

This is Exhibit " A " to the Affidavit of  
CYNTHIA CLARKE  
sworn this 14<sup>th</sup> day of  
FEBRUARY, 20 18

  
A Commissioner for Taking Affidavits, etc.



## CURRICULUM VITAE OF

### Cynthia I. Clarke

As Director of Quadrant Advisory Group Limited, Cynthia Clarke is responsible for leading the firm's asset management consulting practice for clients in the education and municipal sectors. The discipline of enterprise asset management encompasses the whole life management of the infrastructure assets of an organization with a view to maximizing long term value. She is responsible for leading a team of experts providing consulting services related to: asset management planning & strategies; long-term capital plans; demographic projections and peer review; fiscal impacts & strategies; assessment of economic benefit and competitive advantage; alternative funding sources & strategies; business case development; stakeholder consultation and facilitation; development charge studies and site redevelopment strategies; software-support solutions for asset management.

For the 5-year period commencing March 2013, Cynthia was Vice President, Enterprise Asset Management, Ameresco Asset Sustainability Group, a division of Ameresco Canada Inc. The lead corporation, Ameresco Inc. is a leading independent provider of comprehensive solutions for asset management and the financial management of sustainable asset portfolios throughout North America and beyond, delivering long-term value through innovative systems, strategies and technologies. Ameresco Inc. currently has over 1,000 employees and has implemented over \$5 billion of infrastructure-related projects.

Cynthia was initially employed with Watson & Associates Economists Ltd. as a researcher in 1988 and, over the next 10 years, progressed rapidly to Associate Director and a managing equity partner. During her tenure with the firm (1988 to 2012), she was responsible for project management of some of the firm's largest assignments; the creation and management of the firm's extensive education sector consulting practice in Ontario, as well as co-responsibility for the firm's municipal practice. The education sector consulting practice Ms. Clarke created while at Watson & Associates served more than forty of the seventy-two district school boards in Ontario, and dealt with 15-year student enrolment projections, strategies related to long-term capital planning, site redevelopment strategies, education development charges and capital funding within the legislative context of the *Education Act*. Her efforts in this area positioned her team of experts as pre-eminent in this field; recognized as being instrumental in the development of long term capital and financing strategies. The team's breadth of experience focused on the assessment of long term student accommodation strategies for program and facility revitalization directed towards enhancing student learning opportunities. The portion of the firm's municipal practice that Cynthia was involved in related to municipal development charges, fiscal impact studies, rural versus urban servicing issues, the economic impact of cycling infrastructure investments, and the financial and economic impact of land development.

From August 2012 to March 2013, Cynthia was Director of Quadrant Advisory Group Limited, responsible for directing the firm's consulting practice related to the education and municipal infrastructure sectors.



Ms. Clarke is well known for organizing and facilitating forums attended by infrastructure sector representatives, Provincial Ministries, industry experts and a variety of stakeholders, participating in seminars and conferences designed to explore infrastructure investment opportunities and challenges, including multi-use community facilities and alternative financing structures. Cynthia has prepared and submitted briefs to the Province of Ontario on issues related to education development charges - a field in which she is a recognized expert.

Ms. Clarke has provided expert testimony before the Ontario Municipal Board in respect of the EDC by-laws for the Toronto Catholic DSB in 2002; the joint EDC OMB hearing for the Simcoe County DSB and the Simcoe Muskoka Catholic DSB in 2008; and the co-terminous Ottawa boards in 2011. In respect of the latter two cases, the OMB decision was made in favour of the school boards, with the Simcoe Boards decision upheld by the Divisional Court. More recently, Ms. Clarke has been involved in providing expert testimony in respect of Hearings of Necessity on behalf of the Toronto Catholic DSB. *A list of school board clients can be found at the end of this document.*

## **B.1 Professional Accomplishments – Education Sector**

Ms. Clarke has been directly involved in undertaking sixteen of the twenty-five education development charges (EDC) by-laws in force throughout Ontario today, as well as the majority of the EDC studies conducted since 1989. Her expertise in this regard has included preparation of EDC background studies, including underlying demographic analyses, land needs assessment, determination of the quantum of the charge incorporating cash flow analyses, extensive public consultation, stakeholder negotiations, legislative interpretation, the development of methodological approaches and reporting requirements, including dealing with transitional by-law provisions.

As well, Ms. Clarke was asked, early in her career, to provide input to the staff of the Ministry of Education in the legislative areas dealing with education development charges and the capital funding portion of the capital funding model under the *Education Act*, including the development of policies, guidelines and reporting requirements.

