



## Facility Master Plan for Victoria Manor

October 23, 2023

Doc. ID - P1701-523614178-71

Filename: Victoria Manor Facility Master Plan (2.0)



## **ACKNOWLEDGEMENTS**

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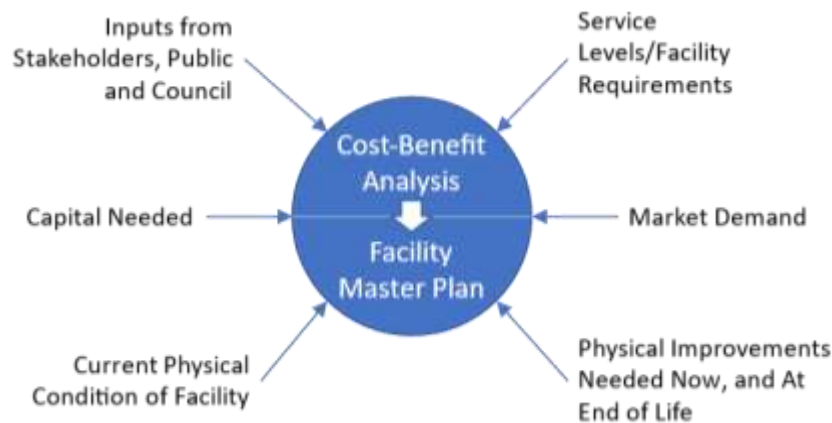
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# 1.0 Executive Summary

## 1.1 Overview

To inform the development of the Facility Master Plan (“the Plan”), several aspects have been taken into consideration, including input from stakeholders, a review of the existing facility, an examination of current service levels and a forecast of future needs. Reviews and investigations were conducted to determine whether Victoria Manor is achieving its mandated requirements given the condition of the existing facility and how to make best use of the asset while serving a population of seniors in the community.



Questions explored during the master planning process include:

- What is the nature and magnitude of current and future demand?
- If improvements are to be made to remedy any deficiencies, or address demand, what is the magnitude and nature of investment required?
- When are the improvements needed - now or in the future?
- What is the timeframe for implementation of recommendations?

Potential end of life scenarios that were considered included: 1) Relocate, sell existing facility; 2) Renovate-expand; or 3) Redevelop.

The research conducted as part of this exercise provides the City with information to understand the state of its current operations, facility portfolio, needs, and potential demand. The Plan assists the City in strategizing the management of and investment in assets for long-term care delivery and implement best practices in asset inventory/documentation and periodic corrective interventions based on evidence. A capital forecast with preventive and predictive maintenance schedules were developed to minimize reactive and unplanned maintenance and identify major long-term capital investment required at the end of the facility’s useful life.

The Plan looks at the investment required to resolve any deficiencies with the current facility and the service it provides, and to address current and anticipated demand. It recommends near-term improvements to the existing facility to improve the quality-of-care services provided and identifies the associated costs of those improvements and recommends the development of a new facility by 2035.

## 1.2 Recommendations

### 1.2.1 Current Facility Recommendations

A review of the physical structure to house the delivery of LTC services supports the 45-year lifecycle use of this facility/asset for long-term care (with noted limitations) with its potential replacement in 2035.

Specific improvements may be completed to support the experience of living/working in the building. While some current limitations within the resident living environment cannot be corrected, the City should immediately establish a “State of Good Repair” framework utilizing a tax-supported Capital fund.

To extend the useful life and effectiveness of the facility to support LTC service delivery, the following recommendations are made. Improvements in the following areas could aid operations usefulness, and bring benefit to the residents’ experience and support the continued use of the existing building:

- Lighting
- Ceiling lifts
- Door widths
- Infection prevention and Control (IPAC)
- Décor (furnishings and fittings)
- Plumbing
- Heating
- Technology
- Parking
- Resident access to the outdoors
- Bariatric enabled rooms
- Administrative wing
- Atrium
- Dining and Activity/Lounge Areas

### 1.2.2 Future Facility Recommendations

Current facility limitations were identified through stakeholder input and service level review. There is little prospect that a renovation would successfully or efficiently resolve the challenges of the current building. Rebuilding existing walls and openings along with all building components such as plumbing, electrical and HVAC would increase the cost to a point perhaps even greater than a new build. A redevelopment, with opportunities for enhanced services such as a campus of care, will serve the long-range future needs of the City of Kawartha Lakes and its residents.

The current building will have reached the end of its useful life at 45 years. Renovation is not an efficient alternative, although the current site is a favourable location. To mitigate the impact of a capital project expenditure in the future, the City could introduce a capital replacement and growth levy now for completion and opening of a new facility by 2035. Planning for a project of this size generally takes four years and could reasonably commence in 2030 to deliver the new building on time. This may also avoid costly maintenance costs as the current building systems wear out.

Future facility recommendations considered:

- Demographics



- Level of care
- Campus of care
- Additional services
- Reducing Emergency Room demand
- Environmental design

## 1.3 Summary of Findings

### 1.3.1 Property Appraisal

Based on investigations, it is the opinion of the appraiser that the market value of the Subject Property (Victoria Manor, located at 220 Angeline Street South in Lindsay, Ontario) as of March 31, 2023, is estimated to be \$10,800,000.

### 1.3.2 Asset Inventory

A hierarchical inventory of the main building's elements or components and ancillary facilities were prepared in accordance with industry (Uniformat) standards and municipal asset management requirements.

There are a total of 176 assets marked with asset ID tags, model/make, installation year, etc. Altus has developed a hierarchal inventory of the facility's assets in accordance with industry standards and municipal asset management requirements.

The Asset Registry was prepared by examining all recent and available documentation, and the physical inspection of the Building Components. This provides a central database of Victoria Manor's assets ensuring ease of tracking, monitoring, validation, and asset management. The data collected provides a snapshot of the asset portfolio, be it physical characteristics or commercial value, at any time and informing decisions related to maintenance requirements, performance or retention, investment, or disposal.

### 1.3.3 Building Condition Assessment

Altus Group Limited ("Altus") performed a Condition Assessment on behalf of Colliers Project Leaders, of Victoria Manor and its ancillary facilities. The primary goals of the assessment include:

- Determine the overall building condition and performance of the primary systems.
- Identify the building requirements and prioritize them.
- Recommend actions with cost estimates for the capital projects within the report term.

The facility was found to be in a good condition at the time of review.

### 1.3.4 Capital Cost Forecast

Short-term maintenance requirements will cost \$276k in three (3) years. Short-term projects include repairs to drywall damage and wall protection in basement level, asphalt parking lots and loading dock resurfacing and repair. Continuation of the ongoing painting program in service hallways and resident home area corridors is planned.

The Capital Plan projects a requirement of \$1.66 million in ten (10) years (inclusive of short-term maintenance requirements will cost \$276k in three (3) years). The Capital Plan also includes general budgeting allowances for interior finishes, exterior envelope, and exterior site system repairs such as

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windows and caulking, end of life replacement for roof top package units over the term of this report and elevator upgrades over the ten-year period.

The cost estimate includes a contingency allowance of 10% and is priced in current (2023) dollars for future projects. Taxes are excluded.

### 1.3.5 Stakeholder Consultations

Colliers conducted a series of consultations and collected a range of perspectives. Consultations were conducted at Victoria Manor on February 9, 2023, and with senior City staff on March 1, 2023. A second round of in-person consultation was conducted at Victoria Manor on June 29, 2023.

Participants included: residents, front line staff, Family Council, management staff at Victoria Manor, and the management company, Medical Director, expert leaders in healthcare including local hospital, home and community care, system planners, Emergency Services, City leadership, and the general community.

As noted by the consultees, positives included:

- Public spaces are well designed and spacious.
- Strong reputation for the successful delivery of high quality LTC services for 35 years and through the COVID-19 pandemic.
- Location and accessibility in the community is good.

Challenges/gaps identified included:

- Building Performance: plumbing and HVAC systems are not maintaining expected comfort levels.
- Care Delivery: building design does not accommodate current IPAC requirements, lighting plan does not support good clinical practices, door opening widths too narrow for modern equipment.
- Resident experience: dementia care needs are increasing, small personal living spaces limit residents' independence; access to outdoors is limited.
- The direct living areas (Resident Home Areas – RHA) are not designed to match the service level demands in the current LTC environment.

### 1.3.6 Examination of Service Levels

The City is considering user-facing needs in context of a review of the built infrastructure through the building condition assessment. It is necessary to identify and understand the standards for the delivery of Long-Term Care (LTC) services, as this is the primary purpose for which the building is expected to perform.

Findings from the examination of service levels are grouped under the following categories:

- Management and administration
- Ministry of Long-term Care Quality Inspection
- Legislation
- Standards

Proposed changes to service levels are categorized as follows:

- Governance
- Management and Administration

- Ministry of Long-terms Care Quality Inspection Program
- Long-Term Care Building Classification
- Legislation
- Standards

### 1.3.7 Growth-Related Capital Needs

The fact that the facility is nearing its design life, combined with the current demographics and the magnitude of potential care needs required if trends in population persist, there is an expectation that Victoria Manor would need to be replaced by 2035.. Capital needs for the future state is estimated based on three scenarios of potential redevelopment by 2027 or 2034.

**Figure 1: Summary of Scenarios and Estimated Capital Costs**

Redevelop by 2027 or 2034 Maintain 166 beds	Low range capital cost estimate: \$71,918,031	High range capital cost estimate: 91,163,701
Redevelop by 2027 Increase to 369 beds	Low range capital cost estimate: \$196,656,070	High range capital cost estimate: \$249,282,342
Redevelop by 2034 Increase to 512 beds	Low range capital cost estimate: \$335,591,941	High range capital cost estimate: \$425,398,235

Based on assumptions outlined in Section 9, the capital cost estimate for redevelopment of Victoria Manor by 2027 (completion of construction) with a total bed count of 369 (based on the projected care needs in 2027) ranges from \$196,656,070 to \$249,282,342 and, in another scenario, the capital cost estimate for redevelopment of Victoria Manor by 2035 with a total bed count of 512 ranges from \$335,591,941 to \$425,398,235 (assuming construction cost inflation of 3% per annum). If the City decides to only maintain its 166 beds and not expand, the capital cost estimate for redevelopment will range from \$71,918,031 to \$91,163,701 and will fail to respond to increased future demand for services.

## 1.4 Background

Victoria Manor Home for the Aged is a 166-bed municipal long-term care home owned by the City of Kawartha Lakes (“the City”), located at 220 Angeline Street South in Lindsay (“the Subject Property”). The City (2016 population 75,423) is a single-tier municipality in Central Ontario, Canada. The City is the size of a typical Ontario county and is mostly rural. It is the second largest single-tier municipality in Ontario by land area after Greater Sudbury, comprising an area of over 3,059 square kilometres. The main population centres of the city are the communities of Bobcaygeon, Fenelon Falls, Lindsay, Omemee and Woodville.

Victoria Manor commenced operations in 1989 and is a Ministry of Long-Term Care-approved home, identified as a Class B facility by the Ontario Ministry of Long-Term Care. The Subject Property has a calculated Facility Condition Index (FCI) of less than 5 percent (Grade A). FCI is the total cost of needed building repairs and renewal divided by the current cost of replacing the building. Each building’s FCI score reflects the current condition of the building: good, fair, poor, or critical. Victoria Manor is assessed to be of ‘good’ quality and in ‘good’ physical condition.

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The facility is situated on a site that is approximately 11.68 acres. The facility is comprised of one two-storey building on the lot. There are 166 resident rooms in total in the facility, including 76 “basic” rooms, 66 semi-private rooms, and 24 private (single) rooms distributed across four distinct ‘home areas’ on two floors. The total gross floor area of the building is approximately 107,956 square feet.

Victoria Manor was constructed under standards of the former 1972 Nursing Homes Act, and the home exceeded the design standards at that time. Current minimum standards for new and redeveloped LTC homes are prescribed in the [Long-Term Care Home Design Manual, 2015](#). Victoria Manor, despite exceeding design standards at the time of construction, does not meet the current design standards. The Ontario Ministry of Long-Term Care has confirmed, in accordance with the [Long-Term Care Homes Act, 2007](#) and the [Fixing Long-Term Care Act, 2021](#), that Victoria Manor, being a municipal long-term care home, is not required to be redeveloped in accordance with the 2015 design standards.

The City has appointed Colliers Project Leaders to develop a Facility Master Plan for Victoria Manor to guide its maintenance, operations, and capital investment for the balance of the facility’s useful life. The plan is intended to provide an evidence-based roadmap for future investment and end-of-life facility decisions.

## 2.0 Project Overview

### 2.1 General Approach and Methodology

The approach used in this master planning exercise involved the synthesis of inputs from the following components, culminating in a summary of key findings and recommendations for the current and future state of care needs as well as ensuring continuity of care delivered through Victoria Manor. Both service and facility requirements were reviewed to inform the development of an evidence-based roadmap for future investment and end-of-life facility decisions.

#### 2.1.1 Components of the Facility Master Plan

Table 1 shows the key inputs that inform the development of the Master Plan:

**Table 1: Components of the Master Plan**

<b>a) Property Appraisal</b>	Appraisal report of the existing long-term care property prepared by the Colliers' Appraisal Institute of Canada designated appraiser. It identifies the values for land and improvements.
<b>b) Asset Inventory</b>	A hierarchical inventory of assets developed in accordance with industry standards and municipal asset management requirements. Data collected on each component asset of the facility, supported by an appropriate asset tagging system for convenient and accurate field identification of facility assets.
<b>c) Building Condition Assessment</b>	General overview of the building systems, including a commentary on the mechanical, electrical, structural, and architectural components in accordance with the ASTM E 2018 Standard Guide for Property Condition Assessments.
<b>d) Capital Cost Forecast</b>	This includes costs pertaining to replacements of building elements that are past their design life. Capital cost items extend the life and retain the commercial value of the facility. These costs are not part of the routine repair and maintenance, which are accounted under facility operating expenses.
<b>e) Maintenance Program</b>	Maintenance program based on asset condition assessments, service levels, legislation, industry standards, cost minimization and other relevant factors and considerations.
<b>f) Stakeholder Consultations</b>	Consultations with stakeholders, the general public and Council. To obtain initial input followed by a subsequent meeting later in the project to obtain feedback on preliminary recommendations.
<b>g) Examination of Service Levels</b>	Defining and examining LTC service levels provided by the facility. Will consider spatial analysis and accessibility requirements.
<b>h) Benchmarking</b>	The objective is to study similar organizations and facilities and identify best practices in the industry, areas for improvement, set goals, set targets, and measure progress. Benchmarking

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will also assist towards cost reduction, improving efficiency, and enhancing performance.

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- i) Growth Related Capital Needs** Estimation of capital needs based on care and service levels required in the future. This would include capital needs arising from potential expansion of beds, rooms, common areas or amenities.
- 

This report also includes recommendations for Victoria Manor in the short term, based on consultations and findings, as well as recommendations for a future facility. This report culminates in an Implementation Plan that identifies the tasks, timeline, and necessary funding requirements.

## 3.0 Property Appraisal

### 3.1 Summary

Colliers conducted an appraisal of 220 Angeline Street South (“the Subject Property”) and carried out an analysis to estimate its current market value. As of March 31, 2023 (Effective Date), the Subject Property consists of a Class B Long Term Care facility, located in the Town of Lindsay, Ontario. Per information provided by the City of Kawartha Lakes, the improvements consisting of four, two-storey residential wings were reported to be 100 percent occupied as of the Effective Date, with a waiting list.

The appraisal report describes the methods and approaches to value in support of the conclusion and contains the pertinent data gathered in our investigation of the market. A summary of the key features as investigated in the property is provided below:

**Table 2: Key Features of the Property**

Property Information	
Address	220 Angeline Street South, Lindsay, Ontario
Nearest Major Intersection	Angeline Street S & Highway 7(South) and Angeline St S & Kent Street
Number Of Buildings	1
Number of Stories	2
Property Data	
Size (Units)	166
Occupancy	100%
Year Built	1989
Quality	Good
Condition	Good
Land Use/Zoning	CF (Community Facility)
Bed Type Mix	
Basic	76
Semi-private	66
Private	24

Based on our investigations, it is the opinion of the appraiser that the market value of the Subject Property as on March 31, 2023, is estimated to be \$10,800,000.

**Table 3: Valuation Summary**

Valuation Summary	
Final Adjusted Value	\$10,800,000
Effective Date	3/31/2023

Value Per Unit	\$65,060
<b>Direct Comparison Approach</b>	
Concluded Unit Value Range	\$60,000 to \$70,000
Size (# Beds)	166
Value Indication	\$9,950,000 to \$11,600,000

The above value estimate is based on an exposure period of 9 to 12 months, assuming the basis of a transaction involving cash to the vendor and is in conjunction with the Assumptions and Limiting Conditions stated within the appraisal report. The detailed appraisal report is provided in Appendix 7.

## 3.2 Methodology

### 3.2.1 Valuation Methodology

Traditionally, there are three accepted methods of valuing real property:

- The **Cost Approach** to value is based upon the economic principle of substitution, which holds that the value of a property should not be more than the amount by which one can obtain, by purchase of a site and construction of a building without undue delay, a property of equal desirability and utility.
- The **Direct Comparison Approach** examines the cost of acquiring equally desirable and valuable substitute properties, indicated by transactions of comparable properties, within the market area. The characteristics of the sale properties are compared to the Subject Property based on time and such features as location, size and quality of improvements, design features and income generating potential of the property.
- The **Income Approach** to value is utilized to estimate real estate value of income-producing or investment properties.

The selection of a relevant methodology depends upon the nature and characteristics of the real estate under consideration.

The **Direct Capitalization Method** is based on the conversion of current earnings directly into an expression of market value. The net income for the current or forthcoming fiscal year is capitalized with an overall rate, which reflects the investment characteristics offered by the asset. The capitalization rate used is based on the analysis of sales and interviews with people active in the market.

**Discounted Cash Flow Technique** allows the appraiser to account for the anticipated growth or decline in income over the term of a prescribed holding period. Two rates must be selected for an application of the DCF process:

- The internal rate of return or discount rate used to discount the projected receivables; and
- An overall capitalization rate used in estimating reversionary value of the asset.

The reversionary capitalization rate utilized is usually similar to the rate that would be applied in present market conditions.



### 3.2.2 Selection of Relevant Methodology

Per the Ministry of Housing and Long-Term Care, Class B license that are in facilities owned by municipalities do not face the same expiration restrictions as privately held license. Notwithstanding the foregoing, the purpose of an appraisal is to estimate market value at a point in time via a hypothetical transaction. Should the Subject Property transact, it would be from municipal ownership to another body, as such, the licensing restrictions would come into effect. As a result, the market value and hypothetical transaction contemplated herein assumes private ownership.

As the property is an income producing asset, purchasers would analyze the property based on its income generating capability. Given the licensing restrictions of Class B beds (should they be transferred from municipal ownership), the income stream ends in June 2025. Furthermore, the Subject Property is operated at a material income deficit every year, as such there is no income to analyze, and all expense metrics would need to be stabilized at market levels. This is superseded by the fact that without significant capital investment and redevelopment, the licenses for the beds within the Subject Property expire in June 2025. For this reason, **the income approach has been excluded.**

Given the nature of Class B, C and D Long Term Care facilities, without significant capital investment via redevelopment, the licensing will expire in June 2025 and the income stream will cease to exist. Discussions with purchasers of Class B, C and D Long Term Care facilities indicate that these improvements are being purchased on a price per bed unit rate. That unit rate depends on the location, excess density to permit concurrent redevelopment, condition of the existing improvements, etc. Purchase decisions based upon a common unit rate relies on the principle of substitution, which is the underlying principle of the Direct Comparison Approach. As such, for Class B, C and D facilities, the **Direct Comparison Approach to value is deemed to be the only relevant approach to value.**

For Investment properties such as the Subject Property, potential purchasers would place considerable emphasis on the income earning potential of the Subject Property. In this regard, the Income Approach would be the favoured method of valuation. Seniors' housing buildings are typically valued using the Direct Capitalization method within the Income Approach.

The Direct Comparison Approach is typically utilized as a secondary valuation method for seniors housing properties. The Direct Comparison Approach considers a property in comparison to market sales based on price per unit. Generally, buyers give primary consideration to existing and future income levels rather than the cost per unit. Considering the property based on price per unit serves as an additional check and balance on the conclusion derived via the Income Approach.

The basis for comparison included the consideration of the following:

- Property Rights Conveyed
- Financing Terms
- Conditions of Sale
- Market Conditions
- Location
- Physical Characteristics
- Economic Characteristics

## 3.3 Findings

### 3.3.1 Location Overview – Lindsay

The Subject property is situated within the Town of Lindsay in the Kawartha Lakes region of the Province of Ontario. The district is approximately 43 km west of Peterborough. The Subject Property is located within a commercial node in Lindsay, along Kent Street West. This town features public transportation via Lindsay Transit, which provides bus service to the community and surrounding area. It was noted that the only hospital in town, Ross Memorial Hospital, is situated within proximity to the Subject Property. Additionally, Fleming College is located just southeast of the Subject Property. Residential pockets can be found to the south, north and east side of the Subject Property. The immediate area of the Subject Property consists of commercial, residential, and vacant land uses.

**Table 4: Location Overview of the Property**

District Boundaries		Adjacent Districts	
North	Scugog River	North	Rural Ops & Cameron
South		South	Rural Ops & Janetville
East	Verulam Road South	East	Rural Ops & Omemee
West	Highway 7 / Highway 35	West	Rural Ops & Oakwood
Major Arterials & Access			
Access	The property has good access characteristics along a major arterial in the east side.		
Arterials	Verulam Rd S, Lindsay St S, Kent St W, Colborne St E.		

### 3.3.2 Site Description

The Subject Property features locational and accessibility characteristics like other long-term care facilities in similarly sized municipalities.

**Table 5: Site Description**

<b>Assessor Parcel</b>	632380071	<b>Number Of Parcels</b>	1
<b>Shape</b>	L-Shaped - See Plot Map for Exact Shape	<b>Topography</b>	Sloping below street grade
<b>Adjacent Use North</b>	Institutional and low-density residential uses	<b>Density / Site Coverage</b>	Site has been developed to a 0.23 density
<b>Adjacent Use South</b>	Institutional and open space land uses	<b>Zoning</b>	Community Facility (CF)
<b>Adjacent Use East</b>	Institutional, commercial, open space and low-density residential land uses	<b>Drainage</b>	Assumed Adequate
<b>Adjacent Use West</b>	Low-density residential and open space land uses	<b>Utilities</b>	All available to the site

Land Area	Acres	Square Feet
Primary Parcel	10.85	472,632

Excess Land	0.00	0
Surplus Land	0.00	0
<b>Total Land Area</b>	<b>10.85</b>	<b>472,632</b>

### 3.3.3 Land Use / Zoning

According to the relevant land use / zoning bylaw for the City of Lindsay, the property is currently classified CF (Community Facility). A zoning summary and a listing of pertinent zoning requirements are presented as follows:



**Table 6: Land Use / Zoning**

<b>Municipality Governing Zoning</b>	City of Lindsay
<b>Zoning Bylaw Number</b>	2000-75
<b>Current Zoning</b>	Community Facility (CF)
<b>Permitted Uses</b>	A full list of permitted uses is in Appendix 6
<b>Current Use</b>	Long Term Care Facility
<b>Is Current Use Legally Permitted?</b>	Yes
<b>Zoning Change</b>	Not Likely
<b>Conforming Use</b>	The existing improvements represent a conforming use within this zone
<b>Minimum Yard Setbacks</b>	
Front (Meters)	12
Rear (Meters)	9
Side (Meters)	6.0 - 9.0
<b>Maximum Building Height</b>	15.0 Meters

<b>Maximum Site Coverage</b>	50%
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### 3.3.1 Property Data

#### Municipal Address

220 Angeline Street S., Lindsay, Ontario

#### Legal Description

P.I.N.	Legal Description
632380071	PT S1/2 LT 18 CON 5 OPS PT 2-33 57R7214; S/T & T/W R309070; S/T R319394, VT46616; KAWARTHA LAKES

#### Encumbrances

There are no encumbrances registered against the title of the Subject property.

#### Realty Taxes/Assessment

The current realty tax and assessment information for the Subject Property is as summarized as follows:

Roll No	Total 2023 Assessment	Total Assessment per Unit
165102000150500	\$6,096,000	\$36,723

### 3.3.2 Description of the Improvements

The Subject Property is improved with a Class B Long Term Care facility known as Victoria Manor, operated by the City of Kawartha Lakes as of the Effective Date. The Subject Improvements consist of four, two- storey residential wings and feature a mixture of basic, semi-private and private rooms.

**Table 7: Description of the Improvements**

<b>Property Type</b>	Seniors' Housing		
<b>No. of Stories</b>	2 story building		
<b>Units</b>	<b>Unit Types</b>	<b># of Units</b>	<b>% Total Units</b>
	Basic Beds	76	46%
	Semi-Private Beds	66	40%
	Private Beds	24	14%
	<b>Total/ Average</b>	<b>166</b>	<b>100%</b>
<b>Year Built</b>	The improvements were reported to have been constructed in 1989.		
<b>Quality &amp; Condition</b>	The property represents good quality construction in good overall condition.		
<b>Observed Condition</b>	The Subject property demonstrates a condition and quality consistent with other Class B Long Term Care facilities of a similar vintage.		

The property is in good overall condition and free from any visible deferred maintenance that would significantly impact the property's market value or its marketability.

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Per the Ministry of Housing and Long-Term Care, the licenses for Class B beds are set to expire June 30, 2025, except for those under ownership of municipalities. Should ownership of the Subject Property be transferred from the municipality, the licenses would face the same terminal date as the balance of Class B licenses across the province.

### 3.3.3 Investment Characteristics of the Subject Property

The following summarizes the major investment attributes of the property that potential investors would consider when determining an appropriate return and yield when making a purchase decision.

#### Location

The Subject Property is located within the Town of Lindsay, within the City of Kawartha Lakes, and is accessible via private vehicle and public bus. The surrounding land uses are other institutional land uses, and the locational characteristics are commensurate with other institutional/Long Term Care land use in similar locations. Access to nearby residential population for family members and work force are important characteristics.

#### Physical Attributes

The Subject Improvement are in good condition. Per the Ministry of Housing and Long-Term Care, the Subject Property is classified as Class B, meaning that under any ownership other than municipal ownership, the license is set to expire in 2025 due to non-compliance with modern design standards. Significant renovation or redevelopment is required to ensure compliance beyond 2025.

#### Operational

Given the nature of Long-Term Care facilities within Ontario, rent and expense subsidization is set by the government. As of the Effective Date the Subject Property is operating at expense levels that greatly exceed private ownership, resulting in a net loss every year.

#### Market

The market for Class B, C and D long term care facilities within Ontario is narrowly traded due to the impending expiration of licenses and associated revenue streams. These facilities require extensive renovation or redevelopment to ensure compliance beyond 2025 and as of the Effective Date, government construction subsidies are widely considered inadequate to cover the significant costs associated with Long Term Care construction. As such, only Class B, C and D facilities in central locations that have significant higher and better use/redevelopment potential are actively being traded.

The Subject Property demonstrates an average location, has been the object of an on-going maintenance and capital program, and is situated upon a lot featuring excess density to the east. Given this, a narrowed range between \$60,000 to \$70,000 is appropriate, resulting in the following range of values:

**Table 8: Range of Valuation**

No. Units	\$/Suite	Value <sup>(1)</sup>
166	\$60,000	\$9,950,000
166	\$65,000	\$10,800,000
166	\$70,000	\$11,600,000

(1) Rounded to nearest \$50,000

In conclusion, a value estimate in the range of \$9,950,000 to \$11,600,000 using the Direct Comparison Approach is indicated as of the effective date of the analysis. A value conclusion of \$10,800,000 for the Subject Property building via the Direct Comparison Approach is concluded in consideration of the overall appeal of the buildings.

## 4.0 Asset Inventory

### 4.1 Summary

Altus Group Limited (“Altus”) developed an Asset Inventory on behalf of Colliers Project Leaders, of Victoria Manor and its ancillary facilities. Asset inventory provides a central repository of information on all assets and its sub-elements to facilitate effective asset management. This allows for effective monitoring, analysis of asset performance and ensures timely intervention and management.

A hierarchical inventory of the main building’s elements or components and ancillary facilities were prepared in accordance with industry (Uniformat) standards and municipal asset management requirements. There are a total of 176 assets marked with asset ID tags, model/make, installation year, etc. A hierarchal inventory of the facility’s assets was developed in accordance with industry standards and municipal asset management requirements. It has been provided in Appendix 2.

The Asset Registry was prepared by examining all recent and available documentation, and the physical inspection of the Building Components. This provides a central database of Victoria Manor’s assets ensuring ease of tracking, monitoring, validation, and asset management. The data collected provides a snapshot of the asset portfolio, be it physical characteristics or commercial value, at any time and informing decisions related to maintenance requirements, performance or retention, investment, or disposal.

### 4.2 Methodology

The methodology of the Asset Registry includes the examination of all recent and available documentation, and the physical inspection of the Building Components. Altus applied a unique and distinct barcode label to all assets listed. Altus logged and recorded a hierarchical inventory of the facility’s assets, applying Uniformat standards including where available equipment nameplate information, including:

- Year of install (where known)
- Unit rating
- Quantum Units and Quantum Type
- Manufacturer (where known)

## 5.0 Building Condition Assessment

### 5.1 Summary

Altus Group Limited (“Altus”) performed a Condition Assessment on behalf of Colliers Project Leaders, of Victoria Manor and its ancillary facilities. This assessment is not a “Structural, Integrity, Adequacy, Sufficiency, Soundness, Safety and/or a Conformity Report” or “Structural Assessment of Existing Buildings and Designated Structures Guideline” as defined by the Professional Engineers of Ontario (PEO). This report comments only on the existing condition of structural elements based on visual, non-destructive review only, and based on a random sampling of areas on the inspection date by the reviewer. The report makes a recommendation for the repair /replacement of these elements based on the current age and visible condition, for financial planning purposes only.

The primary goals of the assessment include:

- Determine the overall building condition and performance of the primary systems.
- Identify the building requirements and prioritize them.
- Recommend actions with cost estimates for the capital projects within the report term.

The building is a three-story low-rise multi-room residential care facility with 166 beds. The building was constructed in 1989 and is 34 years old. The site was found to be in a generally well-maintained condition at the time of review. Short term maintenance requirements will cost \$276k in 3 years. Short term projects include repairs to drywall damage and wall protection in basement level, asphalt parking lots and loading dock resurfacing and repair. Continuation of the ongoing painting program in service hallways and resident home area corridors is planned.

The Capital Plan projects a requirement of \$1.66 million in 10 years. The Capital Plan also includes general budgeting allowances for interior finishes, exterior envelope, and exterior site system repairs such as windows and caulking, end of life replacement for roof top package units over the term of this report and elevator upgrades over the ten-year period.

Costs associated with all capital projects are provided in Appendix 2. The following projects (listed below) are recommended within the next three years and addressed as Priority 3 (P3) - Imminent Breakdown:

**Table 9: Costs for Priority 3 Projects – Imminent Breakdown**

Project	Fiscal Year	Cost
Elevator Cabs (x3) - Refurbishment	2024-2026	\$75,000.00
Baseboard Heaters and Heating System - Renewals	2024-2026	\$126,000.00
Roof Top Packaged HVAC Units	2024-2026	\$25,000.00
Asphalt Parking Lot	2024-2026	\$50,000.00
<b>Total</b>		<b>\$276,000.00</b>



## 5.2 Methodology

The assessment takes into consideration:

- The Life Cycle Maintenance activities for the Improvements.
- Repairs and replacement of Site Components; and,
- Development of Asset Registry
- The overall condition of the improvements, noting any deficiencies and required corrective actions.

The approach is to provide a general overview of the building systems, including a commentary on the mechanical, electrical, structural, and architectural components.

### 5.2.1 Site visit

Altus performed a Site Condition Assessment of Victoria Manor. Altus inspected the property on Dec 15th and 16th, 2022, Mar 28th and 29th, 2023 with assistance from the Manager, Building Services and Victoria Manor's maintenance staff. The site visit review included:

- On-site building(s) and site primary systems inventory and measurement (where possible).
- Visual review of the building's components to identify any deficiencies and needs relevant to system's physical and operation condition, health & safety, lifecycle, and code compliance, and provide resolutions along with any costs involved and in general accordance with the ASTM E 2018 Standard Guide for Property Condition Assessments.
- Electrical and mechanical systems were completed based on a visual review, reported problems, and on life expectancy of equipment, and without opening and/or testing any components.

### 5.2.2 Contingency and Escalation

The cost estimate includes a contingency allowance of 10% and are priced in current (2023) dollars for future projects. Taxes are excluded.

## 5.3 Findings

### 5.3.1 General Physical Condition

Generally, the subject property is in 'good' condition. Issues were noted in the exterior cladding and exterior entrance doors, which require replacement. Otherwise, most of the building elements and systems have been adequately maintained.

The key findings and recommendations in this report are outlined below:

- a) Repairs to the site asphalt parking lots
- b) Replacement of caulking on exterior Windows and Brick Cladding
- c) Replacement of Electric Baseboard Heaters in Resident Home Areas
- d) Replacement of one hot water tank
- e) Refurbishment of two passenger and one service elevator cab

Refer to Appendix 2 for further details.

### 5.3.2 Building Profile

**Table 10: Building Profile**

<b>Building Name</b>	Victoria Manor
<b>Site Address</b>	220 Angeline St. S Lindsay, ON
<b>Construction Type</b>	Steel Framed
<b>Facility Type</b>	Long-Term Care Home
<b>Ownership</b>	City of Kawartha Lakes
<b>Region</b>	Ontario
<b>Construction Year</b>	1989 (Opened)
<b>Total Building GFA (square feet)</b>	Approx. 107,956 sq. ft.
<b>Building RFA (square feet)</b>	Approx. 107,956 sq. ft.
<b>Land Size (Acres)</b>	Approx. 11.68
<b>Elevator(s)</b>	2 passenger, 1 service
<b># of Floors Above Grade</b>	1
<b># of Floor Below Grade</b>	1
<b>Occupancy Type</b>	Residential; Multi-Tenant
<b>Status</b>	In Service
<b>Heritage</b>	No
<b>Date of Inspection</b>	Dec 15th and 16th, 2022 Mar 28th and 29th, 2023

The floor areas on the three floors of the building are broken down as follows:

- a) Basement: 16,382 sq. ft.
- b) Ground Floor: 48,146 sq. ft.
- c) Second Floor: 43,428 sq. ft.

The exterior cladding of the building is brick masonry. The windows are aluminum framed and there is a conventional built-up flat roof. Heating is provided by multiple gas fired roof top units. Domestic water is provided by two domestic hot water boilers. The site features vehicular access from Angeline Street South and features an internal asphalt driveway and asphalt parking stalls. There are three elevators in the building.

### 5.3.3 Building Systems and Utilities

#### MECHANICAL

The heating system consists of one (1) natural gas boiler and multiple roof top units providing heating and cooling, with duct works, and diffusers and grills. Supplemental electric heating in offices and resident rooms are provided by perimeter baseboard heaters throughout the building. Humidifiers provide the necessary humidification especially in the winter. The HVAC system does not include a Building Automation System (BAS); zones are controlled by individual thermostats located in the electrical rooms on each home area floor.

## PLUMBING

Domestic water is provided by the local municipality via an eight (8”) main line. Hot water demands are met through three (3) hot water tanks via one (1) hot water storage tank and circulation pumps. The visible sanitary waste drainage includes cast iron and PVC pipes and fittings. The waste is collected from sanitary fixtures throughout the facility and discharged to a municipal waste system by gravity. The sprinkler room also contains two (2) cylinders of water softeners which supply the laundry and kitchen. Two (2) sets of sump pump rooms are located on the basement level for sanitary and storm water.

## ELECTRICAL

Electrical power is supplied to the facility by Hydro One and is provided by an overhead service and a dedicated exterior transformer on the north side of the facility. The transformer steps down the voltage from 44 KV to 600 Volts. The main electrical switch is in the basement. Equipment requiring 600 Volts is directly fed from the main panel with the necessary switches to the various panels throughout the site.

## CONVEYING

There are three (3) hydraulic elevators: two (2) passenger and one (1) service. All three elevators are connected to the emergency generator for power during power outages. Two elevators are accessed from the main corridor are designed to accommodate those with accessibility challenges.

## FIRE & LIFE SAFETY

The building is equipped with a sprinkler system. Fire extinguishers are mounted throughout the main corridors and stairwells. The fire alarm control panel (FACP) is installed in the main entrance vestibule on the ground floor. The fire alarm system consists of manual pull stations at the points of egress and alarm bells throughout the complex providing fire alarm audible signaling. Smoke detectors are ceiling mounted throughout the shared corridor spaces. The facility is equipped with a “Nurse Call” system as well. The system includes a main controller, nursing station consoles, bedside stations, bathroom/priority stations, dome lights, corridor annunciators and printer.

### 5.3.4 Recommendations for Additional Investigation of Action

Repairs to be completed include the following, where needed:

- a) Annual inspection of the major electrical equipment and infrared thermography scanning and arclash studies under annual maintenance program.
- b) Updating the Fire Safety Plan/Emergency Response Plan annually under annual maintenance program.

### 5.3.5 Environmental Issues

No issues were observed or reported by the property manager such as mold or contamination. An environmental audit was not conducted as part of this study.

### 5.3.6 Hazardous Materials

No documentation was provided or available onsite that would indicate that the property is in conformance with hazardous materials legislation. Hazardous materials (i.e., asbestos, Polychlorinated Biphenyls (PCBs), ozone depleting substances, and Chlorofluorocarbons (CFCs)) are suspected at the property; however, the presence, quantity and condition of hazardous materials could not be visually

confirmed. Only sampling and testing can confirm the presence of any hazardous materials. This was not conducted as part of this study.

### 5.3.7 Compliance with AODA

The findings, along with recommendations/suggestions, for correction per the act *Accessibility for Ontarians with Disabilities Act, 2005* have been presented in the *Comprehensive Accessible Buildings Checklist*, available in Appendix 5.

While most elements were found to be compliant with AODA, Table 11 includes seven recommendations for elements which were found to be non-compliant:

**Table 11: Summary of AODA Recommendations**

Element	Recommendations/ Suggestions/ Improvements
<b>Building Exterior</b>	
Is the route to the building entrance stable, firm and slip-resistant?	Continued ongoing maintenance is recommended to ensure compliance with the requirements to be substantially free from small bumps and breaks.
Do you use salt outside your building when there is ice?	It is recommended that consideration be given to using sand instead of salt on the accessible routes and ramps, as salt may be harmful to the paws of service animals.
<b>Building Entrance</b>	
Can the alternative accessible entrance be used independently and during the same hours as the main entrance?	An alternate does exist, but staff noted some wider scooters need to use the main entry doors
Are edges of carpets or mats securely attached to minimize tripping hazards?	Consider Securing carpeting or mats at edges to prevent possible slipping
<b>Building Interior</b>	
Do doors and door frames have good colour contrast with surrounding wall surfaces and floors?	Repaint areas under maintenance with similar color contrast when repainting to ensure continuity of compliance.
Does the nosing on stairs colour contrast with the treads?	Consideration should be given when repainting to ensure colour contrast where possible.
<b>Signage</b>	
Do washroom doors have Braille lettering?	Tactile signage is recommended
Raised (tactile) male/female symbol?	
Raised letters?	

## 5.4 Maintenance Plan

### 5.4.1 Summary

Altus has developed a maintenance program, as an extension of the asset inventory register, based on asset condition assessments, service levels, legislation, industry standards, cost minimization and other

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relevant factors and considerations. The Maintenance Plan, comprised of a table showing facility elements, maintenance and frequency required, has been attached as Appendix 7.

### 5.4.2 Methodology

The Maintenance Plan includes the examination of all recent and available documentation; and the physical inspection of the Building Components, and a review of all building plans and associated specifications and reports, field notes, and other relevant information to prepare a guide for the ongoing maintenance of the elements listed. This assessment is based on the following criteria:

- The systems and their maintenance and task driven frequencies were referenced against cost data software including RS Means and Altus' own proprietary databases, as well as applying Altus's own expertise.
- Initial data received from Victoria Manor facilities operations staff.
- Building Condition Assessment completed by Altus as part of this study.
- On-site review.
- Further meetings with current project team members to update and review methodology, and initial outcomes employed in the operating estimates provided to date.
- Re-check against industry benchmarks.

## 6.0 Capital Cost Forecast

### 6.1 Methodology

#### 6.1.1 Basis of Assessment

The assessment of Capital Expenditures required is based on the following:

- Building systems failing to meet their performance level.
- Building systems that have reached or are projected to reach the end of their productive life cycle within a 10-year period.
- Information provided by the building owner /or facility management company.

Conclusions are based on the following:

- On-site identification and measurement (where possible) of a specific deficiency and item priced accordingly. Measurement of areas from site visit and drawings where available and priced at current replacement cost prevailing unit rates. It should be noted that reported floor areas are taken directly from documents provided and detailed quantities will need to be assessed for any tendering purposes. Altus Group Limited has carried out no independent verification of measurement.
- Information available from maintenance logs relating to mechanical equipment, etc., priced at prevailing replacement costs for similar or equivalent equipment.

#### 6.1.2 Contingency and Escalation

The cost estimate includes a contingency allowance of 10% and is priced in current (2023) dollars for future projects. Taxes are excluded.

## 6.2 Estimated Capital Expenditures

The estimated current replacement value (CRV) is \$42,102,840 and was developed using RS Means, as well as Altus cost guidelines taking into consideration type of building, location, and structural/ mechanical/ electrical systems specifications.

Measurements and ratings were taken during the site visit. The estimated costs exclude the associated development soft costs<sup>1</sup> of the buildings.

**Table 12: Estimated Capital Expenditures**

Expenditure Summary Table	
Total Estimated Budget for 10-Year Reporting Period	\$1,661,500.00

<sup>1</sup> Soft costs are those costs that are not directly tied to the physical construction of a building but are still essential for the successful completion of a project. Soft costs typically include various architect's/engineer's, permits, fees, and other expenses associated with planning, designing, and managing a development project.

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Average Annual Budget	\$166,150.00
Current Active Projects	\$0.00
Calculated FCI	1.1%

### 6.2.1 Capital Expenditures Forecast

The Table 13 shows the recommended capital repairs and replacements for base building systems over the next 10-years. Capital expenditures are defined as those that exceed the \$5,000 threshold and are not carried out as part of annual maintenance programs.

Failure to address capital components in a timely fashion may cause further deterioration and damage to other associated components, also increase the cost of corrective measures and/or impact life safety. Also, any lack or reduction of planned preventive maintenance activities may also cause further deterioration of the facility.

**CAPITAL PLAN AND RENEWAL FORECAST**

**Table 13: Capital Plan and Renewal Forecast**

ELEMENT	System	Recommendations	Total	2023	2024 Year 1	2025 Year 2	2026 Year 3	2027 Year 4	2028 Year 5	2029 Year 6	2030 Year 7	2031 Year 8	2032 Year 9	2033 Year 10
		<b>Annual total recommended repairs /replacements</b>	<b>\$1,661,500</b>	<b>\$20,000</b>	<b>\$279,500</b>	<b>\$152,000</b>	<b>\$117,000</b>	<b>\$64,000</b>	<b>\$122,000</b>	<b>\$77,000</b>	<b>\$85,000</b>	<b>\$135,000</b>	<b>\$260,000</b>	<b>\$350,000</b>
B20	Exterior Enclosure	Window and Brick Caulking replacement	\$120,000		\$60,000	\$60,000								
B20	Exterior Doors	Replacement of Main Entry Exterior Door	\$35,000		\$35,000									
B20	Exterior Doors	Replacement of Two Loading Dock Overhead Doors	\$10,000		\$10,000									
B30	Roof Covering	Allowance for investigation/ repairs and waterproofing to 2 terraced roofs	\$15,000	\$15,000										
B30	Roof Covering	Replacement of BUR Roof	\$350,000											\$350,000
C10	Interior Construction	Allowance for Interior Finish walls, wall guards, counter tops -Renewal	\$50,000			\$25,000					\$25,000			
D1010	Conveying Systems	Elevators - Cab Finish Updates (x3)	\$75,000		\$25,000	\$25,000	\$25,000							
D1010	Conveying Systems	Elevators - Control Modernization(x3)	\$36,000					\$12,000	\$12,000	\$12,000				
D1010	Conveying Systems	Laundry Chute-Allowance for Investigation in Air Pressure issues	\$10,000		\$10,000									
D2030	Mechanical-Plumbing	Replacement of Hot Water Tank	\$7,500		\$7,500									
D30	HVAC	Allowance for replacement of Baseboard Heaters- end of life (90% of building)	\$168,000		\$42,000	\$42,000	\$42,000	\$42,000						
D30	HVAC	Allowance for replacement of Roof Top PKg Units based on end of life	\$175,000		\$25,000				\$50,000	\$50,000	\$50,000			



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ELEMENT	System	Recommendations	Total	2023	2024 Year 1	2025 Year 2	2026 Year 3	2027 Year 4	2028 Year 5	2029 Year 6	2030 Year 7	2031 Year 8	2032 Year 9	2033 Year 10
D50	Electrical Power Distribution	Replacement of Main Electrical Panel and Switchgear	\$125,000									\$125,000		
D50	Emergency Light and Power	Allowance for Overhaul of Diesel Generator (includes rental of backup)	\$250,000										\$250,000	
D50	Electrical Power Distribution	Allowance for Replacement of Distribution Panels on resident home area floo4s	\$40,000					\$10,000	\$10,000	\$10,000	\$10,000			
D5037	Fire Alarm System	Fire Alarm Panel and Field Devices - Renewal Budget	\$10,000									\$10,000		
D50	Security Systems	System upgrades Allowance	\$10,000										\$10,000	
G20	Site Components	Allowance for replacement of parking lot asphalt	\$150,000		\$50,000		\$50,000		\$50,000					
G20	Site Components	Allowance for repairs to wire fencing on stone retaining wall at loading dock driveway	\$5,000	\$5,000										
G20	Site Components	Allowance for repairs to concrete at loading dock	\$10,000		\$5,000					\$5,000				
G20	Site Components	Allowance for cement repairs to balcony/walkway above loading dock	\$10,000		\$10,000									

## 7.0 Stakeholder Consultations

### 7.1 Summary

Colliers conducted a series of consultations with various stakeholders and collected a wide range of perspectives. All engagements were intended for the purpose of exploring the effectiveness of the home in serving its mandate now and in the future (short and long-range). Broad stakeholder consultations were conducted at Victoria Manor on February 9, 2023, and a meeting with senior City staff held on March 1, 2023. A second round of in-person stakeholder consultations was conducted at Victoria Manor on June 29, 2023.

Participation included: residents, front line staff, Family Council, management staff at Victoria Manor, and the management company, Medical Director, expert leaders in healthcare including local hospital, home and community care, system planners, Emergency Services, City leadership, and the general community.

The following responses were provided by the participants during the engagement sessions:

Positives:

- Public spaces are well designed and spacious.
- Strong reputation for the successful delivery of high quality LTC services for 35 years and through the COVID-19 pandemic.
- Location and accessibility in the community is good.

Challenges/Gaps:

- Building Performance: plumbing and HVAC systems are not maintaining expected comfort levels.
- Care Delivery: building design does not accommodate current IPAC requirements, lighting plan does not support good clinical practices, door opening widths too narrow for modern equipment.
- Resident experience: dementia care needs are increasing, small personal living spaces limit residents' independence; access to outdoors is limited.
- The direct living areas (Resident Home Areas – RHA) are not designed to match the service level demands in the current LTC environment.

### 7.2 Methodology

Methods of consultation included: focus groups, individual and small group interviews, and a public survey.

Consultations were conducted with external and internal stakeholders to assist in identifying current barriers to service delivery for residents in Victoria Manor – at the individual, service, and system level. For this purpose, focus groups, individual and small group interviews, and a public survey were used where deemed appropriate. The engagement methods used are shown below:

- a) 7 Focus Group Discussions, 27 total attendees

- b) 4 Individual Interviews
- c) 4 Small Group Interviews
- d) 1 Public Survey using the City’s Jump In Survey

### 7.2.1 Participation

The following table provides a non-exhaustive list of the types of stakeholders (individuals and groups) that were consulted.

**Table 14: List of types of individuals and groups included for stakeholder consultations**

Participants		
a) Residents	b) Front line staff	c) Family Council
d) Management staff at Victoria Manor, and the Management company	e) Medical Director	f) Emergency Services
g) Expert leaders in healthcare including local hospital, home and community care, system planners	h) City Leadership staff	i) General community

We compiled the commentary received under the following themes to assist in consolidation.

**Table 15: Themes for stakeholder consultations**

Themes	
a) Outdoors – access to and quality	b) Location
c) Supports for staff	d) Quality of Life for residents
e) Aesthetics	f) Performance Indicators (residents)
g) Performance Indicators (staff)	h) Functional attributes
i) MLTC Design Standards	j) CSA Standards
k) IPAC	l) Process
m) Risk	n) Fire/Building Code
o) Technology	p) Health System
q) Future service priorities (general input)	r) Future service options (clinical)

## 7.3 Findings

The full set of findings is attached as Appendix 8, including the summary report of the Jump In Community Survey.

### 7.3.1 Strengths & Challenges

#### STRENGTHS

The following points summarize strengths that support the valuable contribution Victoria Manor provides to the City of Kawartha Lakes community:

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- a) Victoria Manor has been providing quality long-term care services in Kawartha Lakes for 35 years.
- b) The location and free parking make the Manor easily accessible.
- c) The building's ample public spaces set it apart in the LTC sector (including auditorium, tuck shop, staff training room, solarium), and provide interesting destinations for independent residents.
- d) Large chapel supports a range of faith practices.
- e) Skylights bring natural light into the public areas in the building.
- f) Approximately half of the Survey respondents felt that the building meets the needs of current residents and/ or staff.
- g) Wayfinding both in the resident and public spaces is a strength.
- h) The Manor was able to meet IPAC requirements for resident safety during the pandemic despite building design limitations.

