We are here ... it’s amazing!

Congregational Update on
Renovation & Relocation Projects
March 27, 2022
SUMMARY

We at First Unitarian are in the midst of transition: leaving our location of 70 years and moving to a new neighbourhood and building; welcoming new seekers and meeting new neighbours; developing new approaches to worship, communications, fundraising, and community. It’s amazing! And it’s a lot.

This presentation will orient you to how we’re managing the Renovation and Relocation projects which are such major elements of our overall transition story. As a congregation, we’ve made major real estate decisions based on assessing our goals, principles, and resources. We’ll continue to apply those three factors as we make decisions about renovating our new property.

Dozens of First’s amazing volunteers and all of our staff are engaged in this complicated work together, along with a team of professional advisors and contractors. On March 27, you are invited to a comprehensive presentation, including a Q&A session. You’re also invited to provide feedback through an online comment form.

This is one checkpoint along the way – we are “here” at the moment. It is an exciting – and sometimes frustrating – place to be. We have many steps ahead of us to chart our path through a maze of interdependent decisions.
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How did we get here?
- history of decisions (to not renovate 175; to sell 175; to purchase 473)

Where are we headed?
- 473 Oakwood overview (building, neighbourhood), interim plans

What’s happening now at 473?
- tenants, maintenance, visits

What’s the plan for 473?
- process, teams, timeline, design goals & principles
  - advisory committees

What are the current issues?
- building limitations
  - financial considerations

Current version of building layout and design features
- drawings, feedback
HOW DID WE GET HERE?

Our congregation has been working its way towards this transition since 2006. For an outline of the history of our real estate progress, please see the Appendices.

After years of review and consideration, the congregation decided to sell 175 St. Clair W because we believed it would not meet our needs for the future and that we could not afford to make the changes required to do so. By selling, we created opportunities:

- to reserve some of the sale funds for future financial stability ($3MM is now invested)
- to create a more welcoming, accessible, environmentally responsible, and efficient physical space
- to become more actively engaged in a diverse neighbourhood

After selling, we spent over 2 years exploring options and considering dozens of possible sites. It became clear that the cost to purchase land plus construct a building would be prohibitive in Toronto. The congregation approved the selection of 473 Oakwood Avenue, as a re-usable building, because it satisfies our key criteria:

- it is a relatively central Toronto location on excellent public transit routes
- it is big enough to meet our needs and can be renovated to be accessible, environmental, and efficient
- the surrounding neighbourhood is diverse, active, evolving
- the purchase price was in an affordable range
WHERE ARE WE HEADED?

473 Oakwood Avenue will be our new permanent location. It is a former post office, built in the 1960s and renovated in the 2000s to become a rental property. It consists of two floors above ground and a below ground basement. The roof has excellent views of the city. There are welcoming entrance areas on both Oakwood Avenue and Robina Avenue.

Several major transit routes provide access. 473 is about a 10 min. walk from the new Oakwood Station (Eglinton line) and about 15 min. by bus from St. Clair West (Spadina Line) or Ossington station (Bloor line).
WHERE ARE WE HEADED – BEFORE OAKWOOD?

We are applying for a permit to use the auditorium and some classrooms at Oakwood Collegiate, 991 St. Clair Ave. West, as our interim Sunday location until 473 Oakwood is ready for our use. You can view photos of the school, including the auditorium, here: https://bit.ly/OClphotos

Our permit with the TDSB cannot be confirmed by their formal process until the summer. We have reasons to be confident it will be approved, based on discussions with the principle, the permit office, and the school board trustee.

In addition, we plan to rent a small office space in the neighbourhood. It will become our interim mailing address and it will have space for our bookkeeper, our photocopier, essential administrative items, and some storage space for items that need to be moved in and out of the school on Sundays.
ON THE MOVE

Work is proceeding on schedule, with help from volunteer teams

✓ Teams are packing items for
  ✓ storage,
  ✓ use at interim site, or
  ✓ disposal

✓ There are many items we won’t keep
  ✓ available for members and friends to “Take Home A Souvenir of 175 St Clair”
  ✓ sales events in late April/early May (date TBD)
    ✓ co-ordinated by Susan Richardson and Wendy Dines
  ✓ pay-what-you-can donation

✓ To volunteer for this, or any help in the next months, email OnTheMove@firstunitariantoronto.org.
WHAT’S HAPPENING AT 473 RIGHT NOW?

