post-secondary education institutions/think-tanks) offering experiential learning and addressing ‘real’/tangible problems
 - Partnerships with Ontario Power Generation, IBM, Hydro One

Summary of South Georgian Bay Collingwood Campus

- Year Established**
 - **1985 (located in 10 temporary locations for over 26 years, but opened a permanent campus in 2012)**
- Programs Offered**
 - Bookkeeping
 - Office Administration – General and Health Services
 - Computer Programming
 - Personal Support Worker
 - Pre-Health Sciences
 - Hospitality – Hotel and Resort Operations Management
 - Social Service Worker
- Size**
 - 160 full-time, credit-seeking, registered students and 540 part-time studies registrations.
 - 20,000 square feet (about 1,858 square meter) of building
- Location Context**
 - Suburban, occupying 1 building constructed in 2012 on a parcel donated to the college by a private developer
- Government Investment**
 - \$4-million contribution from the Community Adjustment Fund of the Federal Economic Development Agency for Southern Ontario
- Economic Impact**
 - Looking at the impact on the Town of the Blue Mountains, Collingwood, Wasaga Beach, and Clearview Township specifically, the campus and its students add \$8.4 million in income, supporting 109 local jobs.

- Student spending adds \$984,400 to the local economy and the impact of alumni currently employed in the workforce is \$5.5 million.
- Georgian College campuses contribute \$1.7 billion in income to the Georgian catchment area economy, approximately 5.3 per cent of the total gross regional product. This equates to 22,752 regional jobs, or one out of every 15 jobs in the catchment area. Student spending adds \$64.4 million in income, while alumni impact accounts for \$1.4 billion.