### CHALLENGES

The following points summarize challenges we identified to Victoria Manor's continued success:

- a) The building was not contemplated to accommodate the type and level of care that is common to the LTC environment in 2023.
- b) Personal living spaces are cramped, limiting residents' independence and enjoyment due to furniture placement limitations, and washroom layout.
- c) Door opening widths are too narrow for some modern equipment (wheelchairs, scooters, mechanical lifts).
- d) Caregiving for dependent residents in residents' personal spaces is inefficient and, at times, compromises the goal of maintaining dignity, choice, and natural daily rhythms.
- e) Needs of the cognitively impaired and those with responsive behaviours are challenged due to crowded resident home areas with few activity areas, and residents who wander can violate the privacy of others.
- f) Lighting plan does not support good clinical practices.
- g) Workspaces (such as bathing facilities) are not adequate for the level of care of residents in 2023.
- h) Access to the outdoors for dependent residents is very limited.
- i) Dining rooms are overcrowded.
- j) Furnishings and finishes are worn. RHAs have similar appearance and do not help identify each separately.
- k) With the increase in staffing by 2025 there will be inadequate staff parking, as well as goods delivery challenges.
- l) Staff workspaces are cramped and there are few spaces for private consultation with residents/ families.
- m) Building was not designed for today's IPAC requirements such as ability to cohort, air exchange(ventilation), availability of handwash stations, and handsfree door operation.
- n) HVAC and plumbing (both supply and sanitary) are underperforming.
- o) Technology such as security CCTV, and smart TV cannot be used due to outdated IT infrastructure.
- p) One quarter of survey respondents do not feel that the building meets needs of residents and/ or staff.

### 7.3.2 Future Considerations

- a) Serving Younger adults and those who have bariatric conditions is difficult due to space limitations.
- b) Health system providers stated that additional on-site services (diagnostics, specialty consultations, treatments) would add value, and can obviate the need for residents to go outside the Manor to receive the services they need.
- c) 56% of survey participants stated that, by 2030, the building will not meet the needs of the aging population, and 64% of survey participants stated the building would not meet the needs of the aging population by 2045.
- d) Many stakeholders would like to ensure that all rooms are private.
- e) A continuum of housing solutions and medical services (diagnostics, consultations etc.) co-located for support of the local aging population is valued by most stakeholders.
- f) Survey participants also ranked the integration of other community services into the operation as high value (childcare etc.).

### 7.3.3 Future Opportunities for Victoria Manor

- a) Growth demands for the geographic area should be assessed, to determine overall, whether additional beds will be required. Current forecasts are short range and reflect waitlist numbers. The view by several stakeholders is that there is an unmet need, and this was identified as the top ranked future direction in the community survey.
- b) Ontario Health's Lead suggested that they have the authority to control additions of beds to the local system. NOTE: Ministry of Long-Term Care Licensing has a legislated mandate that is embedded in the *Fixing Long-Term Care Act, 2021* regarding the Minister's responsibility in this domain.
- c) Campus of Care (village for aging in place) in which complimentary services are co-located were favoured by several stakeholders. This would include Community Support Services, and housing with supportive services (could be independent, assistive living or supportive housing). Benefits include the ability to co-locate specialty healthcare disciplines according to increased population/demand and improved familiarity with LTC by those who are aging in place and may require admission eventually, using a stepped approach to increased dependency or behavioural concerns whether related to dementia or mental health. In the past community members could come and use the cafeteria, and this connected the Home to the community. In the future such practices could be reinstatement as part of a campus (e.g., Georgian Village), and possibly use the small adjacent kitchen for meal prep for unsheltered community members. See AdvantAge Ontario's study [\*Campuses of Care: Supporting People, Sustaining Care Systems in Ontario, 2020.\*](#)
- d) The second highest ranked future direction in the Community Survey was increasing the number of private bedrooms at Victoria Manor.
- e) More point of care services to provide care for higher complex needs enabled on site such as peritoneal dialysis, management of complex conditions including congestive heart failure and chronic lung disease, and slow- stream or convalescent care rehab. Diagnostic equipment as well as Ontario Telemedicine Network (OTN) for specialty consultations onsite would reduce the need for ER transfers.
- f) Residential Hospice may be appropriate to also co-locate. NOTE; there are mixed opinions as Hospice serves the whole age spectrum with a wide range of diagnoses.

- g) Younger populations being served in clusters was referenced in most sessions. It is understood that adults with complex medical conditions need services similar to LTC, but their personal and social needs are not compatible with the typical LTC population. It was suggested that for younger populations, uniquely designed programs and services can be provided in physical spaces similar to LTC.
- h) Younger populations with mental health diagnoses are underserved. While this type of need is not compatible with the LTC model there are few accommodation options in the region. Only one comment was recorded regarding this topic.
- i) Dementia care needs are on the increase as it is understood that most persons admitted to LTC have cognitive impairments. Modifications to typical LTC spaces would improve the service to the general population. Additionally, and most specifically referenced by stakeholders is the need for more secure accommodations for the residents with significant cognitive impairment that results in aberrant behaviours (responsive behaviours). While Victoria House in the Manor is designated for this population and seems successful, the addition of more units should incorporate more generous programming spaces (Montessori method was mentioned several times). Design of a place that focuses on dementia could include layouts that reduce the need for false barriers such as yellow strips.
- j) Diagnostics support at Victoria Manor was suggested by a few stakeholders. The vision is that more healthcare services be brought on site to be accessible without the stress of scheduling and travelling outside.
- k) Bariatric care needs are increasing. Larger rooms, wider doors, special equipment, and amenities that support full service to this population will be needed.
- l) Infection prevention and control (IPAC) requirements for congregate living such as LTC should be normalized into the designs, so that the separation of units for both resident and staff purposes do not result in isolation, and precautions and processes can be easily implemented (such as donning and doffing).
- m) Intergenerational connections such as possible co-location of children's day care services, and ways to engage all ages, and strengthen family member involvement.

## 8.0 Examination of Service Levels

### 8.1 Summary

The City is incorporating user-facing needs with a review of the infrastructure through the building condition assessment. It is necessary to discover the standards for the delivery of Long-Term Care (LTC) services as this is the primary purpose for which the building is expected to perform.

### 8.2 Methodology

The following resources, of types of service standards which are known in the industry as valid assessment tools for the performance of the functions in a LTC home, were reviewed:

- a) Ministry of Long-Term Care Compliance
- b) Workplace Safety and Insurance Board (WSIB)
- c) Commission on Accreditation of Rehabilitation Facilities (CARF) Accreditation
- d) Management Company Performance Management
- e) City Budget
- f) Canadian Standards Association Standard Z8004 Long-term Care Home operations and Infection Prevention and Control
- g) Long-Term Care Home Design Manual 2015
- h) Fixing Long-Term Care Act 2021

Published reports specific to Victoria Manor have been analyzed to discover service areas that are impacted by the building's functional effectiveness. Additionally, a comprehensive site review against the current Long-Term Care Home Design Manual, 2015 was conducted in-person. Finally, a high-level review of recently published CSA standards captured significant modernization directions. This review will be further complemented by the benchmarking component of this study.

#### 8.2.1 Service Levels Examined

##### MINISTRY OF LTC QUALITY INSPECTION PROGRAM

The Ministry has a comprehensive accountability system which includes the monitoring of reportable events and surprise on-site inspections against detailed criteria. Public reports which are posted on the government website were reviewed.

##### ACCREDITATION

All LTC Homes in Ontario are strongly encouraged and incentivized to participate in independent Accreditation. Victoria Manor maintains its Accreditation with CARF (Commission on Accreditation of Rehabilitation Facilities). The full report of an independent survey conducted in 2019 was reviewed.

### LTC BUILDING CLASSIFICATION

All LTC Homes in Ontario are classified against published “Long-Term Care Home Design Standards”.

The standards are as follows:

Long-Term Care Bed Structural Classification	Definitions
“New” Beds	Beds that comply with the 1999 Long-Term Care Facility Design Manual, 2002 Long-Term Care “D” Retrofit Facility Design Manual, or the 2009 or 2015 Long-Term Care Home Design Manual
“A” Beds	Beds that substantially comply with the 1999 Long-Term Care Facility Design Manual
“B” Beds	Beds that substantially exceed the structural standards of the 1972 Nursing Homes Act Regulation
“C” Beds	Beds that meet the structural standards of the 1972 Nursing Homes Act Regulation
“Upgraded D” Beds	Beds that do not meet the structural standards of the 1972 Nursing Homes Act Regulation but were upgraded under the 2002 D Bed Upgrade Option Guidelines (by spending a minimum of \$3500/bed on approved improvements to benefit resident health, safety or well-being)

Source: [AdvantAge Ontario](#)

Note: All LTC beds structurally classified as “B”, “C” and Upgraded D” are eligible for redevelopment under the Enhanced Strategy for LTC Homes. Victoria Manor is structurally rated as “B” as it was built prior to the publication of Design Standards in 1999. At the time it was constructed the purpose was “Home for the Aged” which, today, might be considered “retirement lodging.”

### FIXING LONG-TERM CARE ACT (2021)

Ontario has a highly regulated LTC Sector. Rigour and regulation were substantially formed through the *Long-Term Care Homes Act (2007)* and renewed in recent legislation that was revised with a view to the challenges of the Pandemic. Some mandatory building and infrastructure requirements were incorporated into this new Act that have not yet been included in the Long-Term Care Home Design Manual (2015) Standards.

### CANADIAN STANDARDS ASSOCIATION STANDARD CZ8004

Two National standards initiatives were undertaken during 2021 and 2022 during the COVID pandemic. Health Standards Organization published a guidance document to support the delivery of person-centred care. Canadian Standards Association released a comprehensive set of recommendations to improve the overall environment for residents, staff and visitors.

### GOVERNANCE

Each Municipality is responsible to form a Committee of Management to oversee the operations of its Long-Term Care Home(s). The form of oversight is locally determined. COKL came into being on January 1, 2001, following an amalgamation required by the Province during its “Common Sense Revolution”. Prior to this, some member municipalities of Victoria County, and at the time of construction of Victoria Manor, jointly oversaw the Home under the Homes for the Aged and Rest Homes Act. In 2010, a sub-committee of City Council was struck for the oversight of the Home as required under the Long-Term



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Care Homes Act. This structure remains in place with 3 committee members appointed by Council. All responsibilities are delegated to the City Council.

### **MANAGEMENT AND ADMINISTRATION**

Victoria Manor is operated on behalf of the City by Sienna Senior Living Inc. Sienna is both an owner/operator and a manager on behalf of owners throughout Ontario. The contract between these parties has been in place since 2012. As set out in the contract Sienna Senior Living provides bi-monthly reports on Key Performance Indicators to the Committee of Management. The indicators are based on Canadian Institute for Health Information (CIHI) indicators. Additionally, Sienna provides Financial, and Satisfaction results. A more granular report is provided to the City's Management.

## **8.3 Benchmarking**

A review of comparable municipal long-term care facilities in Ontario was conducted to aid in the identification of industry best practices and the formulation of needs and recommendations.

Table 16: Benchmarking of comparable LTC facilities in Ontario

Overview	Sector	Victoria Manor
<b>Eastern Ontario Wardens Caucus: Review of Eastern Ontario LTC Facilities Published in 2021 (Data from 2019 -2020)</b>		
<p>The overall objective was an independent report that provides a current state analysis for the municipal operated Long-term Care sector for Eastern Ontario and recommendations for future actions.</p> <ul style="list-style-type: none"> <li>• Provided a high-level overview of LTC sector within the Province.</li> <li>• Conducted a comprehensive review of current operations, including organizational structure, financial and staffing models, fixed asset and facilities for all 15 LTC homes in Eastern Ontario.</li> <li>• Developed service profiles</li> </ul>	<p>Estimated lifecycle of a LTC building is 45 years assuming asset management planning and funding is maintained.</p> <p>Tax Levy contributions are provided by all of the EOW counties. This is measured per bed day. Current range is \$41.62 high to \$4.70 low.</p> <p>Reserve contributions are generally considered to be good financial planning practice to moderate the fluctuating spending for State of Good Repair 50% of the Homes do not actively contribute to reserves, although approximately half have a current reserve balance over \$1M.</p> <p>Municipal Homes may self fund large capital outlays or may seek lender assistance through Infrastructure Ontario.</p> <p>Minor Capital funding is allocated by the Province in the monthly Payment for Home operations. During a special focus on Falls and resident Risk in the late 2000's the Province invested in purchase of mechanical lifts at all LTC Homes. This equipment is at the end of lifecycle. Provincial funding for asset management is unpredictable; e.g., Air Conditioning.</p> <p>MLTC will provide a per diem funding for new Capital Development project. This is a time limited offer of a "Construction Funding Subsidy" which is designed to refresh and grow the supply of long-term care services in Ontario by 2028.</p>	<p>Victoria Manor is 35 years old, requires significant investment (13 -17M) and a plan for its replacement within 10 years. Victoria Manor and one other Home are not actively planning to achieve the current Design Manual standards.</p> <p>COKL tax levy is the third lowest levy per household at \$6.63 per bed day.</p> <p>Victoria Manor has no reserve funds.</p> <p>There is no current debt remaining from the initial capital project (1988).</p> <p>There is limited funding for ongoing capital maintenance costs. The updated funding formula provided by the Province removed Structural Compliance Premium and replaced it with a lesser valued Minor Capital allocation. The cost of repair and replacement of major equipment exceeds this funding. The mechanicals lifts that were purchased at Victoria Manor are at the end of lifecycle but no replacement funding has been allocated by the Province. The safe care of residents now depends on the use of lifts and the Home must certify equipment annually or budget for the replacement.</p> <p>"The cost of re-development, ranging from \$50M to \$85M per facility, COKL must provide capital outlay for a replacement facility.</p>

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Overview	Sector	Victoria Manor
<p>for each of the 15 LTC facilities.</p> <ul style="list-style-type: none"> <li>Completed a comparative analysis.</li> </ul>	<p>Staffing per bed averaged 0.84 FTE in 2019, and Office staffing average was .05 FTE.</p>	<p>“Redevelopment leaves municipalities with large debts and Principal and Interest payments which impede movement towards the 4-hour model of care, and add a significant debt burden on the tax levy support”.</p> <p>Victoria Manor was below average on total staffing (0.72) and above average on Office staffing (.08).</p>
<b>Municipal Bed Comparisons</b>		
<p>Regulatory requirement</p>	<p>FLTC Act (2021)</p> <p><b>122</b> (1) Every southern municipality that is an upper or single-tier municipality shall establish and maintain a municipal home and may establish and maintain municipal homes in addition to the home that is required.</p> <p>Municipal Homes throughout Ontario serve 21% of all residents in all types of LTC Homes.</p>	<p>COKL has the third lowest number of municipal beds per 1,000 population (2016 census) at 2.20 beds per thousand. The Municipal bed rate in the EOWC ranges from 1.63 to 4.80.</p> <p>Currently Victoria Manor provides 22% of the local LTC beds, but by 2025 this will drop to 15%.</p>
<b>LTC Bed Distribution</b>		
<p>Ontario amalgamated Homes for the Aged, Charitable Homes and Nursing Homes into the LTC Home program in 1992.</p> <p>Long-Term Care Homes are categorized by number of beds in operation.</p> <p>Small &lt;= 64 Medium 65 – 160 Large &gt;160</p>	<p>Homes that were operating in 1992 were granted licenses or approvals, without a requirement for a distribution review. In 1999 new allocations of 20,000 beds were competitively awarded using a benchmark of 9.9 beds per 100 over the age of 75 distributed as closely as possible to geographic alignment.</p> <p>No new beds were allocated into the system between 2004 and 2018.</p> <p>New allocations totalling 30,000 and redevelopment approvals of 30,000 older Homes were awarded from 2018 to 2022. No benchmarks for distribution were disclosed by the Province.</p> <p>Across Ontario there are Homes as small as 32 beds and as large as 433.</p>	<p>Within the municipal boundary of the City there are currently 740 LTC beds and upon completion of the known new allocations there will be 1091 beds scheduled to be in operation by 2025.</p> <p>Using the benchmark standard from 25 years ago the supply including all new beds will not meet the benchmark. In 2025 the demand will exceed supply by 14% and the shortfall increases rapidly to 39% in only five years and 69% in 2035.</p> <p>There are 8 Homes located in COKL, and all of the other Homes are either currently meeting the standard or are in planning/construction to modernize and/or expand.</p> <p>More than 50% of Municipal Homes in the Eastern Ontario cluster are considered to be large (over 160)</p>

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Overview	Sector	Victoria Manor
	<p>Most aspects of the funding structure are based on the number of beds, or daily occupancy. There are a few elements that provide compensatory funding for smaller Homes, both for regular operations and for the Capital Development subsidy</p>	<p>beds). This number represents the multiple of 32 beds (32*5=160) which the Design Manual allows as the maximum number in a Resident Home Area (RHA).</p> <p>Victoria Manor at 166 is just above the threshold and is considered a large Home. Documentation reviewed suggests that a redevelopment would reduce the Home to 160 which is consistent with the RHA maximum, and which optimizes physical space and operational deployments. It is reported (in EOWC report) to be the only municipal Home in Eastern Ontario that would plan to reduce its size upon redevelopment.</p>
<p><b>Demographics</b></p>		
<p>Stats Canada conducts a census every five years. Data from 2016 and 2021 provide useful indicators to assist with health system planning.</p> <p>Dementia and Alzheimer Disease incidence has been studied</p>	<p>The number of persons over 65 has been steadily increasing as a share of the total Canadian population and now exceeds the number of youth under the age of 16.</p> <p>The baby boom cohort has significantly impacted the age distribution, and in 2031 the first boomers reach age 85. Long-Term Care primarily serves the frail aged population.</p> <p>The average age of residents in long-term care in Ontario has hovered around 84 for many years. It is possible that the pandemic has shifted this but data is not yet available to confirm</p> <p>While there are approximately 600,000 people living with dementia in Canada today, that number is expected to reach one million by 2030, and 1.7 million by 2050.</p>	<p>City of Kawartha Lakes has a higher-than-average aging population than throughout Canada and Ontario. The average age of the population in COKL is 47 whereas the average age in Ontario is 42.</p> <p>Approximately 28% is over the age of 65 and the Canadian average is 19%.</p> <p>Further, the increase in the older senior cohort (those 85 or older) will multiply 2.5 times between 2021 and 2043 in Ontario, consistent with the rest of Canada.</p> <p>While up to 85% of the population living in LTC shows evidence of memory impairment the incidence of significantly disruptive memory impairment is reported to be 15% of the population.</p>
<p><b>Demand for Long-term Care</b></p>		

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Overview	Sector	Victoria Manor
<p>Long-Term Care serves those who have health care needs that cannot be met with any combination of caregiving in the home or community and whose needs can be met in a LTC Home</p>	<p>In Ontario there are reported to be as many as 40,000 people approved and waiting for a space in a long-term care Home. The average wait for admission in 2021 was reported to be 213 days (waiting in community) and 80 days (waiting in hospital). Locally, in the HealthCare region referred to as Central East the wait was 350 and 120 days respectively. This is more than 60% higher than the rest of Ontario</p>	<p>The Province of Ontario reported that in March 2023 there were 342 people waiting for a space at Victoria Manor. The average waiting period was 559 days in the community and 76 days in hospital. This demonstrates that while the wait time is shorter than comparator communities if the person is in hospital that the wait is exceptionally long if waiting in the community.</p>
<p><b>Home and Community Care Support Services Wait List</b></p>		
<p>Applications for admission to Long-Term Care Homes are managed by Home and Community Care Support Services (formerly CCAC)</p>	<p>Placement management includes the determination of eligibility, completion of documentation, assistance with selection of choice of Homes and the determination and offer of a Long-Term Care Home space in accordance with strict protocols for priority placement. Persons waiting may be in the community, in the hospital or another LTCH requesting a preferred choice.</p>	<p>In June 2023 there are 876 unique individuals waiting for a LTCH in City of Kawartha Lakes.</p> <p>The current location of 81% is Haliburton, Kawartha Lakes or Peterborough, suggesting a high demand amongst the local population of frail adults.</p> <p>In total 40% of these individuals are waiting for admission to Victoria Manor, a proportionately high percentage. Additionally, amongst the total number 7.9% (69) are under the age of 65 .</p>
<p><b>Capital Budgets</b></p>		
<p>There are 3 types of Capital expenditures: Minor Major New</p>	<p>Minor capital includes the regular replacement of equipment.</p> <p>In the municipal sector approximately 50% have an Asset Management Plan for major building fixtures and structure.</p> <p>New Capital is often tied to community growth, including the planned reliance on Development Charges, which are legislatively governed.</p>	<p>The annual funding from the Province is planned and expended on small replacements</p> <p>Victoria Manor does not currently have a long-range major capital plan for systems and fixtures. The current Nurse Call system replacement is funded by a one-time budget request to the City's Finance and Treasury.</p>
<p><b>AdvantAge Ontario Benchmarking</b></p>		

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Overview	Sector	Victoria Manor
<p>AdvantAge Ontario receives and analyzes standardized Ministry reports referred to as Annual Reconciliation Report</p>	<p>Rolled up data is compared between all participant Homes and is further broken down by funding envelope and by type and size of the Home.</p> <p>159 Homes across Ontario participated in the 2020 benchmarking exercise.</p> <p>The most relevant section of the report to inform the Master Plan development is the expenses reported in “Other Accommodation”.</p>	<p>Compared against all municipal Homes Victoria Manor has lower expenses than both the average and the median of 99 Homes.</p> <p>When compared with large Homes these expenses are \$14.31 per diem lower than average and \$11.18 lower than the median. A drill down to examine this result can not be undertaken using the Annual Reconciliation Report as it provides only summative information.</p>

## 8.4 Findings

### MANAGEMENT AND ADMINISTRATION

The existing management contract with Sienna identifies general outcomes, as well as overall expectations related to the management company's activities in the operations at Victoria Manor. There is limited detail to compare, such as the support by Company specialists, as well as limited clarity on roles that may be shared or duplicated with COKL departments. Review of the responsibilities of each party has identified some duplication and opportunities for greater role clarity; HR including Labour Relations, IT, and Financial services including Payroll. The contract is silent on Asset Management.

Indicators reviewed at Committee of Management meetings have not changed across the past several years. It is noted that the contract between Sienna and COKL (2012) set performance targets at the Provincial average result provided by Health Quality Ontario.

### MINISTRY OF LONG-TERM CARE QUALITY INSPECTION PROGRAM

Through compliance reports it was observed that Resident safety monitoring is not maximized due to placement of staff work and storage areas, inability to passively monitor, lack of CCTV capability, and compressed spaces for those with behavioural needs.

### LEGISLATION: *FIXING LONG-TERM CARE ACT, 2021 AND VICTORIA MANOR*

- Air conditioning in all resident use rooms is mandatory and has been achieved. (See O. Reg. 246/22 Section 23.7).
- Lighting level minimums are stated in LUX<sup>2</sup>, and while this was not in scope for this project, during the site visits low lighting levels were observed in the dining rooms. Stakeholder feedback suggests that there are other areas in which lighting improvements would be valued. (See Reg. 246/22 Section 21).
- Window opening governors are required to ensure the maximum opening is no more than 15 centimeters, however this was not reviewed. (See Reg. 246/22 Section 19).
- Door access controls and release mechanisms on areas which residents must be prevented from entering (primarily work areas and exterior doors) are specifically identified, however this was also not reviewed. (See Reg. 246/22 Section 12).

### STANDARDS: *LONG-TERM CARE DESIGN MANUAL, 2015*

Several *Long-Term Care Design Manual, 2015* design standard minimums are not currently met in the resident living areas of Victoria Manor. These undersized spaces significantly impact on daily operations, resident, and staff experience. The direct living areas (referred to as Resident Home Areas – RHA) are not designed for service level demands in the current LTC environment and as defined in the LTC Homes

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<sup>2</sup> LUX is the unit of illuminance, or luminous flux per unit area, in the International System of Units (SI).

Design Manual, as most residents require mobility aids or total assistance for activities of daily living. Number living in an RHA (Design max 32 vs. VM 40 – 42)

- Door opening widths:
  - Bedrooms (Design min 1120 mm vs VM 850 mm)
  - Washrooms (Design min 914 mm vs VM 815 mm)
  - tub/shower rooms (Design min 1120 vs VM 870 mm)
- Turning circle radius
  - Washrooms (Design min 5 ft vs VM 4 ft)
  - tub/shower rooms (Design min 5 ft vs VM varied)
- Social spaces outside of the bedroom (Design min/res 27 sq ft vs VM 9 ½ sq ft)
- Dining spaces (Design min/res 30 sq ft vs VM 16 ½ sq ft)
- Corridor width (Design min 72 inches vs VM 71 inches)
- Work areas for staff (both within RHA and throughout the building) also have some unmet requirements (such as therapy space, cart cleaning space, handwash sinks)

#### STANDARDS: CANADIAN STANDARDS ASSOCIATION STANDARD CZ8004 AND VICTORIA MANOR

- Infection prevention and control resources are inadequate particularly as experienced through the Covid Pandemic (such as PPE storage, and waste receptacles at point of care which are tamper proof, long term cohorting spaces for staff at each RHA, and handsfree door and tap activation)
- Neighbourhood size – that which provides all the amenities found in one’s private household exceeds that which is conducive to homelike living such as households of 10 – 12 and as proposed in this National Standard (Section 8):
  - Bedrooms
  - The preferred single occupant room. VM has 25 private rooms and 141 persons in shared rooms.
- Flexible room layouts are not possible due to room size and fixtures.
- Interior spaces and finishes are challenging for the current resident profile.
- Security and IT systems capacity is limited and impacts on services available.

## 8.5 Proposed Changes

### GOVERNANCE

No changes proposed.

### MANAGEMENT AND ADMINISTRATION

The contract with Sienna has been extended and will expire in 2024. It is understood that discussions are under way regarding the contract, including extension, renewal, or a new competitive process. It is suggested that COKL complete a full and competitive review and management contract renewal. The City should define reporting requirements that include a balanced set of measures including those tied directly to the Annual Operating Plan and Quality Improvement Plan, specifically for building and asset related performance.



- a) **General Market Conditions:** There are several companies that provide Management Services and several different configurations of these agreements, including provisions related to asset management. All these companies are For Profit entities. Recently there has been renewed interest in Management Services in the non-profit sector and some larger non-profit and municipal operators are exploring capacity to provide Management Services. This is being prompted by the current growth of the sector, with the addition of 30,000 beds over the next 5-10 years.
- b) **Benchmarking with other municipal LTC:** Victoria Manor is the only municipal LTC Home in Ontario that uses a Management Company. Key Performance Indicators are important and using current relevant data helps an organization to stay focused on the breadth of factors that contribute to Quality Improvement.
- c) **Anticipated growth in the community:** There are currently 8 LTC Homes within the geographic boundaries of the City. While further analysis of the current environment will be provided in the Benchmarking review, it is noted here that 351 new LTC beds are anticipated to be ready to serve by 2025. These additional LTC beds will reduce the unmet demand and reduce the wait time for access to a space but will not eliminate the current supply/demand mismatch and does not provide for expected growth in demand with expected growth in the frail aged population.
- d) **Anticipated legislative, technological, and sectoral development:** Ontario actively invited new applications to construct and build new LTC Homes during the period 2018 to 2022. Ontario supports the provision of not-for profit LTC, however no other current operator in the City is a non-profit entity. Quality improvement philosophy, with rigorous action plans and monitoring of performance are best practice in the LTC sector. Reports to the governing body are both expected and necessary for risk mitigation and to fulfill the fiduciary responsibility. This should be included as standing agenda with follow-up reports to the Governors at regular intervals.
- e) **Anticipated funding from grants, user fees, property taxes, development charges and other sources:** The operation of Victoria Manor is supported by the municipal tax levy. This levy is the third lowest of a cluster of municipal Homes (Eastern Ontario Wardens Caucus). Funding for special initiatives is offered by the Ministry of Long-Term Care both as one time and sector wide base allocations for both minor capital and regular operational support. Anticipating and understanding new directions that may be leveraged requires close monitoring of political agendas, as well as special consideration of eligibility for non-profit entities such as a municipal Home. This can be most effectively monitored for relevance by the management dedicated to the operation of the LTC Home.

## MINISTRY OF LTC QUALITY INSPECTION PROGRAM

Victoria Manor should increase the means for passive surveillance of residents with behavioural needs and expand the spaces in Resident Home Areas for those with wandering and seeking behaviours. It is also suggested that refreshing the interior decorating with an intent to address the visual and spatial limitations of the aged residents be completed.

- a) General market conditions – see the comments under ‘LTC Building Classification’ below.
- b) Benchmarking with other municipal Homes for the Aged – not relevant.
- c) Anticipated growth in the community – not relevant.
- d) Anticipated legislative, technological, and sectoral development: Currently about 70% of the LTC resident population has cognitive impairment. Those being admitted to LTC are increasingly in later stages of their disease process and require significant monitoring and support to reduce risk and navigate their daily living experience. Vibrant colours are increasingly being incorporated into the environments in LTC Homes.
- e) Anticipated funding from grants, user fees, property taxes, development charges and other sources: Special funding allocations targeted by the Ministry to Behavioral Support or safety initiatives are provided from time to time.

## LTC BUILDING CLASSIFICATION

Changes to correct the design shortfall, and challenges to the living and working environment cannot be reasonably undertaken in the current building as wall systems, openings and services would have to be rebuilt. A long-range replacement plan is needed. Victoria Manor should be rebuilt using updated Ministry standard and incorporating proven best practice resulting from new knowledge gained from the pandemic.

- a) General market conditions: Licensed Homes throughout Ontario are required to upgrade to the current design standards (2015) by 2025 when most licenses will expire. Municipal Homes hold “approved” beds, not licensed beds. The Ministry cannot compel municipalities to update their building if the design does not directly contravene Compliance Inspection criteria.
- b) Benchmarking with other municipal Homes for the Aged: 9 of 15 of the Eastern Ontario Wardens Caucus member Homes have achieved the “A” classification. 3 “C” Homes are actively redeveloping to this new standard, 1 upgraded “D” expects to commence a project in 2025. There is one other “B” Home which is projecting to commence within 5 years.
- c) Anticipated demographic growth in the community makes the case for facility renovation and/or expansion.
- d) Anticipated legislative, technological, and sectoral development: There is much work under way both in Ontario and across Canada regarding LTC building design. However, the Ministry of Long-Term Care Design Standards have not been updated considering the experience of the Covid-19 Pandemic. The standards established in 1999 have not updated the size of each household (32) while other jurisdictions published extensively on the success of smaller units in protecting residents from the spread of infectious disease (e.g., Green House Project). In contrast, it is noteworthy that public spaces throughout the facility are very generous, allowing some relief to the crowded conditions in the RHA. However, the successful use of these spaces is dependent on the portering of most residents as they cannot independently ambulate. Additionally, residents with significant cognitive impairment generally do not benefit from a change in setting such as being taken outside of their local household for social events.

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- e) Anticipated funding from grants, user fees, property taxes, development charges and other sources: The Ministry of Long-Term Care provides a Construction Funding Subsidy for all redevelopments of “B”, “C” and “upgraded D” beds. The funding does not cover 100% of the costs of a construction project. Operators provide equity and many arrange lending which is supported by the Construction Funding Subsidy. Municipalities may raise funds through the management of the tax levy for this type of development, including access to Development Charges which are applied to growth initiatives.

### LEGISLATION: *FIXING LONG-TERM CARE ACT, 2021*

It is recommended that a study of lighting (functions and LUX) be completed in all areas residents use and upgrades to the lighting system be planned.

- a) General market conditions: It is noted that a lighting replacement program was completed in the Home within the past 5 years.
- b) Benchmarking with other municipal Homes for the Aged: recently constructed homes, under the *Long-Term Care Home Design Manual, 2015*, were required to demonstrate upon pre-occupancy inspection that lighting levels meet or exceed LUX level minimums for each specific type of space in the Home. (See Reg. 246/22 Section 21).
- c) Anticipated legislative, technological, and sectoral development: While there is no requirement in the FLTC Act, recent discontinued funding models for LTC development incentivized Homes that would be developed to LEED Silver or higher standard. This certification awards value to green initiatives. Additionally, municipalities have a carbon reduction target for all of their services and as such the development of LTC Homes is considered for calculation of achievement of the target. Controlled lighting systems including light sensors, timers, remote controls and programmed on/off are increasingly incorporated in new LTC building designs as an emerging best practice in Ontario for energy efficiency and IPAC requirements, and more responsive service for the LTC resident population.

### STANDARDS: *CANADIAN STANDARDS ASSOCIATION STANDARD CZ8004*

In the near-term lifecycle of Victoria Manor, improvements in the Resident Home Areas should be made to support better Infection Prevention and Control for the residents and more particularly for the staff. This includes the ready access to PPE, and removal of soiled PPE without impeding the hallways and movement in the area, and inclusion of purpose designed staff cohorting spaces.

- a) General market conditions: Most redeveloping LTC Homes in Ontario will apply the Design Manual Standards (2015), However, Municipalities have generally taken the lead in advancing the quality of the Home environment and in enhancing the services provided to the residents. The CSA standards are new and have not been used widely, although several Municipal and Not-for-Profit operators are now designing Homes with 100% private bedrooms per CSA guidelines.
- b) Benchmarking with other municipal Homes for the Aged: Most recently built municipal LTC Homes have better traffic flow than Victoria Manor's narrow corridors, which also provides space for supplies. Some Municipal operators have recently designed new builds with smaller households (between 13 – 16 persons); this can be understood as a subset of RHAs.
- c) Anticipated growth in the community: The frequency of Infectious Outbreaks and potential future pandemics has increased significantly during the life cycle of this building.

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- d) Anticipated legislative, technological, and sectoral development: Pandemic readiness is now required to be incorporated into Emergency Planning and Emergency Policy and Procedure. Operators are working to enhance the work environment for their staff teams as well as the living environment for those who are served.
- e) Anticipated funding from grants, user fees, property taxes, development charges and other sources: While there was significant funding provided to operators for immediate measures taken during the pandemic the government has signaled that this will end by September 2023.

## 9.0 Growth-Related Capital Needs

### 9.1 Summary

This section outlines current demographics and scenarios possible in the future depending on if trends in population persist. This section addresses "future need" – to define what growth is – including net growth, demographic shift, and increased need for long-term care due to frailty and any other relevant factors that the City can use to validate the collection and use of available funds.

There is a distinction between the capital needs arising from existing demand and those arising from anticipated growth of an aging demographic in the formulation of the capital forecast. It is anticipated that the identification of the growth-related capital needs will support the City's compliance with legislation, and that the distinction will be relevant only to the major long-term capital investment required at the end of the facility's useful life.

At present, there is an expectation that the Victoria Manor would be replaced in 2035. What are the growth pressures beyond 2035, what growth can be expected after the rebuild so that the City can continue serving its residents successfully?

Based on assumptions outlined in this section, and with the increased number of beds required under different projected scenarios, the capital cost estimate for redevelopment of Victoria Manor by 2027 (completion of construction) with a total bed count of 369 ranges from \$196,656,070 to \$249,282,342 and, in the redevelopment of Victoria Manor by 2034 (completion of construction with a total bed count of 512 ranges from \$335,591,941 to \$425,398,235 (assuming 3% escalation per annum).

### 9.2 Findings

#### 9.2.1 City of Kawartha Lakes Population

The City of Kawartha Lakes population had a higher number of persons over age 65 compared to the population of Canada as a whole, fewer children aged 0-14, and fewer working age persons, when compared to the national average.

In 2021, 22,355 persons aged 65 and over were enumerated in Kawartha Lakes (City), representing respectively **28.2%** of the total population. In comparison, for Canada, the proportion of seniors was 19.0% in 2021.

In 2021, 10,535 children aged 0 to 14 were enumerated in Kawartha Lakes (City), representing respectively **13.3%** of the total population. In comparison, for Canada, the proportion of children was 16.3% in 2021.

The working age population (15 to 64) represented **58.5%** of the total population. In comparison, for Canada, the proportion of the population aged 15 to 64 was 64.8% in 2021.<sup>3</sup>

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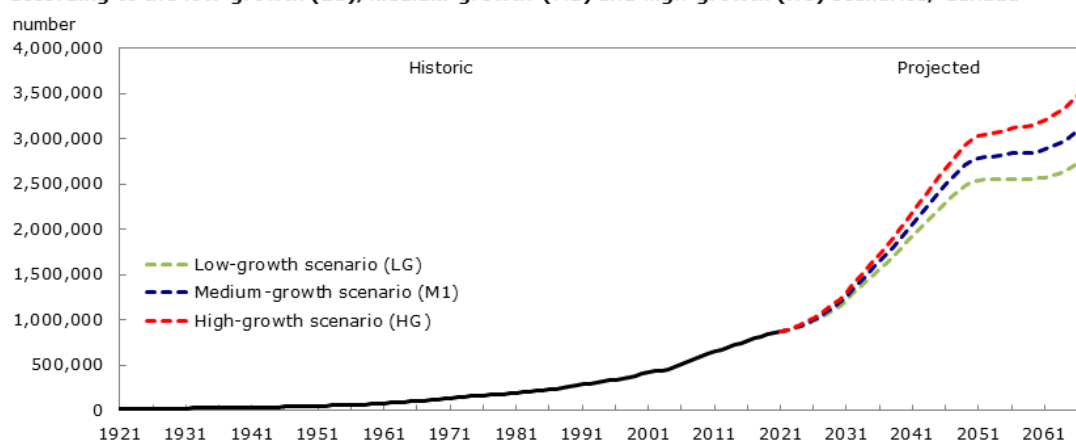
<sup>3</sup> <https://www12.statcan.gc.ca/census-recensement/2021/as-sa/fogs-spg/Page.cfm?Lang=E&Dguid=2021A00053516010&topic=2>

## 9.2.2 Changing Demographics – Future Demand

The number of people aged 85 and over has been steadily increasing as a share of the total Canadian population over time. In 2021, the Canadian population had 871,400 persons aged 85 and over, more than six times as many as 50 years earlier in 1971 (139,000). The members of the baby-boom cohorts will enter this age group between the years 2031 and 2050. This phenomenon, and to a lesser extent, the anticipated gradual increase in life expectancy, would cause the number of people aged 85 and over to increase rapidly during this period in all scenarios, reaching between 2.5 million (scenario LG) and 3.0 million (scenario HG) by 2050. In subsequent years, the population in this age group continues to increase, but at a much slower pace: by 2068, the number of people aged 85 and over would be between 2.8 million (scenario LG) and 3.6 million (scenario HG).

Older seniors would represent a growing share of the total population in the coming decades. From 2.3% of the total population in 2021, people aged 85 and over would represent a peak of 4.6% of the population in 2050 according to the slow-aging (SA) scenario. In contrast, under the fast-aging (FA) scenario, older seniors would continue to increase as a proportion of the total population throughout the projection, representing 7.2% of the population by 2068. People aged 85 and over would also represent a growing share of the senior population in the coming decades. From 12.3% in 2021, this share would reach a peak of 22.0% in 2050 under the slow-aging (SA) scenario and would reach a peak of 24.6% in 2051 under the fast-aging (FA) scenario.

**Number of persons aged 85 years and over, historic (1921 to 2021) and projected (2022 to 2068) according to the low-growth (LG), medium-growth (M1) and high-growth (HG) scenarios, Canada**



Source: Statistics Canada, Centre for Demography.

**Table 17: Number of persons 85 years and over, historic (2021) and projected (2043) according to five scenarios, Canada, Provinces (Ontario and Canada shown only).**

Region	Historic (2021)	Projected (2043)				
		Low-growth scenario (LG)	Medium-growth scenario (M1)	High-growth scenario (HG)	Slow-aging scenario (SA)	Fast-aging scenario (FA)
in thousands						

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Canada	871.5	2,078.7	2,235.6	2,384.6	2,110.3	2,350.0
Ontario	345.1	804.3	864.6	921.0	822.4	901.2

**Source:** Statistics Canada, Centre for Demography.

\*This table displays the results of Number of persons aged 85 years and over. The information is grouped by Region (appearing as row headers), Historic (2021), Projected (2043), Low-growth scenario (LG), Medium-growth scenario (M1), High-growth scenario (HG), Slow-aging scenario (SA) and Fast-aging scenario (FA), calculated using in thousands units of measure (appearing as column headers).

### 9.2.3 Projected Population in Kawartha Lakes

Table 21 provides an overview of the demographic distribution in the City of Kawartha Lakes for various age groups. There are currently 740 LTC beds in the City and it has a waitlist of 876 unique individuals waiting for a LTC bed. Two demographic age groups were considered to estimate the need for LTC beds in the City – 85+ and 75+. Initially, LTC bed requirement was estimated at a ratio of 5% and 10% of these population groups. This data was then compared with the current supply (including the units currently developed) to estimate the magnitude of surplus or deficit in supply. In addition to that, when the current waitlist of 876 and the supply of 740 is considered (approximately 1600+beds), it is evident that a higher ratio, approximately 14.25% of the 75+ age group, needs LTC beds currently.

Currently Victoria Manor supplies 166 bed out of the existing 740 beds in the area, this is roughly 22% of the total supply. If the City plans to address the current shortfall of 876 beds (based on the current waitlist) and maintain its current supply ratio of 22% then it would need to add another 192 beds.

In addition to the existing 740 beds, there are about 350+ additional LTC beds under development in the area, which would bring total LTC beds available to over 1,000+ by year 2025. This would have the capacity to accommodate approximately 40% of the current waitlist. Table 18 provides the summary of existing LTC beds in the City and those in the pipeline. As the number of individuals in the 75+ age group increase, the supply of beds will need to be increased.

**Table 18: Current Supply and Development Pipeline of LTC Beds in the Near Future**

	LTC Home Name	LTC Long Stay Beds Available Currently	Ratio of Beds to the Total	Additional Beds Being Developed	Development Timeframe	Total LTC Beds Available Post Development in Year 2026
1	Caessant Care Lindsay Nursing Home	124	17%		TBD	124
2	Caessant Care on McLaughlin Road	96	13%		TBD	96
3	Case Manor Care Community	96	13%		NA	96
4	Pinecrest Nursing Home (Bobcaygeon)	65	9%	63	2025	128
5	Extendicare Kawartha Lakes	64	9%	96	2024	160
6	Fenelon Court	67	9%		NA	67
7	Frost Manor	62	8%	192	2025	254
8	Victoria Manor Home for the Aged	166	22%		NA	166

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<b>Total Long stay beds in Kawartha Lakes</b>	<b>740</b>	<b>100%</b>	<b>351</b>	<b>1,091</b>
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Currently Victoria Manor is considered to be in good physical condition, and it is expected to continue to serve the community until it completes its useful life of 45 years, in the year 2035. But, if the City decides to redevelop the existing Victoria Manor facility and initiates a development plan in 2023, for a (planning and development) period of 4 years (starting in year 2024), the new facility would be completed by the end of 2027 and become operational in 2028. If the demographic data pertaining to the 75+ age group in year 2028 (provided in Table 21) is used, and LTC bed needs are estimated at the current rate of 14.25% of the 75+ age group, the City will need to develop 203 beds in addition to the existing 166 beds at Victoria Manor to address the need and maintain its current supply ratio of 22%. Table 19 provides a summary of the estimation methodology used in the case of redevelopment of Victoria Manor by year 2028.

**Table 19: Estimate of Beds Required to be added to Victoria Manor in Year 2028**

Victoria Manor - Year of construction completion	1989
Projected useful life of LTC facilities	45
Victoria Manor's expected year of decommissioning based on useful life of LTC facilities	2035
Victoria Manor's expected year of decommissioning if it is decided in 2023 to develop a new facility, considering a 4-year planning/development period. The new facility that will also become operational in the same year.	2028
Potential additional LTC bed requirement @ 14.25% of 75+ population in year 2028.	1,995
Expected supply in year 2028 based on existing LTC beds and confirmed supply pipeline.	1,091
Potential supply shortfall in Year 2028	904
Current LTC bed supply ratio of Victoria Manor.	22%
Potential Additional LTC Beds to be added to Victoria Manor to maintain its current supply ratio.	203

If the City decides to continue to use the facility as-is and consider redevelopment of the existing Victoria Manor facility as it approached its end of its useful life in year 2035, the City should initiate a development plan in 2030, followed by a planning and development period of 4 years. The new facility would be completed by the end of 2034 and become operational in 2035. If the demographic data pertaining to the 75+ age group in year 2035 (provided in Table 21) is used, and LTC bed needs are estimated at the current rate of 14.25% of the 75+ age group, the City will need to develop 346 beds in addition to the



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existing 166 beds at Victoria Manor to maintain its current supply ratio of 22%. Table 20 provides a summary of the estimation methodology used in the case of redevelopment of Victoria Manor by year 2035.

**Table 20: Estimate of Beds Required to be added to Victoria Manor in Year 2035**

Victoria Manor - Year of construction completion	1989
Projected useful life of LTC facilities	45
Victoria Manor's expected year of decommissioning based on completing its estimated useful life, and development of a new facility that will also become operational in the same year.	2035
Potential additional LTC bed requirement @14.25% of 75+ population in year 2035	2,634
Expected supply in year 2035 based on existing LTC beds and confirmed supply pipeline	1,091
Potential supply shortfall in Year 2035	1,543
Current LTC bed supply ratio of Victoria Manor	22%
Potential Additional LTC Beds to be added to Victoria Manor to maintain its current supply ratio	346

It is to be noted that these projections are based on the current demographic data and number of beds expected to be available in the future. The estimates arrived at by using these data would change if any of the data were to change, i.e., a significant change in demographic or supply of beds. Also, it is possible that the Ministry of Health and Long-Term Care would apply its own due diligence in arriving at the estimate of potential beds required in the community and it may vary from the estimate provided herein, based on a variety of factors including demographic data, severity of need, care needs identified in the community and the supply at the time of review.

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**Table 21: Projected Population in Kawartha Lakes**

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041
Age Grp (Census)																									
00-04	3,279	3,306	3,295	3,276	3,255	3,227	3,244	3,255	3,262	3,263	3,257	3,248	3,236	3,218	3,201	3,184	3,168	3,157	3,149	3,148	3,153	3,163	3,177	3,197	3,221
05-09	3,401	3,365	3,392	3,454	3,487	3,564	3,584	3,578	3,569	3,561	3,550	3,577	3,594	3,606	3,612	3,611	3,608	3,602	3,591	3,577	3,562	3,549	3,540	3,535	3,535
10-14	3,401	3,495	3,553	3,612	3,656	3,627	3,591	3,607	3,659	3,688	3,759	3,781	3,787	3,788	3,790	3,789	3,818	3,838	3,854	3,867	3,871	3,869	3,865	3,855	3,846
15-19	3,905	3,761	3,698	3,588	3,591	3,646	3,731	3,785	3,839	3,876	3,853	3,824	3,840	3,889	3,923	3,989	4,013	4,028	4,037	4,048	4,055	4,090	4,115	4,136	4,151
20-24	4,456	4,376	4,193	4,058	3,881	3,741	3,613	3,559	3,475	3,481	3,537	3,615	3,660	3,699	3,729	3,714	3,700	3,718	3,761	3,793	3,849	3,871	3,891	3,909	3,930
25-29	3,923	4,040	4,145	4,149	4,142	4,021	3,932	3,779	3,661	3,517	3,408	3,313	3,275	3,217	3,227	3,272	3,331	3,366	3,400	3,431	3,427	3,421	3,436	3,467	3,497
30-34	3,731	3,723	3,768	3,837	3,920	4,062	4,159	4,232	4,227	4,215	4,117	4,035	3,905	3,795	3,666	3,572	3,491	3,461	3,419	3,426	3,468	3,525	3,561	3,598	3,624
35-39	3,551	3,606	3,666	3,758	3,832	3,851	3,860	3,913	3,991	4,079	4,209	4,302	4,371	4,369	4,357	4,271	4,197	4,078	3,972	3,852	3,765	3,689	3,663	3,629	3,641
40-44	3,544	3,565	3,585	3,593	3,595	3,622	3,674	3,739	3,825	3,901	3,932	3,951	4,011	4,098	4,187	4,312	4,404	4,471	4,472	4,459	4,382	4,314	4,201	4,097	3,982
45-49	4,334	4,226	4,136	4,039	3,944	3,938	3,956	3,977	3,987	4,000	4,040	4,103	4,178	4,268	4,353	4,400	4,433	4,504	4,601	4,701	4,832	4,933	5,004	5,011	5,002
50-54	6,367	6,104	5,710	5,476	5,308	5,157	5,044	4,946	4,851	4,754	4,749	4,767	4,793	4,815	4,852	4,905	4,987	5,082	5,186	5,286	5,357	5,407	5,499	5,619	5,738
55-59	6,980	7,113	7,280	7,218	7,102	6,926	6,640	6,242	5,999	5,835	5,690	5,584	5,488	5,398	5,302	5,299	5,319	5,350	5,383	5,433	5,498	5,596	5,703	5,821	5,931
60-64	6,760	6,890	7,018	7,150	7,323	7,442	7,585	7,753	7,705	7,586	7,400	7,108	6,716	6,472	6,313	6,176	6,074	5,980	5,895	5,804	5,801	5,826	5,866	5,907	5,970
65-69	6,101	6,156	6,334	6,631	6,803	6,932	7,085	7,235	7,390	7,579	7,719	7,880	8,058	8,030	7,916	7,730	7,438	7,064	6,829	6,682	6,558	6,466	6,377	6,299	6,212
70-74	5,270	5,479	5,660	5,786	5,947	5,967	6,036	6,224	6,516	6,707	6,863	7,035	7,204	7,379	7,585	7,740	7,916	8,103	8,096	7,997	7,819	7,541	7,195	6,976	6,848
75-79	3,412	3,725	3,969	4,220	4,438	4,820	5,043	5,231	5,372	5,536	5,572	5,657	5,849	6,130	6,330	6,503	6,690	6,870	7,058	7,273	7,437	7,622	7,813	7,831	7,749
80-84	2,566	2,552	2,572	2,633	2,749	2,909	3,172	3,386	3,606	3,808	4,156	4,377	4,561	4,708	4,864	4,920	5,019	5,207	5,468	5,666	5,846	6,037	6,220	6,413	6,629
85-89	1,781	1,844	1,875	1,855	1,849	1,869	1,882	1,917	1,975	2,075	2,204	2,411	2,577	2,749	2,916	3,207	3,402	3,562	3,693	3,828	3,898	4,003	4,173	4,400	4,579
90+	899	964	1,045	1,147	1,230	1,286	1,345	1,397	1,434	1,475	1,515	1,554	1,606	1,663	1,744	1,844	1,997	2,127	2,263	2,413	2,659	2,865	3,035	3,179	3,338
<b>Grand Total</b>	77,661	78,290	78,894	79,480	80,052	80,607	81,176	81,755	82,343	82,936	83,530	84,122	84,709	85,291	85,867	86,438	87,005	87,568	88,127	88,684	89,237	89,787	90,334	90,879	91,423
<b>Subtotal 80+</b>	5,246	5,360	5,492	5,635	5,828	6,064	6,399	6,700	7,015	7,358	7,875	8,342	8,744	9,120	9,524	9,971	10,418	10,896	11,424	11,907	12,403	12,905	13,428	13,992	14,546

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	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041
10%	525	536	549	564	583	606	640	670	702	736	788	834	874	912	952	997	1,042	1,090	1,142	1,191	1,240	1,291	1,343	1,399	1,455
7%	367	375	384	394	408	61	448	469	491	515	551	584	612	638	667	698	729	763	800	833	868	903	940	979	1,018
Current beds						740	740	740																	
Planned Future beds									1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091
Supply @ 10%						122%			156%	148%	139%	131%	125%	120%	115%	109%	105%	100%	96%	92%	88%	85%	81%	78%	75%
Supply @ 7%						1220%			222%	212%	198%	187%	178%	171%	164%	156%	150%	143%	136%	131%	126%	121%	116%	111%	107%
Supply surplus/(deficit) @ 10%						134	100	70	390	355	304	257	217	179	139	94	49	1	(51)	(100)	(149)	(200)	(252)	(308)	(364)
Supply surplus/(deficit) @ 7%						679	292	271	600	576	540	507	479	453	424	393	362	328	291	258	223	188	151	112	73
<b>Subtotal 75+</b>	8,658	9,085	9,461	9,855	10,266	10,884	11,442	11,931	12,387	12,894	13,447	13,999	14,593	15,250	15,854	16,474	17,108	17,766	18,482	19,180	19,840	20,527	21,241	21,823	22,295
10%	866	909	946	986	1,027	1,088	1,144	1,193	1,239	1,289	1,345	1,400	1,459	1,525	1,585	1,647	1,711	1,777	1,848	1,918	1,984	2,053	2,124	2,182	2,230
7%	606	636	662	690	719	762	801	835	867	903	941	980	1,022	1,068	1,110	1,153	1,198	1,244	1,294	1,343	1,389	1,437	1,487	1,528	1,561
14.25%	1,234	1,295	1,348	1,404	1,463	1,551	1,630	1,700	1,765	1,837	1,916	1,995	2,080	2,173	2,259	2,348	2,438	2,532	2,634	2,733	2,827	2,925	3,027	3,110	3,177
Current beds						740	740	740																	
Planned Future beds									1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091	1,091
Supply @ 10%						68%			88%	85%	81%	78%	75%	72%	69%	66%	64%	61%	59%	57%	55%	53%	51%	50%	49%
Supply @ 7%						97%			126%	121%	116%	111%	107%	102%	98%	95%	91%	88%	84%	81%	79%	76%	73%	71%	70%
Supply surplus/(deficit) @ 10%						(348)	(404)	(453)	(148)	(198)	(254)	(309)	(368)	(434)	(494)	(556)	(620)	(686)	(757)	(827)	(893)	(962)	(1,033)	(1,091)	(1,139)
Supply surplus/(deficit) @ 7%						(22)	(61)	(95)	224	188	150	111	69	24	(19)	(62)	(107)	(153)	(203)	(252)	(298)	(346)	(396)	(437)	(470)

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Supply surplus/(deficit) @ 14.25 %						(811)	(890)	(960)	(674)	(746)	(825)	(904)	(989)	(1,082)	(1,168)	(1,257)	(1,347)	(1,441)	(1,543)	(1,642)	(1,736)	(1,834)	(1,936)	(2,019)	(2,086)

## 9.3 Capital Needs

Capital needs for the future state is estimated based on three development scenarios. The first two scenarios of development identified in section 9.2.3, envisions potential redevelopment by 2027 or 2034 (completion of construction) with the addition of new beds. The third scenario involves the potential replacement of the facility with same number of beds as Victoria Manor currently provides (166 beds).