Since 1999, Ms. Clarke has been instrumental in the development of Long-Term Accommodation Plans for school boards within the context of the *Education Act's* accountability framework. These Plans provide long-term (15-year) enrolment projections, an assessment of capital expenditure needs by sub-area, determination of associated revenue sources, as well as recommendations with respect to financing and accommodation strategies to be employed by the board. The consultation portion of these studies involves seeking public input on the proposed Plan, public consultation to deal with the rationalization of facility space, negotiations with various land-owners, and advocacy, when required, with the Ministry of Education to ensure that the board's long-term accommodation needs are met. Ms. Clarke has provided considerable input to district school boards in respect of planning and funding strategies design to enhance the student learning environment and reduce taxpayer burden.

During 2000/2001, Ms. Clarke was involved in assisting the Ontario School Boards Financing Corporation (OSBFC) and CIBC World Markets, in finalizing three debenture offering memorandums on behalf of a consortium of school boards. Her role consisted of preparing a portion of the background material submitted by client boards to CIBC, specifically long-term enrolment projections and anticipated revenue sources necessary to support the \$1.1 billion in pooled financing interests. The Long-Term Accommodation Plans, Education Development Charge Background Studies and long-term enrolment





projections prepared under Ms. Clarke’s direction, were held in high regard by the financial agencies assessing the credit worthiness of the participating boards.

More recently, Ms. Clarke has been assisting clients with complex site redevelopment strategies, often involving financial and legal structures outlining shared use joint use facility agreements, joint ventures, land assembly and disposition, leasehold agreements, etc.

**B.2 Post-Secondary Education**

1973-76 Business studies at McMaster University and Mohawk College

**B.3 Professional Employment History**

February 2018 to present Director, Quadrant Advisory Group Limited

March 2013 to February 2018 Vice President Enterprise Asset Management, Ameresco Asset Sustainability Group

August 2012 to February 2013 Director, Quadrant Advisory Group Limited, a six-person consulting firm

1998 to August 2012 Associate Director of Watson & Associates Economists Ltd., primarily responsible for undertaking and directing assignments related to school board capital accommodation and financing strategies and for the development of methodological approaches to assessing long term capital expenditure needs under the Province’s capital funding model. During 2011 and 2012 involved in undertaking fiscal impact analyses and development charges studies on behalf of GTA municipalities.

1988 - 98 Senior Consultant, Watson & Associates Economists Ltd., responsible for undertaking municipal and education development charges studies, long term strategic planning for school boards, and economic impact analyses on behalf of municipal clients.

1985 - 86 Financial Policy Analyst, Regional Municipality of Hamilton-Wentworth

1979 - 85 Local Improvements Officer, latterly Supervisor of Local Improvements and Development Control, Regional Municipality of Hamilton-Wentworth responsible for assessing the impact of land development on the Region’s capital infrastructure needs.

1977 - 79 Junior Accountant with Domglas Inc. and Control Data Corporation

**B.4.1 Education Development Charge Studies since 1989**

Education development charge studies undertaken within the legislative provisions of Part IX Division E of the *Education Act*, include the determination of fifteen year residential and non-residential growth forecasts, demographic analyses to determine long term pupil generation and pupil yield cycles for various housing types, by review area. As well, these



studies require the identification of net pupil places and their associated education land costs, and cash flow analyses of the capital expenditure forecast to consider borrowing impact and interest earnings. These studies include the preparation of EDC by-laws on both area-specific and jurisdiction-wide bases. Each assignment typically requires extensive public consultation respecting policy considerations, by-law development, adoption consideration and implementation.

Education development charge studies undertaken under Part III of the *Development Charges Act (DCA), 1989*, required the determination of short term (5 year) residential and non-residential forecasts by sub-area, an analysis of appropriate pupil yields by dwelling unit type in order to forecast pupil enrolment, the identification of pupil accommodation requirements (both school sites and school facilities) and the costing of capital expenditure needs.

DCA education development charge studies were undertaken on behalf of thirteen GGH school boards. As a result, Ms. Clarke was subsequently asked to provide input to the drafting of sections of Division E of the *Education Act*, the successor legislation.

#### **B.4.2 EDC Reserve Fund (Account) Analyses**

This scope of work relates to an analysis of appropriate reserve fund balances for each successor board within the legislative provisions governing the use and apportionment of education development charge funds in the transition from collections under the Development Charges Act to the Education Act, as well as more recent reserve fund analyses under O.Reg. 20/98, tracking site acquisition and development costs through multiple by-law periods. Recently, Ms. Clarke undertook an examination of the acquisition of growth-related sites by EDC-eligible school boards since 1998 to determine if the funding scheme was working as it was originally envisioned.