Right now, our building is being used by several tenants:

- **Ontario Ballet School** – children’s ballet school
- **Naka Ima Aikikai Aikido** – non-aggressive martial arts training studio
- **Music Studio** – office space for Mystic Drumz children’s music program, plus rehearsal and recording and audition spaces for various artists such as wedding bands
- **Marcon Plumbing** – office and storage space
- **Nia Centre for the Arts** – temporary office space for the first Black Arts Centre in Toronto, currently renovating a building across the street
- Note: the Montessori School has relocated

The property is being managed day-to-day by Buttonwood Property Management.

Our professional team of architects, engineers, consultants and other contractors arranges access to the building to assess the current structure and provide more accurate guidance about future plans. Our Advisory Teams are also able to tour the building.
WHAT’S THE PLAN? - STRUCTURE

The Real Estate Steering Committee is coordinating the overall project and interacting with all stakeholder groups.

A team of professionals including architects, engineers, consultants and contractors will provide expertise and deliver the project.

Stakeholder groups and committees are examining specific topics so we can jointly understand our needs and examine options for solutions.

Final recommendations will be made by the Real Estate Steering Committee to the Board after weighing congregational and stakeholder inputs.
A major renovation involves a process of several pre-construction steps, each step getting closer to the exact decisions about design:

**SCHEMATIC DESIGN PHASE**
- Determine basic floorplans and major building features
- Class D Costing, followed by costing review and decisions for adjustments
- City Zoning review, submission to Committee of Adjustment for zoning
- Zoning variances approval

**DESIGN DEVELOPMENT**
- Structural, Mechanical and Electrical designs
- Detailed room design, including furniture, finishings, aesthetics
- Class C Costing followed by costing review and decisions for adjustments

**CONSTRUCTION DOCUMENTS**
- Class B Costing followed by costing review and decisions for adjustments
- Permit Drawings and Permit Review by City
- Class A Costing followed by costing review and decisions for adjustments
- Final Construction Drawings

**TENDER PHASE**
- Permits Issued; Construction Manager identifies contractors to deliver the work

**CONSTRUCTION PHASE**
- Demolition and Construction

**MOVE IN PHASE**
- Installation of furnishings and fixtures, “fit out”
WHAT’S THE PLAN? – TIMELINE

This is an aspirational timeline; some things will be outside our control
WHAT’S THE PLAN? – CITY APPROVALS

We are working with a Planning Consultant to ensure we understand and follow the required steps for City of Toronto approvals for our project.

Pre-Permit Review
The City has performed a review of the zoning requirements for our property and the proposed renovation. Several items were identified as being non-compliant with zoning requirements for religious use. We are advised that all of these should be accepted by the City because we are simply changing the use of an existing building. Examples of non-compliant items based on the usual features required for a place of worship include:

- The required minimum front yard setback is 2.93 metres; our front yard setback is 0.644 metres.
- A minimum 1.5 metre wide strip of soft landscaping must be provided where the lot abuts a residential property; our lot does not have this soft landscaping strip.

Our Planning Consultant is currently discussing the review with the City to ensure any nuances are understood and incorporated prior to us attending a Committee of Adjustments hearing. The City has yet to indicate whether a Parking Study will be required. In recent discussions with a Parking Consultant, their view was that the available parking would be sufficient and that our use would not cause concern for the City.

Committee of Adjustment Meeting
Our Planning Consultant will apply for a Committee of Adjustment date. We expect it to be in early summer. Prior to the meeting, nearby neighbours will receive a notice indicating that a CoA is being held to review our zoning variance application. We will be sending a letter to our immediate neighbours in advance of the meeting, to ensure they are aware of the nature of the conditions and invite discussion of any issues which may be of concern to them before the meeting.
WHAT’S THE PLAN? - DESIGN GOALS

The working teams are guided by the principles we want to uphold when making decisions. By their nature, principles are always aspirational. We aim to meet them in ways that are “good/better/best”. We know that some outcomes will be imperfect because of trade-offs between principles, and because we are retrofitting an existing building.