Capital cost (also referred to as total project or development cost) estimate would generally include costs to acquire land, planning and design fees, permit fees and construction costs. Since land is assumed to be already available in this case, capital costs would include all the rest of the costs listed. For the purposes of this analysis, it is assumed to include the following:

1. Hard Construction costs – Building construction cost, site works (includes surface parking, driveways, civil works, services connections, storm water management, landscaping etc.) and allowances for contingencies.
  - a. Allowances for Design, Construction and Escalation contingencies. Design contingency compensates for a lack of detail in early stages of design; Escalation contingency considers potential changes to labour & material costs till the contract is awarded; Construction contingency allowance is to cover costs related to any unforeseen conditions at site.
2. Soft costs – includes consultants' fees, insurance, permits, development charges etc.
3. Furniture, Fixtures & Equipment (FF&E) costs have been estimated as an allowance to offer flexibility for items difficult to detail at this stage.
4. Allowance for incorporating green initiatives.

The cost estimation methodology uses building construction costs as the primary driver. All the other cost elements are estimated as a percentage of the building construction cost. As the proposed facility is assumed to be developed in a green field site with servicing, demolition and disposal costs or costs related to external servicing are not considered in this estimate. Similarly, as it is not clear how the project will be funded, cost of financing, such as capitalized accrued interest during construction, and loan origination fee are not considered in this estimate.

The building construction cost is based on the cost range per sq. ft. provided in Altus Cost Guide 2023 for Complex Care Residences. The analysis presents the total development cost using the low and high as well as the mid point of the range to estimate the building construction cost. The costs thus estimated were also compared with other similar facilities recently completed and recently awarded. It is to be noted that recently completed facilities would have been awarded at a contractual price based on the construction costs at the time of executing the contract which would have been a lot lower than what it is today. Review of historic building construction cost data published by cost consulting firms for Complex Care Residences from 2018 to 2023 show a 43% increase in costs. Instances of even higher cost increases to the order of 2 to 2.5 times were recorded between pre pandemic estimates and award of contract towards the end of year 2022.

In this analysis the capital costs are first estimated at the current costs and then escalated to the year of completion at the construction cost inflation rate of 3% per annum to estimate the cost at completion. Table 22 and Table 23 provide the assumptions used and estimation of costs for the development scenario 1, wherein Victoria Manor will be redeveloped by end of year 2027, with a total bed count of 369 (existing 166 beds + additional 203 beds). It is to be noted that final bed count would probably be

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adjusted to match the closest multiple of 32 to attain operational efficiency. Also, the building gross area estimated based on the gross area per bed could vary depending on the model of care and architecture layout adopted, and this would have an impact on the capital cost estimate.

**Table 22: Assumptions Used for Estimating Capital Cost for Redevelopment of Victoria Manor by 2028 with a Total Bed Count of 369**

Cost Data - Geographic Area	Altus Cost Guide 2023 for GTA
Building Type	Complex Care Residence
Cost (\$)/sq. ft. - Low	355
Cost (\$)/sq. ft. - High	450
Cost (\$)/sq. ft. – Average (rounded)	403
Existing Beds (No.)	166
New Beds (No.) (refer to Table 19)	203
Total Proposed Bed Count (No.)	369
Gross Sq. Ft./Bed*	800
Gross Building Area (sq. ft.)	295,200
Construction Cost Inflation	3%

\* Based on data from other facilities and industry best practices.

**Table 23: Capital Cost Estimate for Redevelopment of Victoria Manor by 2028 with a Total Bed Count of 369**

	Cost Ratio	Unit Cost (\$) - Low	Unit Cost (\$) - Med	Unit Cost (\$) - High
		355 /sq. ft.	403 /sq. ft.	450 /sq. ft.
			<b>Cost (\$)</b>	
Building Construction Cost (A)		104,796,000	118,818,000	132,840,000
Site Servicing Cost (B)	10% of (A)	10,479,600	11,881,800	13,284,000
Allowances (C)				
Contingencies				
Design	5% of (A)+(B)	5,763,780	6,534,990	7,306,200
Construction	5% of (A)+(B)	5,763,780	6,534,990	7,306,200
Escalation	10% of (A)+(B)	11,527,560	13,069,980	14,612,400
General Requirements and Fees	10% of (A)+(B)	11,527,560	13,069,980	14,612,400
<b>Total Hard Construction Cost (D=A+B+C)</b>		<b>149,858,280</b>	<b>169,909,740</b>	<b>189,961,200</b>
Soft Cost (E)	10% of (D)	14,985,828	16,990,974	18,996,120
Soft Cost Contingency (F)	10% of (E)	1,498,583	1,699,097	1,899,612
<b>Total Soft Costs (G=E+F)</b>		<b>16,484,411</b>	<b>18,690,071</b>	<b>20,895,732</b>
Allowance for Green Initiatives	6% of (A)	6,287,760	7,129,080	7,970,400
Allowance for FF&E	2% of (A)	2,095,920	2,376,360	2,656,800
<b>Total Development Cost (D+G)</b>		<b>174,726,371</b>	<b>198,105,251</b>	<b>221,484,132</b>
Cost/Bed		473,513	536,871	600,228

<b>Total Development Cost in Year 2027 (escalated @3% per annum)</b>		<b>196,656,070</b>	<b>222,969,206</b>	<b>249,282,342</b>
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Table 24 and Table 25 provide the assumptions used and estimate of costs for the development scenario 2 wherein Victoria Manor will be redeveloped by end of year 2035 with a total bed count of 512 (existing 166 beds + additional 346 beds). It is to be noted that final bed count would probably be adjusted to match the closest multiple of 32 to attain operational efficiency. Considering the number of beds and the potential facility size it is possible that these beds are also located in two separate facilities as opposed to one.

**Table 24: Assumptions Used for Estimating Capital Cost for Redevelopment of Victoria Manor by 2035 with a Total Bed Count of 512**

<b>Cost Data - Geographic Area</b>	<b>Altus Cost Guide 2023 for GTA</b>
Building Type	Complex Care Residence
Cost/sq. ft. - Low	355
Cost/sq. ft. - High	450
Cost/sq. ft. – Average (rounded)	403
Existing Beds (No.)	166
New Beds (No.) (refer to Table 19)	346
Total Proposed Bed Count (No.)	512
Gross Sq. Ft./Bed*	800
Gross Building Area (sq. ft.)	409,600
Construction Cost Inflation	3%

**Table 25: Capital Cost Estimate for Redevelopment of Victoria Manor by 2035 with a Total Bed Count of 512**

		Unit Cost (\$) - Low	Unit Cost (\$) - Med	Unit Cost (\$) - High
		355 /sq. ft.	403 /sq. ft.	450 /sq. ft.
	<b>Cost Ratio</b>	<b>Cost (\$)</b>		
Building Construction Cost (A)		145,408,000	164,864,000	184,320,000
Site Servicing Cost (B)	10% of (A)	14,540,800	16,486,400	18,432,000
Allowances (C)				
Contingencies				
Design	5% of (A)+(B)	7,997,440	9,067,520	10,137,600
Construction	5% of (A)+(B)	7,997,440	9,067,520	10,137,600
Escalation	10% of (A)+(B)	15,994,880	18,135,040	20,275,200
General Requirements and Fees	10% of (A)+(B)	15,994,880	18,135,040	20,275,200
<b>Total Hard Construction Cost (D=A+B+C)</b>		<b>207,933,440</b>	<b>235,755,520</b>	<b>263,577,600</b>

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Soft Cost (E)	10% of (D)	20,793,344	23,575,552	26,357,760
Soft Cost Contingency (F)	10% of (E)	2,079,334	2,357,555	2,635,776
<b>Total Soft Costs (G=E+F)</b>		<b>22,872,678</b>	<b>25,933,107</b>	<b>28,993,536</b>
Allowance for Green Initiatives	6% of (A)	8,724,480	9,891,840	11,059,200
Allowance for FF&E	2% of (A)	2,908,160	3,297,280	3,686,400
<b>Total Development Cost (D+G)</b>		<b>242,438,758</b>	<b>274,877,747</b>	<b>307,316,736</b>
Cost/Bed		473,513	536,871	600,228
<b>Total Development Cost in Year 2035 (escalated @3% per annum)</b>		<b>335,591,941</b>	<b>380,495,088</b>	<b>425,398,235</b>

Table 26 provides the assumptions used and estimate of costs for the development scenario 3, wherein Victoria Manor will be redeveloped with a total bed count of 166 beds and building gross area assumed to remain the same as the existing facility. Two sub scenarios are envisioned where the new building will be completed in either year 2027 or year 2034.

**Table 26: Capital Cost Estimate for Redevelopment of Victoria Manor with a Total Bed Count of 166**

		Unit Cost (\$) - Low	Unit Cost (\$) - Med	Unit Cost (\$) - High
		355 /sq. ft.	403 /sq. ft.	450 /sq. ft.
	Cost Ratio	Cost (\$)		
Building Construction Cost (A)		38,324,380	43,452,290	48,580,200
Site Servicing Cost (B)	10% of (A)	3,832,438	4,345,229	4,858,020
Allowances (C)				
Contingencies				
Design	5% of (A)+(B)	2,107,841	2,389,876	2,671,911
Construction	5% of (A)+(B)	2,107,841	2,389,876	2,671,911
Escalation	10% of (A)+(B)	4,215,682	4,779,752	5,343,822
General Requirements and Fees	10% of (A)+(B)	4,215,682	4,779,752	5,343,822
<b>Total Hard Construction Cost (D=A+B+C)</b>		<b>54,803,863</b>	<b>62,136,775</b>	<b>69,469,686</b>
Soft Cost (E)	10% of (D)	5,480,386	6,213,677	6,946,969
Soft Cost Contingency (F)	10% of (E)	548,039	621,368	694,697
<b>Total Soft Costs (G=E+F)</b>		<b>6,028,425</b>	<b>6,835,045</b>	<b>7,641,665</b>
Allowance for Green Initiatives	6% of (A)	2,299,463	2,607,137	2,914,812
Allowance for FF&E	2% of (A)	766,488	869,046	971,604
<b>Total Development Cost (D+G)</b>		<b>63,898,239</b>	<b>72,448,003</b>	<b>80,997,767</b>
Cost/Bed		384,929	436,434	487,938
<b>Total Development Cost in Year 2027 (escalated @3% per annum)</b>		<b>71,918,031</b>	<b>81,540,866</b>	<b>91,163,701</b>



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<b>Total Development Cost in Year 2034 (escalated @3% per annum)</b>		88,450,106	100,284,980	112,119,853
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If the 166 beds facility is to achieve a gross area per bed of 800 sq. ft./bed, then the total development cost is estimated to be approximately range from \$88.5 million to \$122.1 million if the building is to be completed in year 2027 and range from \$108.8 million to \$137.9 million if the building is to be completed in year 2034.

In addition to estimating the capital cost of Scenario 3, the cost of potential remedial works within the existing facility was also explored. For this purpose, the capital cost for redevelopment of Victoria Manor i.e., the cost to construct the building only, in year 2023 in its current configuration of 166 beds with an area of 107,956 sq. ft. was used. This was done to estimate the potential cost of widening doors in resident rooms and washrooms in the current facility. It is estimated based on the elemental breakdown of the total building construction cost, particularly to estimate the cost of the element – Partitions and Doors. Table 27 provides the elemental cost breakdown of the building construction cost (current year costs) and identifies the cost of the building element – Partitions and Doors to range from \$ 2.3 million to \$2.9 million. If roughly 70% of the floor space is assumed to be residential units, and within this up to 50% is assumed to be the walls with doors with adjacent elements, including services that will need to be repaired/replaced as a result of door widening, the cost of door widening could be approximately estimated as 35% of the total elemental cost of Partitions and Doors ranging from \$800k to \$1.02 million. It would also be prudent to add a 25% contingency to accommodate costs related to unforeseen conditions at site, which would bring the total estimated cost to approximately \$1.0 million to 1.27 million.

**Table 27: Elemental Cost Used as Basis for Estimating the Cost of Door Widening**

		Unit Cost (\$) - Low	Unit Cost (\$) - Med	Unit Cost (\$) - High
		355 /sq. ft.	403 /sq. ft.	450 /sq. ft.
Gross Building Area (sq. ft.)	107,956		<b>Cost (\$)</b>	
<b>Building Construction Cost</b>		<b>38,324,380</b>	<b>43,452,290</b>	<b>48,580,200</b>
<b>Elemental Cost Breakdown</b>	<b>Cost Ratio of Building Elements</b>	<b>Cost (\$)</b>	<b>Cost (\$)</b>	<b>Cost (\$)</b>
Substructure	3.50%	1,341,353	1,520,830	1,700,307
Structure	9.00%	3,449,194	3,910,706	4,372,218
Exterior Enclosure	8.50%	3,257,572	3,693,445	4,129,317
Partitions and Doors	6.00%	2,299,463	2,607,137	2,914,812
Finishes	7.00%	2,682,707	3,041,660	3,400,614
Fitting and Equipment	10.00%	3,832,438	4,345,229	4,858,020
Mechanical	34.00%	13,030,289	14,773,779	16,517,268
Electrical	22.00%	8,431,364	9,559,504	10,687,644
<b>Total</b>	100.0%	38,324,380	43,452,290	48,580,200

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If the City decides to extend the life of the current facility it will need to conduct a set of studies that will investigate the integrity of the structural system and other building elements to ensure life safety and energy performance and operational needs in the future. The building may require significant retrofits and upgrades to achieve these goals. In addition to that if the City plans to expand the number of beds, it will need to expand in pods (or resident home area comprising) of 32 beds to ensure optimal operational performance. Based on current total development cost estimates a resident home area of 32 beds at the same gross area per bed as existing will cost approximately between \$13.8 million and \$17.6 million if completed in year 2027 and \$17 million and 21.6 million if completed in year 2034. If the resident home area is sized to achieve a gross area per bed of 800 sq. ft., then it will cost approximately between \$17 million and \$21.6 million if completed in year 2027 and \$21 million and 26 million if completed in year 2034.

# 10.0 Recommendations

## 10.1 Current Facility Recommendations

### 10.1.1 Summary

A review of the physical structure to house the delivery of LTC services supports the 45-year lifecycle use of this facility/asset for long-term care (with noted limitations) with its potential replacement in 2035. Specific improvements may be completed to support the experience of living/working in the building. While some current limitations within the resident living environment cannot be corrected, the City should immediately establish a “State of Good Repair” framework utilizing a tax-supported Capital fund.

### 10.1.2 Methodology

The current facility recommendations have been compiled based on Stakeholder Consultations, Service Level Review and Benchmarking completed and are the opinion of a LTC Operations Subject Matter Advisor. The objective is to identify building improvements that will add positively to the experience of those living, working, and visiting at Victoria Manor in the near-term future.

### 10.1.3 Findings and Recommendations

To extend the useful life and effectiveness of the facility to support LTC service delivery, the following recommendations are made. These improvements could aid operations usefulness, and bring benefit to the residents’ experience and support the continued use of the existing building:

#### LIGHTING

Testing of lighting levels against *Fixing Long-Term Care Act, 2021* requirements in all resident living areas; and completion of operating improvements that illuminate appropriately, enable independent resident use and support wayfinding, and common areas modifications to support staff and model day/night timing.

#### Rationale:

- Refer to *Fixing Long-Term Care Act, 2021*. There are specific lighting requirements which set a minimum standard for resident comfort.
- Also refer to Stakeholder Input identifying clinical practice challenges.

#### CEILING LIFTS

Installation of ceiling mounted lifts where turning radius and door widths currently limit caregiving functions. While the number and locations should be determined by those who work in these areas the primary locations are bedrooms, and ensuite washrooms.

#### Rationale:

- See CSA Standard regarding room functionality.
- Also see Stakeholder Input with reference to caregiving for dependent residents in some areas of the building.

## DOOR WIDTH

Reconstruct the width of bath/shower room doors in each RHA to a minimum of 1120 mm or greater. While bedroom doors also present movement limitations the above proposal to install ceiling lifts may be a more feasible solution

Rationale:

- See Service Level Report Section 3 LTC Building Classification. Findings identify the gap against current MLTC design standards, including restricted movement of residents which challenges worker effort.
- Also see Section 9 Avoidable Emergency Room visits. There is an opportunity to reduce potential for falls which lead to injury.

## INFECTION PREVENTION AND CONTROL (IPAC)

Permanently mounted signage, built in Personal Protective Equipment (PPE) storage, and waste receptacles at point of care (possibly inserted in wall structure at bedroom vestibules with tamper proof lids which eliminates hallway clutter), long-term cohorting spaces for staff at each RHA, and handsfree door and tap activation.

Rationale:

- See CSA Standard. This recent guideline document leverages lessons from the pandemic to improve safety and comfort in LTC.
- Also see Stakeholder Input identifying challenges experienced in the daily operations during the pandemic.

## DÉCOR (INCLUDING DEMENTIA CARE DESIGN)

Using aging and dementia best practice advice for selection of colour schemes, furnishings and finishes to complete a refresh of the interior design. Replace wall protection, corner guards and baseboards

Rationale:

- Industry best practice<sup>4</sup>.
- Also see Stakeholder Input comments about décor, furnishings, and finishes.

## PLUMBING

Assess user reported drainage issues and slow delivery of hot water to end of line rooms

Rationale:

- See Stakeholder Input, which reports specific experience concerns related to hot water supply and drainage.

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<sup>4</sup> [https://brainxchange.ca/Public/Files/Design/5\\_BXC\\_Wayfinding\\_Design\\_Recomendatons.aspx](https://brainxchange.ca/Public/Files/Design/5_BXC_Wayfinding_Design_Recomendatons.aspx);  
<https://www.peelregion.ca/lc/butterfly-home/>

## HEATING

Ensure all bedrooms provide the minimum temperature (22 degrees Celsius) with particular attention to rooms with 2 residents and, if possible, allow individual bedroom control for greater resident satisfaction.

Rationale:

- See Stakeholder Input which reports specific experience concerns related to heating in specific locations.

## TECHNOLOGY

Undertake a comprehensive upgrade to IT infrastructure bringing improved connectivity and faster speed. This will enable all residents access to Wi-Fi for daily needs, staff to maintain connectivity for all caregiving functions and the building to provide capacity for RTLS specifically to improve wanderer monitoring, CCTV and building automation.

Rationale:

- See Section 1 MLTC Quality Inspection Program. Findings suggest technology improvements that could improve resident outcomes.
- Also see Stakeholder Input which identifies limitations for personal entertainment options.
- See CSA LTC Standard 2430078 Section 10.

## PARKING

Rear parking to be reconfigured and expanded to accommodate a larger staff complement, and receiving route for large trucks which does not encroach on driving and walking routes in the parking area.

Rationale:

- Government announcements include targeted funding to provide 4 hours of care per day to each resident. This will result in significant staff growth.
- Also see Stakeholder Input identifying current parking issues.

## ACCESS TO OUTDOORS

Study opportunities to improve independent access for residents from all areas of the Home to use the enclosed gardens currently entered through the McMillan RHA dining room.

Rationale:

- See Stakeholder Input which identifies outdoor access limitations.
- Also see best practice from BrainXChange<sup>5</sup>.

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<sup>5</sup> [https://brainxchange.ca/Public/Files/Design/5\\_BXC\\_Wayfinding\\_Design\\_Recomendatons.aspx](https://brainxchange.ca/Public/Files/Design/5_BXC_Wayfinding_Design_Recomendatons.aspx)

### BARIATRIC ENABLED ROOM(S)

Designate at least one room in each RHA to accommodate a bariatric resident, including entry door width, layout and access to the washroom.

Rationale:

- See Stakeholder Input which signals a greater demand for such accommodations.

### ADMINISTRATIVE WING

Access to offices for leadership staff should be improved so that residents and families may approach without going through the gatekeeper reception desk.

Rationale:

- See Stakeholder Input which identified wayfinding and accessibility concerns with business support offices.

### ATRIUM

Utilization needs to be refreshed to maximize the opportunity it provides and avoid misuse.

Rationale:

- Best Practice related to aesthetics.

### DINING AND ACTIVITY/LOUNGE AREAS

The minimum space required per person is not met and is approximately half of the required size in the LTC Design Standards. While this is a significant impediment to the daily life and experience of residents and staff it would require expensive renovations to change this because of the constraints of the physical structure.

Rationale:

- See Chart Ministry Long-term Care Design Standards Gap Analysis

## 10.2 Future Facility Recommendations

### 10.2.1 Summary

Structural limitations were identified in Stakeholder Input and Service Level Review. As referenced in Current Building Recommendations there is a significant gap below the minimum standard in dining and social/recreational spaces in all Resident Home Areas. There is little prospect that a renovation would successfully or efficiently resolve the challenges of the current building because of the current footprint. Rebuilding existing walls and openings along with all building components such as plumbing, electrical and HVAC would increase the cost to a point perhaps even greater than a new build. A redevelopment with opportunities for enhanced services such as a campus of care will serve the long-range future needs of the aging and frail demographic in COKL.

## 10.2.2 Methodology

Recommendations for a future facility have been compiled based from Stakeholder Consultations, Service Level Review Benchmarking (including demographic review), and consideration of Growth related Capital Needs.

Limitations:

The current Long-Term Care Design Standards for Ontario's LTC Homes were published in 2015. With interest from various jurisdictions for continuous improvement to safety and quality of life in the LTC Home setting following the pandemic the further advancement of building and design standards can be expected but are not known. Recent themes that could influence these updates include environments that promote person centred care models, while expanding design measures to address infection prevention and control.

## 10.2.3 Findings and Recommendations

### DEMOGRAPHICS

Studies suggest a significant growth in the population in Kawartha Lakes specifically in the older demographic, and those who will require LTC. It is estimated that 20% of the Ontario population over age 80 have complex care needs that require long-term care. The Ontario population over 80 will double by 2040. This cohort is already a substantially larger segment (28% vs 19%) of the resident population in City of Kawartha Lakes. In order to address this, a new larger building should be constructed. In order for Victoria Manor to retain a similar segment of the LTC beds in the City (currently 22%), an overall addition of at least 77 beds would maintain the City's market share of the current spaces in Kawartha Lakes. Diversity of service providers, and in particular the retention of a strong contingent of non-profit operators is a core value in the legislation. Because Victoria Manor is the only not-for-profit Home in Kawartha Lakes the addition of these beds is both a growth and demand strategy as well as a market balancing strategy.

By 2025 all beds approved and under development in COKL will serve only 78% of the population over age 80 who have care needs that can only be adequately met in LTC. This gap continues to grow as the aging demographic in the community grows and based on population projections in 2030 services are at 60% of the need. By the target date of Victoria Manor's replacement in 2035 less than 50% of the demand will be served by the 8 Homes in the City. Recognizing that Ontario's LTC Home Design Standards model incentivizes the use of 32 bed Resident Home Areas a rounding of the census to 256 would be more efficient – 13 beds more than proposed above. This total addition of 90 beds would allow the Manor to design 8 resident home areas of 32 spaces. A larger size LTC Home could be considered in light of the demand, although such large operations must be skilled to maintain a small home-like service delivery model.

Rationale:

- See Municipal Bed comparison section, Long-Term Care Bed distribution
- StatsCan Demographics 2021
- Kawartha Lakes Long-Term Care LS beds and Population Projections

## LEVEL OF CARE

The level of care required by residents in LTC today is significantly different than when the current Victoria Manor was built. Updated design standards including Best Practice and evidence-based design provided by CSA should be the primary guide to ensure modernized designs for both resident quality of life and worker experience. At a minimum, in response to both IPAC best practice and consumer preferences the Home may be built using small home concepts with private bedrooms for all. Accessibility standards throughout the whole building would ensure all areas can be utilized by all regardless of mobility needs. Specially designated households for unique populations can be effectively integrated in a new design (Dementia care, younger adults). The Ministry of Long-Term Care provides incentives for the operation of special Behavior Support Units, which are provided for a small percentage of LTC residents with extraordinary cognitive challenges. Within the new building footprint a purpose built BSU or an emotion-focused unit akin to the Butterfly Home model which has gained popularity in supporting those with responsive behaviours would provide significant benefits to the local community.

Rationale:

- CSA standards
- See Stakeholder Input

## CAMPUS OF CARE

Housing options for aging in place can be constructed in a campus offering a continuum of living options including life lease housing, garden apartments, supportive housing units and retirement or wellness suites. There are several successful models providing a mix of housing and care options in Ontario. These models help to provide an environment where aging persons can maintain their independence and personal housing options longer, and while experiencing diminished functional abilities in a supportive continuum. A cluster of service recipients for personal care and professional Homecare needs provides opportunities for improved service utilization.

Some of these elements could qualify for funding through Development Charges, as the Development Charges Act (2019) permits City of Kawartha Lakes to impose DC's to "pay for increased capital costs required because of increased needs for services arising from the development of the area". Capital construction costs for these housing forms may meet Canada Mortgage and Housing funding eligibility criteria.

Rationale:

- See Stakeholder Input
- See *Campuses of Care; Supporting People, Sustaining Care Systems in Ontario, AdvantAge Ontario, March 2020*
- City of Kawartha Lakes By –Law 2019-184 Development Charges By Law
- See National Institute on Aging "Enabling a More Promising Future for Long-Term Care in Canada" <https://www.niaging.ca/long-term-care-paper-3>



## ADDITIONAL SERVICES

Other services designed to aid the extended independence of frail people living independently could be co-located, such as Seniors Active Living Centre, and a central amenity hub that may provide supports and also attract workforce.

Rationale:

- See Stakeholder Input
- See *Building a Seniors Campus*, County of Simcoe, November 2017

## REDUCING EMERGENCY ROOM DEMAND

Healthcare services that can reduce ER transfers (such as Diagnostics (Lab, x-ray and CT), and other Outpatient Services) could be co-located for the use of both LTC residents and other frail persons in the immediate vicinity.

Rationale –

- See Stakeholder Input
- New Ministry Long-term Care vision as described by Minister Calandra in a press conference in May 2023<sup>6</sup>

## ENVIRONMENTAL DESIGN

Environmental design considerations should include location (proximity to walkable, and alternative transportation services) as well as energy management that contributes to municipal carbon reduction targets.

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<sup>6</sup> <https://news.ontario.ca/en/advisory/1002998/minister-calandra-to-hold-a-press-conference#content>

# 11.0 Implementation Plan

## 11.1 Summary of Recommendations

As the landscape of long-term care services is constantly evolving, the need to adapt, innovate, and revitalize long-term care infrastructure to meet the demands of an aging population is both a challenge and an opportunity. In this study we have explored the current state and the potential options to transform the current long-term care facility. The current facility has up to 12 years of useful life remaining. The goal is not just to extend the facility's longevity but to redefine its purpose and capability to respond to the shifting demographics and healthcare needs and expectations of the community. This study indicates that the need for long term care services will continue to increase in the future as the population increases. Although the current facility has many shortcomings when today's care needs and practices are considered, the fact that it is in good condition overall, and has more than a decade of life remaining, it would be prudent to continue to use the facility until 2035.

In the years leading up to 2035, the City will continue to invest in the current facility in accordance with the capital plan forecast. This investment is currently estimated to be approximately \$1.66 million (approximately \$1.9 million when adjusted for inflation at 3%) over a 10-year period. The City may also consider any upgrades or alterations that can improve the operational performance (as per the findings of Examination of Service Levels) of the facility such as widening of doors in resident rooms and washrooms. These potential upgrades are estimated to cost approximately \$1.00 million to \$1.25 million. It is recommended that the City carry out such upgrades immediately so that residents and staff can benefit from the upgrades before the eventual decommissioning of the facility.

Although it is possible that the current facility could continue to operate beyond its useful life, it has already many functional shortcomings that has started to affect the day-to-day operations, which can consume the productive hours of care staff who are paid by the system on an hourly basis. In an operation like long-term care where personnel costs are the single biggest cost of operations, the facility and functional spaces should maximize the utilization of the care delivery personnel, as opposed to impeding their work and negatively affecting productivity. In addition, if the needed facility upgrades are not addressed in a timely manner, this can contribute to faster deterioration of the asset and increase in potential operational risks (safety), disruptions and liabilities (including financial and legal) arising as a result. This may increase the operating costs and capital expenditure. Considering all these factors, it is recommended that a new facility be developed to house the existing and prospective long-term care residents by 2035.

## 11.2 Tasks, Timeline and Funding Requirements

The nature of potential development presents numerous challenges with regards to the project initiation, defining the project requirement, seeking regulatory approvals, procurement management such as prequalification of developers and contractors, selection, obtaining funding, timelines, debt issuance requirements, etc. This section proposes a potential timeline to consider towards meeting the deadline for the completion of construction and ensuring opening of the new facility by the end of year 2035.

**Table 28: Proposed Timeline**

Timeline	Tasks	Description	Estimated Costs
2024 to 2035	Continued use of the existing facility	Continue investments in the current facility as per the recommendations of the building condition assessment and to improve operational performance (as per the findings of Examination of Service Levels) by conducting remedial works such as door widening, and AODA compliance as needed.	Approximately \$3.5 million over 10 years
2028	Initiation	By the end of year 2028 finalize the decision to develop new facility. Establish a project governance framework, steering committee.	
2029 to 2030	Pre-project studies	<p>Following the finalization of the decision to develop a new facility, conduct pre-project studies to define project requirements, magnitude, and budget. This will include the following:</p> <ol style="list-style-type: none"> <li>1. <b>Needs Assessment:</b> Conduct a comprehensive analysis of demographic data to forecast the future demand for long-term care services in the region, care needs, supply of beds, model of care, staffing levels, regulations, industry trends and best practices.</li> <li>2. <b>Financial Assessment:</b> Assess the potential capital cost of development of the new facility, staffing requirements and operating costs for the model of care chosen, identify potential funding sources, availability of funds, estimate any capital and operating funding shortfall, including budget constraints.</li> <li>3. <b>Define Project Scope:</b> Based on the needs assessment and financial assessment, determine the size and scope of the future facility.</li> <li>4. <b>Engage Stakeholders:</b> Involve residents, families, and staff in the planning process to gather input and address concerns.</li> <li>5. <b>Budget Planning:</b> Develop a preliminary budget for the redevelopment program and secure initial funding commitments.</li> <li>6. Pursue Ministry of Long-Term Care’s capital and licensing approval.</li> </ol>	Approximately \$375k over 2 years (applicable to any scenario)

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Timeline	Tasks	Description	Estimated Costs
		<ol style="list-style-type: none"> <li>7. Establish a project management team to oversee the preconstruction and construction processes, ensure quality control and timely completion.</li> <li>8. <b>Procurement Analysis:</b> Conduct procurement options analysis to determine the most suitable procurement method for delivery of this project.</li> <li>9. <b>Site selection:</b> The current site was identified by the residents as easily accessible and ideal for its intended use. Considering the existing building covers approximately 10% of the site, it should be possible to construct the new facility on site. However, this needs to be validated through a constructability review to ensure that there would be no technical challenges or any potential disruptions or safety risks to existing operations. In addition to that it also needs to be verified whether it is functionally efficient to have all the proposed beds located in one facility or in two facilities in the same location or different locations.</li> </ol>	
2031 to 2032	Planning and design	<ol style="list-style-type: none"> <li>1. <b>Preliminary Design:</b> Hire architectural and engineering firms to develop preliminary design for the proposed new facility.</li> <li>2. <b>Stakeholder engagement:</b> engage key stakeholders to seek feedback and approval of the preliminary/ concept design.</li> <li>3. Obtain development approval from the City.</li> <li>4. Develop preliminary project cost estimates.</li> <li>5. Obtain development agreement/planning grant from the Ministry.</li> <li>6. Develop <b>Detailed Design:</b> Ensure that the design incorporates the latest healthcare trends and technologies.</li> <li>7. <b>Regulatory Approvals:</b> Begin the process of obtaining all necessary permits and regulatory approvals for the construction project.</li> </ol>	Approximately \$30 million to \$38 million for the 512 beds facility and approximately \$8 million to \$12.5 million for the 166 beds facility (in the case of the 166 bed facility, range also depends on gross area per bed achieved, higher end of the range applies to 800 sq. ft./bed).
2032 to 2034	Construction	<ol style="list-style-type: none"> <li>1. Procure construction services through a competitive bidding process.</li> </ol>	Approximately \$288 million to \$365 million for

Timeline	Tasks	Description	Estimated Costs
		2. Complete construction	the 512 beds facility and approximately \$75.8 million to \$118.3 million for the 166 beds facility (in the case of the 166 bed facility, range also depends on gross area per bed achieved, higher end of the range applies to 800 sq. ft./bed).
2032 to 2035	Post Construction	<ol style="list-style-type: none"> <li>1. <b>Transition Plan:</b> Develop a comprehensive plan (2032) to transfer residents and staff from the old facility to the new one, ensuring minimal disruption to care.</li> <li>2. <b>Staffing and Operational Readiness:</b> Pursuant to the transition plan, Staffing and operational readiness plans are to be made, followed by hiring and training staff. The timeline for this phase depends on recruitment and training needs. Train staff members on new technologies and care protocols that will be implemented in the new facility (2033-34).</li> <li>3. <b>Decommission Old Facility:</b> Develop a plan for the decommissioning and potential repurposing of the old facility (2034).</li> <li>4. <b>Full Transition:</b> Execute the transition plan to move residents, staff, and equipment to the new facility (2035).</li> </ol>	Approximately \$700k to \$1.0 million (planning costs only; applicable in either case - 166 beds or 512 beds facility)).

*\* All costs provided above are estimated based on information available in year 2023 and have been adjusted for inflation at 3% per annum.*

### 11.3 Next Steps

Kicking-off this strategic project requires significant pre-planning effort starting with finalizing the project scope (i.e., number of beds, care model, needs etc.), and identifying the most suitable development and procurement option for the proposed new LTC. The latter is also a critical step in the path forward, as it would determine the funding of costs and operation of the facility in the long term. The City has initiated important first steps via this master planning exercise; it has informed the key stakeholders about the potential options, its pros and cons, risks and opportunities, enabling them to make better decisions.

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To move forward, a few immediate steps will need to be initiated to effectively plan and manage the development. The next steps that follow are recommended elements for a strategic approach and could help form a plan for the project.

**GOVERNANCE:** The City should consider developing a comprehensive project governance framework for the development of the LTC facility. The governance framework will help to clearly delineate roles and responsibilities for the various stakeholders and participants in this initiative. The success of this project depends on engaging with the community, stakeholders, various government entities at the municipal and provincial level, and the technical team (architect, engineer, contractor etc.). It is for these reasons this project warrants an integrated management approach, and the governance framework will help identify the relationship between these entities, processes and how all of this would work in unison to achieve project goals at the right time.

**MANAGEMENT:** This project needs to be completed by the end of year 2034 to facilitate transition to the new facility from the old in the beginning of year 2035. The magnitude of this project and the timeframe requires an integrated approach to project management. It is imperative that a core project team is established by the City which should identify the opportunities, challenges, and risks of the entire project from initiation to completion of construction. The core team would have the sole purpose of keeping this project in focus and providing leadership of this initiative and acting as a bridge with entities such as the stakeholders, developer, and the community. It will also ensure that the project processes and decision-making structure are in alignment with the City's internal project management, delivery expertise and capacity. This needs to be verified as a first step. If City's internal resources are deemed inadequate it will need to hire extra resources or a firm that has significant experience in planning, procurement (especially if public-private-partnerships are considered) and management of capital projects.

**FUNDING/FINANCING:** As LTC projects are to be funded upfront by the owner, all potential funding and financing options and terms should be explored further to understand suitability to the proposed project. It needs to be confirmed as to what percentage of the costs can be funded through grants and debt, as the ratio of the latter would have a significant impact on the long-term financial sustainability of the proposed project. There should be a distinct financial analysis team created internally to solely investigate the funding and financing channels (including municipality's capacity to issue debt, DCs, taxes etc.), terms and conditions, availability, timeline, and other characteristics, to move quickly through the application process and lock-in those funds.

**PROCUREMENT ANALYSIS/MARKET SOUNDING:** To ensure a successful and well-informed approach to the development, it is imperative to conduct a thorough analysis of procurement options and engage in market sounding activities. Different procurement/project delivery methods have different risk profiles, and choosing the right model will help in effectively managing development risk and devising timely risk mitigation strategies. Engaging in market sounding activities is a proactive measure to gauge interest, capacity, and capabilities within the market. This involves structured consultations with potential service providers, developers, and other stakeholders. These steps will provide valuable insights, enhance decision-making, and foster collaboration with potential partners and stakeholders.

In conclusion, this Facility Master Plan provides the City of Kawartha Lakes with information needed to understand the state of its current operations, facility portfolio, needs, and potential future demand. The Plan looks at the investment required to address shortfalls with the current building and recommends improvements over the short-term to the existing facility to improve the quality-of-care services provided and identifies the associated costs of those improvements. The Plan recommends the development of a

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new facility by 2035, at the end of Victoria Manor’s useful life, and outlines herein the steps the City can follow to implement this recommendation.

## Appendix 1 LIST OF DOCUMENTS PROVIDED BY COKL

**Table 29: All documents provided by City of Kawartha Lakes**

Category of Document	Doc. No.	Name of Document	Date of Document	Publisher/ Author
Facility Condition Assessment	1.	Building Condition Assessment + MOHLTC 1999 Design Manual Compliance Report Victoria Manor Long-Term Care City of Kawartha Lakes	March 18, 2009	Snider
	2.	Facility Condition Assessment Victoria Manor	April 19, 2016	Altus Group Limited
	3.	Elevator Maintenance Contract between Corporation of the City of Kawartha Lakes and ThyssenKrupp Elevator (Canada) Ltd	August 16, 2018	The City of Kawartha Lakes
	4.	Thermographic Inspection of Electrical Distribution Equipment Location: Victoria Manor	December 22, 2022	FLIR Transformer Engineering Services Ltd.
	5.	Inspection Certificate for Main Kitchen Hood at Victoria Manor	August 2022	Troy Life & Fire Safety Ltd.
	6.	Inspection Certificate for 1st Floor Activity Room - Kitchen Hood at Victoria Manor	August 2022	Troy Life & Fire Safety Ltd.
	7.	Inspection Certificate for 1st Floor South Kitchen - Kitchen Hood at Victoria Manor	August 2022	Troy Life & Fire Safety Ltd.
	8.	Test & Maintenance Inspection Report for Repairs – <i>Fire Alarm, Sprinkler, Fire Shutters, &amp; Fire Extinguishers and Backflow &amp; Kitchen Hood</i>	December 6, 2022	Troy Life & Fire Safety Ltd.
	9.	Valve Upgrade Service Contract between TK Elevator (Canada) and the City of Kawartha Lakes	May 5, 2022	TK Elevator (Canada) Limited
	10.	Softstarter Service Contract between TK Elevator (Canada) and the City of Kawartha Lakes	April 21, 2022	TK Elevator (Canada) Limited
	11.	CARF Accreditation Report for Victoria Manor Three Year Accreditation	January 2020	CARF Canada
	12.	Plumbing Survey and Test Report Letter from Water and Wastewater Division of the City of Kawartha Lakes for Victoria Manor	March 24, 2022	The City of Kawartha Lakes



## City of Kawartha Lakes – Facility Master Plan for Victoria Manor

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13.	Hydrant Inspection Report for Victoria Manor – NE Hydrant back parking area	August 31, 2022	LiquidLogics
14.	Hydrant Inspection Report for Victoria Manor – South side of building	August 31, 2022	LiquidLogics
15.	Hydrant Inspection Report for Victoria Manor – NW hydrant front of building	August 31, 2022	LiquidLogics
16.	Hydrant Inspection Report for Victoria Manor – West hydrant - front parking lot	August 31, 2022	LiquidLogics
17.	Elevator Oil Overheating Inspection Report for Victoria Manor	May 02, 2022	Technical Standards and Safety Authority
18.	Transformer Substation Maintenance Report for Victoria Manor	June 29, 2022	Transformer Engineering Services Ltd.
19.	Tripped Breaker Service Report for Victoria Manor	August 10, 2022	Transformer Engineering Services Ltd.
20.	Asset Registry for Victoria Manor	2015-2016	Altus Group Limited
21.	Ontario Elevating Device License Certificates for Victoria Manor	N/A	Technical Standards and Safety Authority
22.	Deficiency Correction Invoice for Victoria Manor – <i>Sprinklers, Fire Alarms, &amp; Fire Extinguishers</i>	December 29, 2022	Troy Life & Fire Safety Ltd.
23.	Transformer Substation Maintenance Report for Victoria Manor	June 7, 2021	Transformer Engineering Services Ltd.
24.	Quote for Water System Upgrades for Victoria Manor	2022	Kawartha Mechanical Ltd.
25.	Transformer Oil Test Laboratory Report for Victoria Manor	September 2, 2021	Petro Laboratories Inc.
26.	Scheduled Tasks for Maintenance Care Summary Report for Victoria Manor	January 12, 2023	Sienna Senior Living
27.	Cross Connection Survey form from Water and Wastewater Division of the City of Kawartha Lakes – <i>Unfilled Copy</i>	N/A	The City of Kawartha Lakes
28.	Capital Budget 5 Year Plan for Victoria Manor 2022-2026	N/A	N/A
29.	Draft of 2023 Budget for Victoria Manor	2022	N/A
30.	Cross Connection Survey Form from Water and Wastewater Division of the City of Kawartha Lakes for Victoria Manor – <i>Filled Copy</i>	May 02, 2022	Victoria Manor
31.	Private Backflow Device Test Form from The City of Kawartha Lakes	N/A	The City of Kawartha Lakes

**City of Kawartha Lakes – Facility Master Plan for Victoria Manor**

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32.	Tax Account Copy for Victoria Manor	Jan 10, 2023	The City of Kawartha Lakes
33.	General Ledger Details for Victoria Manor	December 2021	Victoria Manor
34.	Monthly Financial Report for Victoria Manor	December 2021	Victoria Manor
35.	Balance Sheet for Victoria Manor	December 2021	Victoria Manor
36.	Monthly Financial Report for Victoria Manor	November 2022	Victoria Manor

## Appendix 2 ASSET INVENTORY



# Asset Registry- Victoria Manor Sept.5th , 2023

20130.104334.000

**Issued:** September 5, 2023

**Prepared for:** Colliers Project Leaders

**Prepared by:** Altus Group Limited – Asset and Facilities Management

September 5, 2023

Job Number: 20130.104334.000

Laura Berazadi

Manager, Infrastructure Advisory

Colliers Project Leaders

Mobile 647.204.5426

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Re: ***Asset Registry- Victoria Manor Sept 5th, 2023***

We are pleased to submit our Asset Registry for the above-noted Project. Please note that the Altus AFM team has included assets from the Asset Registry in an elemental format.

This Report is not intended for general circulation, publication, or reproduction for any other person without express written permission in each specific instance. The Report is written for the exclusive use Colliers Project Leaders and the documented consultants for this project. Altus Group Limited does not hold any reporting responsibility to any other party.

We trust the Report meets your requirements. Should you have any questions related to the document or require additional information, please contact the undersigned.

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# 1. Methodology

The methodology of the Asset Registry includes the examination of all recent and available documentation, and the physical inspection of the Building Components. Altus applied a unique and distinct barcode label to all assets listed. These Asset are referenced in the attached spreadsheet with their corresponding barcode for future updates as needed. Altus logged and recorded a hierarchical inventory of the facility's assets, applying Uniformat standards including where available equipment nameplate information, including:

- Year of install (where known)
- Unit rating
- Quantum Units and Quantum Type
- Manufacturer (where known)

# 2. Reporting Qualifications and Limitations

- This report is written for the exclusive use of the Colliers Project Leaders. Altus Group Limited (Altus) does not assume any reporting responsibility to any other party without Altus' express written consent.
- This report reflects our best professional judgement based on swift review of the subject information only.
- The report or parts thereof are not intended for general circulation, publication, or reproduction without express written permission from Altus in each specific instance.
- The analyses made and opinions expressed herein are based on sources, drawings, data, reports, and related information supplied by others that are believed by Altus to be reliable and provided in good faith; however, no representation or warranty is made by Altus, expressed, or implied, as to their accuracy, validity, completeness, or correctness.
- This assessment does not wholly eliminate uncertainty regarding the potential for existing or future costs, hazards, or losses in connection with the property.
- Altus accepts no responsibility for any decisions made or actions taken as a result of this report unless specifically advised of and participating in such action, in which case our responsibility will be as agreed to at that time.
- The opinions expressed in this report are statements of judgment and fact as of the date of publication and are subject to change without further notice.
- Any use of this report specifically denies any right to claims against the Consultant, their officers, agents, and employees in excess of the fee paid for professional service.
- Neither Altus nor its officers or its employees accepts liability whatsoever for any direct or consequential loss arising from the negligent use of this report.