#### **B.4.3 Long Term Accommodation Capital Plans and Special Studies Dealing with Accommodation Issues**

Long Term Accommodation Plans are studies designed to assess long-term accommodation strategies to be employed in achieving “efficient and effective” use of a board’s capital resources. The scope of these studies includes fifteen-year enrolment projections for each school facility, an assessment of capital expenditure needs, both growth-related and renewal of existing school facilities, and the determination of capital grant revenue sources over the forecast period. The renewal portion of the Plan addresses program and facility upgrades required, as well as an assessment of facilities which should be replaced rather than renewed, the evaluation of the existing and future utilization of facilities, and an assessment of long term accommodation needs including timing, location and capital costs. Finally, these studies assess the financial impact of undertaking the Plan in terms of the board’s ability to balance operating costs, facility renewal and administrative costs over the long term. Several of these studies also required analyses related to the rationalization of facility space, including public consultation related to school closures.

Examples of input related to specific accommodation issues: specific school locations, size, servicing requirements, financing requirements, construction timing and/or potential catchment areas, and conducted on behalf of:

Halton Catholic DSB

Milton Boyne Secondary Plan Student  
Accommodation Needs



Rainy River DSB	Town of Rainy River JK-12 student accommodation needs Town of Atikokan JK-12 & Community Hub needs
Toronto Catholic District School Board	St. Norbert, Dante Alighieri, St. John the Evangelist, St. Joseph Morrow Park, Botham Rd. sites
Conseil des Ecoles Publiques de l'Est de l'Ontario	JK-12 school in Prescott Russell Elementary school and Community Hub in Ottawa Secondary school to be constructed in Cumberland
Dufferin-Peel Catholic DSB	John Cabot Secondary School
Halton DSB and Halton Catholic DSB	Alton Secondary Plan – school facility requirements North Aldershot Central Sector
Peel DSB/Dufferin-Peel Catholic DSB	Churchill Meadows agreement
Former Lambton County Roman Catholic School Board	servicing requirements related to the development of a new elementary facility

#### **B.4.4 Administrative Accommodation Needs**

Studies were undertaken on behalf of the Halton DSB and the Toronto French Schools to Address longer term needs for administration offices and the determination of potential funding sources, in conjunction with architects, engineers and cost consultants.

#### **B.4.5 Business Cases and Fiscal Impact Analyses**

Comprehensive Business Cases are prepared in support of a request for capital funding allocations by the Ministry of Education. Each business case details the capital project requirements, projected enrolment, capital costs, anticipated funding sources and timelines.

Fiscal impact analyses are an assessment of a school’s ability to fund school operations, facility renewal and school administration given projected changes in student enrolment. This analysis is typically undertaken for two separate scenarios: the first is the status quo indicating how the board would be affected if there were no changes to the board’s capital asset inventory and the second is an alternative scenario showing how revenues and expenditures would change if there were modifications to the capital asset inventory.

#### **B.4.6 Municipal Fiscal Impact Analyses (School Board Component)**

As well, Ms. Clarke has provided input into fiscal impact analyses of specific development applications as they relate to school board accommodation needs.





Oakridges Co-tenancy, Town of Richmond Hill  
 Grindstone Creek, City of Burlington  
 Uptown Core, Town of Oakville  
 Milton Urban Expansion, Halton Urban Structure Plan  
 Growth Management Strategy (the portion of the study dealing with student accommodation needs) for the Town of Ajax

#### **B.4.7 Municipal Development Charge Studies (Projects managed by Ms. Clarke or in which she was a major participant)**

Prior to 1998, Ms. Clarke undertook municipal development charge studies on behalf of twenty-four municipalities and assisted in the preparation of DC studies for an additional nine municipalities, including the Region of Waterloo and Ottawa-Carleton. The scope of her experience in municipal DC studies includes special consideration of rural versus urban servicing requirements and rural planning policies, analysis of front-end financing of engineered services and research into various financing alternatives to the *Development Charges Act*. She participated extensively in the public process to implement development charge policies on behalf of the clients cited below:

Town of Ancaster	Township of Ops
Town of Arnprior	Region of Ottawa-Carleton (research and background study preparation role)
Village of Bath	Peterborough P.U.C.
Township of Blandford-Blenheim	Town of Rockland
Village of Colborne	Village of Rockcliffe Park
Town of Dundas	Township of Romney
Township of East Zorra-Tavistock	Township of Russell
Ernestown Township	Township of Sidney
Town of Flamborough	Township of South-West Oxford
Town of Hawkesbury	Township of Storrington
City of Kanata/Kanata H.E.C.	Township of Thurlow
City of Kingston	City of Vanier
Township of Kingston	Region of Waterloo (research and background study preparation role)
Loyalist Township	Township of West Carleton
Township of Mariposa	Township of Zorra
Township of McNab	Town of Whitby (2012)
Township of North Plantagenet	
Township of Norwich	

#### **B.4.8 Other Studies**

In 1994, Ms. Clarke undertook an analysis of infrastructure costs associated with conventional versus alternative development patterns, on behalf of Canada Mortgage and Housing Corporation and the Regional Municipality of Ottawa-Carleton. In 1995, she was retained to undertake a study of rural servicing alternatives as part of the development of a rural settlement strategy on behalf of the Region of Ottawa-Carleton. Recently Ms. Clarke undertook extensive research respecting the economic impact of cycling infrastructure, on behalf of the Region of Durham.