Yours truly,

**Altus Group**



Prepared by:  
**Brian Tingay, FMA**  
Senior Consultant  
Cost & Project Management



Rev. By:  
**Mark Orge, MBA CFM PMP**  
Director, Asset and Facilities Management  
Cost & Project Management

Asset Registry  
Victoria Manor- Kawartha Lakes

Asset ID Tag	Building	Facility Type	Level 3 - Group	Level 4 - Component	Level 5 - Element	Level 2-Uniformat	Year of Install	Rating	Quantum Type	Quantum Units	Model /Make	Serial #
1300517	Victoria Manor	Long Term Care	Services	Conveying	Hydraulic Elevator	D10	1988	1361	KG	Item	United Technologies/Otis Elevator	288488
1300515	Victoria Manor	Long Term Care	Services	Conveying	Hydraulic Elevator	D10	1988	1361	KG	Item	United Technologies/Otis Elevator	288489
1300552	Victoria Manor	Long Term Care	Services	Conveying	Service Elevator Cab	D10	1988	1814	KG	Item	Otis	Missing
1300546	Victoria Manor	Long Term Care	Services	Conveying	Service Elevator Motor	D10	1988	1814	KG	Item	United Technologies/Otis Elevator	288437
1300549	Victoria Manor	Long Term Care	Services	Conveying	Elevator Cab	D10	1988	1361	KG	Item	Otis	Missing
1300550	Victoria Manor	Long Term Care	Services	Conveying	Elevator Cab	D10	1988	1361	KG	Item	Otis	Missing
1423897	Victoria Manor	Long Term Care	Services	Domestic Water Distribution	Circulating Pump Motor	D20	Unknown	3/4	HP	Item	N/A	Missing
1423898	Victoria Manor	Long Term Care	Services	Domestic Water Distribution	Circulating Pump Motor	D20	Unknown	3/4	HP	Item	N/A	Missing
1423808	Victoria Manor	Long Term Care	Services	Domestic Water Distribution	Circulating Pump Motor	D20	Unknown	3/4	HP	Item	Armstrong	Missing
1300516	Victoria Manor	Long Term Care	Services	Other Plumbing Systems	Storm Pumps	D2090	Unknown	Unknown	Unknown	Item	Siemens	Missing
1300543	Victoria Manor	Long Term Care	Services	Other Plumbing Systems	Sanitary Sewage Pump	D2090	Unknown	Unknown	Unknown	Item	Siemens	Missing
1300459	Victoria Manor	Long Term Care	Services	Rain Water Drainage	Roof Drain	D20	1988	N/A	N/A	Area	Missing	Missing
1423823	Victoria Manor	Long Term Care	Services	Natural Gas Shut-off	Energy Supply	D30	1988	N/A	N/A	Item	Missing	Missing
1300460	Victoria Manor	Long Term Care	Services	Roof Top Gasline	Energy Supply	D30	1988	N/A	N/A	Item	Missing	Missing
1300486	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan 3	D30	Unknown	2500	CFM	Item	Greenheck	Missing
1300485	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan	D30	Unknown	2500	CFM	Item	Greenheck	Missing
1300481	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan "1"	D30	Unknown	2500	CFM	Item	Greenheck	Missing
1300480	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan "2"	D30	Unknown	2500	CFM	Item	Greenheck	Missing
1300466	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan "5"	D30	Unknown	2500	CFM	Item	Greenheck	Missing
1300465	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan "6"	D30	Unknown	2500	CFM	Item	Greenheck	Missing
1300462	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan "8"	D30	Unknown	2500	CFM	Item	Greenheck	Missing
1300461	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan "7"	D30	Unknown	2500	CFM	Item	Greenheck	Missing
1300453	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan "9"	D30	Unknown	Unknown	Unkown	Item	Greenheck	Missing
1300452	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan 4	D30	Unknown	2500	CFM	Item	Greenheck	Missing
1300449	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan "10"	D30	Unknown	400	CFM	Item	Greenheck	Missing
1300472	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan 14	D30	2022	850	CFM	Item	Greenheck	88L0387
1300473	Victoria Manor	Long Term Care	Services	HVAC	Exhaust fan "15"	D30	2022	1000	CFM	Item	Greenheck	Missing
1300476	Victoria Manor	Long Term Care	Services	HVAC	Kitchen Exhaust	D30	2022	7090	CFM	Item	Canarm B1-13	Missing
1300477	Victoria Manor	Long Term Care	Services	HVAC	Exhaust Fan "12"	D30	Unknown	2500	CFM	Item	Eaton	Missing
1300484	Victoria Manor	Long Term Care	Services	HVAC	Outdoor Rooftop Vent	D30	Unknown	N/A	N/A	Area	Missing	Missing
1300488	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired "P"	D30	2009	5 to 7	Ton	Item	lennox	5609K00166
1300487	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired "Q"	D30	2008	5 to 7	Ton	Item	lennox	Missing
1300483	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired "O"	D30	2008	5 to 7	Ton	Item	lennox	5608A00388
1300482	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired "N"	D30	2007	5 to 7	Ton	Item	lennox	5607L00287
1300474	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired	D30	2016	5 to 7	Ton	Item	lennox	5616L02144
1300468	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired	D30	Unknown	5 to 7	Ton	Item	lennox	Missing
1300467	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired	D30	2016	5 to 7	Ton	Item	lennox	Missing
1300463	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired	D30	Unknown	5 to 7	Ton	Item	lennox	5606M06485
1300464	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired "L"	D30	2006	5 to 7	Ton	Item	lennox	5606L12326
1300458	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired "B"	D30	Unknown	5 to 7	Ton	Item	lennox	5613H07351
1300457	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired	D30	Unknown	5 to 7	Ton	Item	lennox	5619B11316
1300455	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired	D30	Unknown	5 to 7	Ton	Item	lennox	5615A05303
1300456	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired "E"	D30	Unknown	5 to 7	Ton	Item	Lennox	5617K03164



Asset Registry  
Victoria Manor- Kawartha Lakes

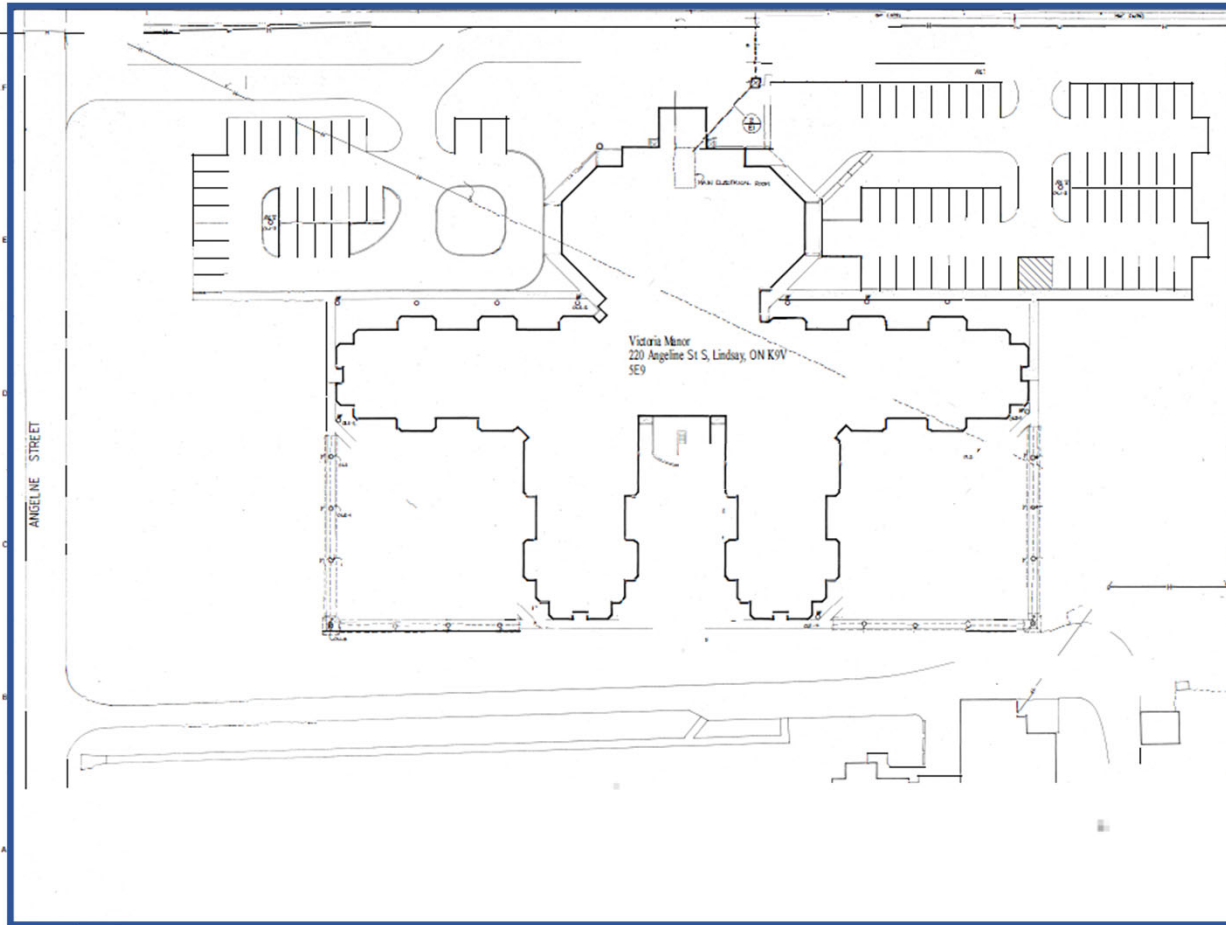
1300451	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired "10"	D30	Unknown	5 to 7	Ton	Item	York	NE8829779
1300475	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired	D30	Unknown	5 to 7	Ton	Item	Lennox	5611K03357
1300470	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Air Handling Unit	D30	Unknown	5 to 7	Ton	Item	Engineered Air	M21299 MUA-1
1300471	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Air Handling Unit	D30	Unknown	5 to 7	Ton	Item	Engineered Air	M21299 MUA-1
1300469	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired	D30	2015	5 to 7	Ton	Item	Engineered Air	M17630 CU
1300454	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Rooftop Unit Gas Fired	D30	Unknown	5 to 7	Ton	Item	Lennox	5614A04957
1300479	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Air Handling Unit	D30	Unknown	5 to 7	Ton	Item	Engineered Air	N/A
1300478	Victoria Manor	Long Term Care	Services	Terminal & Package Units	Air Handling Unit	D30	Unknown	5 to 7	Ton	Item	Engineered Air	M21299 MUA-1
1423904	Victoria Manor	Long Term Care	Services	Heat Generating Systems	Heating Boiler -1	D30	Unknown	119	Gal	Item	A.O Smith	2219129500976
1423902	Victoria Manor	Long Term Care	Services	Heat Generating Systems	Heating Boiler - 2	D30	Unknown	119	Gal	Item	A.O Smith	2304132608550
1423901	Victoria Manor	Long Term Care	Services	Heat Generating Systems	Heating Boiler - 3	D30	Unknown	119	Gal	Item	A.O Smith	N/A
1423899	Victoria Manor	Long Term Care	Services	Heat Generating Systems	Hot Water Storage Tank	D30	1988	125	Psi	Item	Cummer Industries	5-867690
1423900	Victoria Manor	Long Term Care	Services	Heat Generating Systems	Water Heater	D30	1988	160	Psi	Item	RBI	101675133
1423803	Victoria Manor	Long Term Care	Services	Heat Generating Systems	Electric Baseboard Heaters	D30	1988	120/208	Volt	Area	Missing	Missing
1423822	Victoria Manor	Long Term Care	Services	Cooling Generating Systems	Split Unit	D30	Unknown	2	Ton	Item	Fujitsu	Missing
1423819	Victoria Manor	Long Term Care	Services	Cooling Generating Systems	Split Unit	D30	Unknown	2	Ton	Item	Fujitsu	Missing
1300558	Victoria Manor	Long Term Care	Services	Cooling Generating Systems	Fridge/Freezer Condensor Unit	D30	Unknown	Unknown	Unkown	Item	Missing	Missing
1300557	Victoria Manor	Long Term Care	Services	Cooling Generating Systems	Fridge/Freezer Condensor Unit	D30	Unknown	Unknown	Unkown	Item	Missing	Missing
1300559	Victoria Manor	Long Term Care	Services	Cooling Generating Systems	Fridge/Freezer Condensor Unit	D30	Unknown	Unknown	Unkown	Item	Missing	Missing
1300560	Victoria Manor	Long Term Care	Services	Cooling Generating Systems	Fridge/Freezer Condensor Unit	D30	Unknown	Unknown	Unkown	Item	Missing	Missing
1300505	Victoria Manor	Long Term Care	Services	Fire Alarm and Detection	Annunciator Panel	D40	1988	Unknown	Unkown	Item	EST	Missing
1300450	Victoria Manor	Long Term Care	Services	Fire Alarm and Detection	Annunciator Panel	D40	1988	Unknown	Unkown	Item	EST	Missing
1300533	Victoria Manor	Long Term Care	Services	Fire Alarm and Detection	Annunciator Panel	D40	1988	Unknown	Unkown	Item	EST	Missing
1300525	Victoria Manor	Long Term Care	Services	Fire Alarm and Detection	Annunciator Panel	D40	1988	Unknown	Unkown	Item	EST	Missing
1300496	Victoria Manor	Long Term Care	Services	Fire Alarm and Detection	Field Panel	D40	1988	Unknown	Unkown	Item	EST	Missing
1300497	Victoria Manor	Long Term Care	Services	Fire Alarm and Detection	Field Panel	D40	1988	Unknown	Unkown	Item	EST	Missing
1300498	Victoria Manor	Long Term Care	Services	Fire Alarm and Detection	Field Panel	D40	1988	Unknown	Unkown	Item	EST	Missing
1300495	Victoria Manor	Long Term Care	Services	Fire Alarm and Detection	Mag Lock Keyswitch	D40	1988	Unknown	Unkown	Item	RCI	Missing
1423917	Victoria Manor	Long Term Care	Services	Fire Supression	Double Check Backflow Preventer	D40	Unknown	Unknown	Area	Item	ZURN	Missing
1423918	Victoria Manor	Long Term Care	Services	Fire Supression	Main Sprinkler Incoming	D40	1989	Unknown	Area	Item	ZURN	Missing
1423919	Victoria Manor	Long Term Care	Services	Fire Supression	Water Meter	D4020	1988	Unknown	Unkown	Item	Sensus	74860200
1300516	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1300547	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1300548	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1423916	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1423913	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	UPS Unit	D5010	1988	347/600	Volt	Item	Missing	Missing
1423911	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	347/600	Volt	Item	Siemens	Missing
1423915	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	347/600	Volt	Item	Siemens	Missing
1423912	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	347/600	Volt	Item	Siemens	Missing
1423910	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	347/600	Volt	Item	Siemens	Missing
1423914	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Transfer Switch	D5010	1988	600	Volt	Item	Siemens	Missing
1423909	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Metering Cabinet	D5010	1988	347/600	volt	Item	Missing	Missing
1423907	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	347/600	volt	Item	Siemens	Missing
1423908	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1423903	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Transformer	D5010	1988	347/600	Volt	Item	Siemens	Missing



Asset Registry  
Victoria Manor- Kawartha Lakes

1300508	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1300506	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1300503	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1300501	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1300502	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1300499	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1300500	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1423817	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1423816	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Disconnect	D5010	1988	347/600	Volt	Item	Siemens	Missing
1423815	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Disconnect	D5010	1988	347/601	Volt	Item	Siemens	Missing
1423813	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/208	Volt	Item	Siemens	Missing
1423814	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/209	Volt	Item	Siemens	Missing
1423812	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Panel	D5010	1988	120/210	Volt	Item	Siemens	Missing
1423810	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Disconnect	D5010	1988	347/600	Volt	Item	Siemens	Missing
1423811	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Disconnect	D5010	1988	347/601	Volt	Item	Siemens	Missing
1423809	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Disconnect	D5010	1988	347/602	Volt	Item	Siemens	Missing
1423807	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Disconnect	D5010	1988	347/603	Volt	Item	Siemens	Missing
1423805	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Disconnect	D5010	1988	347/604	Volt	Item	Siemens	Missing
1423806	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Electric Disconnect	D5010	1988	347/605	Volt	Item	Siemens	Missing
1423802	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Splitter Box	D5010	1988	30	Amp	Item	I.T.E	Missing
1423801	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Transformer	D5010	1988	Unknown	Unkown	Item	Siemens	Missing
1300547	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Kitchen electrical Panel	D5010	1988	120/208	amp	Item	Siemens	Missing
1300548	Victoria Manor	Long Term Care	Services	Electrical Services & Distribution	Kitchen electrical Panel	D5010	1988	120/208	amp	Item	Siemens	Missing
1423804	Victoria Manor	Long Term Care	Services	Communication & Security	CCTV Camera	D5030	Unknown	Unknown	Unkown	Area	AXIS	Missing
1423818	Victoria Manor	Long Term Care	Services	Communication & Security	Access Control	D5030	1988	Unknown	Unkown	Area	Missing	Missing
1300544	Victoria Manor	Long Term Care	Services	Commerical Equipment	Laundry wash unit	E1010	Unknown	Unknown	Unknown	Item	Primus	047 459
1300541	Victoria Manor	Long Term Care	Services	Commerical Equipment	Laundry wash unit	E1010	Unknown	Unknown	Unknown	Item	Primus	047 458
1300542	Victoria Manor	Long Term Care	Services	Commerical Equipment	Laundry wash unit	E1010	Unknown	Unknown	Unknown	Item	Primus	048 227
1300539	Victoria Manor	Long Term Care	Services	Commerical Equipment	Laundry Dryer unit	E1010	Unknown	Unknown	Unknown	Item	Primus	047 702
1300540	Victoria Manor	Long Term Care	Services	Commerical Equipment	Laundry Dryer unit	E1010	Unknown	Unknown	Unknown	Item	Primus	047 703
1300538	Victoria Manor	Long Term Care	Services	Commerical Equipment	Laundry Dryer unit	E1010	Unknown	Unknown	Unknown	Item	Primus	047 704
1300537	Victoria Manor	Long Term Care	Services	Commerical Equipment	Laundry Dryer unit	E1010	Unknown	Unknown	Unknown	Item	Primus	047 705
1423920	Victoria Manor	Long Term Care	Services	Commerical Equipment	Laundry Soap Dispensor unit	E1010	Unknown	Unknown	Unknown	Item	Missing	Missing
1300555	Victoria Manor	Long Term Care	Services	Commerical Equipment	Freezer #1	E1010	1988	Unknown	Unknown	Item	Missing	Missing
1300556	Victoria Manor	Long Term Care	Services	Commerical Equipment	Freezer #2	E1010	1988	Unknown	Unknown	Item	Missing	Missing
1300553	Victoria Manor	Long Term Care	Services	Commerical Equipment	Refrigerator #1	E1010	1988	Unknown	Unknown	Item	Missing	Missing
1300554	Victoria Manor	Long Term Care	Services	Commerical Equipment	Refrigerator #2	E1010	1988	Unknown	Unknown	Item	Missing	Missing
1300551	Victoria Manor	Long Term Care	Services	Commerical Equipment	Kitchen Exhaust Hood	E1010	Unknown	Unknown	Unknown	Item	Garland	Missing
1300545	Victoria Manor	Long Term Care	Services	Commerical Equipment	Dishwasher Unit	E1010	Unknown	Unknown	Unknown	Item	Missing	Missing
1300504	Victoria Manor	Long Term Care	Equipment & Furnishings	Other Equipment	Laundry Chute	E1010	1988			Item	Missing	Missing
1423820	Victoria Manor	Long Term Care	Building Sitework	Site Electrical Utilities	Transformer Enclosure	G40	1988	3000	Amp	Item	Hydro-One	N/A
1423824	Victoria Manor	Long Term Care	Building Sitework	Site Electrical Utilities	Site Lighting	G40	1988		Area	Area	Missing	Missing
1423821	Victoria Manor	Long Term Care	Building Sitework	Site Electrical Utilities	Emergency Generator	G40	1988	1000	KVA	Item	Caterpillar	N/A

## Appendix 3 SITE MAP



Colliers / Altus Site Plan,  
August 2023

VICTORIA  
MANOR -  
Colliers /  
Altus Site  
Plan 2023  
Lindsay, Ontario

Fleming College -  
Frost Residence



# Appendix 4 BUILDING CONDITION ASSESSMENT



**Altus Group**

**Building Condition Assessment Report**

**Victoria Manor  
Lindsay, ON**

**220 Angeline St. S**

**Job Number: 20130.104334.000**

**Issued: September 5, 2023**

**Prepared for: Colliers Ltd**

**Prepared by: Altus Group Limited**

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**PRIVATE & CONFIDENTIAL**



September 5, 2023  
20130.104334.000.

Victoria Manor  
220 Angeline St. S  
Lindsay, On K9V OJ8

Attn: Laura Berazadi – Infrastructure Advisory

Re: **Victoria Manor 220 Angeline St. S Lindsay, ON**

Pursuant to your instructions, we enclose our Building Condition Assessment report for the above noted property. This report provides a general overview of the building components and site systems, including a commentary on the structure, building envelope, mechanical, electrical, and fire protection & life safety systems. In addition, we have identified conditions observed which may result in future capital expenditures above those associated with routine maintenance.

Exclusions, assumptions and all limiting conditions and qualifications are identified in Section 4.

It should be noted that this report may not be circulated, published, reproduced, or quoted from in whole or in part by any person without the express written permission of Altus Group Limited in each instance.

Furthermore, this report is for the exclusive use and benefit, and is delivered to Victoria Manor and the City of Kawartha Lakes on behalf of Colliers Project Leaders.

Altus Group Limited does not hold reporting responsibility to any other party and does not assume any liability whatsoever to any other party. We trust this report meets your requirements and we would be pleased to meet and discuss this in detail at your convenience.

Yours truly,

**ALTUS GROUP LIMITED**

Per: **Brian Tingay, FMA**  
Senior Consultant  
Asset and Facilities Management

Per: **Patrick Ritsma., M. BSc**  
Consultant  
Asset & Facilities Management

Cc: [mark.orge@altusgroup.com](mailto:mark.orge@altusgroup.com)  
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# 1. Executive Summary

This executive summary has been prepared as a reference of pertinent facts and estimates of this Building Condition Assessment. Readers are advised to refer to the report in its entirety, including the appendices.

Altus Group Limited (“Altus”) performed a Site Condition Assessment at the written request of Colliers Project Leaders, for the aforementioned property. This report is not a “Structural, Integrity, Adequacy, Sufficiency, Soundness, Safety and/or a Conformity Report” or “Structural Assessment of Existing Buildings and Designated Structures Guideline” as defined by the PEO ( Professional Engineers of Ontario). This report comments only on the existing condition of structural elements based on visual, non-destructive review only and based on a random sampling of areas on the inspection date by the reviewer. The report makes a recommendation for the repair /replacement of these elements based on the current age and visible condition for financial planning purposes only.

The primary goals of the assessment include:

- Determine the overall building condition and performance of the primary systems.
- Identify the building requirements and prioritize them.
- Recommend actions with cost estimates for the capital projects within the report term.

Costs associated with all capital projects are provided in Appendix C. The following projects (listed below) are recommended within the next three years and addressed as Priority 3 (P3) - Imminent Breakdown:

Project	Fiscal Year	Cost
Elevator Cabs (x3) - Refurbishment	2024-2026	\$75,000
Baseboard Heaters and Heating System - Renewals	2024-2026	\$126,000
Roof Top Packaged HVAC Units - Renewals	2024-2026	\$25,000
Asphalt Parking Lot – Refurbishment	2024-2026	\$50,000
<b>Totals</b>		<b>\$276,000</b>

In addition to the near-term expenditures, the following projects are highlighted as major expenditures in the capital planning term.

Project	Fiscal Year	Cost	Rational
Main Electrical Panel and Switchgear - Replacement	2031	\$125,000	End of lifecycle – preventative replacement
Diesel Generator - Replacement	2032	\$250,000	End of lifecycle – preventative replacement
BUR Roof - Replacement	2033	\$350,000	End of lifecycle – preventative replacement

Replacements recommended are based on data obtained from RSMeans, BOMA, and industry best practices. Lifecycle based replacements are recommended in order to avoid major failure of these critical building components, ensuring unnecessary expenditures in remediation due to unexpected failure. Refer to the respective system comments and recommendations within Appendix B for additional information.

## 1.1 Background

In accordance with the Project Agreement, Consulting Services for Asset Management/Kawartha Lakes-Victoria Manor, every five years during the term an Independent Inspector will be commissioned to assess the condition and ongoing serviceability of improvements and their future life expectancy and prepare a Site Condition Assessment for each of the sites. The assessment should take into consideration:

- The Life Cycle Maintenance activities for the Improvements.
- Repairs and replacement of Site Components; and,
- Development of Asset Registry
- The overall condition of the improvements, noting any deficiencies and required corrective actions.

## 1.2 Purpose and Scope

Altus Group Limited (“Altus”) performed a Site Condition Assessment at the written request of Colliers Project Leaders, for the aforementioned property. The mandate is to provide a general overview of the building systems, including a commentary on the mechanical, electrical, structural, and architectural components. In addition, we have observed conditions which result in future capital expenditures above those associated with routine maintenance.

We understand our terms of reference to be as follows:

- Review all documentation provided with a view to integrating the findings, conclusions, and recommendations.
- Visually review the buildings and identify any major issues and provide resolutions along with any costs involved and in general accordance with the ASTM E 2018 Standard Guide for Property Condition Assessments.
- Prepare a report including base building systems and findings and recommend immediate and proactive actions over the 10-year term of this report for capital expenditures with a minimum threshold of \$5,000.

### 1.3 Contingency and Escalation

Our cost estimate includes a contingency allowance of 10% and are priced in current (2023) dollars for future projects. Taxes are excluded.

### 1.4 References

- Blueprints
- PM Plans
- Previous FCA Reports
- Invoices for repairs/replacements
- Interviews with Site Maintenance Staff and Management

### 1.5 Summary

The site was found to be in a generally well maintained condition at the time of review. Short term projects include repairs to drywall damage and wall protection in basement level, asphalt parking lots and loading dock resurfacing and repair. Continuation of the ongoing painting program in service hallways and resident home area corridors. The Capital Plan also includes general budgeting allowances for interior finishes, exterior envelope, and exterior site system repairs such as windows and caulking, end of life replacement for roof top package units over the term of this report and elevator upgrades over the ten-year period.

## 2. Building Profile

BUILDING PROFILE	
Building Name	Victoria Manor
Site Address	220 Angeline St. S Lindsay, On
Construction Type	Steel Framed
Facility Type	Long Term Care Home
Ownership	City of Kawartha Lakes
Region	Ontario
Construction Year	1989 (Opened)
Total Building GFA (square feet)	Approx. 107,956 ft <sup>2</sup>
Building RFA (square feet)	Approx. 107,956 ft <sup>2</sup>
Land Size (Acres)	Approx. 11.68
Elevator(s)	2 passengers, 1 service
# of Floors Above Grade	1
# of Floor Below Grade	1
Occupancy Type	Residential – Multi -Tenant
Status	In Service
Heritage	No
Date of Inspection	Dec 15th and 16th, 2022 Mar 28 <sup>th</sup> and 29 <sup>th</sup> , 2023

## 3. General Approach and Methodology

Prior to the site visit, Altus requested certain information to be provided, some of which had also been provided as part of the annual performance review, we did collate this information from a variety of sources to review all information provided with a view to integrating the findings, conclusions, and recommendations.

### 3.1.1 Basis of Analysis

The assessment of Capital Expenditures required is based on the following:

- Building systems failing to meet their performance level.
- Building systems that have reached or are projected to reach the end of their productive life cycle within a 10-year period.
- Information provided by the building owner /or facility management company.

### 3.1.2 Conclusions Methodology

Our conclusions are based on the following:

- On-site identification and measurement (where possible) of a specific deficiency item priced accordingly. Measurement of areas from site visit and drawings where available and priced at current replacement cost prevailing unit rates. It should be noted that reported floor areas are taken directly from documents provided and detailed quantities will need to be assessed for any tendering purposes. Altus Group Limited has carried out no independent verification or measurement.
- Information available from maintenance logs relating to mechanical equipment, etc., priced at prevailing replacement costs for similar or equivalent equipment.

### 3.1.3 Site Visit

Brian Tingay from Altus inspected the property on Dec 15<sup>th</sup> and 16<sup>th</sup>, 2022, Mar 28<sup>th</sup> and 29<sup>th</sup>, 2023 with assistance from Jean Harrison, Manager Building Services and Victoria Manor maintenance staff.

The site visit review includes:

- On-site building(s) and site primary systems inventory and measurement (where possible).
- Visually review of the building's components to identify any deficiencies and needs relevant to system's physical and operation condition, health & safety, lifecycle, and code compliance, and provide resolutions along with any costs involved and in general accordance with the ASTM E 2018 Standard Guide for Property Condition Assessments.
- Electrical and mechanical systems were completed based on a visual review, reported problems, and on life expectancy of equipment, and without opening and/or testing any components.



## 4. Facility Description and Condition

### 4.1 General Description

The subject property is located at 220 Angeline Street South, Lindsay, Ontario known as Vitoria Manor. The building is a three-story low-rise multi-room residential care facility with 166 bedrooms. The exterior cladding at the building is brick masonry. The windows are aluminum-framed and there is a conventional built-up flat roof. Heating is provided by multiple gas-fired roof top units. Domestic water is provided by two domestic hot water boilers. The site features vehicular access from Angeline Street South and features an internal asphalt driveways and asphalt parking. There are three elevators at the building. The building was constructed in 1989 and is 33 years old. The floor areas on the three floors broken down as follows:

**Basement: 16,382 ft<sup>2</sup>**

**Ground Floor: 48,146 ft<sup>2</sup>**

**Second Floor: 43,428 ft<sup>2</sup>**

### 4.2 General Physical Condition

Generally, the subject property is in good condition with a calculated Facility Condition Index (FCI) of less than 5 percent (Grade A). The majority of the building components are functioning as intended, with no critical issues observed on major systems. Deterioration was noted in the exterior cladding sealants, and exterior entrance doors, which require replacement. Otherwise, the building elements and systems have been adequately maintained and capital expenditures consist predominantly of age-based replacements. Ongoing preventative maintenance and capital replacements are contributing to the overall good condition of the facility.

### 4.3 Building Systems and Utilities

#### 4.3.1 Mechanical

The heating system consists of one (1) natural gas boiler and multiple roof top units providing heating and cooling, with duct works, and diffusers and grills. Supplemental electric heating in offices and resident rooms are provided by perimeter baseboard heaters throughout the building. Humidifiers provide the necessary humidification especially in the winter. The HVAC system does not include a Building Automation System (BAS), zones are controlled by individual thermostats located in the electrical rooms on each home area floor.

#### 4.3.2 Plumbing

Domestic water is provided by the local municipality via an eight (8") main line. Hot water demands are met through three (3) hot water tanks via one (1) hot water storage tank and circulation pumps. The visible sanitary waste drainage includes cast iron and PVC pipes and fittings. The waste is collected from sanitary fixtures throughout the facility and discharged to a municipal waste system by gravity. The sprinkler room also contains two (2) cylinders of water softeners which supply the laundry and kitchen. The kitchen is equipped with an additional softener unit. Two (2) sets of sump pump rooms are located on the basement level for sanitary and storm water.

### 4.3.3 Electrical

Power supply to the facility by Hydro One and is provided by an overhead service and a dedicated exterior transformer on the north side of the facility. The transformer steps down the voltage from 44 KV to 600 Volts. The main electrical switch is located in the basement. Equipment requiring 600 Volts is directly fed from the main panel with the necessary switches to the various panels throughout the site.

### 4.3.4 Conveying

There are two (2) hydraulic passenger and one (1) service elevator. All three elevators are connected to the emergency generator for power during power outages. Elevators 2 and 3 accessed from the main corridor are designed to accommodate those with accessibility challenges.

### 4.3.5 Fire & Life Safety

The building is equipped with a sprinkler system. Fire extinguishers are mounted throughout the main corridors and stairwells. The fire alarm control panel (FACP) is installed in the main entrance vestibule on the ground floor. The fire alarm system consists of manual pull stations at the points of egress and alarm bells throughout the complex providing fire alarm audible signaling. Smoke detectors are ceiling mounted throughout the shared corridor spaces. The facility is equipped with “Nurse Call” system. The system includes main controller, nursing station consoles, bedside stations, bathroom/priority stations, dome lights, corridor annunciators and printer.

## 4.4 Recommendations for Additional Investigation of Action

Repairs to be completed as per the PM plan and where needed including the following:

- Annual inspection of the major electrical equipment and infrared thermography scanning and arc-flash studies under annual maintenance program.
- Update the Fire Safety Plan/Emergency Response Plan annually under annual maintenance program.

## 4.5 Environmental Issues

No issues were observed or reported by the property manager such as mold or contamination. However, environment audit is excluded from this report.

## 4.6 Estimated Capital Expenditures.

The building’s estimated current replacement value (CRV) is \$42,102,840 and was developed using RS Means, as well as Altus cost guidelines taking into consideration type of building, location, and structural/mechanical/electrical systems specifications.

Measurements and ratings were taken during the site visit. The estimated CRV consists exclusively of hard construction costs for the building and excludes any sitework (e.g., parking lots) as well as any soft development or operational costs (e.g., janitorial) associated with the building.

### EXPENDITURE SUMMARY TABLE

Total Estimated Budget for 10-Year Reporting Period	\$1,661,500.00
Average Annual Budget	\$166,150.00
Current Active Projects	\$0.0
Calculated FCI	1.1%

## 4.7 Conclusion & Next Steps

As noted in the executive summary, the building was found to be operating without any major issues and remains in adequate condition. The ongoing preventative maintenance program and previous capital works projects have ensured the building is in acceptable condition. Altus has provided a tailored capital expenditure schedule in Appendix C, outlining the recommended future capital projects, renewals, and updates. Adhering to the prescribed schedule of renewals and replacements should ensure the continued operation of the facility without impact to program residents and services.

## 5. Component Description and Condition

This section of the report describes the building and site components that were visually surveyed during the site inspection and that are included. Where required, we have elaborated on particular components that deviate from a standards remove-and-replace scenario or are of major impact as expenditure in the Building Condition Assessment. Key findings are listed in Clause 1.3 and described in Appendix B.

- **System Description:** Facility(s) is made up of a group of systems. Each system represents a component of the facility, such as foundation, exterior walls, windows, roofing, plumbing or any other element that can be assigned a Uniformat II category.
- **Comments & Recommendations (Requirements):** Facility needs or deficient conditions that should be addressed in the BCA report, including Health & Safety, deferred or proposed maintenance, code issues, functional requirements, and capital improvement.
- **Component Rating:** Each system is evaluated with regards to its current condition (Good, Fair, & Poor)
- **Expected Lifecycle:** The lifespan of a building component based on BOMA or any other standards may be used by Altus
- **Installation Date:** Indicates the date the system was installed
- **Current Age:** The number of years that has passed from the installation date to the given date
- **Remaining Life:** The number of the remaining useful life based on the current system's condition
- **Action:** For each requirement, an appropriate Action should be formulated. Each Action typically includes an estimated cost for addressing the requirement.
- **Occurrences:** Estimated number of Actions during the given capital plan period for the same repair or replacement.
- **Cycle:** Estimated number of years between Occurrences.
- **First Occurrence:** First time for repair or replacement to occur
- **Status:** The status of the recommended Action. It's either forecasted or based on a previous study
- **Current Capital Cost:** The estimated cost of project based on RSMeans or other cost database may be used
- **QTY:** Estimated or calculated quantity in square feet, linear feet, items, Tons, etc. that should be included in the project
- **Project Priority:** Category of project priority e.g., P1-Health & Life safety, P2-Code Compliance, P3-Imminent Breakdown, etc. Refer to Table II for Project Priority Classification.
- **Maintenance Code:** Deferred or proposed based on the system age and/or condition
- **Adequacy of Maintenance Regimen:** Assessor's judgment based on the current physical, operational system's condition, and/or maintenance records

## 6. Capital Expenditures Forecast

Figures 41 and 42, found in Appendix C, show the recommended capital repairs and replacements for base building systems over the next 10-years. Details are described in Appendix B. Capital expenditures are defined as those that exceed the \$5,000 threshold and are not carried out as part of annual maintenance programs.

Failure to address capital components in a timely fashion may cause further deterioration and damage to other associated components, also increase the cost of corrective measures and/or impact life safety. Also, any lack or reduction of planned preventive maintenance activities may also cause further deterioration.

## 7. Hazardous Material

ASBESTOS, PCB'S, OZONE DEPLETING SUBSTANCES AND CFC'S			
DESCRIPTION			
No documentation was provided or available onsite that would indicate that the property is in conformance with hazardous materials legislation. Hazardous materials are suspected at the property; however, the presence, quantity and condition of hazardous materials could not be visually confirmed. Only sampling and testing can confirm the presence of any hazardous materials. This component is the property owner's responsibility.			
COMPONENT RATING	N/A	MAINTENANCE CODE	N/A
INSTALLATION DATE	N/A	LIFE SPAN	N/A
REMAINING LIFE	N/A	CURRENT AGE	N/A
PROJECT PRIORITY CLASSIFICATION	Code Compliance (Year 1)		
ADEQUACY OF MAINTENANCE REGIME	N/A		
RECOMMENDATIONS			
Based on the site inspection, no actions are recommended with regards to hazard materials.			
PROJECT BREAKDOWN	QTY: N/A	CAPITAL COST: N/A	ACTION: N/A

## 8. Report Qualifications

The qualifications described below apply to this report:

- All review surveys were visual only. No removal or testing of materials or components were carried out. The review was made on a random basis with no attempt to review or inspect every element or portion of the building. The intent of the review was to determine areas of visually obvious deterioration and need for repair and to determine, in a general way, the overall quality and sufficiency of the existing building conditions but not to ascertain the quality or sufficiency of any aspect of the building.
- This report is intended to provide Colliers with a general description of the systems employed in the building and to comment on their general condition, which may be apparent at the time of our review. No calculations were performed to confirm the adequacy of the elements. No findings contained in this report shall be construed as a guarantee or warranty of the quality or sufficiency of any aspect of the building or the adequacy of any particular element of any system employed in the building.
- The timing of site visits is critical to building performance reviews. To observe the actual extent of problem areas, it is necessary to monitor the building conditions throughout the year and under varying weather conditions (for example, contraction and expansion of all component joints occur at different times of the year) in each specific area. As a result, all problems may not be visible at the time of our review and we shall not be responsible for any problems not readily visible or apparent at the time of our inspection.
- Any timeframe given for repair or replacement work represents a judgement based on the apparent condition and theoretical life span of components. Failure of the item, or optimum repair/replacement time, may be earlier or later than the time estimate due to conditions unknown and beyond our control. The building owner or property manager should pro-actively assess the timelines identified going forward.
- Any previous opinions expressed by Altus Group Limited, either verbally or in writing, regarding the condition of the building or cost estimates for repair of the above elements of the building cannot be relied upon unless contained herein and are superseded by this report. No portion of this report may be used as a separate entity; it is written to be read in its entirety.
- Environmental issues are excluded from this report. No environmental issues have been addressed nor renewal costs included in our summaries.
- We are not responsible for the effects of any actions taken as a result of this report unless we are specifically advised of and participate in such action in which case our responsibility will be agreed to at that time.
- Altus Group Limited shall have no liability either in contract or in tort for services or matters beyond the scope of the services as outlined and qualified in this report.
- This report is for the exclusive use and benefit of Colliers. Altus Group Limited does not hold reporting responsibility to any other party and does not assume any liability whatsoever to any other party.
- In general, we have not included in the report any items considered as minor operation costs, maintenance contracts and/or maintenance repairs. We have, however, included for items that, such as painting and repairs to walls, that may be considered a maintenance on a small individual unit by unit basis, but when multiplied over many units generate large cash expenditures. Although the report may reference or imply operation and maintenance procedures, the report is not to be used as an

operation and maintenance schedule as this was not the intention of the scope of work. Items below the threshold are considered under operations and maintenance.

- The recommendation given for future work to any of the components is non-descriptive in most cases. This is intentional as this was not the rationale behind the project. In most cases the response is simply repair or replace. It is prudent that building owner or facility management investigate all referenced repairs and replacements described within the report prior to execution to determine or locate the cause. In the same regard, the effect of the repair or replacement should be investigated. These investigative costs would be typically covered under the work item cost as a mark-up for engineering. We have added additional fees to the work item, as determined necessary, to cover for investigative work for larger items such as the parking garage or roof replacement projects.
- In some cases, on larger unit costs, we have intentionally made the repair or replacement coincide with other similar work. Also, pricing for building component may be covered in other building components for similar work. If this is done, it is described in the Report. We will not be accountable for any errors or omissions in the logistics of scheduling of the repairs.
- No phasing of work has been accounted for and one lump sum cost repair or replacement is carried in most cases. Phasing of work can lessen the financial impact on the annual capital expenditures and should be considered by the building owner.

## 8.1 Exclusions

- Specialist Building Code Review or compliance.
- Specialist Heritage review.
- Environmental assessment or opinion on the presence of any environmental issues such as potable water quality, asbestos, hazardous wastes, toxic materials, presence of mould, or fungus.
- Flood plain assessments.
- Evaluation of acoustical or insulating characteristics of systems or components.
- Reporting on subterranean conditions such as soil types, underground utilities, and wells.
- Entering or accessing any areas of the premises that deemed potentially posing a threat to the reviewer's health and safety.
- Infra-Red Scans and audibility tests.
- Review of specialty equipment and appliances.
- Thermographic scanning of roofing.
- Swing-stage inspections.
- Expenditures for capital items which are categorized as maintenance or operational in nature.
- Detailed breakdown of repair tasks and costs.
- No destructive testing of any assembly is included nor inspection of concealed elements.
- Engineering analysis or design checks.
- Review of leases is not included as part of Property Condition Assessment work.
- Testing mechanical and electrical systems.

- Meetings and presentations.
- Seismic assessment.
- Validation of the warranty documents incorporated in report are not completed by Altus Group.
- Determining the extent of infestation or remedy for treatment, pertaining to any type of pests such as wood damaging organisms, rodents, or insects.

This report is not a “Structural Adequacy Report” as defined by APEGA. This report comments only on the existing condition of structural elements based on a random sampling, visually reviewed on the inspection date by the reviewer and makes recommendation for the repair / replacement of these elements based on the current age and visible condition for financial planning purposes only.

The assessment of the mechanical and electrical systems was strictly visual to determine the type of system, age and aesthetic condition. No physical testing or intrusive investigative techniques were used.



# APPENDIX A - DEFINITIONS

**TABLE I – COMPONENTS RATING**

RATING FOR BUILDING SYSTEMS & COMPONENTS	DEFINITION
GOOD	Normal Result. Functioning as intended; normal deterioration observed; no maintenance anticipated within the next five years.
FAIR	Functioning as intended; normal deterioration and minor distress observed; maintenance will be required within the next five years to maintain functionality.
POOR	Not functioning as intended; significant deterioration and distress observed; maintenance and some repair required within the next year to restore functionality.
CRITICAL	Not functioning as intended; significant deterioration and major distress observed, possible damage to support structure; may present a risk to people or materials; must be dealt with without delay.

**TABLE II – PROJECT PRIORITY CLASSIFICATION**

CATEGORY	DESCRIPTION	PROJECT EXAMPLES
<p>Priority –1 Health &amp; Life Safety <b>(Year 1)</b></p>	<p>Failure to implement projects in the category will put building occupants in danger if the work is not completed within the planning year.</p>	<p>Projects that adversely impact the health and safety of building occupants and visitors include but are not limited to: Projects that result in Workplace Health &amp; Safety concerns (e.g., indoor air quality, mold, asbestos abatement and water or other environmental issues).</p>
<p>Priority-2 Code Compliance <b>(Year 2)</b></p>	<p>Projects in this category are initiated to ensure that the building systems and components are in compliance with current codes and legislation and failure to comply may result in fines and lawsuits.</p>	<p>Examples of these are projects that include compliance with: National Building Code – 2019 Ontario Edition, National Fire Code – 2019 Ontario Edition, <i>Barrier Free Design Guidelines</i>, <i>Residential Tenancies Act</i>, <i>Municipal by-laws</i> for noise, parking etc.</p>
<p>Priority -3 Imminent Breakdown <b>(Years 1 to 3)</b></p>	<p>These projects if left unattended will adversely impact customer program delivery due to the imminent breakdown of critical building systems and components.</p>	<p>Projects in this category are initiated to ensure continuous operation of the facility without risk of interruption or evacuation.</p> <p>Avoid disruption to customer programs and to the public.</p> <p>Reduce expensive emergency repairs, and prevent undue costs associated with acquiring alternate accommodation.</p>
<p>Priority – 4 Program Coordination <b>(Not Time Based)</b></p>	<p>Projects that represent a sensible upgrade or improvement to the existing facility condition.</p>	<p>Any project that may improve overall usability and/or reduce long term maintenance or operation cost.</p>
<p>Priority – 5 Proactive Replacement <b>(Years 3 to 10)</b></p>	<p>Projects in this category relate to proactive replacement of building systems and components at the end of their useful life.</p>	<p>Projects in this category are identified to recognize future funding requirements, lessen exposure to future hazards and breakdown, and carry out preventative maintenance</p>

**TABLE III – PROJECT MAINTENANCE CODES**

MAINTENANCE CODE	NAME	DESCRIPTION
D	Deferred Maintenance	Deferred maintenance indicates that the estimated useful life of the building system or component has expired, there is evidence of wear and physical deterioration and that the work should have been completed previously. Analysis should be done to assess the cost of replacing the building versus repair. (No projects beyond years one and two should be categorized as deferred maintenance unless the scale of that project will require that project to be phased beyond year two).
P	Proactive Replacement	Proactive Replacement involves proactively scheduling the upkeep or replacement of building components before or near the end of their normal life in order to maintain the overall integrity of the asset. Proactive Replacement may also include replacement of functionally obsolete building systems and components to upgrade to modern performance standards and energy conservation efficiencies.

**TABLE IV – FACILITY CONDITION INDEX AND CONDITION RATING**

CALCULATED FCI	%	OVERALL BUILDING CONDITION
0%- 5%	The facility and its components are functioning as intended; limited (if any) deterioration observed on major systems.	A
6% - 10%	The facility and its components are functioning as intended; for most infrastructure assets, this would infer that no maintenance anticipated within the next five years.	B
11% - 30%	The facility and its components are functioning as intended; normal deterioration and minor distress observed; maintenance will be required within the next five years to maintain functionality.	C
31% - 60%	The facility and its components are not functioning as intended; significant deterioration and distress observed; maintenance and some repair required within the next year to restore functionality.	D
> 60%	The facility and its components are not functioning as intended; significant deterioration and major distress observed, possible damage to support structure; may present a risk to people or materials; must be dealt with without delay.	E

**Overall Facility Condition Rating**

The following facility condition rating (FCR) has been provided:

$$\text{Facility Condition Index (FCI)} = \frac{\text{Total Deferred Project Costs Plus Years 1, 2 and 3 Capital Repairs (less Site work)}}{\text{Total Replacement Cost of Facility}} \times 100\%$$

# APPENDIX B – SYSTEM DESCRIPTION AND COMMENTS

## A10 SUBSTRUCTURE: FOUNDATION WALL & STRUCTURAL SLAB ON GRADE

### Description

The foundation walls consist of poured concrete and are visible at a few locations at grade level at the building perimeter. The footings are not visible as they are concealed below grade level.

No significant signs of deterioration were present. No issues were reported. Based on a normal life span for this component replacement is not anticipated during the study period. Minor repairs in the interim are considered under operations and maintenance.

### Comments & Recommendations

A water leak was noted in the main electrical room of the basement, and further investigation is required. Otherwise, no deficiencies such as major cracks, differential settlement, or heaving were noted in the structure. Minor cracks were observed that seem to be consistent with normal shrinkage cracks that should not have any impact on the structural integrity of the building.

Component Rating: Good

Expected Lifecycle: 75

Installation Date: 1989

Current Age: 33

Remaining Life: 42

Action: Investigation

Occurrences: N/A

Cycle: N/A

First Occurrence: N/A

Status:

Current Capital Cost:

QTY: N/A

Project Priority: N/A

Maintenance Code: D

Adequacy of Maintenance Regimen: The components maintenance is adequate.



*Figure 1- Foundation Leaking - Main Electrical Room Basement Level*



*Figure 2 – Foundation Wall – Fire Pump Room Basement Level*

## B10 SUPERSTRUCTURE - FLOOR & ROOF CONSTRUCTION

### Description

Based on our visual review, the building is a combination of steel and concrete framed structures. The walls, floor and roof structures are generally hidden beneath interior finishes and were not fully accessible for visual evaluation. Where visible, we noted fire-protected open web steel beams with precast concrete walls and floor slabs at the service rooms. There are fire-protected steel beams with concrete filled metal decking at the stairwells.

### Comments & Recommendations

Generally, the residential building structure is in good condition. No damages, major cracks, movement in structural elements, and/or sagging were observed at the time of site visit. Investigation of moisture leaking to the electrical room in the back of the Facilities Maintenance room on the basement level should be undertaken.

Component Rating: Good

Expected Lifecycle: 75

Installation Date: 1989

Current Age: 34

Remaining Life: 41

Action: Investigation

Occurrences: Varied

Cycle: Varied

First Occurrence: 2065

Status: Forecasted

Capital Cost: Refer to Capital Plan

QTY: 2

Project Priority: P3

Maintenance Code: P

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 3 – Roofing Structure



Figure 4 –Example of Roof Construction



## B20 EXTERIOR ENCLOSURE AND WINDOWS

### Description

The exterior of the building is clad in brick masonry with cement parging over the exposed sections of foundation above grade. The exterior wall envelopes are assumed to contain metal studs, batt insulation, and sheathing. The windows consist of operable four sash sliders. The units are double-glazed anodized aluminum insulating glass units (IGU) in thermally broken aluminum frames. The windows at the stairwells consist of decorative frosted block window units.

### Comments & Recommendations

We noted small areas of efflorescence, spalled brick. There was evidence of caulking peeling and cracking which should be addressed during this reporting period. We have included an allowance to complete brickwork repairs towards the end of the report term. Windows were reportedly replaced in 2018, however some are still original, and a partial replacement is. A budget should be set aside for caulking to be replaced at the control joints. Staff also report issues with windows on the second floor in the resident activity room, as not having been installed correctly at time of construction. A budget allowance should be carried, for investigation and correction as needed. The masonry is generally in good condition.

Component Rating: Fair-Good

Expected Lifecycle: 30

Installation Date: 2018 (varied)

Current Age: Varied

Remaining Life: Varied

Action: Exterior Enclosure - Caulking Repairs

Occurrences: varied

Cycle: Varied

First Occurrence: 2024

Status: Forecasted

Capital Cost: See Capital Plan

QTY: N/A

Project Priority: P3/P5

Maintenance Code: P

Adequacy of Maintenance Regimen: The components maintenance is inadequate



*Figure 5 – Exterior brick expansion joints  
Deterioration*



*Figure 6 – Exterior Brick Effluence*



*Figure 7 – Exterior Cladding*



*Figure 8 - Exterior Window Sealants*

## B20 EXTERIOR DOORS

### Description

The main entrance doors are set in a vestibule opening with a single glass and aluminum commercial door on the exterior and an aluminum double sliding door at the interior of the vestibule. The main entrance door has a power door opener for barrier-free access. The building exit doors are also glass and aluminum doors. There are two (2) overhead roll up doors at the loading dock area.

### Comments & Recommendations

The main exterior entrance doors on the southwest corner were noted to be in fair condition, with deterioration in the form of chips, dents, and missing weatherstripping. Replacement of the main entrance door is recommended in 2024. No issues were noted in the single metal exterior doors. The doors appear in fair condition and are showing some signs of wear and tear. We have included a budget to replace the overhead doors within the term of the report.

No issues were reported with exit doors which were noted to be in good condition. According to the Site Representative the interior entrance sliding door was replaced in 2014. This item is not anticipated for replacement during the study period

Component Rating: Poor - Fair

Expected Lifecycle: 30

Installation Date: Varied

Current Age: Varied

Remaining Life: Varied

Action: Exterior Doors - Replace

Occurrences: Once

Cycle: 30

First Occurrence: 2024

Status: N/A

Capital Cost: Refer to Capital Plan

QTY: 1

Project Priority: P3

Maintenance Code: P

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 8 – Main Entrance Door



Figure 9- Exterior steel rolling doors



*Figure 10 - Rolling steel door Loading Dock*

## B30 ROOF COVERING

### Description

The main roof is a flat conventional built-up roof (BUR) with metal flashing at the perimeter. Angular atrium sky-lighting and terraced roofs are also contained within the facility.

### Comments & Recommendations

It was previously reported that the roof coverings were replaced in 2010, therefore renewals are anticipated within the report term given the age. There are no reported water leakage issues. At the time of our site visit, the roof appeared in good condition and we noted no defected areas or ponding water based on visibility at the time (snowstorm). We have included for full replacement in the long term based on a normal life span. There are two terrace roofs at the building, one at the east elevation and one at the west elevation of the building. Areas of the roof covering which were visible appeared to be in good condition at the time of the site visit. The Terrace located in the Bob Marks Courtyard shows signs of water leaking along the concrete wall where the terrace is connected. Further investigation is recommended to correct the issue.

Component Rating: Good

Expected Lifecycle: 20

Installation Date: 2010

Current Age: 12

Remaining Life: 8

Action: Roof Replacement

Occurrences: N/A

Cycle: 20

First Occurrence: 2033

Status: Forecasted

Capital Cost: See Captial Plan

QTY: 25,000 sq ft

Project Priority: P5

Maintenance Code: N/A

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 10 – Rooftop HVAC Units



Figure 11 – Atrium Skylight



*Figure -12 Roof Covering*

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## C10 INTERIOR CONSTRUCTION – DOORS AND FINISHES

### Description

This system includes the floor, wall, and ceiling finishes, as well as interior doors throughout the resident home area corridors, resident rooms, and lobby spaces. Floor finishes include rolled/tile carpeting, VCT, and ceramic tile. Wall and ceiling finishes consist of painted GWB and vermiculite. Interior doors include solid wood and hollow metal doors, with glazing inserts. Interior finishes within resident spaces are not included.

### Comments & Recommendations

The interior doors, flooring, wall, and ceiling finishes appeared to be well maintained, as minimal deterioration was observed. Staff reported issues with the door hardware as there a differing style through the resident home areas. Monthly Preventative Maintenance inspections of all resident door hardware is recommended to ensure proper operation. Walls and wall guards in the basement level showed significant wear and tear and should be repaired as part of regular ongoing maintenance and painting refresh program. An allowance is included to provide for updates to the interior finishes in 2025.

Component Rating: Good

Expected Lifecycle: 15

Installation Date: Various

Current Age: Various

Remaining Life: Various

Action: Interior Finishes - Renewals

Occurrences: Recurring

Cycle: 15

First Occurrence: 2025

Status: N/A

Capital Cost: See Capital Plan

QTY: N/A

Project Priority: P3

Maintenance Code: P

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 13 – Floor Finish Home Area Corridor



Figure 14 – Interior Door & Wall Finish

## C20 STAIR CONSTRUCTION – STANDARD

### Description

There are three (3) common stairwells in the building. There is one (1) stairwell in each wing of the building and there is also an emergency staircase in the center atrium of the building. The stairs are metal with vinyl tiles and metal handrails/guardrails.

### Comments & Recommendations

The interior stairwells appeared to be in good condition and were well maintained. No capital expenditures are anticipated in the next 10-years.

Component Rating: Good

Expected Lifecycle: 75

Installation Date: 1989

Current Age: 33

Remaining Life: 42

Action: N/A

Occurrences: N/A

Cycle: N/A

First Occurrence: N/A

Status: N/A

Capital Cost: N/A

QTY: N/A

Project Priority: N/A

Maintenance Code: N/A

Adequacy of Maintenance Regimen: The components maintenance is adequate.



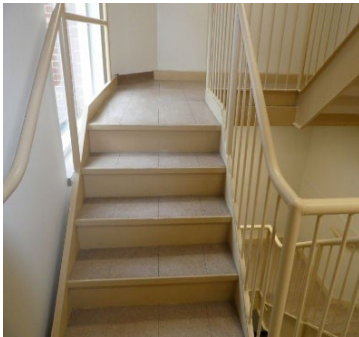


Figure 15 – Interior Staircase

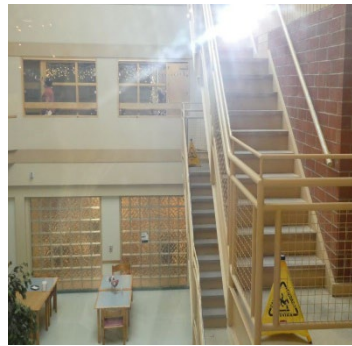


Figure 16 – Interior Atrium Staircase

## D1010 CONVEYING

### Description

There are two (2) hydraulic passenger and one (1) service elevator. All three elevators are connected to the emergency generator for power during power outages. Elevators 2 and 3 accessed from main corridor system are designed to accommodate those with accessibility challenges.

### Comments & Recommendations

The elevators were in good working condition at time of inspections and is regularly inspected by a third party. In May 2022 Thyssen Krupp shutdown car 3 due to a valve failure, requiring replacement. No major signs of deterioration were evident; however, site staff have mentioned that the elevators have been failing more frequently due to age. The system is nearing the end of expected lifespan. Modernization of the elevator system is anticipated within the 10-year plan. Staff have reported issue with negative air pressure in laundry chute and not meeting PIDA code. Further investigation as part of regular maintenance should be carried out.

Component Rating: Good

Expected Lifecycle: 35

Installation Date: 1989

Current Age: 33

Remaining Life: 2

Action: Replacement/Upgrade Elevator motor

Occurrences: N/A

Cycle: 35

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First Occurrence: 2024

Status: Forecasted

Capital Cost: Refer to Capital Plan

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QTY: 3

Project Priority: P3

Adequacy of Maintenance Regiment: The components maintenance is adequate.

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Figure 17 - Elevator Cab Finishes



Figure 18 - Elevator Motor

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## D2030 MECHANICAL – PLUMBING

### Description

Domestic water is provided by the local municipality via an eight (8”) main line. Hot water demands are met through three (3) hot water tanks via one (1) hot water storage tank and circulation pumps located in the laundry area mechanical room. The heating water from the storage tanks is distributed to all common area and suite plumbing fixtures by in-line circulating pumps.

The visible sanitary waste drainage includes steel and PVC pipes and fittings. Sanitary piping is provided to collect wastewater from washrooms, kitchen and utilities rooms throughout the building and discharge to the municipal sanitary main by gravity. Stormwater is collected through downspouts, interior piping, site catch basins and discharged to the surroundings and municipal storm main.

### Comments & Recommendations

No issues were observed or reported. Also, no signs of water leakage. Based on our site assessment and discussion with the building Facilities Representative, the system is working satisfactorily, and no issues were identified. A plumbing system consists of components with various lifecycles. General repairs and replacements are anticipated for items such as pinhole leaks, circulation pump replacement etc., Site staff provided reporting of full replacement of water re-circulation lines throughout the resident home areas. Staff have also reported that replacement of the (2) two holding tanks were completed in May 2022. An allowance is included in the capital plan. Based on estimated system lifetimes, replacement of the third hot water tank anticipated for replacement within the 10-year report term.

Component Rating: Good

Expected Lifecycle: 12

Installation Date: Varied

Current Age: Varied

Remaining Life: Varied

Action: Plumbing Repair Allowance,

Occurrences: See Capital Plan

Cycle: Varied

Hot Water Tanks - Replace

First Occurrence: 2024

Status: Forecasted

Capital Cost: See Capital Plan

QTY: N/A

Project Priority: P5

Maintenance Code: P

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 19 – DHW Tank



Figure 20 – Hot Water Heating Systems

## D30 MECHANICAL - HVAC

### Description

The heating, ventilation and air conditioning for the entire facility is provided by multiple gas heat and DX cooled roof top units. The make-up air for kitchen is provided by one (1) gas heat and DX cooled make-up air unit with multiple exhaust fans. The exhaust for the common area and suites washrooms, service areas and kitchen are provided by various roof top mounted exhaust fans. All air distribution throughout the building is provided by galvanized steel ductwork complete with diffusers and grilles. Humidification for the building is provided by electric humidifiers located at various mechanical closets/rooms throughout the facility.

The heating for the common area and residential suites is provided by perimeter electric baseboard heaters. The heating for the service area is provided by electric unit heaters. Heating for the vestibule and entrances area are provided by electric heaters.

### Comments & Recommendations

Our inspection was limited to accessible equipment on the roof, basement mechanical rooms, and resident floor utility closets. At the time of the review existing systems were operating with some issues as were reported by staff. Replacements are recommended based on the expected useful lifetime of these systems and ongoing issues reported. Staff report the server roof top ventilation unit was replaced in 2022. We have included an allowance to replace those Roof-top units nearing end of life.

Component Rating: Fair-Poor

Expected Lifecycle: 25

Installation Date: 2007

Current Age: 16

Remaining Life: 8

Action: Terminal Units, Piping – Renewals, Perimeter Heating

Occurrences: Recurring

Cycle: Varied

First Occurrence: 2024

Status: Forecasted

Capital Cost: Refer to Capital Plan

QTY: Varied

Project Priority: P5

Maintenance Code: P

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 21 – Gas Fired Roof Top Unit



Figure 22 – Kitchen Ventilation



*Figure 23- Perimeter Heating*

## D4010 FIRE PROTECTION

### Description

The building is equipped with a wet sprinkler system throughout the residential floors, common and administration area including the basement area. The building is not equipped with a standpipe system and fire hose cabinets. The main sprinkler on the basement level is equipped with an 6" incoming water line and a sprinkler zone valve header. There are also fire hydrants at street level on Angeline Street, and Siamese connections around the building.

### Comments & Recommendations

Fire suppression systems were not tested but appeared to be in good working condition. The fire extinguishers are inspected by Revolution Fire Protection Ltd. System renewal is not anticipated within the report term.

Annual inspections, and any minor repairs that are found to be needed, are expected to continue as part of ongoing preventative maintenance program currently in place.

Component Rating: Good

Expected Lifecycle: 30

Installation Date: 2012

Current Age: 10

Remaining Life: 20

Action: N/A

Occurrences: Recurring

Cycle: 30

First Occurrence: 2031

Status: Forecasted

Capital Cost: N/A

QTY: N/A

Project Priority: N/A

Maintenance Code: N/A

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 24 – Fire Extinguisher – Mechanical Room



Figure 25- Fire Alarm Panel Typical



*Figure 26- Main Sprinkler Incoming*

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## D5012 ELECTRICAL - POWER DISTRIBUTION

### Description

The incoming electrical service enters the building at the basement Mechanical Room where the main switchgear is located. The switchgear is rated for 3000A, 347/600V, three-phase. From the main switchgear unit electrical service is supplied to the main panels (2 @ 2000 Amp each) and fed throughout the building to various distribution panels located on resident home floors.

### Comments & Recommendations

All power panels and associated equipment were performing at the time of the site visit; however, the service panels and switches appear to be original to the building. Based on anticipated lifespans of the electrical systems, replacement is recommended within the report term. Replacement of the panels and switches is scheduled to occur in 2026, as well as the fire alarm systems.

It is recommended infrared thermography scanning of all electrical equipment (i.e., main, distribution etc.) to find "hot spots," is scheduled annually. This is considered a part of normal facility operations and maintenance and would be below the threshold limit. Annual allowances may require increases based on findings.

Component Rating: Fair

Expected Lifecycle: 30

Installation Date: 1989

Current Age: 43

Remaining Life: 0

Action: Electrical – Renewals

Occurrences: Recurring

Cycle: 30

First Occurrence: 2027

Status: Forecasted

Capital Cost: Refer to Capital Plan

QTY: N/A

Project Priority: P5

Maintenance Code: D

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 27 – Main Switchgear



Figure 28 – Typical Distribution Panel

## D50 ELECTRICAL - LIGHTING AND BRANCH WIRING

### Description

This system includes lighting and branch wiring throughout the shared spaces within the building, as well as exterior lighting. The shared corridors and stairwell lighting consists of ceiling mounted and 2x4 ft strip LED fixtures. Exterior lighting consists of HID wall pack units and LED pole lighting throughout the parking lots of the building.

### Comments & Recommendations

The interior and exterior light fixtures appeared to be recently installed and remained in good condition. No issues with the lighting or branch wiring were reported by site staff. System renewal is not anticipated within the report term.

Component Rating: Good

Expected Lifecycle: 25

Installation Date: Varied

Current Age: Varied

Remaining Life: Varied

Action: N/A

Occurrences: Recurring

Cycle: 25

First Occurrence: N/A

Status: N/A

Capital Cost: N/A

QTY: N/A

Project Priority: N/A

Maintenance Code: N/A

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 29 – Exterior LED Wall pack



Figure 30 – Interior Corridor Fixture

## D5037 FIRE ALARM

### Description

The building is equipped with multiple “Edwards System Technology-EST 3 Series” Fire Alarm Panels. The fire alarm system consists of a control panel, ceiling mounted heat and smoke detectors, manual pull stations at the points of egress, and alarm bells. The control panel is in the Electrical Room and at the Fire Fighter Entrance with a secondary panel located at the main entrance.. Annunciator Panels are located at each nursing station within each resident home area.

The fire alarm control panel (FACP) is in the main entrance vestibule as well as an annunciator panel in the main floor electrical room, inspected by Revolution Fire Ltd.

### Comments & Recommendations

Fire alarm and associated systems are performing as intended and inspections carried out on a regular basis. According to the Site Representative, it was reported the panel was installed around 2-3 years ago. The fire alarm system is inspected annually, and no major deficiencies have been identified. Based on the estimated age of the systems, renewals are anticipated within the capital plan. Budgeting for renewal of the fire alarm systems has been included with the electrical renewal recommended for 2031.

Component Rating: Good

Expected Lifecycle: 20

Installation Date: Varied

Current Age: N/A

Remaining Life: Varied

Action: Renewal

Occurrences: Recurring

Cycle: 20

First Occurrence: 2031

Status: Forecasted

Capital Cost: See Capital Plan

QTY: N/A

Project Priority: P5

Maintenance Code: P

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 31 – FACP – Main floor Fire Fighters Entrance



Figure 32 – Pull Station

## D5038 – SECURITY AND DETECTION

### Description

The building has installed a CCTV system with eleven (11) cameras located on main floor areas, resident home common areas, and in the secure resident home area. Several areas of resident home areas had doors secured with Access Control card readers. The CCTV systems are monitored and controlled from basement building Facility Operations room.

### Comments & Recommendations

The CCTV camera systems appeared to be working correctly at the time of site assessment, and Facilities staff reported no issues with the operation. The cameras appeared to show no visible signs of deterioration or malfunction.

Component Rating: Good

Expected Lifecycle: 20

Installation Date: Unknown

Current Age: Unknown

Remaining Life: 9

Action: N/A

Occurrences: Recurring

Cycle: 20

First Occurrence: N/A

Status: N/A

Capital Cost: N/A

QTY: N/A

Project Priority: N/A

Maintenance Code: N/A

Adequacy of Maintenance Regimen: The components maintenance is adequate.

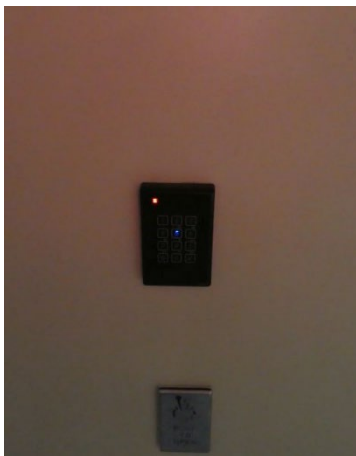


Figure 33 – Access Control Card Reader



Figure 34– CCTV Camera in use on Main floor

## D5092 EMERGENCY LIGHT AND POWER

### Description

The emergency system includes exit signs, emergency lights, and battery packs installed throughout the building and at points of egress. The building is equipped with one (1) natural gas fired, 1000 KVA outdoor generator manufactured by Caterpillar. The existing generator is installed in a fire rated enclosure container with a double wall fuel oil storage tank and an exterior fuel filling station.

### Comments & Recommendations

The emergency lighting fixtures are inspected regularly, with no issues to report. Failed fixtures are replaced under annual maintenance program or on an as needed basis. Allowance for Generator overhaul is included in this reporting term.

Component Rating: Good

Expected Lifecycle: Varied

Installation Date: Varied

Current Age: Varied

Remaining Life: Varied

Action: Generator Overhaul

Occurrences: Recurring

Cycle: 10

First Occurrence: 2032

Status: Forecasted

Capital Cost: \$250,000

QTY: 1

Project Priority: P5

Maintenance Code: P

Adequacy of Maintenance Regimen: The components maintenance is adequate.



Figure 35 - Exit Sign & Nurse Call Strobe Light



Figure 36 – 1000KVA Gas Generator



*Figure 37- Emergency Lighting*

## G20 SITE COMPONENTS

### PARKING LOTS – ASPHALT PAVEMENT, SIDEWALK

#### Description

There is an asphalt driveway and parking lot area at the northwest and northeast side of the property. Loading docks are comprised of poured concrete. There is a stone retaining wall within the ramp leading down to the loading dock bays.

### UTILITIES

#### Description

Site utilities include underground site sanitary, storm water, manholes, and water supply.

#### Comments & Recommendations

The asphalt surfaces vary from fair-to-poor condition. We noted that the asphalt paving at the northeast and northwest of the property had several areas of rutting, alligator cracking, and delaminated paving. Based on visual review, repairs and replacements to the asphalt are anticipated during the study period. An allowance is carried. Significant cracking and spalling were observed in the main southwest entrance sidewalk and concrete pad. Deterioration to the retaining wall paving was evident, as sections of paving were cracked and missing. A budget is included for the sidewalks, stone retaining wall (loading dock), and asphalt parking lot systems for necessary repairs.

The walkways are generally in good condition with only minor alligator cracks noted. Any cracks in pedestrian paving could pose a trip hazard and should be marked and repaired immediately.

Component Rating: Poor - Fair

Expected Lifecycle: Multi Systems

Installation Date: Varied

Current Age: Varied

Remaining Life: Varied

Action: Sidewalks, Asphalt Parking, Retaining Wall - Repairs

Occurrences: 2024

Cycle: N/A

First Occurrence: 2024

Status: Forecasted

Capital Cost: See Capital Plan

QTY: N/A

Project Priority: P3/P5

Maintenance Code: P

Adequacy of Maintenance Regimen: The components maintenance is inadequate



*Figure 38 – East Parking walkway*



*Figure 39 – Stone retaining wall wire meshing Loading Dock*



*Figure 40 – Asphalt cracking- Northwest parking*



# APPENDIX C – FIGURES

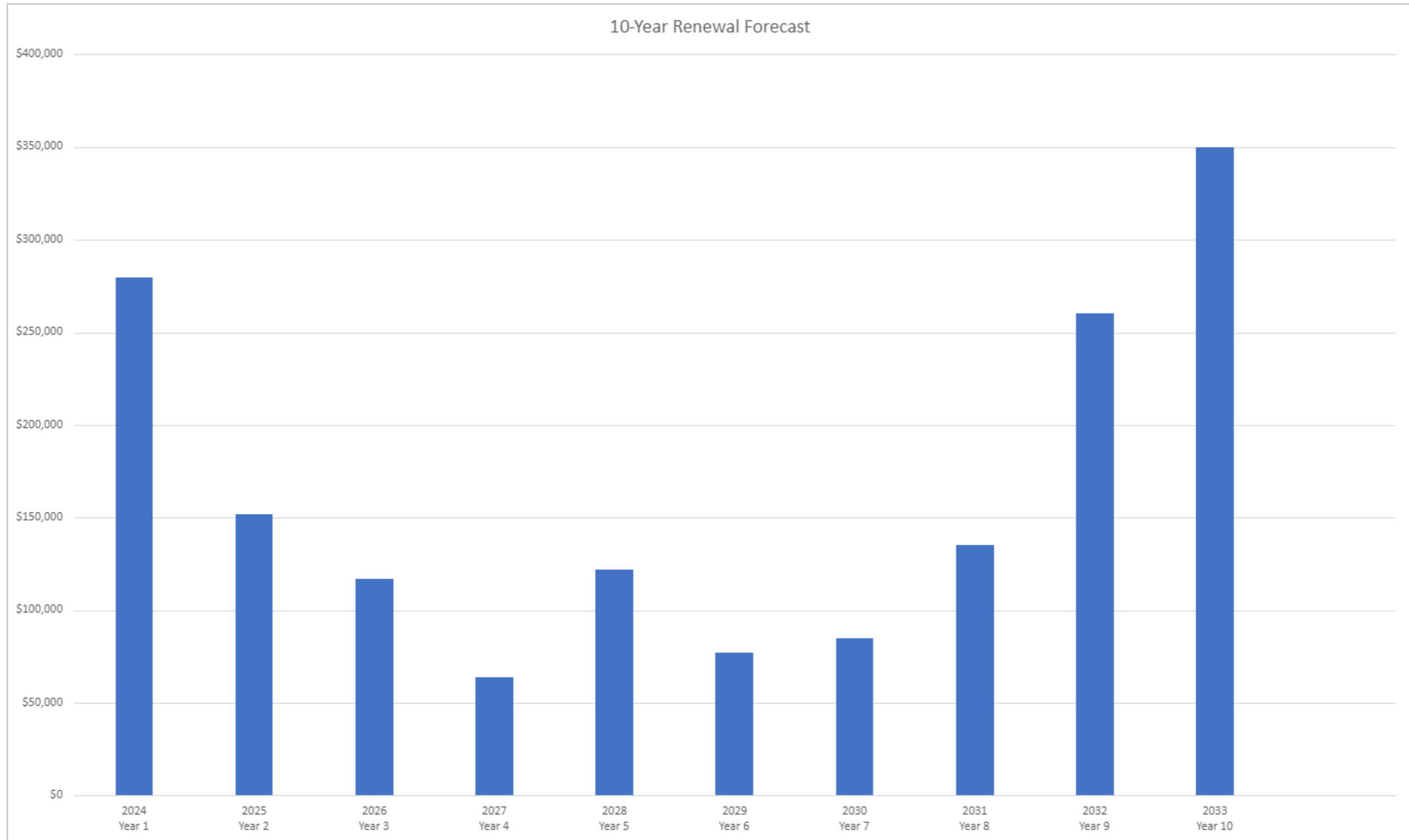
**Figure 31 - Capital Plan and Renewal Forecast (Year 0 – 5)**

Element	System	Recommendations	Total	2023 Year 0	2024 Year 1	2025 Year 2	2026 Year 3	2027 Year 4	2028 Year 5
		<b>Annual total recommended repairs/replacements</b>	<b>\$1,661,500</b>	<b>\$20,000</b>	<b>\$279,500</b>	<b>\$152,000</b>	<b>\$117,000</b>	<b>\$64,000</b>	<b>\$122,000</b>
B20	Exterior Enclosure	Window and Brick Caulking replacement	\$120,000		\$60,000	\$60,000			
B20	Exterior Doors	Replacement of Main Entry Exterior Door	\$35,000		\$35,000				
B20	Exterior Doors	Replacement of Two Loading Dock Overhead Doors	\$10,000		\$10,000				
B30	Roof Covering	Allowance for investigation/repairs and waterproofing to 2 terraced roofs	\$15,000	\$15,000					
B30	Roof Covering	Replacement of BUR Roof	\$350,000						
C10	Interior Construction	Allowance for Interior Finished walls, wall guards, counter tops - Renewal	\$50,000			\$25,000			
D1010	Conveying Systems	Elevators - Cab Finish Updates (x3)	\$75,000		\$25,000	\$25,000	\$25,000		
D1010	Conveying Systems	Elevators - Control Modernization (x3)	\$36,000					\$12,000	\$12,000
D1010	Conveying Systems	Laundry Chute - Allowance for Investigation in Air Pressure issues	\$10,000		\$10,000				
D2030	Mechanical - Plumbing	Replacement of Hot Water Tank	\$7,500		\$7,500				
D30	HVAC	Allowance for replacement of Baseboard Heaters - end of life (90% of building)	\$168,000		\$42,000	\$42,000	\$42,000	\$42,000	
D30	HVAC	Allowance for replacement of Roof Top Pkg. Units based on end of life	\$175,000		\$25,000				\$50,000
D50	Electrical Power Distribution	Replacement of Main Electrical Panel and Switchgear	\$125,000						
D50	Emergency Light and Power	Allowance for Overhaul of Diesel Generator (Includes rental of backup)	\$250,000						
D50	Electrical Power Distribution	Allowance for Replacement of Distribution Panels (Resident areas)	\$40,000					\$10,000	\$10,000
D5037	Fire Alarm System	Fire Alarm Panel and Field Devices - Renewal Budget	\$10,000						
D50	Security Systems	System upgrades Allowance	\$10,000						
G20	Site Components	Allowance for replacement of parking lot asphalt	\$150,000		\$50,000		\$50,000		\$50,000
G20	Site Components	Allowance for repairs to wire fencing on stone retaining wall at loading dock	\$5,000	\$5,000					
G20	Site Components	Allowance for repairs to concrete at loading dock	\$10,000		\$5,000				
G20	Site Components	Allowance for cement repairs to balcony/walkway above loading dock	\$10,000		\$10,000				

**Figure 42 - Capital Plan and Renewal Forecast (Year 6 – 10)**

Element	System	Recommendations	Total	2029 Year 6	2030 Year 7	2031 Year 8	2032 Year 9	2033 Year 10
		<b>Annual total recommended repairs/replacements</b>	<b>\$1,661,500</b>	<b>\$77,000</b>	<b>\$85,000</b>	<b>\$135,000</b>	<b>\$260,000</b>	<b>\$350,000</b>
B20	Exterior Enclosure	Window and Brick Caulking replacement	\$120,000					
B20	Exterior Doors	Replacement of Main Entry Exterior Door	\$35,000					
B20	Exterior Doors	Replacement of Two Loading Dock Overhead Doors	\$10,000					
B30	Roof Covering	Allowance for investigation/repairs and waterproofing to 2 terraced roofs	\$15,000					
B30	Roof Covering	Replacement of BUR Roof	\$350,000					\$350,000
C10	Interior Construction	Allowance for Interior Finished walls, wall guards, counter tops - Renewal	\$50,000		\$25,000			
D1010	Conveying Systems	Elevators - Cab Finish Updates (x3)	\$75,000					
D1010	Conveying Systems	Elevators - Control Modernization (x3)	\$36,000	\$12,000				
D1010	Conveying Systems	Laundry Chute -Allowance for Investigation in Air Pressure issues	\$10,000					
D2030	Mechanical - Plumbing	Replacement of Hot Water Tank	\$7,500					
D30	HVAC	Allowance for replacement of Baseboard Heaters - end of life (90% of building)	\$168,000					
D30	HVAC	Allowance for replacement of Roof Top Pkg. Units based on end of life	\$175,000	\$50,000	\$50,000			
D50	Electrical Power Distribution	Replacement of Main Electrical Panel and Switchgear	\$125,000			\$125,000		
D50	Emergency Light and Power	Allowance for Overhaul of Diesel Generator (Includes rental of backup)	\$250,000				\$250,000	
D50	Electrical Power Distribution	Allowance for Replacement of Distribution Panels on resident home area floors	\$40,000	\$10,000	\$10,000			
D5037	Fire Alarm System	Fire Alarm Panel and Field Devices - Renewal Budget	\$10,000			\$10,000		
D50	Security Systems	System upgrades Allowance	\$10,000				\$10,000	
G20	Site Components	Allowance for replacement of parking lot asphalt	\$150,000					
G20	Site Components	Allowance for repairs to wire fencing on stone retaining wall at loading dock	\$5,000					
G20	Site Components	Allowance for repairs to concrete at loading dock	\$10,000	\$5,000				
G20	Site Components	Allowance for cement repairs to balcony/walkway above loading dock	\$10,000					

**Figure 43 - Estimated 10-Year Renewal Forecast**



# APPENDIX D – AODA COMPLIANCE SUMMARY

Please see AODA Compliance Summary submitted as separate report.

# Appendix 5 AODA CHECKLIST



# AODA Checklist / Victoria Manor- Kawartha Lakes- Sept.5th 2023

12130.100585.000

**Issued: Sept. 5th, 2023**

**Prepared for:** Colliers Project Leaders

**Prepared by:** Altus Group Limited – Asset and Facilities

Management



Sept. 5th 2023

Job Number: 20130.104334.000

**Danette Romard, BHA, MBA, EDAC**

Director, Infrastructure Advisory

Colliers Project Leaders

[danette.romard@colliersprojectleaders.com](mailto:danette.romard@colliersprojectleaders.com)

M: (905) 330-6266

Re: ***AODA Checklist / Victoria Manor-Kawartha Lakes***

We are pleased to submit our analysis/checklist for the above-noted Project. In order to thoroughly understand the contents of this checklist as they relate to the overall Facilities Master Plan for Victoria Manor and Kawartha Lakes, please note that the Altus AFM team has included elements as they relate to the use of the facility and the elements outside of Resident Home Areas utilized by the general public and staff, and understanding that the facility is designed for those requiring the care of a Long-Term Care Home. We are pleased to present our findings within this checklist along with recommendations/suggestions for correction per the act **Accessibility for Ontarians with Disabilities Act, 2005**, where applicable.

We trust the Report meets your requirements. Should you have any questions related to the document or require additional information, please contact the undersigned.

Yours truly,

**Altus Group**



Prepared by:

**Brian Tingay, FMA**

Senior Consultant

Cost & Project Management



Rev. By:

**Mark Orge, MBA CFM PMP**

Director, Asset and Facilities Management

Cost & Project Management

# Accessible Buildings Checklist: Comprehensive

Building Exterior	Yes	No	N/A	Recommendations
Are there accessible parking spaces at/near your location?	X	<input type="checkbox"/>	<input type="checkbox"/>	The parking lot has two (2) compliant accessible parking spots. <b>Act Ref. (80.34)</b>
Are accessible parking spaces clearly marked with the International Symbol of Accessibility?	X	<input type="checkbox"/>	<input type="checkbox"/>	
Is there an accessible parking space to accommodate vehicles equipped with a mechanical lift or a wheelchair ramp?	X	<input type="checkbox"/>	<input type="checkbox"/>	
Is there a curb ramp from the parking onto the sidewalk?	X	<input type="checkbox"/>	<input type="checkbox"/>	The entrance does have a ramp accessible that is compliant with current legislation (2022) including grade and width. <b>Act. Ref (80.26)</b>
Is the route to the building entrance stable, firm and slip-resistant?	X	<input type="checkbox"/>	<input type="checkbox"/>	Continued ongoing maintenance is recommended to ensure compliance with the requirements to be substantially free from small bumps and breaks. <b>Act Ref. (80.23)</b>
Is the route at least 36 inches wide?	X	<input type="checkbox"/>	<input type="checkbox"/>	
If the accessible route crosses a curb, is there a curb ramp?	X	<input type="checkbox"/>	<input type="checkbox"/>	
Do you use salt outside your building when there is ice?	X	<input type="checkbox"/>	<input type="checkbox"/>	It is recommended that consideration be given to using sand instead of salt on the accessible routes and ramps, as salt may be harmful to the paws of service animals.

# Accessible Buildings Checklist: Comprehensive

<b>Building Entrance</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Suggestions/Improvements</b>
Is the main entrance easily seen?	X	<input type="checkbox"/>	<input type="checkbox"/>	Lighting meets or exceeds the requirements.
Is the entrance well-lit at night?	X	<input type="checkbox"/>	<input type="checkbox"/>	Lighting meets or exceeds the requirements.
Is the main entrance accessible?	X	<input type="checkbox"/>	<input type="checkbox"/>	The main entrance includes a compliant ramp.
If the main entrance is not accessible, is there an alternative accessible entrance?	<input type="checkbox"/>	<input type="checkbox"/>	X	
If the main entrance is not accessible by one step, is there a ramp?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Can the alternative accessible entrance be used independently and during the same hours as the main entrance?	X	<input type="checkbox"/>	<input type="checkbox"/>	An alternate does exist but staff noted some Wider Scooters need to use the main entry doors
Does the main entrance door have an automatic door opener?	X	<input type="checkbox"/>	<input type="checkbox"/>	The automatic door opener is compliant, and functions as intended.
Where an exterior door to a vestibule is automatic, is the interior door also equipped with an automatic door opener as well?	X	<input type="checkbox"/>	<input type="checkbox"/>	The inner automatic door opener within the vestibule is a sliding door and is compliant, and functions as intended.
If there are two doors in a series, e.g. vestibule, is the distance between the doors at least 48 inches plus the width of the doors when swinging into the space?	X	<input type="checkbox"/>	<input type="checkbox"/>	This dimension is compliant.

# Accessible Buildings Checklist: Comprehensive

Are entrances well lit?	X	<input type="checkbox"/>	<input type="checkbox"/>	Entrance lighting levels meet the requirement for compliance
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If the threshold is vertical, is it no more than 1/4 inch high? Or, no more than 1/2 inch high with the top 1/4 inch beveled?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
If you have entrance stairs, do they have tactile warning strips?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Can doors be opened without too much force (5 lbs maximum for interior doors)?	X	X	<input type="checkbox"/>	Compliant
On the pull side of doors, next to the handle, is there at least 18 inches of clear wall space so that a person using a wheelchair or crutches can get near to open the door?	X	<input type="checkbox"/>	<input type="checkbox"/>	These dimensions are compliant

## Accessible Buildings Checklist: Comprehensive

Are door handles 48 inches high or less and operable with a closed fist?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Are the operable parts of the door hardware no less than 34 inches and no greater than 48 inches above the floor or ground surface?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
If provided at the building entrance, are carpets or mats no higher than 1/2 inch thick?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant

Are edges of carpets or mats securely attached to minimize tripping hazards?	<input type="checkbox"/>	X	<input type="checkbox"/>	Consider Securing carpeting or mats at edges to prevent possible slipping
<b>Building Interior</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Suggestions/Improvements</b>
Is the reception desk / check-out counter in clear view of entrance doors?	X	<input type="checkbox"/>	<input type="checkbox"/>	Covid 19 desk also located at main entry point

## Accessible Buildings Checklist: Comprehensive

Do doors and door frames have good colour contrast with surrounding wall surfaces and floors?	X	<input type="checkbox"/>	<input type="checkbox"/>	Repaint areas under maintenance with similar color contrast when repainting to ensure continuity of compliance.
Does the nosing on stairs colour contrast with the treads?	<input type="checkbox"/>	X	<input type="checkbox"/>	Consideration should be given when repainting to ensure colour contrast where possible.
Do the handrails colour contrast with the surrounding walls?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Do counters colour contrast with the surrounding areas?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Do furniture such as couches, chairs, and tables colour contrast with their surrounding surfaces such as the walls and floor?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Do all objects on circulation paths through public areas, e.g. fire extinguishers, drinking fountains, signs, etc., protrude no more than 4 inches into the path?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Are aisles and pathways to goods and services at least 36 inches wide?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Are tripping hazards clearly marked with a bright colour, cane-detectable floor finish, or guard?	X	<input type="checkbox"/>	<input type="checkbox"/>	No tripping hazards were observed in this facility

# Accessible Buildings Checklist: Comprehensive

Is there a 5-foot circle or T-shaped space for turning a wheelchair completely?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Are floor surfaces stable, firm and slip resistant?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
If there is carpet: Is it no higher than 1/2 inch and securely attached along the edges?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Can controls (light switches, security and intercom systems, emergency/alarm boxes, etc.) be operated with one hand and without tight grasping, pinching, or twisting of the wrist?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Do you have sufficient lighting to ensure colours, patterns, and signage are all clearly identifiable?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Do you have seating available for those waiting in line?	<input type="checkbox"/>	<input type="checkbox"/>	X	
Can the chairs at the tables move?	X	<input type="checkbox"/>	<input type="checkbox"/>	Chairs and tables in the Canteen area can be moved for accommodation
Are popular items at an easy to reach height on shelves?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Do you have background music?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Is it low enough in volume so that customers can hear conversations clearly?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant

# Accessible Buildings Checklist: Comprehensive

Do fire alarms include both auditory and visual components?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
<b>Signage</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Suggestions/Improvements</b>
Is there an exterior sign identifying the name and address of the facility?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
If the main entrance is not accessible, does a sign clearly visible at the front of the building indicate the location of an accessible entrance?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
If not all entrances are accessible, is there a sign at the accessible entrance with the International Symbol of Accessibility	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Is there is an alternate system to communicate information on signs to consumers with visual impairments?	<input type="checkbox"/>	<input type="checkbox"/>	X	



# Accessible Buildings Checklist: Comprehensive

Are the characters in permanent signage (e.g. building address, room numbers and names, exit signs, and directional information) on a contrasting background?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Are text characters raised (sized between 5/8 and 2 inches high, with high contrast)?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Is there Braille?	<input type="checkbox"/>	X	<input type="checkbox"/>	Compliant
Is the sign mounted on the wall on the latch side of the door?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant

<b>Washrooms</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>	<b>Suggestions</b>
Do washroom doors have Braille lettering?	<input type="checkbox"/>	X	<input type="checkbox"/>	Tactile signage is recommended
Raised (tactile) male/female symbol?	<input type="checkbox"/>	X	<input type="checkbox"/>	
Raised letters?	<input type="checkbox"/>	X	<input type="checkbox"/>	
Are washroom doors equipped with an automatic or push-button opener?	X	<input type="checkbox"/>	<input type="checkbox"/>	

# Accessible Buildings Checklist: Comprehensive

Does the toilet stall door swing outwards?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Is there a grab bar beside the toilet?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Are washrooms large enough to accommodate people who use scooters and power wheelchairs?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Is there at least 810 mm of clear floor space beside the toilet for a lateral transfer?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Can someone using a wheelchair, or a scooter reach the faucets and turn the water on using one hand?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Are washroom accessories and dispensers within easy reach of a person using a wheelchair or scooter?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant
Are the dispensers automatic or easy to use?	X	<input type="checkbox"/>	<input type="checkbox"/>	Compliant

## References

**Accessibility Guidelines for Sensory Loss** (Deaf Blind Ontario Services)

[http://www.deafblindontario.com/index.php?option=com\\_content&view=article&id=271&Itemid=770&lang=en](http://www.deafblindontario.com/index.php?option=com_content&view=article&id=271&Itemid=770&lang=en)

**Accessibility Checklist for Existing Facilities** <http://uiaccess.com/facilities.html#p2>

Accessibility for Ontarians with Disabilities Act, 2005, S.O. 2005, c. 11 <https://www.ontario.ca/laws/statute/05a11>

**ADA Checklist for Existing Facilities**

<http://www.adachecklist.org/doc/fullchecklist/ada-checklist.pdf>

**Breaking Barriers to Business** <http://www.tourismsarnialambton.com/accessibility-sarnia-lambton/>

**Illustrated Technical Guide to the Accessibility Standard for the Design of Public Spaces (GAATES)**

<http://gaates.org/DOPS/default.php>

**Improving Access to Historic Buildings and Landscapes**

<https://www.historicengland.org.uk/advice/technical-advice/easy-access-to-historic-buildings-and-landscapes/>

**International Best Practices in Universal Design** [http://gaates.org/wp-content/uploads/2014/pdf/BP\\_english.pdf](http://gaates.org/wp-content/uploads/2014/pdf/BP_english.pdf)

**Planning an Accessible Meeting: A Checklist**

<http://www.accessiblecampus.ca/wp-content/uploads/2013/09/A-Checklist-for-Planning-Accessible-Events.pdf>

**Senior-Friendly Businesses Checklist** (Malvern Family Resource Centre)

# Appendix 6 MAINTENANCE PLAN



# Maintenance Plan- Victoria Manor Sept. 5th, 2023

20130.104334.000

**Issued:** Sept. 5th, 2023

**Prepared for:** Colliers Project Leaders

**Prepared by:** Altus Group Limited – Asset and Facilities Management

Sept. 5th, 2023

Job Number: 20130.104334.000

Laura Berazadi

Manager, Infrastructure Advisory

Colliers Project Leaders

Mobile 647.204.5426

181 Bay St, #1400 | Toronto, ON M5J 2V1 | Canada

[Laura.Berazadi@colliersprojectleaders.com](mailto:Laura.Berazadi@colliersprojectleaders.com)

Re: ***Maintenance Plan- Victoria Manor Sept. 5th, 2023***

We are pleased to submit our Maintenance Plan for the above-noted Project. Please note that the Altus AFM team has also included assets from the Asset Registry in an elemental format.

This Report is not intended for general circulation, publication, or reproduction for any other person without express written permission in each specific instance. The Report is written for the exclusive use Colliers Project Leaders and the documented consultants for this project. Altus Group Limited does not hold any reporting responsibility to any other party.

We trust the Report meets your requirements. Should you have any questions related to the document or require additional information, please contact the undersigned.

**Brian Tingay, FMA**  
**Senior Consultant**  
**Cost & Project Management**

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(647) 551-0277

**Mark Orge, MBA CFM PMP**  
**Director, Asset and Facilities Management**  
**Cost & Project Management**

[mark.orge@altusgroup.com](mailto:mark.orge@altusgroup.com)

(416) 995-1326

# 1. Methodology

The methodology of the Maintenance Plan includes the examination of all recent and available documentation; and the physical inspection of the Building Components, etc.; and a review of all building plans and associated specifications and reports, field notes, and other relevant information in order to prepare a guide for the ongoing maintenance of the elements listed. These assessment are based on the following criteria:

- The systems and their maintenance and task driven frequencies were referenced against RS Means, Whitestone, and Altus own proprietary databases, as well as applying Altus AFM Team's own expertise.
- Initial data received from Victoria Manor Facilities Operations Staff
- Altus Group Building Condition Assessment.
- On-site review
- Further meetings with current project team members to update and review methodology, and initial outcomes employed in the operating estimates provided to date.
- Re-check against industry and Altus benchmarks

# 2. Reporting Qualifications and Limitations

- This report is written for the exclusive use of the Colliers Project Leaders. Altus Group Limited (Altus) does not assume any reporting responsibility to any other party without Altus' express written consent.
- This report reflects our best professional judgement based on swift review of the subject information only.
- The report or parts thereof are not intended for general circulation, publication, or reproduction without express written permission from Altus in each specific instance.
- The analyses made and opinions expressed herein are based on sources, drawings, data, reports, and related information supplied by others that are believed by Altus to be reliable and provided in good faith; however, no representation or warranty is made by Altus, expressed, or implied, as to their accuracy, validity, completeness, or correctness.
- This assessment does not wholly eliminate uncertainty regarding the potential for existing or future costs, hazards, or losses in connection with the property.
- Altus accepts no responsibility for any decisions made or actions taken as a result of this report unless specifically advised of and participating in such action, in which case our responsibility will be as agreed to at that time.

- The opinions expressed in this report are statements of judgment and fact as of the date of publication and are subject to change without further notice.
- Any use of this report specifically denies any right to claims against the Consultant, their officers, agents, and employees in excess of the fee paid for professional service.
- Neither Altus nor its officers or its employees accepts liability whatsoever for any direct or consequential loss arising from the negligent use of this report.

Yours truly,

**Altus Group**



Prepared by:  
**Brian Tingay, FMA**  
Senior Consultant  
Cost & Project Management



Rev. By:  
**Mark Orge, MBA CFM PMP**  
Director, Asset and Facilities Management  
Cost & Project Management









# Appendix 7 PROPERTY APPRAISAL REPORT



# Narrative Appraisal

Victoria Manor

220 Angeline Street S.

Lindsay, Ontario

Effective Date: March 31, 2023

Report Date: March 31, 2023

---

#### Prepared For

Ashley Wykes  
Purchaser  
City of Kawartha Lakes

#### Prepared By

Rob Purdy, AACI, P.App  
Executive Director, Toronto  
Valuation & Advisory Services



Our File: TOR230136

March 31, 2023

City of Kawartha Lakes  
26 Francis Street,  
Lindsay, ON K9V 5R8

**Attention: Ashley Wykes**  
**Purchaser**

Dear Mr. Wykes;

**RE: NARRATIVE APPRAISAL OF A LONG TERM CARE FACILITY, VICTORIA MANOR**  
220 ANGELINE STREET S., LINDSAY, ONTARIO

In accordance with your request, we have inspected the above property and have carried out a full analysis in order to estimate its current market value. As of the Effective Date, the Subject Property consists of a Class B Long Term Care facility, located in the Town of Lindsay. Per information provided by the client, the improvements were reported to be 100% occupied as of the Effective Date, with a waiting list.

Based on our investigations, it is our opinion that the market value of the Subject Property as at March 31, 2023 is estimated to be:

VALUE TYPE	INTEREST APPRAISED	DATE OF VALUE	VALUE
Current Market Value As-Is	Leased Fee	March 31, 2023	\$10,800,000

The above value estimate is based on an exposure period of 9 to 12 months, assuming the basis of a transaction involving cash to the vendor and is in conjunction with the Assumptions and Limiting Conditions stated within this appraisal. Of particular note are the Hypothetical Conditions, Extraordinary Assumptions and Extraordinary Limiting Conditions outlined within the Terms of Reference section.

This report describes the methods and approaches to value in support of the conclusion and contains the pertinent data gathered in our investigation of the market.

Should you have any questions, we would be pleased to discuss the valuation further.

Yours truly,  
**COLLIERS INTERNATIONAL REALTY ADVISORS INC.**

**DRAFT**

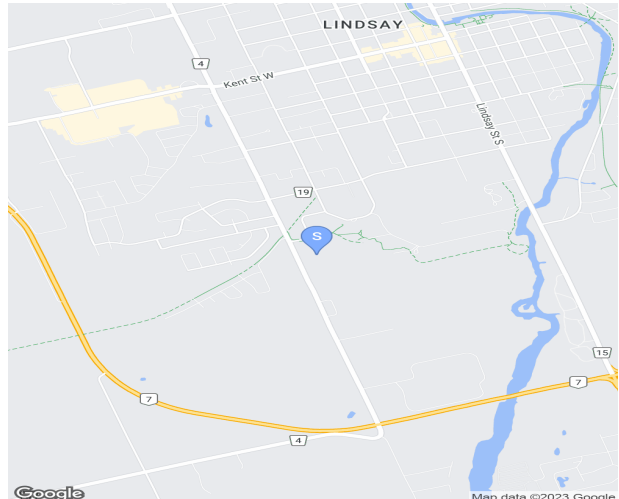
Rob Purdy, AACI, P.App  
Executive Director, Toronto

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# Executive Summary



PROPERTY INFORMATION		PROPERTY DATA	
Address	220 Angeline Street S.	Size (Units)	166
Nearest Major Intersection	Angeline Street S & Highway 7(South) and Angeline St S & Kent Street W (North)	Occupancy	100%
Property Type	Long Term Care (Class B)	Year Built	1989
Number Of Buildings	1	Quality	Good
Number of Stories	2	Condition	Good
		Land Use/Zoning	CF (Community Facility)
SUITE MIX		VALUATION SUMMARY	
Basic	76	Final Adjusted Value	\$10,800,000
Semi Private	66	Effective Date	3/31/2023
Private	24	Operating Expense Ratio	
		Value Per Unit	\$65,060
		DIRECT COMPARISON APPROACH	
		Concluded Unit Value Range	\$60,000 to \$70,000
		Size (Units)	166
		Value Indication	\$9,950,000 to \$11,600,000

The above value estimate is based on an exposure period of 9 to 12 months, assuming the basis of a transaction involving cash to the vendor and is in conjunction with the Assumptions and Limiting Conditions stated within this appraisal. Of particular note are the Hypothetical Conditions, Extraordinary Assumptions and Extraordinary Limiting Conditions outlined within the Terms of Reference section.



## LOCATION

### Strengths

- The Subject Property is situated in such a fashion that excess density exists to the east of the Subject Improvements. Permitting for possible redevelopment on site.
- The Town of Lindsay provides public transportation, via bus, to the Subject Property and broader Town of Lindsay.

### Weaknesses

- The Subject Property is located on the periphery of the Town of Lindsay, with few nearby amenities

## PHYSICAL ATTRIBUTES

### Strengths

- The Subject Improvements have been the object of an on-going maintenance program.

### Weaknesses

- The Subject Improvements are considered to be a Class B Long-Term Care Facility. Per the government of Ontario, facilities that do not comply with modern design standards (Class B, C and D Beds) will expire on June 30, 2025. The exception to this is that municipally owned Class B and C beds do not have the same finite licensing restriction. Notwithstanding the foregoing, should the Subject Property be transferred from municipal ownership, the typical license expiration criteria would apply.

## INVESTMENT

### Strengths

- There is a significant waitlist noted for occupancy within the Subject Property, limiting down time due to vacancy.

### Weaknesses

- The investment market for Class B, C and D Long-Term Care facilities within the Province of Ontario is considered to be very narrow as of the Effective date given the impending expiry of Class B, C and D beds. The impending expiration of licenses places a significant limitation on the period a potential investor can operate a given Class B, C or D facility without significant redevelopment and investment.

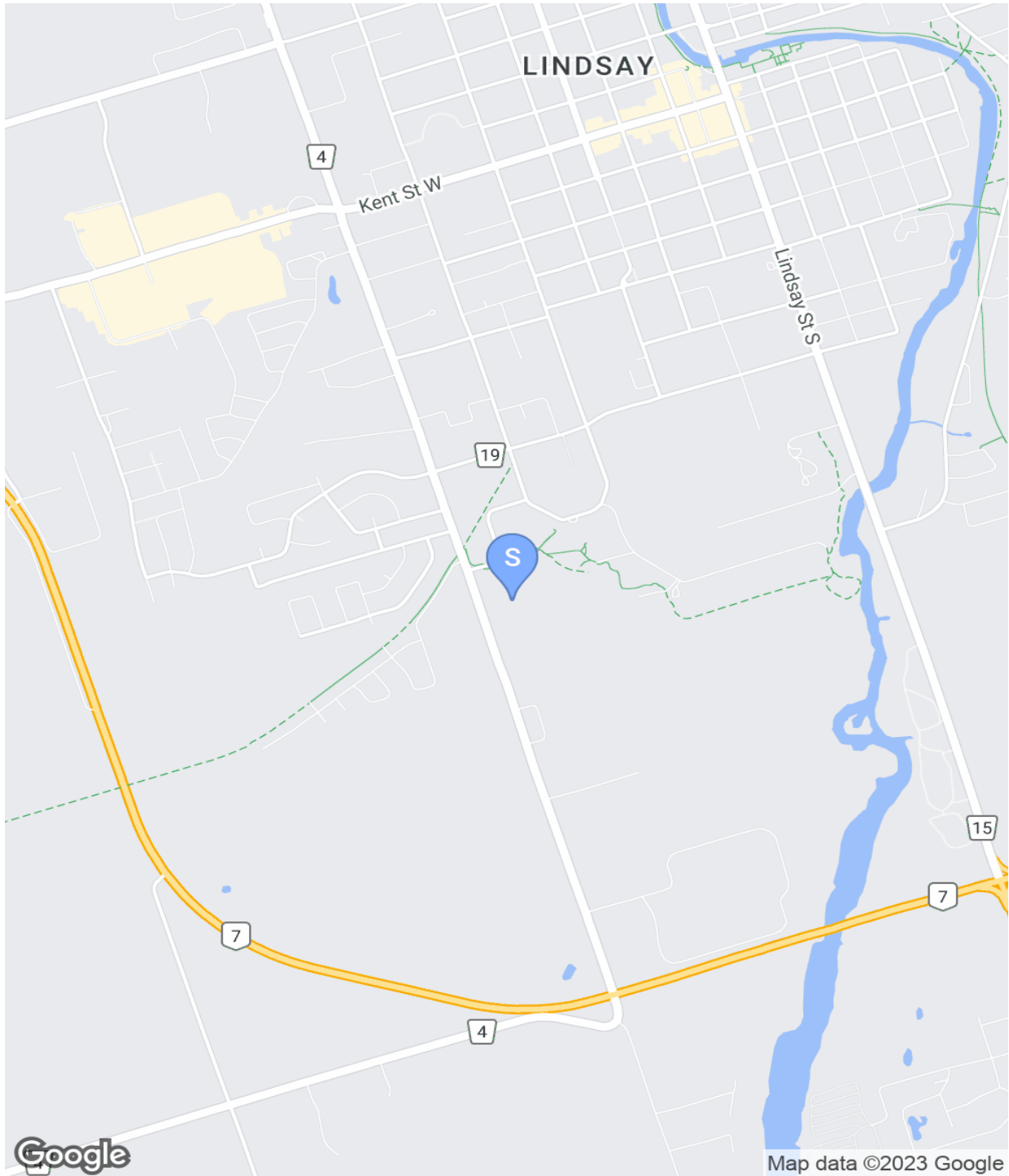
## ECONOMIC

### Strengths

### Weaknesses

- Throughout 2022 Canadian and Global economies faced persistently high inflation rates, causing central banks to take action by raising interest rates. Since the start of 2022 the Bank of Canada has raised interest rates by 425 bps; however, forward looking guidance provided by the BoC indicated they are likely entering a holding pattern on further rate hikes to properly assess the impact of interest rate hikes performed to date. The increase in interest rates represent an upward pressure on capitalization rates which may reduce liquidity and be the catalyst of a recalibration of values. Real Estate transactions are considered to be lagging indicators, with the full effect of higher borrowing costs yet to fully manifest within completed transactions.