## B.5 Selected Addresses, Seminars and Publications (by Cynthia Clarke)

Community Hubs Summit in conjunction with Karen Pitre, Community Hubs Secretariat	Design Charrette exploring Community Hubs as Part of School Site Redevelopment	May 2017
Ottawa Carleton District School Board	School Site Sizes a Brief to the City of Ottawa	April 2016
Province of Ontario	Recovery of Growth-related Net Education Land Costs – a Brief to the Province of Ontario	July 2014
Conferences/workshops organized by Cynthia Clarke	Education Development Charges Moving the Yardsticks Forward Designing Multi-use School Facilities	March 2012 November 2011 June 2011 (2 day conference)
Conferences/workshops organized by Cynthia Clarke	School Board Capital Strategies	October 2010
Ottawa School Board	Capital Funding Model and Expectations for School Boards; and Pupil Accommodation Review Process – An Alternative Approach	June 28 2010
OCSTA/OCSBOA	Capital Management in an Era of Declining Enrolment	May 7 2009
ASBO International Conference	Fiscal Impact Assessment of Accommodation Alternatives	October 2008
CEFPI International Conference	Program and Facility Revitalization in an Urban Setting	October 2008
CEO Annual Conference	Accommodation Strategies in a Declining Enrolment Environment	January 2008
OCSBOA	School Board Demographics and the Impact for Catholic Boards	March 23 2007
CEFPI 81st Annual Conference	Accommodation Strategies – A Case Study	October 22 2004
CEO/CFO Annual Conference	Enrolment Trends and the Future of Schools	January 22 2004
OCSTA Annual Conference	Future Capital Funding and Accommodation Strategies	May 9 2003
Various School Boards	Education Development Charge Workshop Presentation	May 4 2001
Dufferin-Peel Catholic District School Board	Capital Strategic Plan, John Cabot Secondary School Overcrowding	June 5 2000





OASBO	Ontario Association of School Board Officials Enrolment Seminar	December 11 2000
Various Boards	Education Strategy Session, Capital Strategic Plan	November 24 1999
OASBO	School Capital Funding Issues and Challenges for Boards and Municipalities	November 17 1999
OPPI	The Provisions of Services in a Reduced Funding Environment	September 23 1999
UDI, GTHBA, Toronto Construction Association, CIPREC	Education Development Charges Information Session for Development Community Stakeholders	April 28 1999
Various School Boards Ministry of Education	Education Development Charges Workshop Session	February 12 1999
Simcoe County District School Board	Caucus Session for Accommodation Planning	September 2 1998
Various School Boards	Education Development Charges Workshop Session	June 26 1998
OASBO	Ontario Association of School Board Officials Strategic Capital Planning for the new Accommodation Funding Model	May 7 1998
Insight Seminars	"Community Schools in the Next Millennium"	April 3 1998
OASBO	Ontario Association of School Board Officials, Bill 160 Presentation – "Linking Accommodation Needs to Anticipated Provincial Funding"	December 12 1997
Carleton Boards, Peel Boards, Halton Boards, Simcoe Boards, Durham Region RCSSB	Brief to the Ministry's Expert Panel on School Accommodation – "The Future Role of EDCs and Other Growth-related Capital Funding Issues"	July 25 1997
Various Boards	Education Development Charges Position Paper, Various Boards, Workshop 1	June 3 1997
Peel DSB, Dufferin-Peel RCSSB, Halton Board, Halton RCSSB	Joint Session on Educational Development Charges Reserve Fund Management	April 17 1997
Simcoe County Board of Education	Development Charges process, Student Accommodation Committee Presentation	February 17 1997
OASBO	Ontario Association of School Board Officials, Education Development Charges Presentation	January 9 1997



OASBO	Submission to Ministry of Education – “Financing Education Capital Costs”	March 1995
AMCTO DC Seminars	Kanata, Kingston, Peterborough and Hamilton	April 1998
CMHC Seminar	Presentation of Findings re: “Infrastructure Costs of Conventional versus Alternative Development Standards” undertaken on behalf of RMOC and CMHC	1994