## General Location Map



## Photographs of Subject Property



Main Entrance/Exterior



Bistro



Great Hall



Loading/Receiving



Fridges/Kitchen



Kitchen

## Photographs of Subject Property (continued)



Laundry Room



Boilers



Atrium



Atrium



Dining Room (1 of 4)



Servery (1 of 2)

## Photographs of Subject Property (continued)



Semi-Private Room



Bathroom



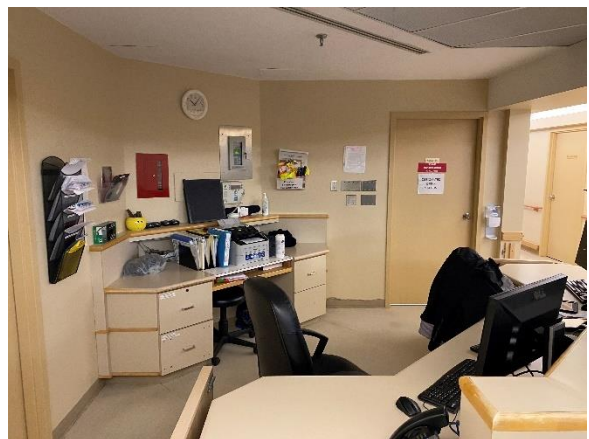
Semi-private Room



Private Room



Bathing Room



Nurses Station

## Photographs of Subject Property (continued)



Hallway/Common Area



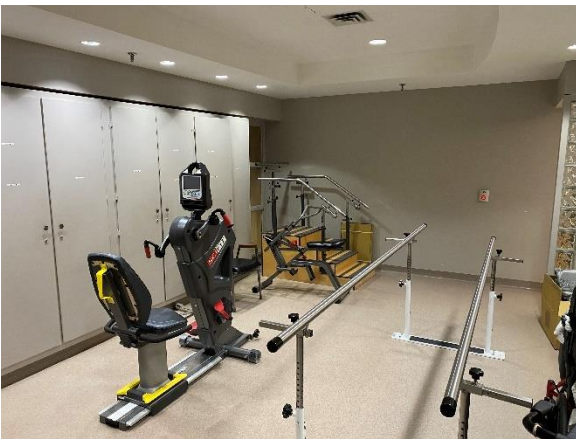
Treatment Room



Courtyard



Elevator Lobby



Physiotherapy Gym



Activities Room

## Photographs of Subject Property (continued)



Boardroom



Salon



Main Parking Area



Back-up Generator



Receiving Area - Exterior



Rear of Improvements



# Terms of Reference

## Client and Intended User

The Client of this appraisal is City of Kawartha Lakes, and the Intended User is City of Kawartha Lakes.

## Purpose and Intended Use of Report

The purpose of this valuation is to estimate the current market value as is of the Subject Property described.

This appraisal is provided on a confidential basis and for the sole and exclusive use by City of Kawartha Lakes and any other Intended User specifically identified for internal business purposes only and any third party use of or reliance on this Appraisal Report or any materials prepared by Colliers International Realty Advisors Inc. (Colliers), is strictly prohibited, except to the extent that Colliers has provided prior permission in writing, such permission to be provided or withheld in Colliers's sole and exclusive discretion. In the event that Colliers has not provided said permission City of Kawartha Lakes shall ensure and be responsible for notifying the third party in writing that it should not rely on the Appraisal Report and any use by such third party of the Appraisal Report or any materials prepared by Colliers shall be at its own risk and that Colliers makes no representations or warranties of any kind. Notwithstanding anything to the contrary, Colliers shall not owe any duty to any third party with respect to the Appraisal Report.

The appraisal report must be used in its entirety and any reliance on any portion of the appraisal report independent of others may lead to erroneous conclusions.

## Indemnification and Limitation of Liability

City of Kawartha Lakes shall indemnify, defend and hold Colliers fully harmless from and against any and all claims, liabilities, damages, costs and expenses (including court costs and reasonable legal fees) resulting from or arising out of the Client's breach of the professional service agreement relating to the Appraisal Report, wrongful acts or omissions (including any failure to perform any duty imposed by law), misrepresentation, distortion or failure to provide complete and accurate information, or any unauthorized use or reliance by third parties on the Appraisal Report or any materials prepared by Colliers. Except for City of Kawartha Lakes 's indemnification obligations, neither party shall be liable to the other party for any special, consequential, punitive or incidental damages of any kind whatsoever. Moreover, to the maximum extent permitted by law, Colliers' total liability for any losses, claims or damages arising out of or connecting or relating to this agreement (under any applicable theory of law) shall be limited in the aggregate to the total sum of fees and costs received by Colliers from City of Kawartha Lakes for the applicable subject report(s).

## Property Rights

The property rights appraised are those of the Leased Fee Interest. The Leased Fee Interest refers to an ownership interest held by the lessor, which includes the right to the contract rent specified in the lease plus the reversionary right when the lease expires.

## Effective Date

The effective date of this valuation is March 31, 2023.

This Appraisal Report is prepared in the context of the market conditions and other factors (including assumptions and/or materials provided by parties and sources outside of the control of Colliers) prevailing as of the effective date. Real estate markets and assets are subject to significant volatility and change; and

can be affected by numerous economic and political conditions as well as other conditions. The value contained (if any) in this Appraisal Report is made as of the effective date only and should not be relied on as of any other date without receiving prior written authorization from Colliers.

### Property Inspection

The following table illustrates the Colliers professionals involved with this appraisal report, and their status with respect to the property inspection.

SUBJECT PROPERTY INSPECTION			
APPRAISER	INSPECTED	EXTENT	DATE OF INSPECTION
Rob Purdy, AACI, P.App	Yes	Interior/Exterior	February 14, 2023

### Market Value Definition

For the purposes of this valuation, market value is defined as:

"The most probable price, as of a specified date, in cash, or in terms equivalent to cash, or in precisely revealed terms, for which the specified property rights should sell after reasonable exposure in a competitive market under all conditions requisite to a fair sale, with the buyer and the seller each acting prudently, knowledgeably, and for self-interest, assuming that neither is under duress."

(The Appraisal of Real Estate, Third Canadian Edition, ed. Dybvig, (University of British Columbia, Real Estate Division, 2010), p. 2.8)

### Exposure Time

An estimate of market value is related to the concept of reasonable exposure time. Exposure time is defined as:

"The estimated length of time the property interest being appraised would have been offered on the market before the hypothetical consummation of a sale at the estimated value on the Effective Date of the appraisal. Exposure time is backward-looking."

(The Appraisal Institute of Canada "Canadian Uniform Standards of Professional Appraisal Practice". 2022 ed., p. 6)

Exposure Time is a retrospective function of asking price, property type, and past market conditions and encompasses not only adequate, sufficient and reasonable time, but also adequate, sufficient and reasonable marketing effort. Exposure time is a necessary element of a market value definition but is not a prediction of a specific date of sale.

In practice, the exposure time assumes the following:

- The property was extensively marketed. Potential purchasers could inspect the property at will.
- The owner provided interested agents with any and all relevant property information.
- Negotiations of any offers to purchase were performed in a timely manner.
- The property was maintained at a physical status equivalent to its present condition.
- Market level financing was readily available.
- The seller was not under duress.

Ongoing discussions with agents familiar with the market have indicated that properties like the Subject Property typically require a marketing period of 9 to 12 months depending on a variety of factors including its location, vacancy levels, tenant quality, size, market conditions, and motivation of the vendor/purchaser.

In consideration of these factors, it is concluded that for the Subject Property to sell at the market value estimated as of the effective date of this report, an exposure period of approximately 9 to 12 months would be required.

### Scope of the Valuation

This report has been written in a Narrative format, and complies with the reporting requirements set forth under the Canadian Uniform Standards of Professional Appraisal Practice. As such, all relevant material is provided in this report including the discussion of appropriate data, reasoning, and analyses that were used in the appraisal process to develop the appraiser's opinion of value. Additional supporting documentation concerning the data, reasoning, and analyses are retained in the appraiser's file. The depth of discussion contained in this report is specific to the needs of the client and for the intended use stated.

During the course of preparing this valuation, the following was completed:

- Property inspection details are indicated previously within the Terms of Reference section of this report.
- No lease review or audit was conducted. This valuation has been prepared on the basis of summary financial and operating data provided directly to us by our client or their designated agents, in either hard copy or electronic form or both. It is assumed that this information, and specifically that relating to the financial performance of the Subject Property described, is accurate. This assumption is critical to the value estimate contained and the authors of this report, and Colliers reserve the right to amend our estimate(s) in whole or in part should the foregoing not be the case.
- A review of a detailed tenant rent roll as provided by our client or their designated agents has been conducted.
- A review has been completed of available data regarding the local market.
- Verification of current land use and zoning regulations has been undertaken. Municipal and neighbourhood information, including tax information, were sourced as noted below and verified where appropriate and possible. Site area and dimensions are from information obtained from the GeoWarehouse. Should further confirmation of site size and dimensions be required, a legal survey should be commissioned.
- A review of sales and listing data on comparable properties has been undertaken. Comparable market information was obtained from our information database and local real estate professionals knowledgeable in the Lindsay real estate market. It was confirmed, when appropriate, with public information at the GeoWarehouse or the parties involved when there was reason to doubt its accuracy.
- Discussions have been held with market participants where applicable.

SOURCES OF INFORMATION	
ITEM	SOURCE
Assessment / Tax Information	Municipal Property Assessment Corporation
Zoning Information	City of Lindsay
Official Plan Information	City of Lindsay
Site Size Information	GeoWarehouse
Building Size Information	Client Supplied Documentation
Demographics	Hydra
Comparable Information	RealNet, RealTrack, MLS, GeoWarehouse
Legal Description	GeoWarehouse
Other Property Data	Client Supplied Documentation
Rent Roll Data	Client Supplied Documentation
Income/Expense Statements	Client Supplied Documentation

Colliers cannot be held liable for any errors in the information that was provided by third parties or by City of Kawartha Lakes. The Appraisal Report must be used in its entirety and any reliance on any portion of the appraisal report independent of others may lead to erroneous conclusions.

#### Ordinary Assumptions and Limiting Conditions

This report is subject to the Ordinary Assumptions and Limiting Conditions set forth within the Appendix to this appraisal in addition to any specific assumptions that may be stated in the body of the report. These conditions are critical to the value stated and should be thoroughly read and understood before any reliance on this report should be considered.

#### Extraordinary Limiting Conditions

An Extraordinary Limiting Condition refers to a necessary modification to, or exclusion of, a Standard Rule which may diminish the reliability of the report. The following Extraordinary Limiting Conditions were invoked within this report:

The Government of Ontario regulates and administers licenses associated with Long Term Care. As of the Effective Date, the Ontario Government and Ministry of Housing and Long Term Care has indicated it will enforce the expiry date of June 30, 2025 for all Class B, C and D beds. The report herein has not contemplated the potential for policy change beyond the Effective Date.

As of the date of this report Canada and the Global Community is experiencing unprecedented measures undertaken by various levels of government to curtail health related impacts of the Covid-19 Pandemic. The duration of this event is not known. While there is potential for negative impact with respect to micro and macro-economic sectors, as well as upon various real estate markets, it is not possible to predict such impact at present, or the impact of current and future government countermeasures. There is some risk that the Covid-19 Pandemic increases the likelihood of a global recession, however without knowledge of further anticipated government countermeasures at the national and global levels it is not possible to predict any impact at this point in time. Accordingly, this point-in-time valuation assumes the continuation of current market conditions, and that current longer-term market conditions remain unchanged. Given the market uncertainties of the Covid-19 pandemic, a force majeure event, we reserve the right to revise the value estimation set out in this report for a fee, with an update appraisal report under a separate appraisal engagement, incorporating market information available at that time.

### Hypothetical Conditions

Hypothetical Conditions are a specific type of an Extraordinary Assumption that presumes, as fact, simulated but untrue information about physical, legal or economic characteristics of the Subject Property or external conditions, and are imposed for purposes of reasonable analysis. No Hypothetical Conditions were invoked within this report.

### Extraordinary Assumptions

An Extraordinary Assumption is an assumption, directly related to a specific assignment, which, if were not assumed to be true, could materially alter the opinions or conclusions. Extraordinary Assumptions presume uncertain information about or anticipated changes in: the physical, legal or economic characteristics of the subject property; or about: conditions external to the subject property such as market conditions or trends, or the integrity of data used in an analysis to be fact. The following Extraordinary Assumptions were invoked within this report:

We have relied on information provided to us by our client or their designated agents with respect to the status of the tenancy and their contractual rights and obligations, and financial data relating to the income and expenses associated with the property's operations, as well as the physical attributes of the property and environmental condition of the site, including any required capital expenditures. The assumptions stated are critical to the value estimate contained and the authors of this report and Colliers reserve the right to amend our estimates should any of these assumptions be altered in whole or in part.

We have not undertaken a detailed soil analysis, and as we are not qualified to comment on soil conditions, we have assumed that there are no contaminants affecting the site. However, a full environmental assessment would be required for certainty and any cost of remedy could potentially impact the reported value conclusion. The sub-soil is assumed to be similar to other lands in the area and suitable in drainage qualities and load bearing capacity to support the existing development.

As the date of the inspection and of writing this report precedes the effective date, it is an Extraordinary Assumption that there are no material changes in the interim to either the physical or operating status of the property or the prevailing market conditions that might impact the value conclusions.

With the exception of the foregoing, there have been no other Extraordinary Assumptions employed in the preparation of this appraisal or report.

### Assemblage

When relevant to the assignment, CUSPAP requires that assemblage must be considered and analyzed as to the effect on value. In the instance of the Subject Property, assemblage is not considered to be a relevant factor, and therefore no analysis is deemed necessary.



#### Anticipated Public or Private Improvements

When relevant to the assignment, CUSPAP requires that anticipated public or private improvements must be considered and analyzed as to the effect on value. In the instance of the Subject Property, public or private improvements are not considered to be a relevant factor, and therefore no analysis is deemed necessary.

#### Personal Property

When relevant to the assignment, CUSPAP requires that personal property must be considered and analyzed as to the effect on value. In the instance of the Subject Property, personal property is not considered to be a relevant factor, and therefore no analysis is deemed necessary.

# Property Data

## Municipal Address

220 Angeline Street S., Lindsay, Ontario

## Legal Description

P.I.N.	Legal Description
632380071	PT S1/2 LT 18 CON 5 OPS PT 2-33 57R7214; S/T & T/W R309070; S/T R319394, VT46616; KAWARTHA LAKES

## Property Rights

This valuation pertains to the Leased Fee interest in the property described.

## Encumbrances

There are no encumbrances registered against the title of the Subject property. A copy of the Certificate of Title are included in the Addendum to this report to which the reader's attention is specifically directed.

## Ownership / Sale History

Ownership of the property last transferred on June 20, 1904. According to the information available, the current owner, The Corporation of the County of Victoria acquired the Subject Property from an undisclosed party. for the reported consideration of \$6,668. This transaction is assumed to have occurred at arm's length. It should be noted that the above transaction pertains to the purchase of the land by the municipality in a vacant state, prior to improvement.

There have been no other transfers of the Subject Property within the past three years.

## Recent Activity

To the best of the author's knowledge the Subject Property has not been openly marketed for sale within the past twelve months.

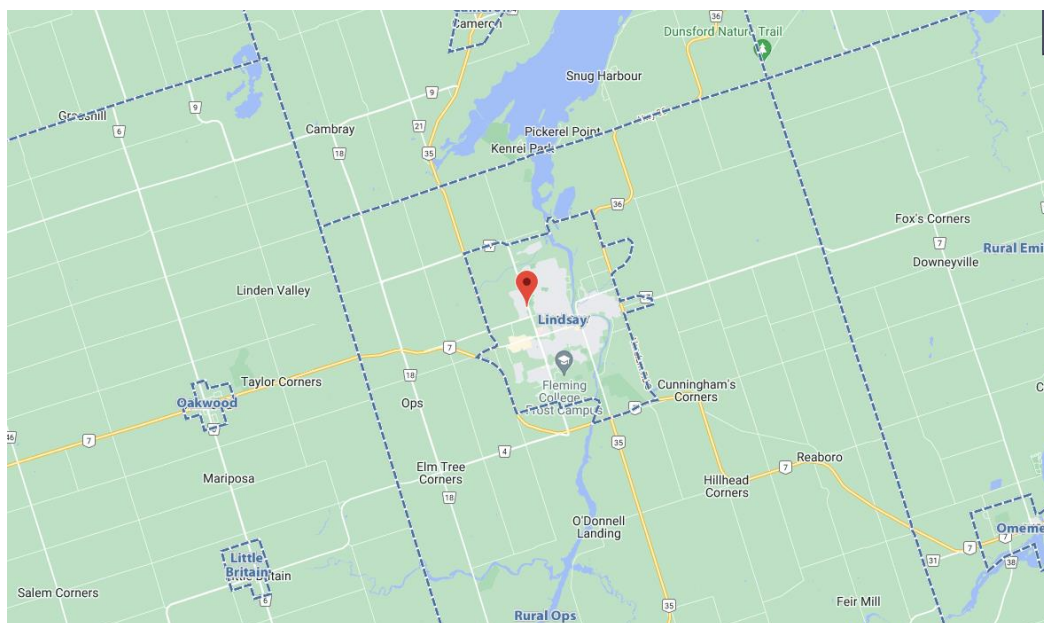
## Realty Taxes/Assessment

The current realty tax and assessment information for the Subject Property is as summarized as follows:

ASSESSMENT & TAXES		
ROLL NO	TOTAL 2023 ASSESSMENT	TOTAL ASSESSMENT PER UNIT
165102000150500	\$6,096,000	\$36,723

The above assessment and levy are deemed reasonable for the Subject Property. Notwithstanding this, we recommend a full review be conducted on the assessment to ensure both equity and accuracy.

## Location Overview - Lindsay



The Subject property is situated within the Town of Lindsay in the Kawartha Lakes region. The district is approximately 43 km west of Peterborough. The Subject Property is located within a commercial node in Lindsay, along Kent Street West. Based upon the 2016 census data, the Town of Lindsay had a population of 20,713 people. This town features public transportation via Lindsay Transit, which provides bus service to the community and surrounding area. It was noted that the only hospital in town, Ross Memorial Hospital, is situated within close proximity to the Subject Property. Additionally, Fleming College is located just south east of the Subject Property. Residential pockets can be found to the south, north and east side of the Subject Property. The immediate area of the Subject Property consists of commercial, residential and vacant land uses.

### District Boundaries

- North ● Scugog River
- South ●
- East ● Verulam Road South
- West ● Highway 7 / Highway 35

### Adjacent Districts

- North ● Rural Ops & Cameron
- South ● Rural Ops & Janetville
- East ● Rural Ops & Omemee
- West ● Rural Ops & Oakwood

### Major Arterials & Access

- Access ● The property has good access characteristics along a major arterial in the east side.
- Arterials ● Verulam Rd S, Lindsay St S, Kent St W, Colborne St E.



## Site Description



### General Description

The Subject site consists of 1 parcel. As noted below, the Subject site has 472,632 SF (10.85 AC) of land area. The area is based on information provided by the land registry, and may change if a professional survey determines more precise measurements. Going forward, our valuation analyses will utilize the usable site area. The following discussion summarizes the Subject site size and characteristics.

<b>Assessor Parcel</b>	632380071		
<b>Number Of Parcels</b>	1		
<b>Land Area</b>	<b>Acres</b>	<b>Square Feet</b>	
Primary Parcel	10.85	472,632	
Excess Land	0.00	0	
<u>Surplus Land</u>	<u>0.00</u>	<u>0</u>	
<b>Total Land Area</b>	<b>10.85</b>	<b>472,632</b>	

<b>Shape</b>	L-Shaped - See Plot Map For Exact Shape
<b>Topography</b>	Sloping below street grade
<b>Adjacent Use North</b>	Institutional and low-density residential uses
<b>Adjacent Use South</b>	Institutional and open space land uses
<b>Adjacent Use East</b>	Institutional, commercial, open space and low-density residential land uses
<b>Adjacent Use West</b>	Low-density residential and open space land uses
<b>Density / Site Coverage</b>	Site has been developed to a 0.23 density
<b>Zoning</b>	Community Facility (CF)
<b>Drainage</b>	Assumed Adequate
<b>Utilities</b>	All available to the site

<b>Street Improvements</b>	<b>Frontage</b>	<b>Direction</b>	<b>No. Lanes</b>	<b>Street Type</b>	<b>Curbs</b>	<b>Skatewalks</b>	<b>Streelights</b>	<b>Center Lane</b>	<b>Gutters</b>
Angeline Street S.	386 Feet	Two-Way	Two-Lane	Minor Arterial	✓	✓	✓		

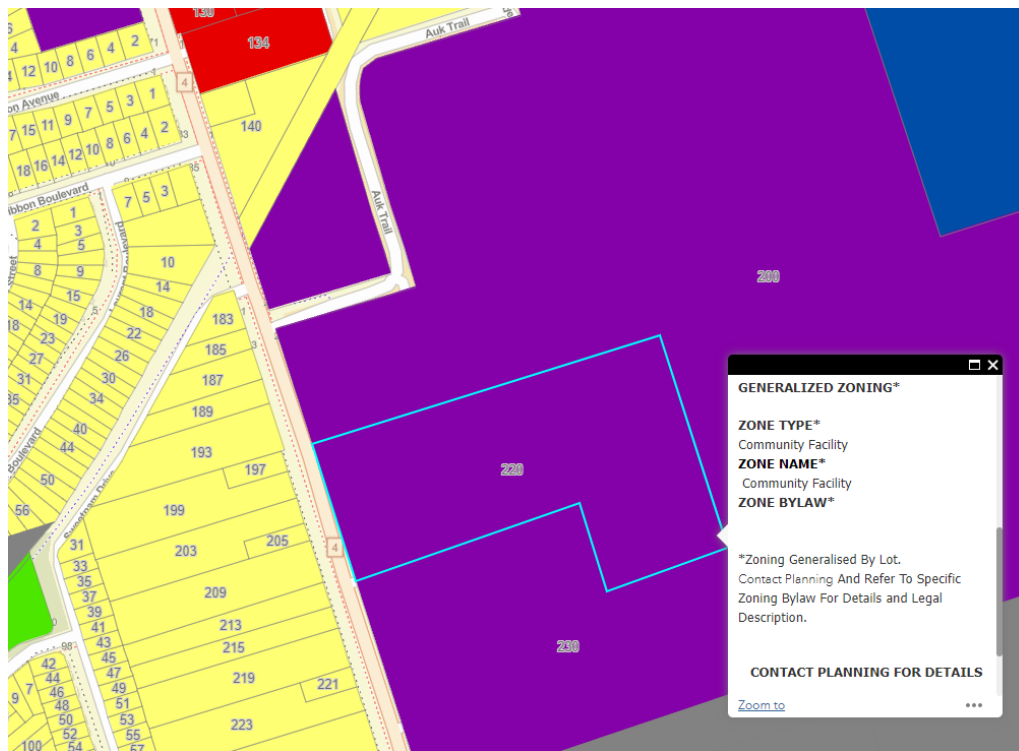
**Accessibility** Average/Good - The Subject Property is located on the southern periphery of the Town of Lindsay. The Subject Property can be accessed via private vehicle or public bus, operated by the Town of Lindsay. The Subject Property is considered to have accessibility characteristics commensurate with other Long-Term Care facilities in similar markets.

**Exposure** Average/Good - The Subject Property occupies a midblock appointment and is considered to have typical exposure of similarly appointed lots in the Subject Market.

**Soil Conditions** We have not undertaken a detailed soil analysis, and as we are not qualified to comment on soil conditions, we have assumed that there are no contaminants affecting the site. However, a full environmental assessment would be required for certainty and any cost of remedy could potentially impact the reported value conclusion. The sub-soil is assumed to be similar to other lands in the area and suitable in drainage qualities and load bearing capacity to support the existing development.

**Conclusion** The Subject Property features locational and accessibility characteristics similar to other long-term care facilities in similarly sized municipalities. Access is primarily via private vehicle; however, public transportation does provide service to the Subject Property as well.

## Land Use / Zoning



### Introduction

Zoning bylaws typically establish ranges of permitted and discretionary uses, in addition to development restrictions including such factors as maximum building heights, allowable densities, setback requirements, parking and loading limitations, signage restrictions and other items.

According to the relevant land use / zoning bylaw for the City of Lindsay, the property is currently classified CF (Community Facility). An excerpt from the zoning bylaw is included in the appendices to this report.

A zoning summary and a listing of pertinent zoning requirements are presented as follows:

ZONING SUMMARY	
<b>Municipality Governing Zoning</b>	City of Lindsay
<b>Zoning Bylaw Number</b>	2000-75
<b>Current Zoning</b>	Community Facility (CF)
<b>Permitted Uses</b>	A full list of permitted uses is located in the Appendix of this report.
<b>Current Use</b>	Long Term Care Facility
<b>Is Current Use Legally Permitted?</b>	Yes
<b>Zoning Change</b>	Not Likely

## ZONING REQUIREMENTS

<b>Conforming Use</b>	The existing improvements represent a conforming use within this zone.
<b>Minimum Yard Setbacks</b>	
Front (Meters)	12
Rear (Meters)	9
Side (Meters)	6.0 - 9.0
<b>Maximum Building Height</b>	15.0 Meters
<b>Maximum Site Coverage</b>	50%

---

Source: City of Lindsay

### Zoning Conclusions

Detailed zoning studies are typically performed by a zoning or land use expert, including attorneys, land use planners, or architects. The depth of analysis presented correlates directly with the scope of this assignment, and it considers all pertinent issues that have been discovered through our due diligence. Please note that this appraisal is not intended to be a detailed determination of compliance, as that determination is beyond the scope of this real estate appraisal assignment.

Based on our interpretation of the applicable land use/zoning bylaw, the property use appears to reflect a legally permitted conforming use. However, the authors are not technically qualified to confirm zoning compliance, and for greater certainty in this regard, written confirmation from the municipality and/or a qualified legal opinion should be obtained.

## Description of the Improvements



The Subject Property is improved with a Class B Long Term Care facility known as Victoria Manor, operated by the City of Kawartha Lakes as of the Effective Date. The Subject Improvements consist of four, two-storey residential wings and feature a mixture of basic, semi-private and private rooms. Per the Ministry of Housing and Long Term Care, the licenses for Class B beds are set to expire June 30, 2025 with the exception of those under ownership of municipalities, which is approximately 800 beds across the province.

Should ownership of the Subject Property be transferred from the municipality, the licenses would face the same terminal date as the balance of Class B licenses across the province.

**Property Type** Seniors' Housing

**No. of Stories** 2 story building

**Units**

UNIT MIX		
Unit Types	# of Units	% Total Units
Basic Beds	76	46%
Semi-Private Beds	66	40%
Private Beds	24	14%
<b>TOTAL/AVERAGE</b>	<b>166</b>	<b>100%</b>

**Year Built** The improvements were reported to have been constructed in 1989.

Quality & Condition	The property represents good quality construction in good overall condition.
Foundation	The foundation of the Subject Improvements consists of cast-in place reinforced concrete strip footings. The residential wings of the Subject Improvements consist of slab on grade construction.
Superstructure	The superstructure of the Subject Improvements consists of combination of cast-in-place reinforced concrete, steel framing with metal pans and concrete block masonry.
Roof	The roof was not inspected during the course of the site visit. Per the information provided by the client, the roof consists of a conventional built up roof system.
Windows / Doors	<p>The main entrance door consists of a vestibule configuration, with a single glass and aluminum commercial door on exterior and an aluminum double sliding door at the interior of the vestibule. The building exit doors consists of glass inserts in aluminum framing. Doors to individual resident rooms consist of solid core metal slabs suspended in metal frames, with automatic closing mechanisms.</p> <p>Windows consist of operable four sash sliders. The units are double glazed anodized aluminum insulated glass units (IGU) in thermally broken aluminum frames. The windows at stairwells consist of decorative frosted block windows.</p>
Common Area/Hallways	<p>Common areas generally consist of commercial vinyl tile flooring with painted gypsum board walls and either acoustic tile grid ceilings or painted gypsum board ceilings. Hallway walls are equipped with railings and grab bars. Lighting throughout the common areas consists of a mixture of ceiling mounted fluorescent fixtures or wall sconces.</p> <p>Each floor is equipped with a central servery area which is serviced by the primary kitchen facilities located in the basement. The serveries provide dining service to two dining rooms each, that are in turn each shared by two wings.</p>
Interior Finishes	<p>Individual rooms consist of basic, semi-private and private. The rooms are generally finished in the same fashion:</p> <ul style="list-style-type: none"><li>- commercial vinyl tile flooring</li><li>- two piece bathroom (toilet and vanity)</li><li>- painted gypsum board walls and ceiling</li><li>- ceiling mounted light fixtures</li></ul> <p>In basic and semi-private rooms, resident areas are separated by a gypsum board wall and ceiling mounted curtains.</p> <p>Each wing is equipped with bathing facilities for residents of that wing.</p>
Vertical Access	Vertical access is provided three elevators (2 passenger and one freight) and various stairwells.

**Heating/Cooling** The heating, ventilation and air conditioning for the entire building is provided by multiple gas heat and DX cooled rooftop units. The heating for the common area and residential suites is provided by perimeter electric baseboard heaters and gas-fired rooftop units. Cooling is provided to all areas by rooftop units.

Humidification for the building is provided by electric humidifiers located at various mechanical closets throughout the improvements.

**Plumbing** It is assumed to be adequate in capacity for current tenant demand.

**Electrical** The electrical service is assumed to be adequate for the current and anticipated requirements of the building.

The building is serviced by a natural gas fired back-up generator that has a reported capacity sufficient to service building life systems.

**Parking** At the time of inspection, available parking appeared to be adequate.

Surface	77 stalls
Covered	0 stalls
Underground	0 stalls
Other	0 stalls
Total	77 stalls

**Design and Functionality** Average/Good

**Amenities** Given the nature of residents mobility within long term care, amenities are considered to be commensurate with other Class B long term care facilities, including:

- Salon
- Congregate dining rooms
- Physiotherapy gym
- Courtyard
- Bathing/Shower rooms
- Bistro/Coffee bar

**Observed Condition** The Subject property demonstrates a condition and quality consistent with other Class B Long Term Care facilities of a similar vintage.

**Turnover Package** Upon turnover, suites are painted, cleaned, and repairs are made as required.



## Comments

The property is in good overall condition and free from any visible deferred maintenance that would significantly impact the property's market value or its marketability. However, no building condition reports were provided to the writer. It is assumed herein that all mechanical equipment is in adequate working condition, has been maintained in a professional manner, and that no atypical capital expenses are required.

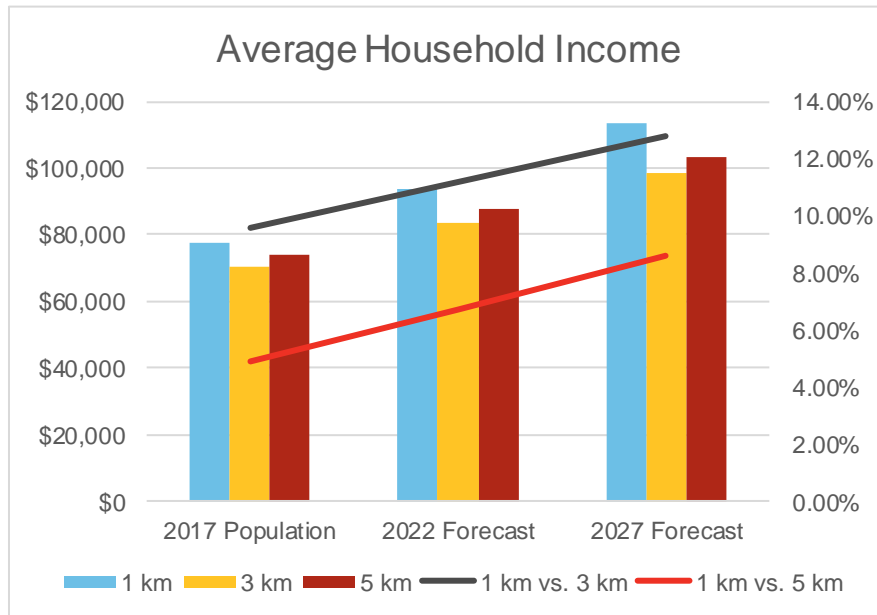
It should be noted that per the Government of Ontario, a Class B, C and D long term care facilities will have their respective bed licenses expire on June 30, 2025, with the exception of those facilities owned by Municipalities. Should ownership be transferred from a municipality to private entity, the same license expiry date would be applicable.



# Market Overview

## Demographics

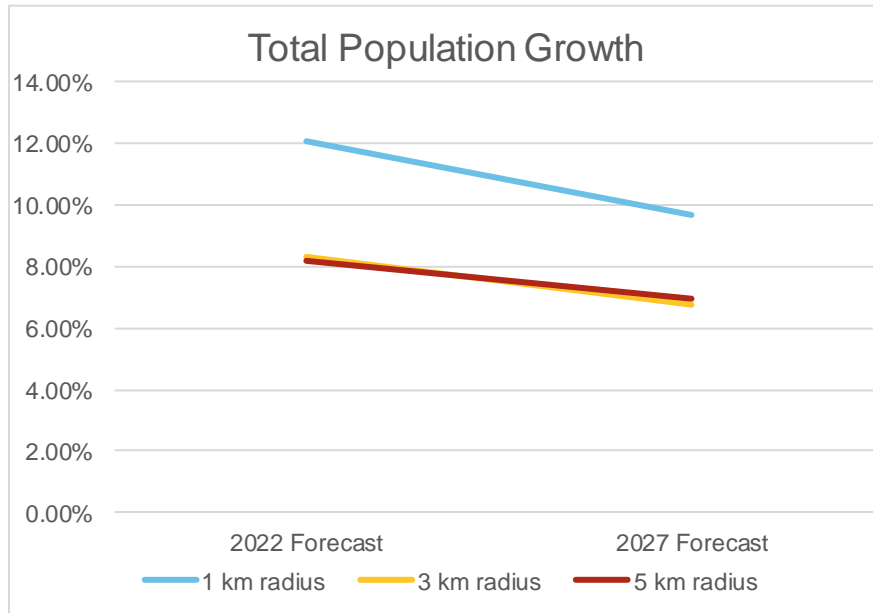
### Household Income



AVERAGE HOUSEHOLD INCOME					
	1 km	3 km	5 km	1 km vs. 3 km	1 km vs. 5 km
2017 Population	\$77,582	\$70,144	\$73,781	9.59%	4.90%
2022 Forecast	\$93,810	\$83,327	\$87,486	11.17%	6.74%
2027 Forecast	\$113,263	\$98,777	\$103,540	12.79%	8.58%

As can be seen in the chart above, the population within 1 km of the subject property exhibits an average household income that surpasses the 3 km level and is similar to the 5 km level. Income levels observed at 1 km, 3 km and 5 km from the subject property are expected to increase steadily over the -2017-year forecast period.

Total Population



**TOTAL POPULATION**

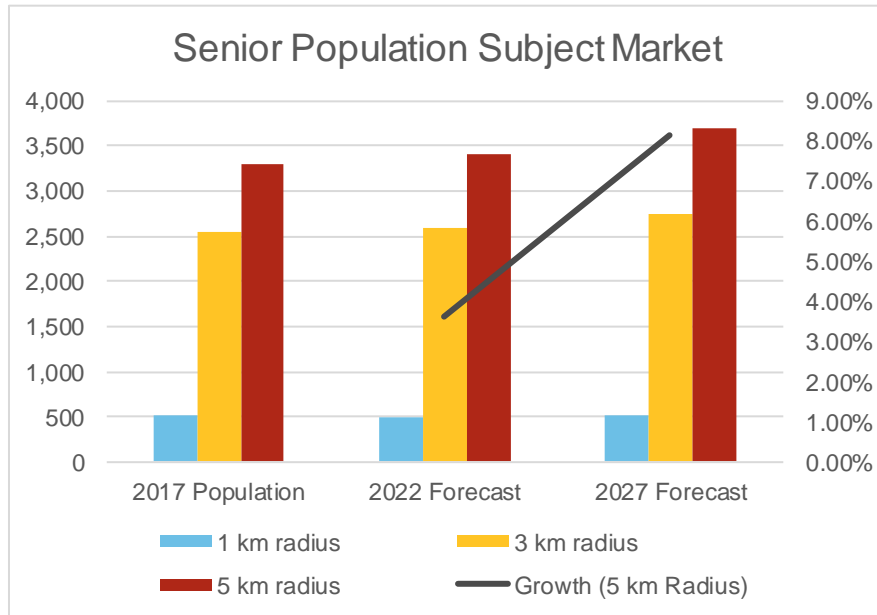
	1 km radius	3 km radius	5 km radius
2017 Population	2,658	18,002	24,295
2022 Forecast	2,980	19,500	26,284
2027 Forecast	3,269	20,820	28,119

**TOTAL POPULATION GROWTH**

	1 km radius	3 km radius	5 km radius
2017 Population			
2022 Forecast	12.11%	8.32%	8.19%
2027 Forecast	9.70%	6.77%	6.98%
Total Forecast Period Growth	22.99%	15.65%	15.74%

The population within the 5 km study area is approximately 24,295 as of the effective date. The population levels observed within the study areas are expected to remain stable over the forecast period.

Total Senior Population 75+



**SENIORS POPULATION**

	1 km radius	3 km radius	5 km radius
2017 Population	521	2,545	3,294
2022 Forecast	495	2,589	3,413
2027 Forecast	506	2,736	3,690

**SENIORS POPULATION GROWTH**

	1 km radius	3 km radius	5 km radius
2017 Population			
2022 Forecast	-4.99%	1.73%	3.61%
2027 Forecast	2.22%	5.68%	8.12%
Total Forecast Period Growth	-2.88%	7.50%	12.02%

Within a 5 km radius there are a total of 3,294 seniors above the age of 75. The seniors 75+ population is expected to experience moderate growth year over year throughout the forecast period.

**COMPOSITION OF SENIORS WITHIN 5KM**

	75-79	80-84	85+
2017 Population	34.24%	30.33%	35.43%
2022 Forecast	41.34%	27.37%	31.29%
2027 Forecast	41.68%	31.33%	26.99%

Within the 5 km study area, approximately 35% of seniors 75+ are above the age of 85, representing approximately 1,167-/+ people above 85 within a 5 km radius.

## Economic Overview – Canada

Canada has the world's 39<sup>th</sup> largest population and the world's second largest land mass. The country's population is dispersed among 10 provinces and 3 territories with nearly 90% of its people living within 160 kilometers of the United States border. Canada consistently receives a top fifteen Human Development Index ranking and a top twenty ranking for GDP (nominal) per capita.

Canada's economy consistently receives a top twelve world ranking. International trade makes up a large part of Canada's economy, with the United States as its largest trading partner followed by the European Union and China. Key Canadian exports include petroleum, automobiles and auto parts, precious metals, machinery including computers, wood, electrical machinery, aircraft and spacecraft, pharmaceuticals and aluminum. More recently, Canada's high knowledge industries of manufacturing, business services, engineering and computer and management services have received a top ten global knowledge economy ranking from the World Bank Institute.

Following is a summary of featured insights prepared by the Conference Board of Canada regarding the Canadian economy.

### Bracing for a Slowdown: Canada's Three-Year Business and Industry Outlook

- Many businesses anticipate a recession in Canada within the next year, derailing their production and investment plans.
- Elevated oil prices mean the energy sector will lead in investment over the short term.
- Industries hit hard over the past two years—such as transportation and manufacturing—are poised for increased investment, though challenges remain.
- Softer domestic and global demand and ongoing supply chain problems will continue to temper output in several manufacturing sectors throughout 2023.
- Commercial services will face competing forces over the short term, where the lifting of most pandemic-related restrictions will help some industries, but higher inflation will hinder others.
- Fiscal constraints at all levels of government will soften output growth for the public sector for most of the forecast period.

### Short-Term Pain but Long-Term Gain: Canada's Three-Year Housing Outlook

- Higher mortgage interest rates are stifling homebuyer interest, prompting a dramatic reversal in Canadian housing markets.
- National resale price growth will slow to 2.0 per cent this year after a record 22.6 per cent increase in 2021. Canada's average price will decline roughly 8 per cent and 1 per cent respectively in 2023 and 2024 before rising by 3.0 per cent in 2025.
- Should the pace of current sales declines accelerate, a larger price correction could result.
- Housing starts will fall to 247,100 units in 2022, down from last year's 45-year high of near 271,200 units. Starts will hover near 230,000 units annually in 2023 to 2025.
- Slowing activity in the new and resale housing markets will outweigh modest renovation growth to cut total residential investment in 2023 before it rises again slightly in 2024 and 2025.
- Strong population growth will challenge industry and governments to deliver sufficient housing.

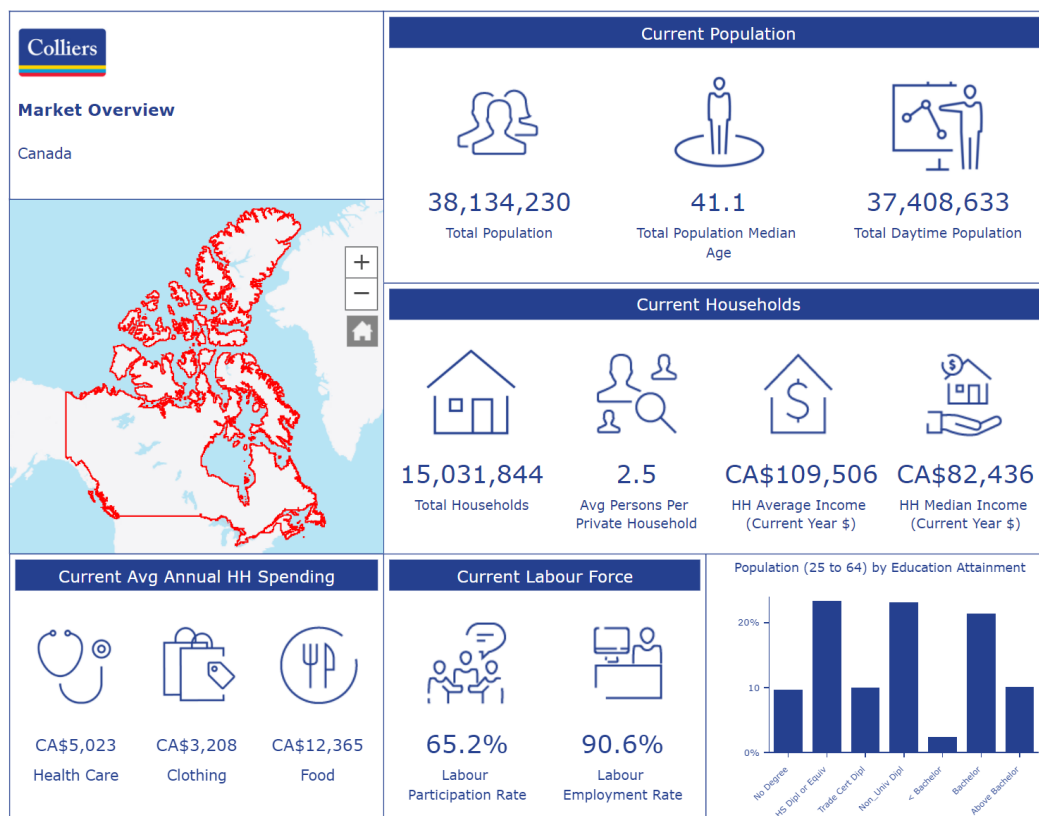
### Rising Headwinds: Canada's Three-Year Labour and Household Outlook

- The labour market has reached an inflection point, employment growth has stalled, and unemployment is set to rise.

- Wage growth has given way to price pressure and is now accelerating. Ahead, weakening labour demand will draw steam from this ascent.
- The consumer price index will grow by 7.0 per cent this year and 3.8 per cent next year. Rising wage pressures will hinder inflation's return to the Bank of Canada's target range.
- Real household consumption spending will grow by 5.4 per cent in 2022 and 1.6 per cent in 2023.
- Tighter monetary policy is discouraging the consumption of goods and services that are sensitive to interest rates. Spending on durable goods fell in the second quarter of 2022 and will fall further into 2023.
- Real household spending on services reclaimed its pre-pandemic level in the second quarter of 2022. However, spending on transportation, recreation, and travel hasn't fully bounced back.

Central Banks Battle Inflation: Canada's Three-Year Financial Markets Outlook

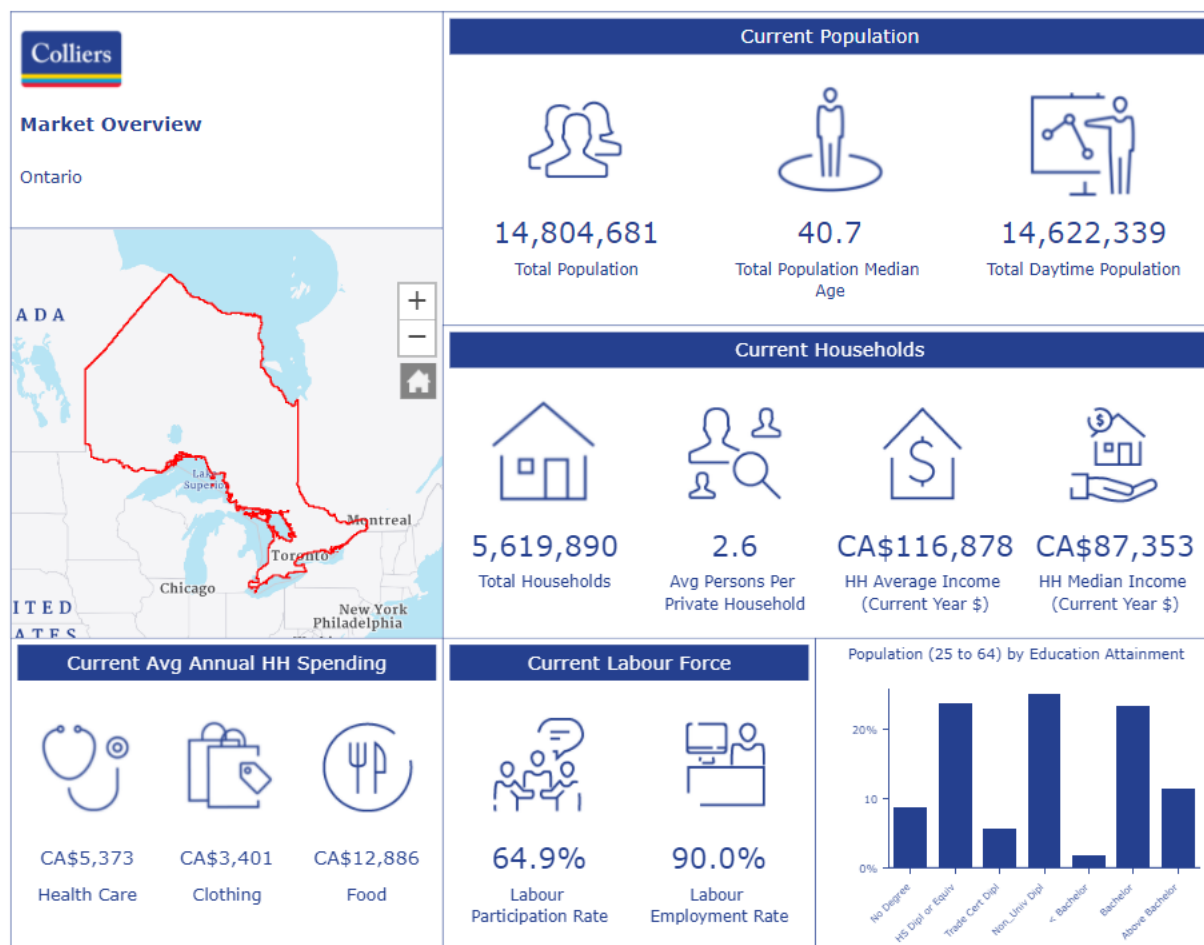
- High inflation is prompting central banks everywhere to lift interest rates. Price pressures are widespread.
- The Bank of Canada has raised its benchmark interest rate five times this year with the overnight target rate increasing from 0.25 per cent in January to 3.25 per cent in September.
- We expect a further hike of 50 basis points in October 2022 before a Bank pause for economic assessment.
- The Bank should start cutting rates in the second half of 2023 by 25 points in each of the third and fourth quarters.
- The U.S. Federal Reserve Board seems poised to raise the federal funds rate by 50 basis points in November and by 25 points in December. This will put the rate near 4.0 per cent by year-end.
- We believe Canada's dollar will remain weak, hovering below US\$0.78 in the fourth quarter of 2022 and through much of 2023.



## Economic Overview – Ontario

The Province of Ontario is Canada’s most populous province and home to the nation’s capital, Ottawa, as well as the nation’s largest city, Toronto. Besides having 40% of Canada’s population, Ontario has the most culturally diverse population in Canada. The great majority of Ontario’s population and arable land is located in the south. In contrast, the larger, northern part of Ontario is sparsely populated.

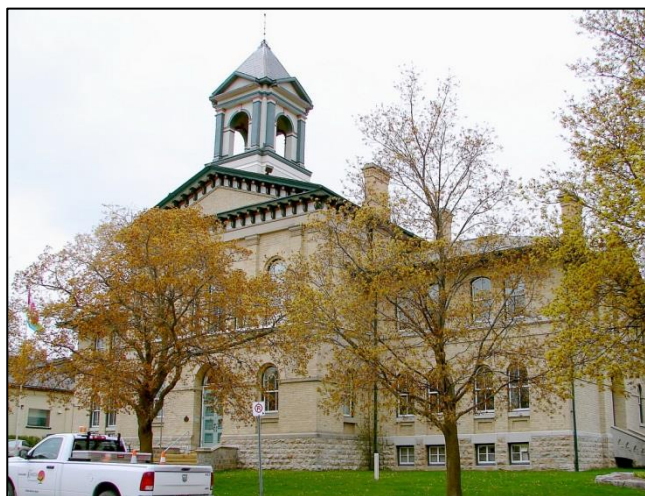
Ontario generates 39% of Canada’s GDP and forms Canada’s largest economy. The province’s economy is led by its service sector, manufacturing, agriculture, mining and forestry industries. Nearly 50% of Canada’s high tech, financial services and other knowledge intensive industries are employed in Ontario. Meanwhile, Ontario is Canada’s manufacturing powerhouse, shipping more than \$258 billion of automobiles, information and communications technologies, biotech, pharmaceuticals and medical devices. In addition, the province’s mining industry is among the top 10 producers in the world for nickel and platinum and a significant producer of gold, copper, zinc, cobalt and silver.



## Kawartha Lakes & Lindsay Market Overview

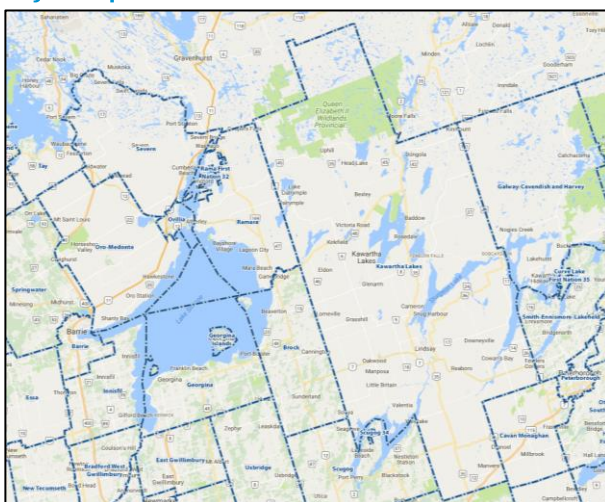
### Overview

The City of Kawartha Lakes is located northeast of the Greater Toronto Area, in Central Ontario, Canada. The southwestern corner of the City of Kawartha Lakes is approximately 90 kilometres from the City of Toronto and approximately 50 kilometres from the City of Toronto northeastern boundary. Algonquin Park, Muskoka Lakes, and Haliburton are located to the north, Lake Simcoe to the west, Durham Region and the Greater Toronto Area to the south, and The Region Peterborough to the east. Several of Canada's major 400-series Highways (400, 401, 404, 407), the Trans-Canada Highway 7, and Provincial Highways 35 and 115 provide access to multiple Canadian cities and major US border crossings.



The Muskoka-Kawarthas Economic Region (ER) is anchored by the census metropolitan area of Peterborough County and the City of Kawartha Lakes. The ER also spans the Northumberland, Muskoka and Haliburton regions. While the geographic region is vast, Muskoka-Kawarthas represents less than one percent of Ontario's population. The Town of Lindsay is located in the south-central area of the City of Kawartha Lakes, at the southern point of Sturgeon Lake.

### City Maps



Source: TREB MLS. Modified by Colliers.



Source: TREB MLS. Modified by Colliers.



## Economic Overview

The Town of Lindsay is the hub for business and commerce within the region. Major industries in the City of Kawartha Lakes include manufacturing, agriculture, tourism, and retail/commerce. There are approximately 125 manufacturers within the City, of which more than 25% are actively involved in international exports. The industrial base in the City is diverse and includes a number of niche market manufacturers. Agriculture is a major contributor to the City's economy. Hay is the largest single crop, beef cattle and dairy farming comprise a large portion of the industry and there is also mixed livestock farming. The tourism industry is a significant component of the City's economy and has the potential for growth, particularly in the following of eco/nature tourism, education/learning vacations, sustainable development/resource conservation, and maintaining healthy lifestyles. Major employers in the City include the City of Kawartha Lakes, Trillium Lakeland District School Board, Ross Memorial Hospital, Central East Correctional Centre, Sir Sandford Fleming College Post, Armada Toolworks Limited and Sykes (Formerly ICT).



**Market Overview**  
Kawartha Lakes, ON (CY)

**Current Avg Annual HH Spending**

**CA\$5,583**  
 Health Care

**CA\$2,531**  
 Clothing

**CA\$11,872**  
 Food

**Current Population**

**82,923**  
 Total Population

**50.8**  
 Total Population Median Age

**69,897**  
 Total Daytime Population

**Current Households**

**33,547**  
 Total Households

**2.4**  
 Avg Persons Per Private Household

**CA\$98,735**  
 HH Average Income (Current Year \$)

**CA\$79,713**  
 HH Median Income (Current Year \$)

**Current Labour Force**

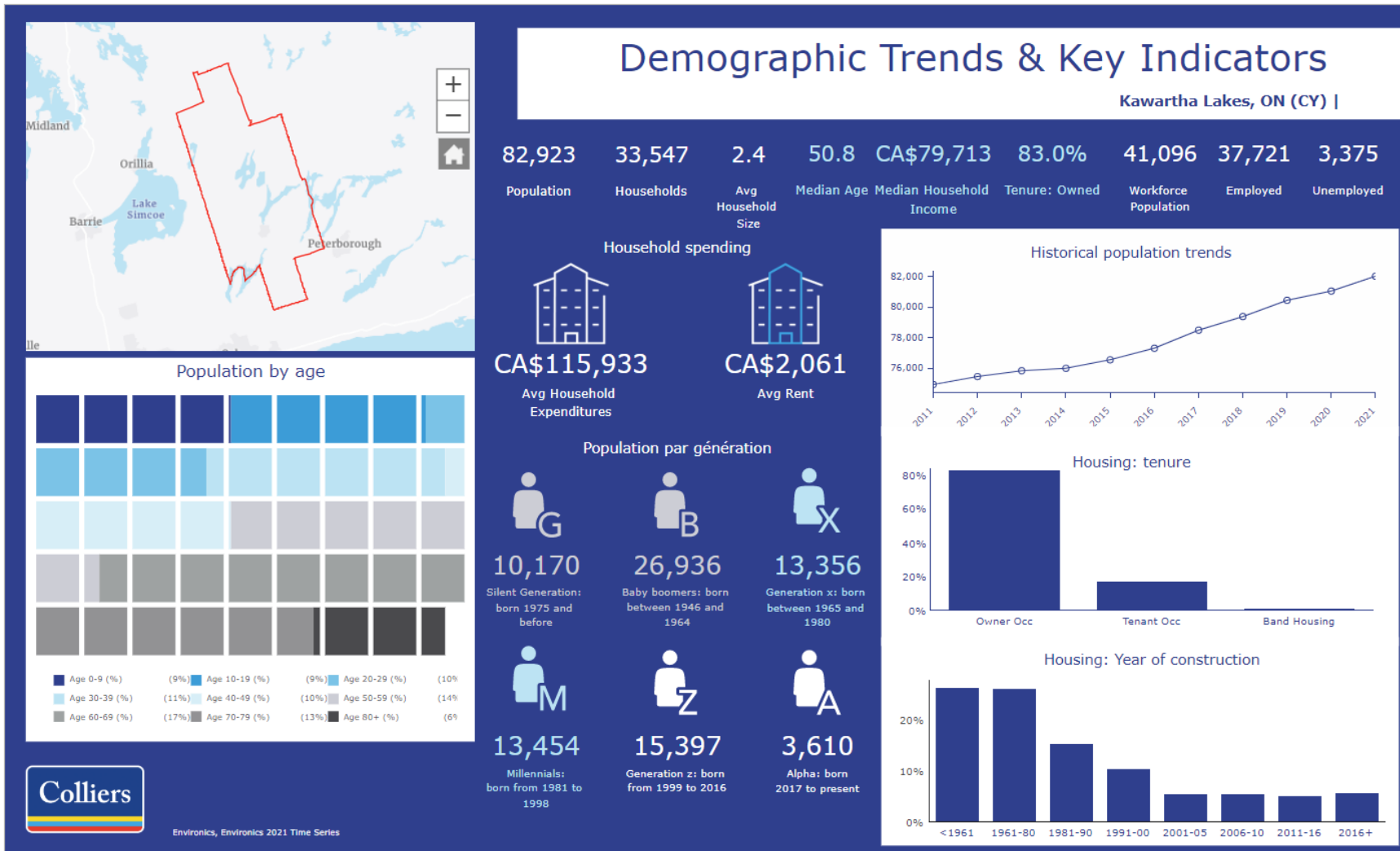
**59.1%**  
 Labour Participation Rate

**91.8%**  
 Labour Employment Rate

**Population (25 to 64) by Education Attainment**

Education Attainment	Local Population (%)	Ontario Comparison (%)
No Degree	10	10
HS Dipl or Equiv	32	24
Trade Cert Dipl	8	8
Non_ Univ Dipl	32	25
< Bachelor	2	2
Bachelor	10	24
Above Bachelor	4	12

Dots show comparison to Ontario

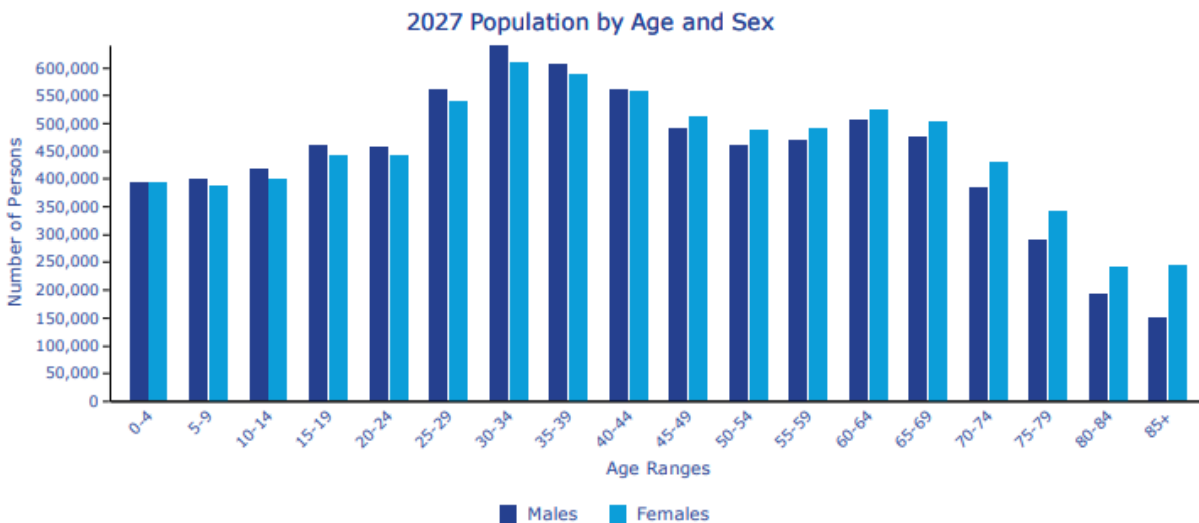
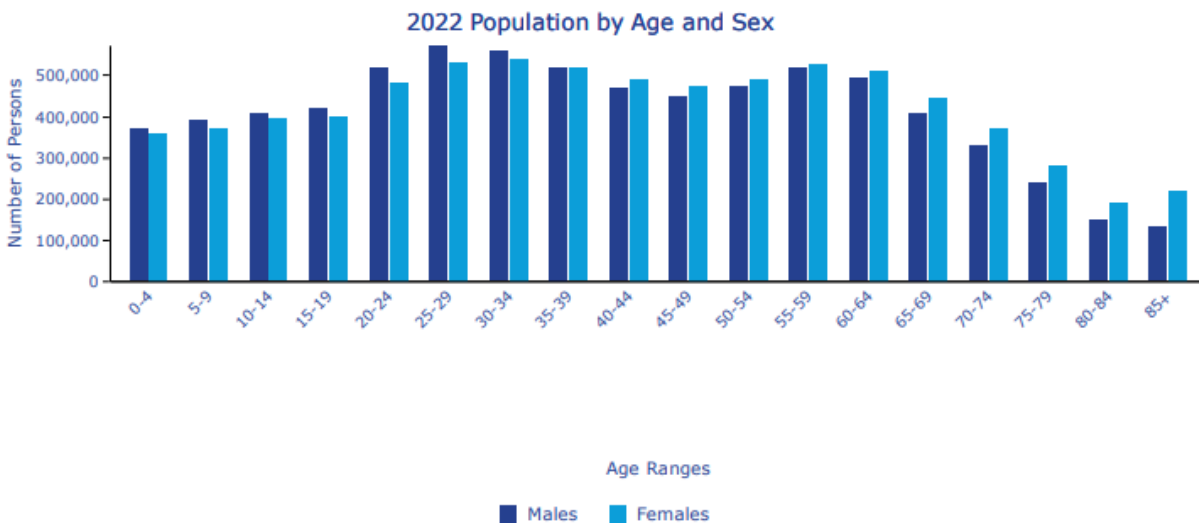


# Ontario Long-Term Care Overview

In recent years, Canada’s most populous province has seen a significant increase demand for long term care (LTC) support and housing due in part to the COVID-19 pandemic as well as a rapidly aging population. This has placed considerable stress on long term care infrastructure across the province, forcing the provincial government to respond by increasing funding for LTC centres which are expected to be completed in the coming years.

Ontario’s network of LTC centres includes both private and public facilities and encompasses approximately 626 LTC homes containing nearly 80,000 LTC beds throughout the province. The care provided at each facility for each bed differs. Beds are licensed as either long-stay or short-stay, and are graded on a classification system which assigns a grade based on the level of care ranging from A to D.

## Demographic Trends



As indicated in the charts above, the population of Ontario is projected to increase throughout the decade. The majority of this growth will be fueled by immigration rather than natural births, and when combined with a higher standard of living and advances in medical technology, a higher median age is expected as a result. While long term care support has been increasing for several years, the retirement of the Baby Boom cohort is projected to have an unprecedented increase in demand for LTC support and infrastructure. From 2011 to 2018, the population of Ontarians aged 75 and over grew by 20% while the number of LTC beds in Ontario grew by only 0.8%. By 2033-2034, it is expected that an additional 55,000 more Ontarians will require LTC beds. This will place considerable pressure on the government to increase the funding and the level of support given to LTC providers.

### LTC Bed Licensing Classifications

As previously mentioned, LTC beds are licensed based on the level of care that can be provided at their specific facility. Modern beds are based on a series of design standards established in 1998 and updated several times since, while older beds typically follow design standards from legislation that dates to 1972. Generally speaking;

**New Beds** that have been constructed since 1998 and meet current design standards are issued licenses for 30-year terms.

**Class A** beds are those that may be built prior to 1998 but meet current standards regardless. These beds are typically issued 20-25 year licenses.

**Class B** beds are those that exceed 1972 design standards but narrowly miss 1998 design standards. These beds are usually licensed for 15-year terms.

**Class C** beds meet the 1972 design standards but do not exceed them. They are also licensed for 15-year terms.

**Class D Upgrade** beds are those that have been upgraded beyond typical Class D servicing but still do not meet 1972 standards. These beds are relicensed on 10-year terms.

**Class D** beds do not meet 1972 design standards. Their licenses are not renewed unless they are upgraded to meet modern standards.

In addition, various short-term licenses may be issued in the events of emergencies or as interim beds while facility upgrades are ongoing. Short-term licensing can range from as little as 30 days for persons who require immediate admission to a LTC home based on their condition to as long as 5 years for facilities that are going through significant renovations and upgrades.

There is no official breakdown of LTC beds in Ontario based on classification, as the numbers are constantly in flux. New beds are constantly being added and many Class C and D beds are in the process of upgrades. However, a 2019 survey found that the majority of beds were considered New or Class A. D beds made up a minority of beds in Ontario and were largely concentrated in rural and northern parts of the province.

	New & D Retrofit Beds	A Beds	B Beds	C Beds	D Upgrade & D Beds	Total
Number	39,508	6,986	5,628	24,695	1,616	78,433
%	50.37%	8.91%	7.18%	31.49%	2.06%	100.00%

### Funding Model

Ontario Health funds LTC homes based on a per diem basis, the precise amount being derived from the level of care provided for each bed in the home. The per diem funding is calculated for each bed using the following formula:

***nursing and personal care (NPC) per diem+ programs and support services (PSS) per diem+ nutritional support (NS)+ other accommodation (OA) per diem - resident co-payment revenue per diem=LOCper diem funding***

As of 2023, the maximum amount of funding that any LTC bed can receive is \$191.02 per diem. However, specialized beds can receive additional subsidies. Per diem amounts are set by the ministry and are updated occasionally.

In addition, facilities with fewer than 65 LTC beds may receive \$180,000 in annual staffing supplements, while those with 65 or more LTC beds are eligible for \$106,000.

### Projected Growth

The provincial government has committed to building 30,000 additional LTC beds by 2028 at the cost of \$2.68 billion, making it the largest LTC development program in Canadian history. As of 2022, there were already 31,705 new beds and 28,648 upgraded beds in development, and as a result it is likely that the province will meet these growth requirements. Beginning in 2024-2025 the province will invest a further \$3.7 billion to build or upgrade an additional 22,000 LTC beds.

However, there are some headwinds in the way of development. Many care providers are instead investing in private, for-profit care retirement homes to capitalize on the wealthier tranche of the Baby Boom cohort. Furthermore, some LTC providers have opted to sell their facilities to private developers rather than go through the costly process of upgrading older Class C and D beds.

Regardless, the commitment by the provincial government to increase the number of LTC beds in the province is substantial and will likely see the number of beds increase in line with the rate of population growth. This ensures a stable and reliable market for LTC beds in Ontario in the coming years.

# Valuation

## Highest and Best Use

The principle of highest and best use is fundamental to the concept of value in real estate. Highest and best use, in general, may be defined as follows:

“The reasonably probable use of real property, that is physically possible, legally permissible, financially feasible, and maximally productive, and that results in the highest value.”

(The Appraisal Institute of Canada "Canadian Uniform Standards of Professional Appraisal Practice". 2022 ed., p. 7)

### Legal Permissibility

The current use is permitted within the applicable zoning and/or land use bylaw requirements affecting the property. There are no known private or other restrictions negatively impacting use of the property. Therefore, the current use is legally permissible.

### Physical Possibility

The site is of a sufficient size, configuration, and topography to accommodate the property's present use as improved in an efficient and functional manner. Therefore, the current use is physically possible.

### Financial Feasibility

As improved, the property provides a sufficient return (and/or enduring benefit in the case of an owner/occupied property) that the property as presently improved is considered to be financially feasible.

### Maximum Productivity

Of the various legally permissible, physically possible, and financially feasible uses available, the current use represents the maximum productivity of the property.

### As Vacant Conclusion

The improvements to the property contribute positively and substantially to the overall value of the property such that the value of the site as though vacant is significantly lower than the value of the property as though improved. As such, a thorough examination of the highest and best use of the property as vacant has not been completed. It is our considered and professional opinion that the highest and best use of the land as though vacant is as a development site for a property similar to that which exists at present.

### As Improved Conclusion

Based on the foregoing, the highest and best use of the property is considered to be a continuation of its current use until such time that the licensing expires. This opinion of the property's highest and best use forms the basis of our valuation.

## Valuation Methodology

Traditionally, there are three accepted methods of valuing real property:

- Cost Approach;
- Direct Comparison Approach; and
- Income Approach.

The selection of a relevant methodology depends upon the nature and characteristics of the real estate under consideration.

- 1) **The Cost Approach** to value is based upon the economic principle of substitution, which holds that the value of a property should not be more than the amount by which one can obtain, by purchase of a site and construction of a building without undue delay, a property of equal desirability and utility.
- 2) **The Direct Comparison Approach** examines the cost of acquiring equally desirable and valuable substitute properties, indicated by transactions of comparable properties, within the market area. The characteristics of the sale properties are compared to the Subject Property on the basis of time and such features as location, size and quality of improvements, design features and income generating potential of the property.
- 3) **The Income Approach** to value is utilized to estimate real estate value of income-producing or investment properties.

**The Direct Capitalization Method** is based on the conversion of current earnings directly into an expression of market value. The net income for the current or forthcoming fiscal year is capitalized with an overall rate, which reflects the investment characteristics offered by the asset.

The capitalization rate used is based on the analysis of sales and interviews with people active in the market.

**Discounted Cash Flow Technique** allows the appraiser to account for the anticipated growth or decline in income over the term of a prescribed holding period.

Two rates must be selected for an application of the DCF process:

- The internal rate of return or discount rate used to discount the projected receivables; and
- An overall capitalization rate used in estimating reversionary value of the asset.

The reversionary capitalization rate utilized is usually similar to the rate that would be applied in present market conditions.

## Selection of Relevant Methodology

As a caveat to the valuation here, per the Ministry of Housing and Long Term Care, Class B license that are located in facilities owned by municipalities do not face the same expiration restrictions as privately held license. Notwithstanding the foregoing, the purpose of an appraisal is to estimate market value at a point in time via a hypothetical transaction. Should the Subject Property transact, it would be from municipal ownership to another body, as such, the licensing restrictions would come into effect. As a result, the market value and hypothetical transaction contemplated herein assumes private ownership.

As the property is an income producing asset, purchasers would analyze the property on the basis of its income generating capability. Notwithstanding the foregoing, given the licensing restrictions of Class B beds (should they be transferred from municipal ownership), the income stream ends in June, 2025. Furthermore, the Subject Property is operated at a material income deficit every year, as such there is no income to analyze and all expense metrics would need to be stabilized at market levels. This is superseded by the fact that without significant capital investment and redevelopment, the licenses for the beds within the Subject Property expire in June, 2025. For this reason, the income approach has been excluded.

Given the nature of Class B, C and D Long Term Care facilities, without significant capital investment via redevelopment, the licensing will expire in June 2025 and the income stream will cease to exist. Discussions with purchasers of Class B, C and D Long Term care facilities indicate that these improvements are being purchased on a price per bed unit rate. That unit rate depends on the location, excess density to permit concurrent redevelopment, condition of the existing improvements, etc. Purchase decisions based upon a common unit rate relies on the principle of substitution, which is the underlying principle of the Direct Comparison Approach. As such, for Class B, C and D facilities, the Direct Comparison Approach to value is deemed to be the only relevant approach to value.

Investors or analysts do not typically use the Cost Approach to value properties such as the Subject Property. The inherent difficulties in accurately estimating developer's profit and all forms of depreciation restrict the reliability of this approach. For these reasons, we have not utilized the Cost Approach to value the property.



## Direct Comparison Approach

The Direct Comparison Approach is based on the Principle of Substitution which maintains that a prudent purchaser would not pay more for a property than what it would cost to purchase a suitable alternative property that exhibits similar physical characteristics, tenancy, location, etc. Within this approach, the property being valued is compared to properties that have sold recently or are currently listed and are considered to be relatively similar to the Subject Property. Typically, a unit of comparison is used to facilitate the analysis. In the case, the sale price per suite is the most commonly used unit of comparison.

The sale indices presented in the previous section represent transactions involving similar investment (seniors housing properties) in Ontario. In valuing the Subject Property, it has been compared to each of the index sales. The basis for comparison included the consideration of the following:

- Property Rights Conveyed
- Financing Terms
- Conditions of Sale
- Market Conditions
- Location
- Physical Characteristics
- Economic Characteristics

## Analysis

### Property Rights Conveyed

Rights conveyed relates to the type of ownership transferred. In this case all the sale transactions related to the fee simple estate as rented (leased fee estate). As such, no adjustments under this category are required.

### Financing Terms

Refers to the financing arrangements made when the property sold. In this regard, financing is not believed to have been a significant motivating factor in any of the sales summarized and therefore no adjustments are required.

### Conditions of Sale

It is not believed that any of the vendors were unduly motivated to divest the properties and therefore no adjustments are required for motivation.

### Market Conditions

Unit prices have increased for seniors housing properties over the time in which the comparables were sold. Accordingly, upward adjustments have been applied to selected sales.

### Location

In our opinion, the location influences of the asset are generally reflected in the operating performance level of the property.



### Physical Characteristics

As was the case with location, in our opinion differences in overall physical condition are largely reflected by the property's operating performance.

Overall physical attributes reflected in operating performance would include unit floor plans in terms of number of bedrooms, bathrooms, laundry facilities as well as age/condition, overall management, security and maintenance of the property, as well as type of parking, utilities and recreation facilities.

### Economic Characteristics

As the Subject Property represents an investment property, we have considered the relationship between net operating income per unit and the indicated sale price per unit of the comparables relative to that forecast for the Subject Property. The following chart summarizes this relationship between net operating income and price, on a per unit basis, for each of the transactions analyzed, along with NOI adjusted sale prices per unit for each of the comparable properties.

## Investment Analysis

### Investment Alternatives

Following are current investment yields with respect to various alternative investments.

INVESTMENT ALTERNATIVES											
Gov't. Yields		Office REIT'S		Industrial REIT'S		Retail REIT'S		Apartment REIT'S		Diversified REIT'S	
BOC OR	4.50%	Allied	6.2%	Summit	-	RioCan	4.6%	CAP	2.9%	Morguard	4.5%
GOC 5yr	3.42%	DREAM	6.0%	DREAM	4.7%	First Cptl.	4.8%	Killam	3.8%	H&R	4.6%
GOC 10yr	3.26%	Slate	9.0%	Granite	3.8%	Smart	6.7%	Boardwalk	1.8%	Artis	6.4%

Source: Bank of Canada, BMO Capital Markets as at February 15, 2023

### Investment Parameters

Following are the results of the most recent commercial real estate return surveys, as expressed by overall capitalization rates and discount rates.

Following are the results of the most recent commercial real estate return surveys, as expressed by overall capitalization rates and discount rates.

Q4 2022 INVESTMENT PARAMETERS - TORONTO		
Investment Type	Overall Capitalization Rates	Discount Rates
<b>Industrial</b>		
Single	4.50% - 5.00%	4.80% - 7.30%
Multi	5.00% - 5.75%	5.00% - 7.70%
<b>Downtown Office</b>		
Class 'AA'	5.25% - 5.75%	6.00% - 7.30%
Class 'B'	5.50% - 6.00%	5.80% - 7.30%*
<b>Suburban Office</b>		
Class 'A'	6.50% - 7.00%	6.00% - 7.30%*
Class 'B'	7.00% - 7.50%	6.50% - 7.80%*
<b>Retail</b>		
Regional/Power	5.50% - 6.75%	5.50% - 6.50%
Community	5.50% - 6.50%	6.80% - 9.50%*
Strip Plaza	5.50% - 6.50%	5.00% - 6.50%*
<b>Multi-Residential</b>		
High Rise	3.75% - 4.25%	
Low Rise	3.50% - 4.25%	

\* These IRR's are not updated every quarter. Figures shown are the most recent, but not necessarily current.

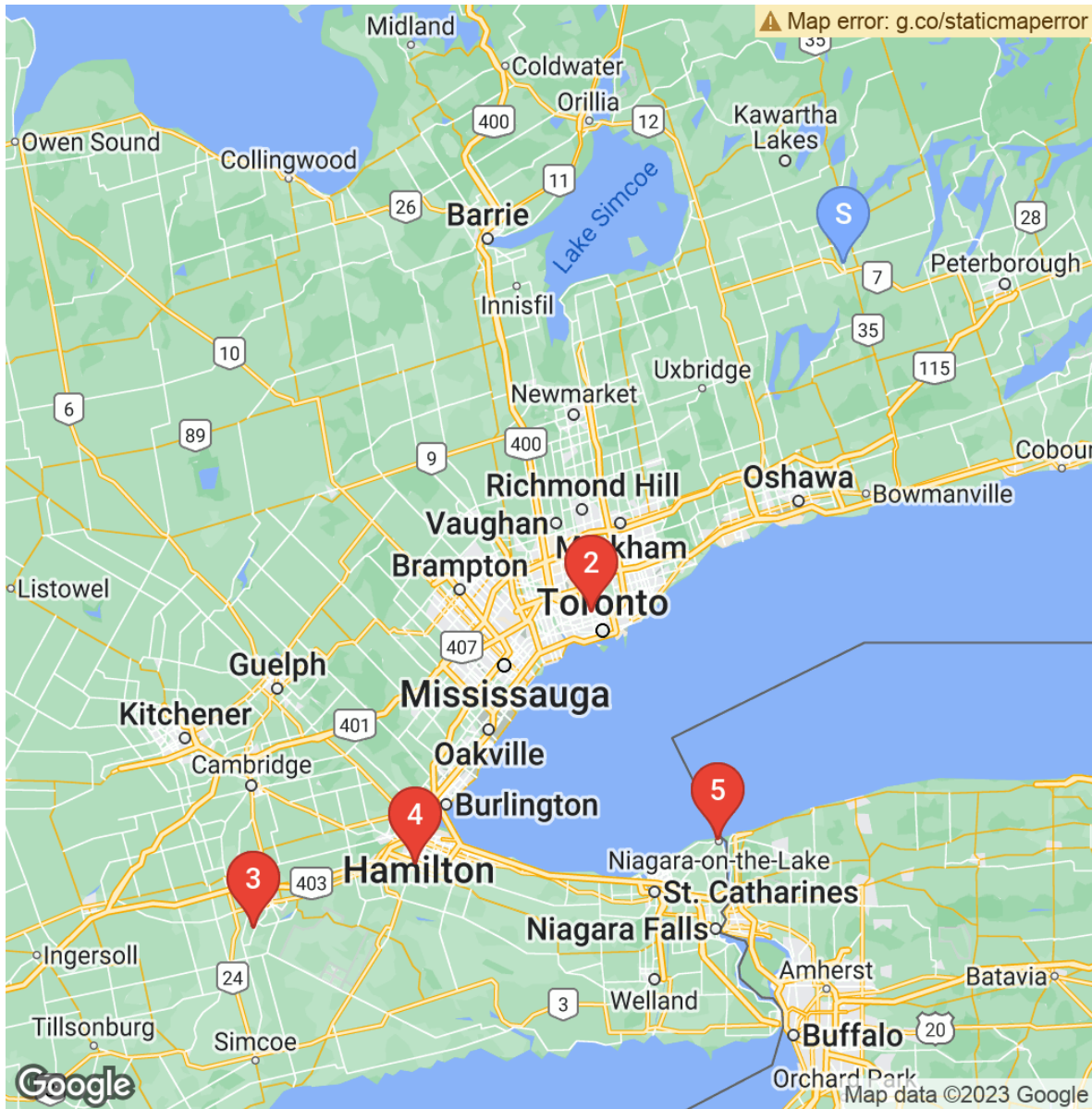
Source: Colliers International Realty Advisors (OCR), Altus InSite (IRR)

### Comparable Transactions

The most appropriate method of determining an appropriate overall capitalization rate is best served through an analysis of current market activity. In consideration of the characteristics described above, the transactions summarized in the table on the following page have been selected and analyzed.

**Market Data**

Presented are several comparable seniors housing transactions in Ontario. The selected comparables are considered to provide an adequate basis from which to estimate the required investment parameters applicable to the Subject Property.



CAPITALIZATION RATES COMPARABLES (OAR)					
ADDRESS	CITY	SALE DATE	UNITS	\$/UNIT	SALE PRICE
1 Chartwell/AgeCare Portfolio	17 Ontario Cities	March 31, 2022	2642	\$169,001	\$446,500,000
2 429 Walmer Rd	Toronto	June 16, 2022	218	\$146,789	\$32,000,000
3 612 Mount Pleasant Road	Brantford	February 21, 2021	101	\$40,990	\$4,140,000
4 1430 Upper Wellington Rd	Hamilton	May 6, 2022	102	\$80,877	\$8,249,500
5 120 Wellington St, 428 Front Rd W and 105 Military Rd N	Niagara on the Lake, Prescott and Glengarry South	April 1, 2020	244	\$52,969	\$12,924,512

LOW
HIGH
AVERAGE
MEDIAN
INDICATED CAPITALIZATION RATE (OAR)

## Significant Investment Characteristics of the Subject Property

The following summarizes the major investment attributes of the property that potential investors would consider when determining an appropriate return and yield when making a purchase decision.

### Location

The Subject Property is located within the Town of Lindsay, within the City of Kawartha Lakes. The Subject Property is accessible via private vehicle and public bus route, operated by the Town of Lindsay. The surrounding land uses are other institutional land uses and the locational characteristics are considered to be commensurate with other institutional/Long Term Care land use in similar locations. It should be noted that the resident population within improvements such as the Subject Property are typically not highly mobile and generally do not leave the Subject Property. Access to nearby residential population for family members and work force are important characteristics.

### Physical Attributes

The Subject Improvement are considered to be in good condition. Per the Ministry of Housing and Long Term Care, the Subject Property is classified as Class B, meaning that under any ownership other than municipal ownership, the license is set to expire in 2025 due to non-compliance with modern design standards. Significant renovation or redevelopment is required to ensure compliance beyond 2025.

### Operational

Given the nature of Long Term Care facilities within Ontario, rent and expense subsidization is set by the government. As of the Effective Date the Subject Property is operating at expense levels that greatly exceed private ownership, resulting in a net loss every year.

### Market

The market for Class B, C and D long term care facilities within Ontario is narrowly traded due to the impending expiration of licenses and associated revenue streams. These facilities require extensive renovation or redevelopment to ensure compliance beyond 2025 and as of the Effective Date, government construction subsidies are widely considered inadequate to cover the significant costs associated with Long Term Care construction. As such, only Class B, C and D facilities in central locations that have significant higher and better use/redevelopment potential are actively being traded. Class B, C and D facilities are narrowly traded, with a small group of purchaser actively aggregate licenses in similar locations, with plans for large scale consolidation and redevelopment.

The sales previously presented are summarized and analyzed below:

**Index 1, Chartwell AgeCare portfolio** features a total of over 16 existing facilities and one forward sale of a to be completed facility, totaling 2642 beds. The index transacted on March 31, 2022 for \$446,500,000 with a reported price per bed of \$169,001.

In terms of location, this index would be considered similar to the Subject; thus, no adjustment is warranted for location. This index is considered to be superior to the Subject in terms of age and condition therefore an upward adjustment is required. The index is of larger size compared to the Subject requiring an upward adjustment for size as a larger index can operate more efficiently from a management standpoint. No adjustment is required to account for the upside potential of the Subject given its rents in place and suite quality. In terms of suite mix, this index would be considered superior to the Subject; thus, an upward adjustment is warranted.

In terms of market conditions, a downward adjustment is considered warranted given the market for multi residential assets has improved. Overall, the Subject property should achieve a price per bed lower than - indicated by this sale.

**Index 2, 429 Walmer Rd, Toronto**, features 218 beds. The index transacted on June 16, 2022 for \$32,000,000 with a reported price per bed of \$146,789.

In terms of location, this index would be considered superior to the Subject; thus, an upward adjustment is warranted for location. This index is considered to be inferior to the Subject in terms of age and condition therefore a downward adjustment is required. The index is of larger size compared to the Subject requiring an upward adjustment for size as a larger index can operate more efficiently from a management standpoint. No adjustment is required to account for the upside potential of the Subject given its rents in place and suite quality. In terms of suite mix, this index would be considered similar to the Subject; thus, no adjustment is warranted.

In terms of market conditions, a downward adjustment is considered warranted given the market for multi residential assets has improved. Overall, the Subject property should achieve a price per bed lower than - indicated by this sale.

**Index 3, 612 Mount Pleasant Road, Brantford**, features 101 beds. The index transacted on February 21, 2021 for \$4,140,000 with a reported price per bed of \$40,990.

In terms of location, this index would be considered inferior to the Subject; thus, a downward adjustment is warranted for location. This index is considered to be inferior to the Subject in terms of age and condition therefore a downward adjustment is required. The index is of smaller size compared to the Subject requiring a downward adjustment for size as a larger index can operate more efficiently from a management standpoint. No adjustment is required to account for the upside potential of the Subject given its rents in place and suite quality. In terms of suite mix, this index would be considered similar to the Subject; thus, no adjustment is warranted.

In terms of market conditions, a downward adjustment is considered warranted given the market for multi residential assets has improved. Overall, the Subject property should achieve a price per bed higher than - indicated by this sale.



**Index 4, 1430 Upper Wellington Rd, Hamilton**, features 102 beds. The index transacted on May 6, 2022 for \$8,249,500 with a reported price per bed of \$80,877.

In terms of location, this index would be considered superior to the Subject; thus, an upward adjustment is warranted for location. This index is considered to be similar to the Subject in terms of age and condition therefore no adjustment is required. The index is of smaller size compared to the Subject requiring a downward adjustment for size as a larger index can operate more efficiently from a management standpoint. No adjustment is required to account for the upside potential of the Subject given its rents in place and suite quality. In terms of suite mix, this index would be considered similar to the Subject; thus, no adjustment is warranted.

In terms of market conditions, a downward adjustment is considered warranted given the market for multi residential assets has improved. Overall, the Subject property should achieve a price per bed lower than - indicated by this sale.

**Index 5, 120 Wellington St, 428 Front Rd W and 105 Military Rd N, Niagara on the Lake, Prescott and Glengarry South**, features 244 beds. The index transacted on April 1, 2020 for \$12,924,512 with a reported price per bed of \$52,969.

In terms of location, this index would be considered inferior to the Subject; thus, a downward adjustment is warranted for location. This index is considered to be inferior to the Subject in terms of age and condition therefore a downward adjustment is required. The index is of similar size compared to the Subject therefore no adjustment is required. No adjustment is required to account for the upside potential of the Subject given its rents in place and suite quality. In terms of suite mix, this index would be considered similar to the Subject; thus, no adjustment is warranted.

In terms of market conditions, a downward adjustment is considered warranted given the market for multi residential assets has improved. Overall, the Subject property should achieve a price per bed higher than - indicated by this sale.

The Subject Property building demonstrates an average location, has been the object of an on-going maintenance and capital program and is situated upon a lot featuring excess density to the east. Given this, a narrowed range between \$60,000 to \$70,000 is appropriate. Applying the narrowed range in unit values to the Subject properties results in the following range of values:

VALUE MATRIX - DIRECT COMPARISON		
NO. UNITS	\$/SUITE	VALUE <sup>(1)</sup>
166	\$60,000	\$9,950,000
166	\$65,000	\$10,800,000
166	\$70,000	\$11,600,000

(1) Rounded to nearest \$50,000

## Summary

In conclusion, a value estimate in the range of \$9,950,000 to \$11,600,000 using the Direct Comparison Approach is indicated as of the effective date of the analysis. A value conclusion of \$10,800,000 for the Subject Property building via the Direct Comparison Approach is concluded in consideration of the overall appeal of the buildings.

The above value estimate is based on an exposure period of 9 to 12 months, assuming the basis of a transaction involving cash to the vendor and is in conjunction with the Assumptions and Limiting Conditions stated within this appraisal. Of particular note are the Hypothetical Conditions, Extraordinary Assumptions and Extraordinary Limiting Conditions outlined within the Terms of Reference section.



## Reconciliation and Final Estimate of Value

The approaches used in this valuation provide the following values:

<b>VALUATION SUMMARY</b>	
<b>VALUATION INDICES</b>	<b>CURRENT MARKET VALUE AS-IS</b>
<b>INTEREST APPRAISED</b>	<b>LEASED FEE</b>
<b>DATE OF VALUE</b>	MARCH 31, 2023
<b>INCOME APPROACH</b>	
<b>Overall Income Capitalization</b>	N/A
Overall Income Capitalization \$/Unit	
Net Operating Income	
NOI \$/Unit	
Capitalization Rate	
<b>DIRECT COMPARISON APPROACH</b>	
<b>DIRECT COMPARISON</b>	<b>\$10,800,000</b>
Direct Comparison \$/Unit	\$65,060/Unit
<b>FINAL VALUE CONCLUSION</b>	
<b>FINAL VALUE</b>	<b>\$10,800,000</b>
Final \$/Unit	\$65,060/Unit

For Investment properties such as the Subject Property, potential purchasers would place considerable emphasis on the income earning potential of the Subject Property. In this regard, the Income Approach would be the favoured method of valuation. Seniors housing buildings are typically valued using the Direct Capitalization method within the Income Approach.

The Direct Comparison Approach is typically utilized as a secondary valuation method for seniors housing properties. The Direct Comparison Approach considers a property in comparison to market sales based on price per unit. Generally, buyers give primary consideration to existing and future income levels rather than the cost per unit. That being said, considering the property on the basis of price per unit serves as an additional check and balance on the conclusion derived via the Income Approach.

Based on the foregoing, and with most weight applied to the Income Capitalization Method, it is our opinion that the market value of the property, subject to the assumptions set forth, and as at March 31, 2023 was:

<b>VALUE TYPE</b>	<b>INTEREST APPRAISED</b>	<b>DATE OF VALUE</b>	<b>VALUE</b>
<b>Current Market Value As-Is</b>	<b>Leased Fee</b>	<b>March 31, 2023</b>	<b>\$10,800,000</b>

The above value estimate is based on an exposure period of 9 to 12 months, assuming the basis of a transaction involving cash to the vendor and is in conjunction with the Assumptions and Limiting Conditions stated within this appraisal. Of particular note are the Hypothetical Conditions, Extraordinary Assumptions and Extraordinary Limiting Conditions outlined within the Terms of Reference section.



## Certification

**Victoria Manor**  
**220 Angeline Street S., Lindsay, Ontario K9V 5E9**  
**(See Property Data Section for Legal Description)**

I, the undersigned appraiser, certify that, to the best of my knowledge and belief:

- The statements of fact contained in this report are true and correct;
- The reported analyses, opinions and conclusions are limited only by the reported Assumptions and Limiting conditions, and are my impartial and unbiased professional analyses, opinions and conclusions;
- I have no past, present or prospective interest in the property that is the subject of this report and no personal and/or professional interest or conflict with respect to the parties involved with this assignment;
- I have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment;
- My engagement in and compensation for this assignment were not contingent upon developing or reporting predetermined results, the amount of the value estimate, a conclusion favouring the client, or the occurrence of a subsequent event;
- My analyses, opinions and conclusions were developed, and this report has been prepared, in conformity with the Canadian Uniform Standards of Professional Appraisal Practice (CUSPAP);
- I have the knowledge and experience to complete this assignment competently, and where applicable this report is co-signed in compliance with CUSPAP;
- Except as disclosed herein, no one has provided significant professional assistance to the person(s) signing this report;
- As of the date of this report the undersigned has fulfilled the requirements of The Appraisal Institute of Canada's Continuing Professional Development Program;
- I am a member in good standing of the Appraisal Institute of Canada;
- I am licensed to practice in the Province of **Ontario**.

Information pertaining to inspection of the subject property is as follows:

SUBJECT PROPERTY INSPECTION			
APPRAISER	INSPECTED	EXTENT	DATE OF INSPECTION
Rob Purdy, AACI, P.App	Yes	Interior/Exterior	February 14, 2023



## Final Estimate of Value

Based upon the data, analyses and conclusions contained herein, the current market value of the Leased Fee interest in the property described herein, as at March 31, 2023, is estimated to be as follows:

VALUE TYPE	INTEREST APPRAISED	DATE OF VALUE	VALUE
Current Market Value As-Is	Leased Fee	March 31, 2023	\$10,800,000

The above value estimate is based on an exposure period of 9 to 12 months, assuming the basis of a transaction involving cash to the vendor, and is subject to the Extraordinary Assumptions, Hypothetical Conditions and Extraordinary Limiting Conditions as detailed within the Terms of Reference section of this report, in addition to the Ordinary Assumptions and Limiting Conditions contained in the Addenda. Any alterations to either the information provided or the assumptions in this report may have a material impact on the value contained herein.

Appraiser

# DRAFT

Rob Purdy, AACI, P.App  
Date: March 31, 2023  
AIC Membership No. 906382

# Appendices

Appendix A	Ordinary Assumptions and Limiting Conditions
Appendix B	Definitions
Appendix C	Comparable Sales

## Appendix A

# Ordinary Assumptions and Limiting Conditions

## Ordinary Assumptions and Limiting Conditions

The certification that appears in this appraisal report is subject to compliance with the Personal Information and Electronic Documents Act (PIPEDA), Canadian Uniform Standards of Professional Appraisal Practice ("CUSPAP"), and the following conditions:

- 1) This report has been prepared at the request of **Ashley Wykes** of City of Kawartha Lakes (the client) for the purpose of providing an estimate of the market value of **220 Angeline Street S., Lindsay, Ontario** (the Subject Property) and for the specific use referred to. It is not reasonable for any party other than the person or those to whom this report is addressed to rely upon this appraisal without first obtaining written authorization from the client and the author of this report. This report has been prepared on the assumption that no other party will rely on it for any other purpose. Liability is expressly denied to any person other than the client and those who obtain written consent and, accordingly, no responsibility is accepted for any damage suffered by any such person as a result of decisions made or actions based on this report. Diligence by all intended users is assumed.
- 2) This report has been prepared at the request of **Ashley Wykes** of City of Kawartha Lakes and for the exclusive (and confidential) use of the recipient as named and for the specific purpose and function as stated. Written consent from the authors must be obtained before any part of the appraisal report can be used for any use by anyone except the client and other intended users identified in the report. Liability to any other party or for any other use is expressly denied regardless of who pays the appraisal fee.
- 3) All copyright is reserved to the author and this report is considered confidential by the author and **Ashley Wykes** of City of Kawartha Lakes. Possession of this report, or a copy thereof, does not carry with it the right to reproduction or publication in any manner, in whole or in part, nor may it be disclosed, quoted from or referred to in any manner, in whole or in part, without the prior written consent and approval of the author as to the purpose, form and content of any such disclosure, quotation or reference. Without limiting the generality of the foregoing, neither all nor any part of the contents of this report shall be disseminated or otherwise conveyed to the public in any manner whatsoever or through any media whatsoever or disclosed, quoted from or referred to in any report, financial statement, prospectus, or offering memorandum of the client, or in any documents filed with any governmental agency without the prior written consent and approval of the author as to the purpose, form and content of such dissemination, disclosure, quotation or reference.
- 4) The contents of this report are confidential and will not be disclosed by the author to any party except as provided for by the provisions of the CUSPAP and/or when properly entered into evidence of a duly qualified judicial or quasi-judicial body. The appraiser acknowledges that the information collected is personal and confidential and shall not use or disclose the contents of this report except as provided for in the provisions of the CUSPAP and in accordance with the appraiser's privacy policy. The client agrees that in accepting this report, it shall maintain the confidentiality and privacy of any personal information contained and shall comply in all material respects with the contents of the appraiser's privacy policy and in accordance with the PIPEDA.
- 5) This appraisal report, its content and all attachments/addendums and their content are the property of the appraiser. The client, intended users and any appraisal facilitator are prohibited, strictly forbidden and no permission is expressly or implicitly granted or deemed to be granted, to modify, alter, merge, publish (in whole or in part) screen scrape, database scrape, exploit, reproduce, decompile, reassemble or participate in any other activity intended to separate, collect, store, reorganize, scan, copy,

manipulate electronically, digitally, manually or by any other means whatsoever this appraisal report, addendum, all attachments and the data contained within for any commercial, or other, use.

- 6) The appraiser has agreed to enter into the assignment as requested by the client named in the report for the use specified by the client, which is stated in the report. The client has agreed that the performance of this appraisal and the report format are appropriate for the intended use.
- 7) This report is completed on the basis that testimony or appearance in court or at any administrative proceeding concerning this appraisal is not required unless specific arrangements to do so have been made beforehand. Such arrangements will include, but not necessarily be limited to, adequate time to review the appraisal report and data related thereto and for preparation and for any appearances that may be required, and the provision of appropriate additional compensation.
- 8) The estimated market value of the real estate that is the subject of this appraisal pertains to the value of the **leased fee interest** in the real property. The property rights appraised exclude mineral rights, if any.
- 9) The concept of market value presumes reasonable exposure. The exposure period is the estimated length of time the asset being valued would have been offered on the market prior to the hypothetical consummation of a sale at market value on the effective date of valuation. The overall concept of reasonable exposure encompasses not only adequate, sufficient and reasonable time but also adequate, sufficient and reasonable effort. The reasonable exposure period is a function not only of time and effort but will depend on the type of asset being valued, the state of the market at the date of valuation and the level at which the asset is priced. (The estimated length of the exposure period needed to achieve the estimated market value is set forth in the Letter of Transmittal, prefacing this report).
- 10) The analyses set out in this report relied on written and verbal information obtained from a variety of sources we considered reliable. However, these data are not guaranteed for accuracy. Unless otherwise stated, we did not verify client-supplied information, which we believed to be correct. Certain information has been accepted at face value, especially if there was no reason to doubt its accuracy. Other empirical data required interpretative analysis pursuant to the objective of this appraisal. Certain inquiries were outside the scope of this mandate.
- 11) The appraiser will not be responsible for matters of a legal nature that affect either the property being appraised or the title to it. A title search has not been performed, and the appraiser assumes that the title is good and marketable and free and clear of all value influencing encumbrances, encroachments, restrictions or covenants, including leases, unless otherwise noted in this report, and that there are no pledges, charges, liens or special assessments outstanding against the property other than as stated and described. The property is appraised on the basis of it being under responsible ownership. Matters of a legal nature, including confirming who holds legal title to the appraised property or any portion of the appraised property, are outside the scope of work and expertise of the appraiser. Any information regarding the identity of a property's owner or identifying the property owned by the listed client and/or applicant provided by the appraiser is for informational purposes only and any reliance on such information is unreasonable. Any information provided by the appraiser does not constitute any title confirmation. Any information provided does not negate the need to retain a real estate lawyer, surveyor or other appropriate experts to verify matters of ownership and/or title.
- 12) The property has been valued on the basis that there are no outstanding liabilities except as expressly noted, pursuant to any agreement with a municipal or other government authority, pursuant to any contract or agreement pertaining to the ownership and operation of the real estate or pursuant to any lease or agreement to lease, which may affect the stated value or saleability of the Subject Property or any portion thereof.

- 13) The property has been valued on the basis that there is no action, suit, proceeding or investigation pending or threatened against the real estate or affecting the titular owners of the property, at law or in equity or before or by any federal, provincial or municipal department, commission, board, bureau, agency or instrumentality which may adversely influence the value of the real estate appraised.
- 14) The legal description of the property and the area of the site were obtained from the GeoWarehouse. No survey of the property has been made. Any plans and sketches contained in this report show approximate dimensions only and are included solely to aid the recipient in visualizing the location of the property, the configuration and boundaries of the site and the relative position of the improvements on the said lands. It is unreasonable to rely on this report as an alternative to a survey, and an accredited surveyor ought to be retained for such matters.
- 15) The property has been valued on the basis that the real estate complies in all material respects with any restrictive covenants affecting the site and has been built and is occupied and being operated, in all material respects, in full compliance with all Government regulations and requirements of law, including all zoning, land use classification, building codes, planning, fire and health by-laws, rules, regulations, orders and codes of all federal, provincial, regional and municipal governmental authorities having jurisdiction with respect thereto, and that if it doesn't comply, any such non-compliance may affect market value. (It is recognized there may be work orders or other notices of violation of law outstanding with respect to the real estate and that there may be certain requirements of law preventing occupancy of the real estate as described in this report. However, such circumstances have not been accounted for in the appraisal process).
- 16) The term "inspection" refers to observation and reporting of the general material finishing and conditions seen for the purposes of a standard appraisal inspection. The inspection scope of work includes the identification of marketable characteristics/amenities offered for comparison and valuation purposes only, in accordance with the CUSPAP.
- 17) The opinions of value and other conclusions contained assume satisfactory completion of any work remaining to be completed in a good and workmanlike manner. Further inspection may be required to confirm completion of such work. The appraiser has not confirmed that all mandatory building inspections have been completed to date, nor has the availability/issuance of an occupancy permit been confirmed. The appraiser has not evaluated the quality of construction, workmanship or materials. It should be clearly understood that this physical inspection does not imply compliance with any building code requirements as this is beyond the professional expertise of the appraiser.
- 18) The author of this report is not qualified to comment on environmental issues (including, without limitation any chemical or biological issues) that may affect the market value of the property appraised, including but not limited to pollution or contamination of land, buildings, water, groundwater or air. Unless expressly stated, the property is assumed to be free and clear of pollutants and contaminants, including but not limited to moulds or mildews or the conditions that might give rise to either, and in compliance with all regulatory environmental requirements, government, or otherwise, and free of any environmental condition, past, present or future, that might affect the market value of the property appraised. If the party relying on this report requires information about environmental issues then that party is cautioned to retain an expert qualified in such issues. We expressly deny any legal liability relating to the effect of environmental issues on the market value of the property appraised.
- 19) Unless otherwise stated in this report, the appraiser has no knowledge of any hidden or unapparent conditions of the property (including, but not limited to, its soils, physical structure, mechanical or other operating systems, its foundation, etc.) or adverse environmental conditions (on it or a neighbouring property, including the presence of hazardous wastes, toxic substances, etc.) that would make the property more or less valuable. It has been assumed that there are no such conditions unless they were observed at the time of inspection or became apparent during the normal research involved in



completing the appraisal. This report should not be construed as an environmental audit or detailed property condition report, as such reporting is beyond the scope of this report and/or the qualifications of the appraiser. The author makes no guarantees or warranties, express or implied, regarding the condition of the property, and will not be responsible for any such conditions that do exist or for any engineering or testing that might be required to discover whether such conditions exist. The bearing capacity of the soil is assumed to be adequate.

- 20) Investigations have been undertaken in respect of matters which regulate the use of land. However, no inquiries have been placed with the fire department, the building inspector, the health department or any other government regulatory agency with respect to the Subject property's compliance with all applicable regulations, unless such investigations are expressly represented to have been made in this report. Assumptions have been made that the Subject property is in compliance with all such regulations. The Subject Property must comply with such regulations and, if it does not comply, its non-compliance may affect the market value of this property. To be certain of such compliance, further investigations may be necessary. Any information provided by the appraiser does not negate the need to retain an appropriately qualified professional to determine government regulation compliance.
- 21) The interpretation of any leases and other contractual agreements, pertaining to the operation and ownership of the property, as expressed, is solely the opinion of the author and should not be construed as a legal interpretation. Further, any summaries of such contractual agreements are presented for the sole purpose of giving the reader an overview of the salient facts thereof.
- 22) The estimated market value of the property does not necessarily represent the value of the underlying shares of the entity owning the property, if the asset is so held, as the value of the shares could be affected by other considerations. Further, the estimated market value does not include consideration of any extraordinary financing, rental or income guarantees, special tax considerations or any other atypical benefits which may influence the ordinary market value of the property, unless the effects of such special conditions, and the extent of any special value that may arise therefrom, have been described and measured in this report.
- 23) Should title to the real estate presently be held (or changed to a holding) by a partnership, in a joint venture, through a Co-tenancy arrangement or by any other form of divisional ownership, the value of any fractional interest associated therewith may be more or less than the percentage of ownership appearing in the contractual agreement pertaining to the structure of such divisional ownership. For the purposes of our valuation, we have not made any adjustment for the value of a fractional interest.
- 24) In the event of syndication, the aggregate value of the limited partnership interests may be greater than the value of the freehold or fee simple interest in the real estate, by reason of the possible contributory value of non-realty interests or benefits such as provision for tax shelter, potential for capital appreciation, special investment privileges, particular occupancy and income guarantees, special financing or extraordinary agreements for management services.
- 25) Unless otherwise noted, the estimated market value of the property referred to is predicated upon the condition that it would be sold on a cash basis to the vendor subject to any contractual agreements and encumbrances as noted in this report as-is and where-is, without any contingent agreements or caveats. Other financial arrangements, good or cumbersome, may affect the price at which this property might sell in the open market.
- 26) Because market conditions, including economic, social and political factors, change rapidly and, on occasion, without notice or warning, the estimate of market value expressed, as of the effective date of this appraisal, cannot be relied upon as of any other date except with further advice from the appraiser and confirmed in writing.
- 27) The value expressed is in Canadian dollars.



- 28) This report is only valid if it bears the original or password secured digital signature(s) of the author(s). If transmitted electronically, this report will have been digitally signed and secured with personal passwords to lock the appraisal file. Due to the possibility of digital modification, only originally signed reports and those reports sent directly by the appraiser, can be relied upon without fault.
- 29) These Ordinary Assumptions and Limiting Conditions shall be read with all changes in number and gender as may be appropriate or required by the context or by the particulars of this mandate.
- 30) Where the intended use of this report is for financing or mortgage lending or mortgage insurance, it is a condition of reliance on this report that the authorized user has or will conduct lending underwriting and insurance underwriting and rigorous due diligence in accordance with the standards of a reasonable and prudent lender or insurer, including but not limited to ensuring the borrower's demonstrated willingness and capacity to service his/her debt obligations on a timely basis, and to conduct loan underwriting or insuring due diligence similar to the standards set out by the Office of the Superintendent of Financial Institutions (OSFI), even when not otherwise required by law. Liability is expressly denied to those that do not meet this condition. Any reliance on this report without satisfaction of this condition is unreasonable.

## Appendix B

### Definitions

## Definitions

### Property Interests

- Fee Simple*** • Absolute ownership unencumbered by any other interest or estate, subject only to the limitations imposed by the governmental powers of taxation, expropriation, police power and escheat.
- Leased Fee Interest*** • The ownership interest held by the lessor, which includes the right to the contract rent specified in the lease plus the reversionary right when the lease expires.
- Leasehold Interest*** • The right held by the lessee to use and occupy real estate for a stated term and under the conditions specified in the lease.

### General Definitions

***Adjusted or Stabilized Overall Capitalization Rate*** is usually derived from transactions with excessive vacancy levels or contract rents over/under market levels. In such cases, net operating income is “normalized” to market levels and the price adjusted to reflect expected costs required to achieve the projected net operating income.

***The Cost Approach*** to value is based upon the economic principle of substitution, which holds that the value of a property should not be more than the amount by which one can obtain, by purchase of a site and construction of a building without undue delay, a property of equal desirability and utility.

***Direct or Overall Capitalization*** refers to the process of converting a single year’s income with a rate or factor into an indication of value.

***The Direct Comparison Approach*** examines the cost of acquiring equally desirable and valuable substitute properties, indicated by transactions of comparable properties, within the market area. The characteristics of the sale properties are compared to the Subject Property on the basis of time and such features as location, size and quality of improvements, design features and income generating potential of the property.

***Discount Rate*** is a yield rate used to convert future payments or receipts into a present value.

***Discounted Cash Flow Technique*** offers an opportunity to account for the anticipated growth or decline in income over the term of a prescribed holding period. More particularly, the value of the property is equivalent to the discounted value of future benefits. These benefits represent the annual cash flows (positive or negative) over a given period of time, plus the net proceeds from the hypothetical sale at the end of the investment horizon.

Two rates must be selected for an application of the DCF process:

- the internal rate of return or discount rate used to discount the projected receivables;
- an overall capitalization rate used in estimating reversionary value of the asset.

The selection of the discount rate or the internal rate of return is based on comparing the Subject Property to other real estate opportunities as well as other forms of investments. Some of the more common benchmarks in the selection of the discount rate are the current yields on long term bonds and mortgage interest rates.

**Exposure Time** - The Canadian Uniform Standards of Professional Appraisal Practice adopted by the Appraisal Institute of Canada define “Exposure Time” (The Appraisal Institute of Canada, Canadian Uniform Standards of Professional Appraisal Practice, 2022 ed. Page 6) as:

***“The estimated length of time the property interest being appraised would have been offered on the market before the hypothetical consummation of a sale at the estimated value on the Effective Date of the appraisal. Exposure time is backward-looking.”***

**Fair Value (International Financial Reporting Standards)** – IFRS 13 defines “Fair Value” as:

***“The price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date.”***

**Highest and Best Use** - The Canadian Uniform Standards of Professional Appraisal Practice adopted by the Appraisal Institute of Canada define “Highest and Best Use” (The Appraisal Institute of Canada, Canadian Uniform Standards of Professional Appraisal Practice, 2022 ed. Page 7) as:

***“The reasonably probable use of Real Property, that is physically possible, legally permissible, financially feasible, and maximally productive, and that results in the highest value.”***

**The Income Approach** to value is utilized to estimate real estate value of income-producing or investment properties.

**Internal Rate of Return** is the yield rate that is earned or expected over the period of ownership. It applies to all expected benefits including the proceeds of sale at the end of the holding period. The IRR is the Rate of Discount that makes the net present value of an investment equal zero.

**Market Value** - The Canadian Uniform Standards of Professional Appraisal Practice adopted by the Appraisal Institute of Canada define “Market Value” (The Appraisal of Real Estate, Third Canadian Edition, ed. Dybvig, (University of British Columbia, Real Estate Division, 2010), p. 2.8) as:

***“The most probable price, as of a specified date, in cash, or in terms equivalent to cash, or in precisely revealed terms, for which the specified property rights should sell after reasonable exposure in a competitive market under all conditions requisite to a fair sale, with the buyer and the seller each acting prudently, knowledgeably, and for self-interest, assuming that neither is under duress.”***

**Net Operating Income** is the actual or anticipated net income remaining after all operating expenses are deducted from effective gross income before debt service and depreciation. Net Operating Income is usually calculated for the current fiscal year or the forthcoming year.



**Overall Capitalization Rate** is an income rate that reflects the relationship between a single year's net operating income expectancy and the total property price. The Overall Capitalization Rate converts net operating income into an indication of a property's overall value.

**A Yield Rate** is applied to a series of individual incomes to obtain a present value of each.

## Appendix C

### Comparable Sales

**COMPARABLE 1: Chartwell - AgeCare Health Services Portfolio  
Various, Various, ON**



LOCATION / LEGAL / LAND USE		TRANSACTION DETAILS	
Address	Various	Purchaser	AgeCare Health Services
Municipality	Various	Vendor	Chartwell Retirement Residences
Province	ON	Date	March 31, 2022
Parcel No.	Various	Status	Recorded
Legal Description	Various	Sale Price	\$446,500,000
		Sale Price per unit	\$169,001
		Occupancy	100%
		Rights Transferred	Fee Simple

PROPERTY DESCRIPTION	
Tenancy Type	Healthcare
Property Type	Multi-Family Residential
Sub-Type	Skilled Nursing
Property Class	InnerCity
Construction	Concrete
No. of Units	2642
No. of Buildings	17
Parking	Adequate

**COMMENTS**  
 The transaction involves the sale of 16 operating Long Term Care facilities in Ontario, with a total of 2,418 beds (2,124 Class A and 219 Class C). The transactions also includes management contracts for an additional 866 beds that Chartwell third party managed prior to the transaction. The transaction also involves the forward sale of the Ballycliffe Long term Care home under development in Ajax for a reported \$64,500,000.

The purchased assets are Pine Grove LTC (Woodbridge, ON 96 Class A Beds), Royal Oak LTC (Kingsville, ON 160 Class A Beds), London LTC



**COMPARABLE 2: Cedarvale Terrace Long Term Care Home  
429 Walmer Rd, Toronto, ON**



**LOCATION / LEGAL / LAND USE**

Address	429 Walmer Rd
Municipality	Toronto
Province	ON
Parcel No.	104670013
Legal Description	LT 26 PL 911 TWP OF YORK; LT 27 PL 911

**TRANSACTION DETAILS**

Purchaser	Stafford Walmer Inc.
Vendor	429 Walmer GP Inc.
Date	June 16, 2022
Status	Recorded
Sale Price	\$32,000,000
Sale Price per unit	\$146,789
Occupancy	100%

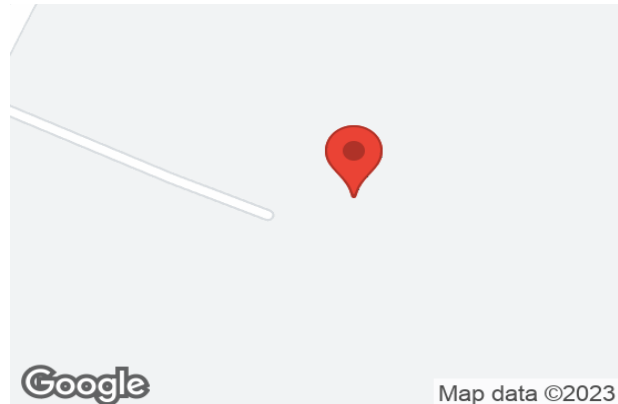
**PROPERTY DESCRIPTION**

Tenancy Type	Healthcare
Property Type	Multi-Family Residential
Sub-Type	Skilled Nursing
Property Class	InnerCity
Construction	Concrete
No. of Units	218
Parking	Adequate

**COMMENTS**

The index property consists of a six storey Class C long term care facility located in the City of Toronto. The improvements feature 87 rooms, furnished with 20 private beds, 35 semi-private rooms (70beds) and 32 basic rooms (128 beds). Per information available to the author, the beds are considered to be Class C, with license set to expire on June 30, 2025. It was reported that the purchaser will operate the Long Term Care home until such time.

**COMPARABLE 3: Hardy Terrace Long Term Care Home**  
**612 Mount Pleasant Road, Brantford, ON**



**LOCATION / LEGAL / LAND USE**

Address	612 Mount Pleasant Road
Municipality	Brantford
Province	ON
Parcel No.	320660033
Legal Description	PT LT 9 RANGE 1 E MT PLEASANT RD

**TRANSACTION DETAILS**

Purchaser	Hardy Terrace Brantford Realty Ltd.
Vendor	Diversicare Healthcare Services
Date	February 21, 2021
Status	Recorded
Sale Price	\$4,140,000
Sale Price per unit	\$40,990
Occupancy	100%
Rights Transferred	Fee Simple

**PROPERTY DESCRIPTION**

Tenancy Type	Healthcare
Property Type	Multi-Family Residential
Sub-Type	Skilled Nursing
Property Class	InnerCity
Construction	Concrete/Block
No. of Units	101
No. of Buildings	1
Parking	Adequate

**COMMENTS**

The index property consists of a Class C Long Term Facility known as Hardy Terrace, situated southwest of the City of Brantford. Given the age and classification of the improvements, the license attached to the Class C beds is set to expire on June 30, 2023. The index property is of a size and configuration that my permit for redevelopment of Class A beds without having to displace existing residents.

**COMPARABLE 4: The Wellington**  
**1430 Upper Wellington Rd, Hamilton, ON**



**LOCATION / LEGAL / LAND USE**

Address	1430 Upper Wellington Rd
Municipality	Hamilton
Province	ON
Parcel No.	169430057
Legal Description	PT LT 13, CON 7 BARTON , PART 1 ,

**TRANSACTION DETAILS**

Purchaser	Arch Wellington Facility Inc.
Vendor	Barton Retirement Inc.
Date	May 6, 2022
Status	Recorded
Sale Price	\$8,249,500
Sale Price per unit	\$80,877
Occupancy	100%
Rights Transferred	Leased Fee

**PROPERTY DESCRIPTION**

Tenancy Type	Healthcare
Property Type	Multi-Family Residential
Sub-Type	Skilled Nursing
Property Class	InnerCity
Construction	Concrete
No. of Units	102
No. of Buildings	1
Parking	Adequate

**COMMENTS**

The index property consists of a 102 bed Class C Facility located in Hamilton Ontario. Per information provided by the Ontario Government the index property has a total of 82 rooms, with 102 Class C beds. Per the Government of Ontario legislation, the licenses are set to expire June 30, 2025.

**COMPARABLE 5: Chartwell/Arch LTC Portfolio**  
**120 Wellington St, 428 Front Rd W and 105 Military Rd N, Niagara on the Lake, Prescott and Glengarry**



**LOCATION / LEGAL / LAND USE**

Address	120 Wellington St, 428 Front Rd W and 105
Municipality	Niagara on the Lake, Prescott and Glengarry
Province	ON
Parcel No.	464060086, 541420757 and 671350501

**TRANSACTION DETAILS**

Purchaser	Arch - Q Residential
Vendor	Chartwell Retirement Residences
Date	April 1, 2020
Status	Recorded
Sale Price	\$12,924,512
Sale Price per unit	\$52,969
Occupancy	100%
Rights Transferred	Leased Fee

**PROPERTY DESCRIPTION**

Tenancy Type	Healthcare
Property Type	Multi-Family Residential
Sub-Type	Skilled Nursing
Property Class	InnerCity
Construction	Concrete
No. of Units	244
No. of Buildings	3
Parking	Adequate

**COMMENTS**

This portfolio transaction involves the sale of three Class C Long Term Care facilities from Chartwell to Arch, a subsidiary of Q Residential. The properties comprising this transaction include Chateau Lancaster Gardens (60 Class C Beds), Pleasant Rest Long Term Care Home (60 Class C Beds) and Chateau Gardens Niagara (124 Class C Beds). The portfolio represents a direct deal with the vendor.

## Appendix 8 VICTORIA MANOR COMMUNITY SURVEY REPORT

# Victoria Manor - Kawartha Lakes Community Survey

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## **SURVEY RESPONSE REPORT**

17 June 2019 - 23 March 2023

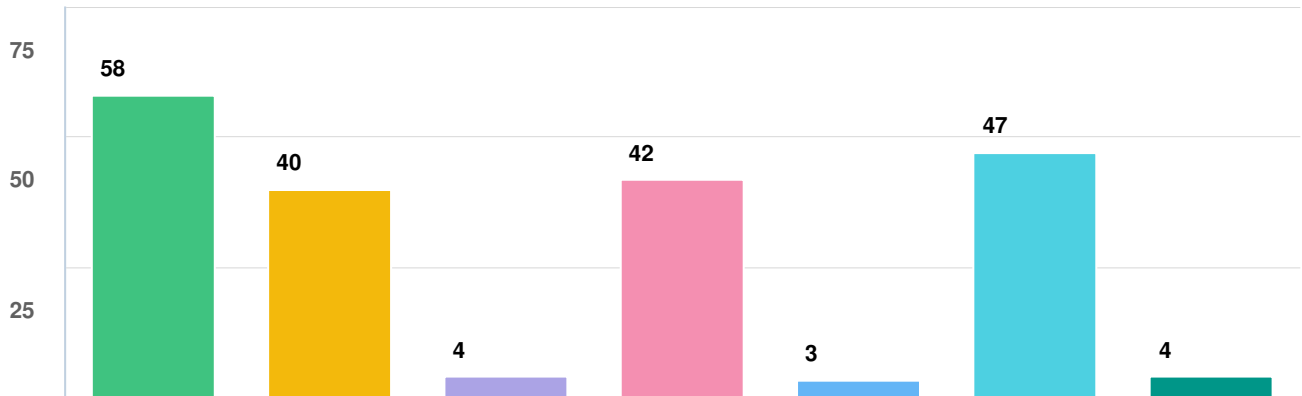
### **PROJECT NAME:**

Victoria Manor Master Plan



SURVEY QUESTIONS

**Q1 How do you know Victoria Manor? (Check all that apply)**

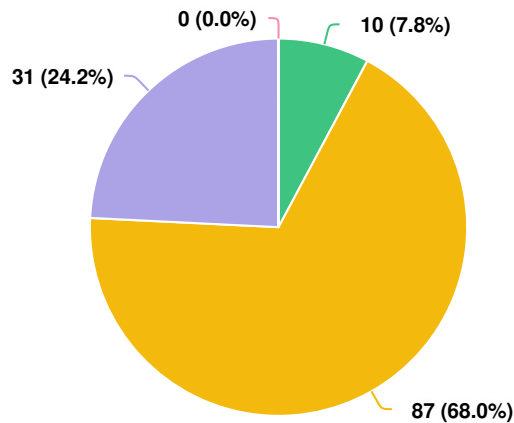


**Question options**

- Family lives/lived here    ● Friend/family works here    ● I volunteer at or on behalf of the Home
- It is in my neighbourhood/close to where I live    ● I follow Victoria Manor on social media
- I read/hear about Victoria Manor in local media    ● I do not know Victoria Manor

*Optional question (137 response(s), 1 skipped)*  
*Question type: Checkbox Question*

**Q2 Thinking about the Victoria Manor building and its amenities, such as the residents' rooms and visiting areas, is your impr...**



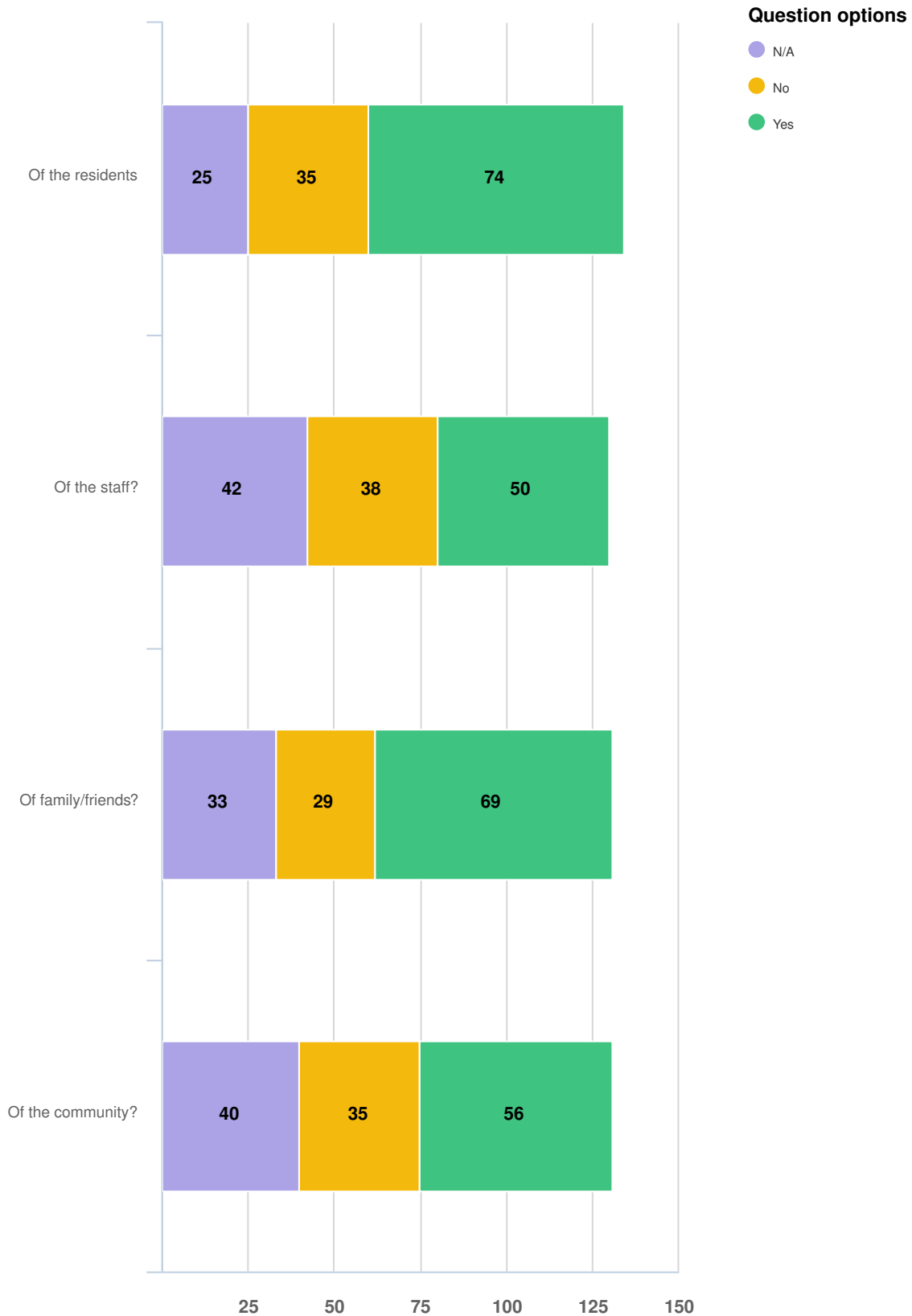
**Question options**

- Excellent    ● Good    ● Poor    ● Very Poor

*Optional question (128 response(s), 10 skipped)*  
*Question type: Dropdown Question*



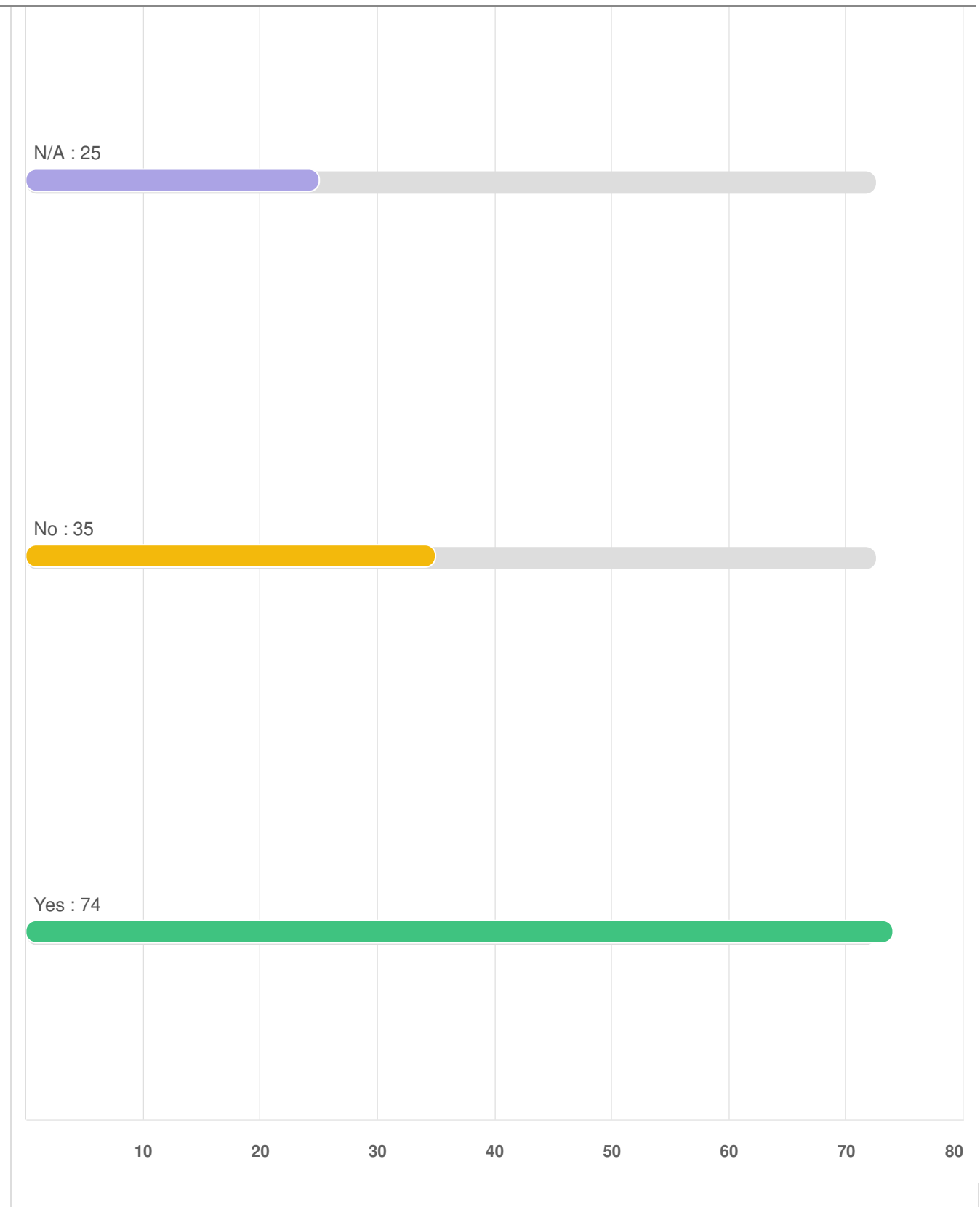
**Q3** | A long-term care home is designed to meet a range of needs. It should provide: Residents with a feeling of home; Important amenities needed to support the resident's care; Appropriate areas, where residents can socialize with their family, friends and...

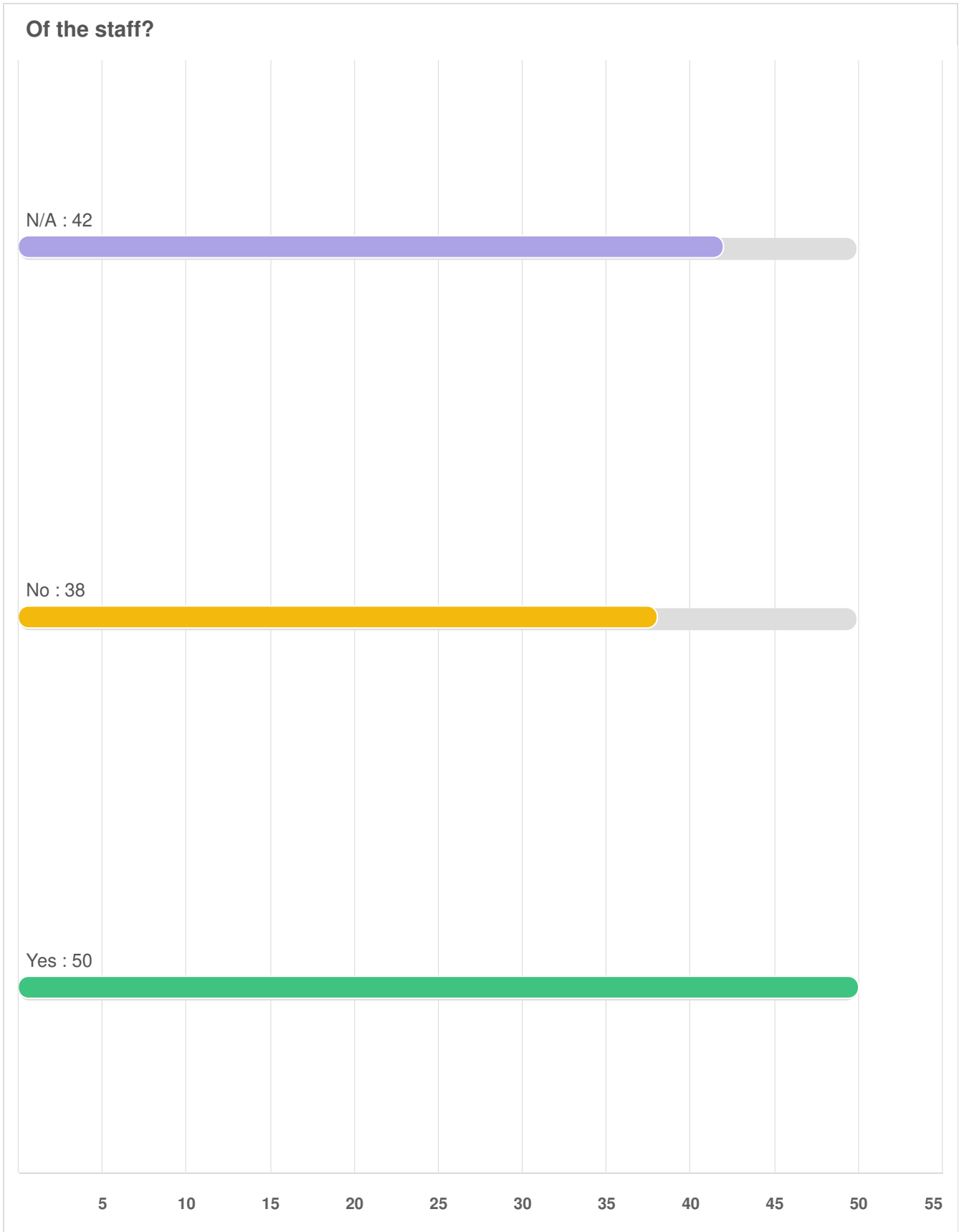


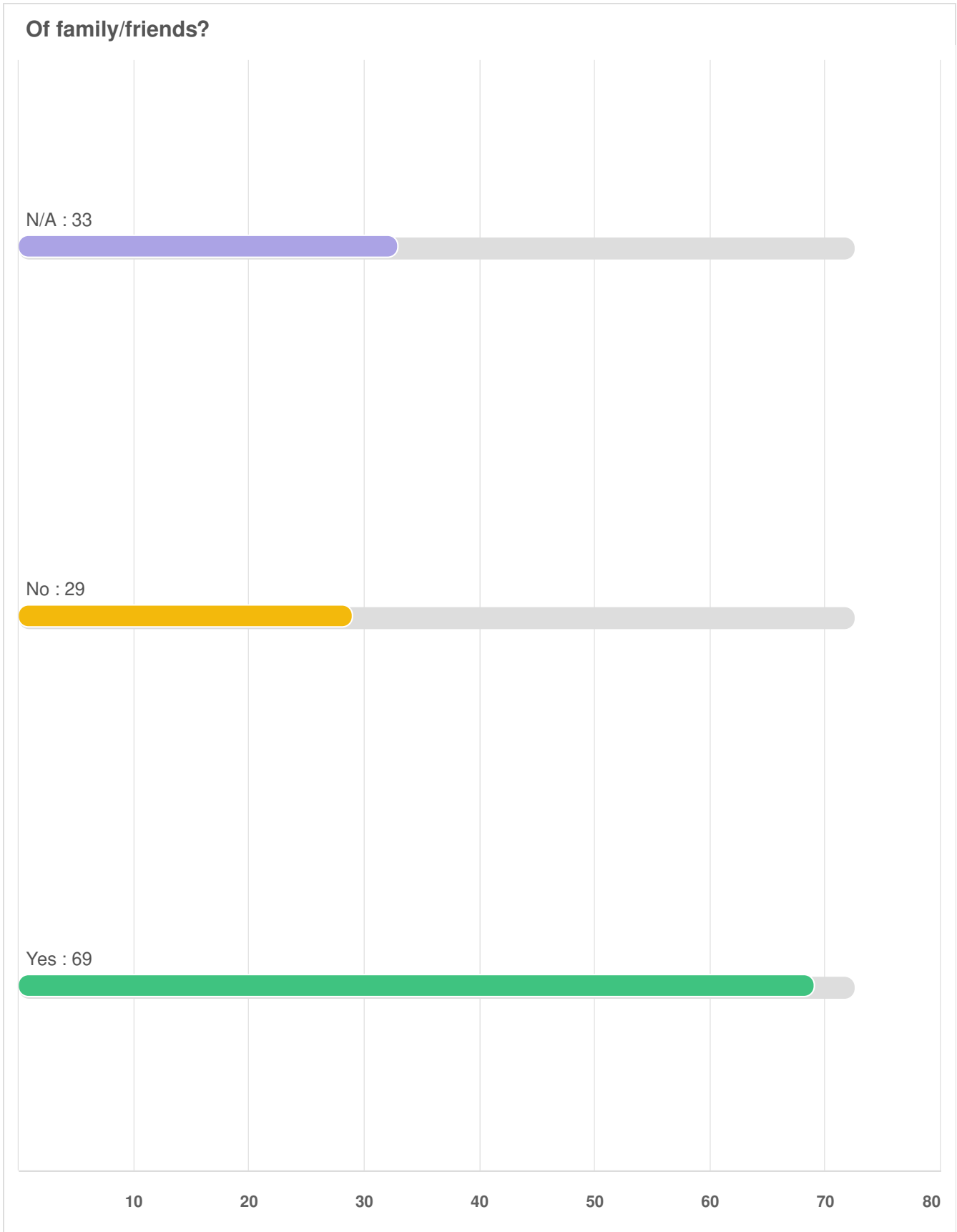
Optional question (134 response(s), 4 skipped)  
Question type: Likert Question

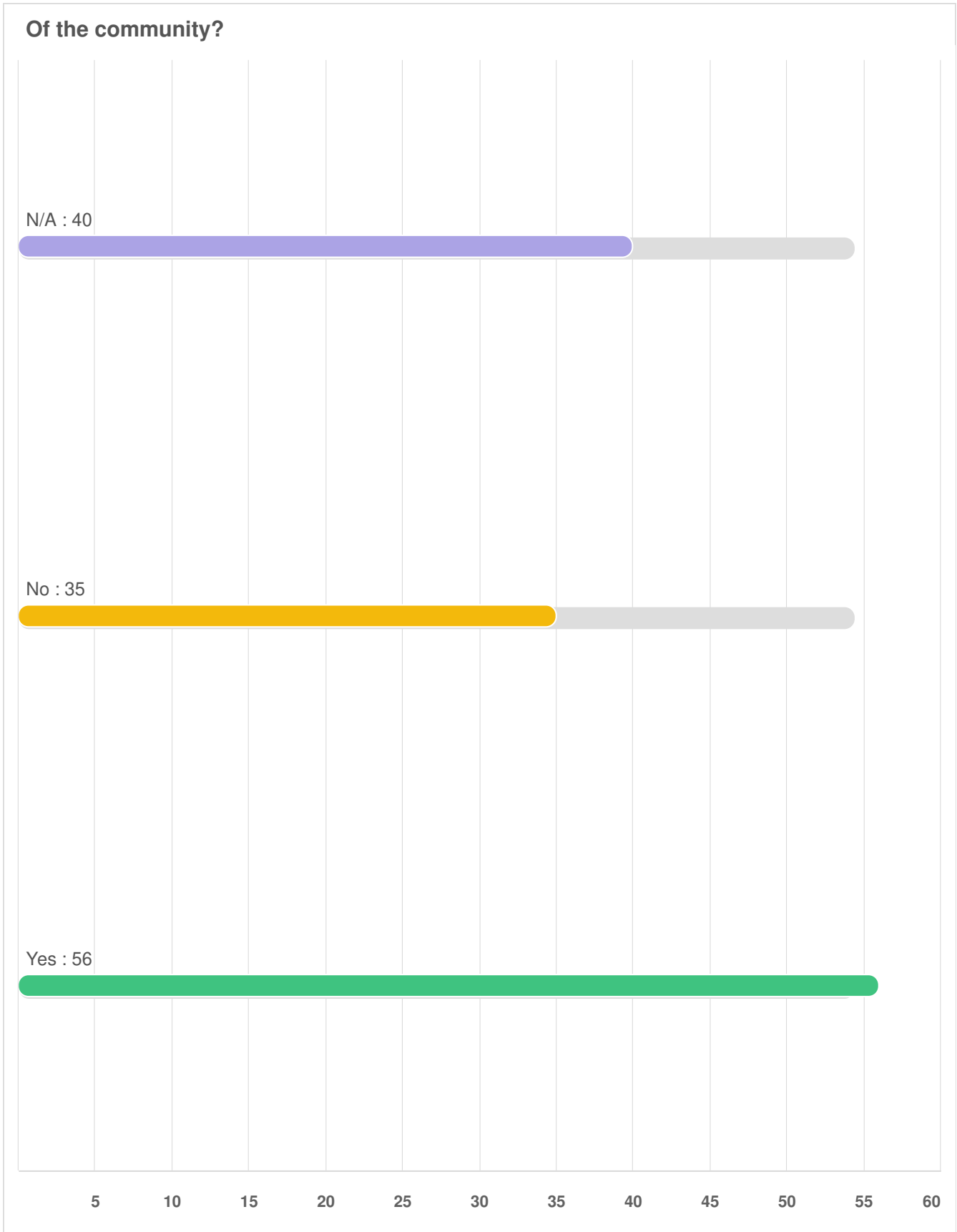
**Q3** | A long-term care home is designed to meet a range of needs. It should provide: Residents with a feeling of home; Important amenities needed to support the resident's care; Appropriate areas, where residents can socialize with their family, friends and...

**Of the residents**









**Q4** Victoria Manor is located on spacious grounds, at 220 Angeline St. S. It has 24 private rooms and 71 semi-private rooms. The 166 residents of this long-term care home have access to a variety of wellness activities, programs and services and meetin...

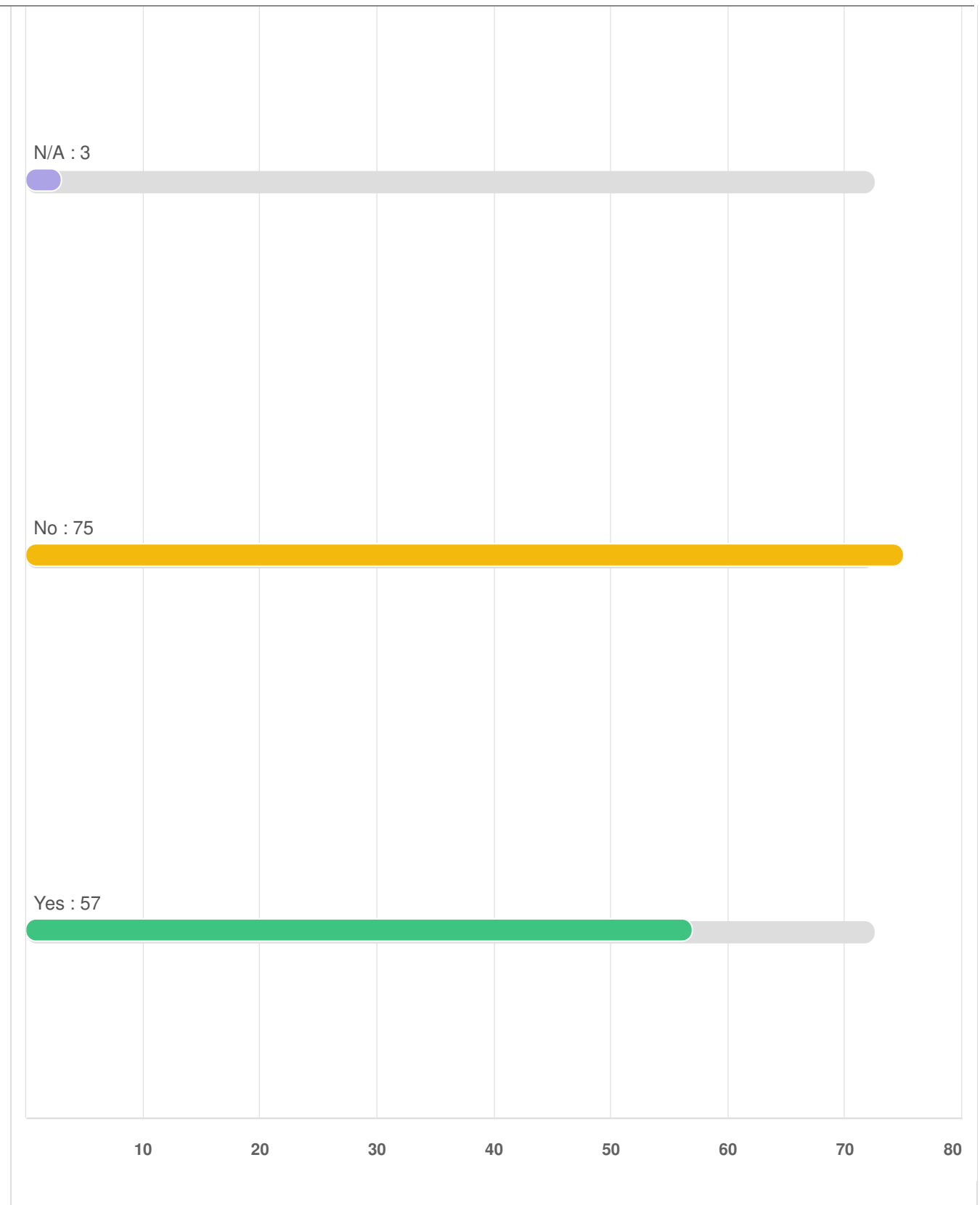


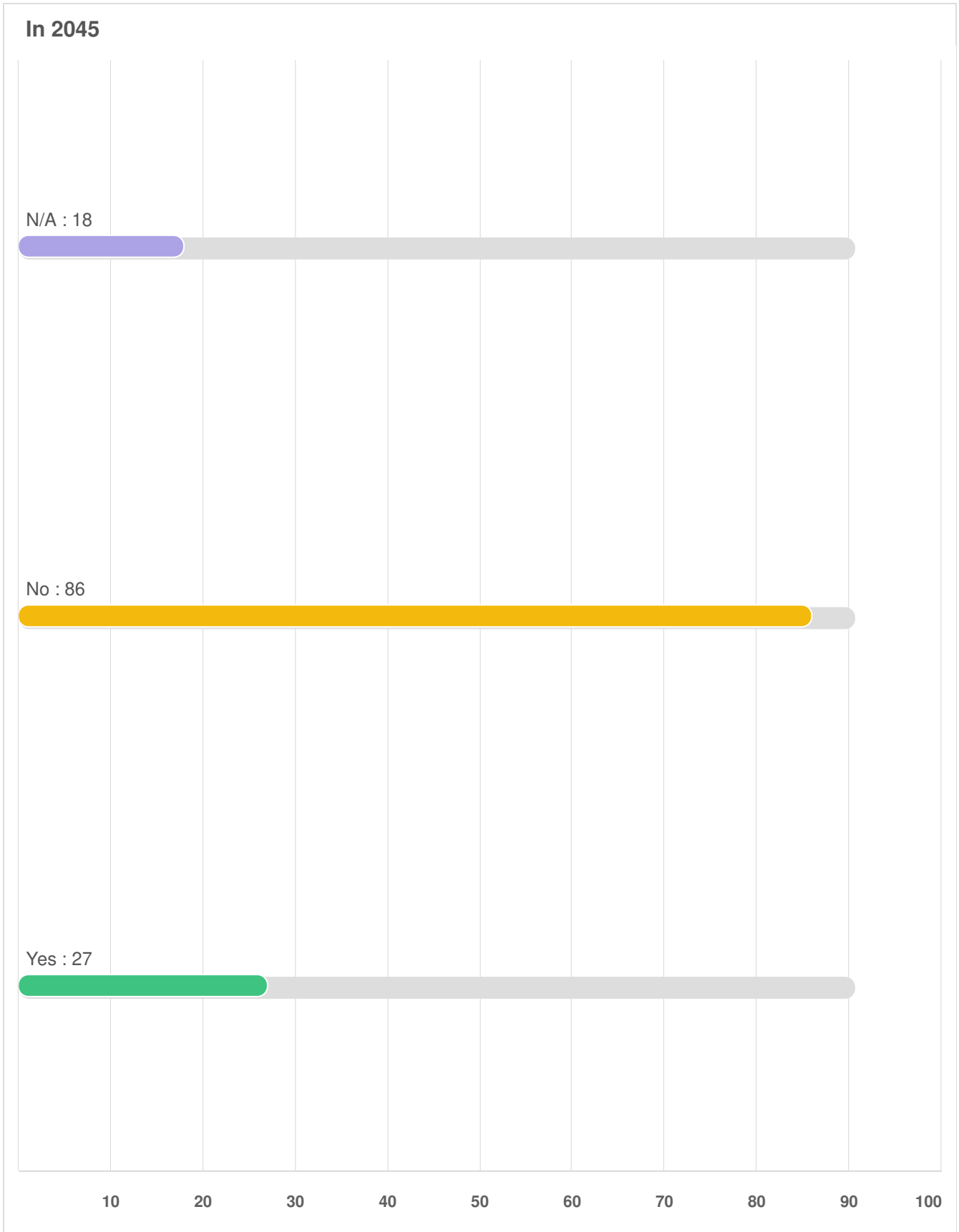
Optional question (135 response(s), 3 skipped)  
Question type: Likert Question

**Q4** | Victoria Manor is located on spacious grounds, at 220 Angeline St. S. It has 24 private rooms and 71 semi-private rooms. The 166 residents of this long-term care home have access to a variety of wellness activities, programs and services and meetin...

In 2030







**Q5** | Please order the following statements from 1 to 5 with 1 being the most important change that Victoria Manor should make to better serve the community and its residents.

<b>OPTIONS</b>	<b>AVG. RANK</b>
Build additional long-term care beds	2.27
Redevelop Victoria Manor to modern standards such as all private rooms	2.50
Build new, complementary accommodations that support an aging in place model, including end of life care – i.e. a seniors' hub	2.85
Provide space for residents to pursue personal interests i.e. hobby rooms, fitness centre	3.35
Build complimentary facilities that support intergenerational connections, i.e. co-locate a day care or before/after school care program	3.96

*Optional question (136 response(s), 2 skipped)*  
*Question type: Ranking Question*