<table>
<thead>
<tr>
<th>General Principle*</th>
<th>Our building should ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functionality</td>
<td>... meet the needs of our core programs (worship, RE, administration, congregational activities, etc.) and be easy to maintain over time</td>
</tr>
<tr>
<td>Accessibility</td>
<td>... present no barriers to participation and enable dignified access and usability for all</td>
</tr>
<tr>
<td>Gender Neutrality</td>
<td>... be usable equally by people identifying with any gender (e.g., washrooms)</td>
</tr>
<tr>
<td>Environmental Responsibility</td>
<td>... minimize our energy consumption and carbon footprint and respect the environment in our choice of materials</td>
</tr>
<tr>
<td>Design Integrity</td>
<td>... present an overall consistent style and aesthetic, with intentional variations to meet the needs of different spaces</td>
</tr>
<tr>
<td>Rentability</td>
<td>... be rentable most of the week; First is the primary user on Sundays</td>
</tr>
<tr>
<td>Financial Affordability</td>
<td>... be an asset we can afford to build and sustain with our own resources or resources we believe we can reasonably obtain over time</td>
</tr>
</tbody>
</table>

* General Principles may also be associated with more specific goals developed by our committees (e.g., the Environmental Advisory Committee is assessing a “path to net zero” for carbon consumption.) Some principles will be met by applying future policies instead of by building design (e.g., Right now, we can design how many rooms there will be; later, we’ll need to consider which rooms must be reserved at certain times versus being rented to meet our functionality.)
AESTHETIC DESIGN ADVISORY COMMITTEE WORK

The role of the ADAC is to help create a consistent and pleasing aesthetic throughout the building by describing desirable “look and feel” principles and reviewing options presented by the professional team. Aesthetics include finishes, colours, signage.

This committee is new and has not yet developed the aesthetic principles. Below is a sample of the types of “look and feel” principles which could apply throughout different spaces. Once the principles have been developed, we will work with the architect and designer to review “palettes” of options for paint, finishes, etc.

<table>
<thead>
<tr>
<th>Area</th>
<th>Aesthetics Principle</th>
</tr>
</thead>
<tbody>
<tr>
<td>General overall</td>
<td>Welcoming, accessible, natural, calm, fresh, open, ...</td>
</tr>
<tr>
<td>Children’s areas</td>
<td>Bright, fun, safe ....</td>
</tr>
<tr>
<td>Meeting rooms</td>
<td>Well-lit, functional, convenient, modern ...</td>
</tr>
<tr>
<td>Staff offices</td>
<td>Well-lit, functional, convenient, modern ...</td>
</tr>
<tr>
<td>Worship Hall</td>
<td>Natural, calm, serene, meditative, ...</td>
</tr>
<tr>
<td>Exterior</td>
<td>Welcoming, noticeable, modern ...</td>
</tr>
<tr>
<td>Etc.</td>
<td></td>
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</tbody>
</table>

These are sample principles; this work is just beginning.
The role of the AAC is to help create dignified accessibility for people attending First by participating in the design process. This includes describing needs and barriers, reviewing and prioritizing solution options, and seeking grants for financial aid.

<table>
<thead>
<tr>
<th>Goals: Barrier-Free Access</th>
<th>Options being reviewed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobility</td>
<td></td>
</tr>
<tr>
<td>• Elevators</td>
<td>• Washrooms</td>
</tr>
<tr>
<td>• Powered doors</td>
<td>• Designated parking spots, Wheel-</td>
</tr>
<tr>
<td>• Ramps</td>
<td>Trans access</td>
</tr>
<tr>
<td>Hearing</td>
<td></td>
</tr>
<tr>
<td>• T-coil system</td>
<td>• Acoustically neutral flooring and</td>
</tr>
<tr>
<td>• Acoustic paneling</td>
<td>ceilings</td>
</tr>
<tr>
<td>Vision</td>
<td></td>
</tr>
<tr>
<td>• Lighting</td>
<td>• Wayfinding – signage, navigation</td>
</tr>
<tr>
<td></td>
<td>apps</td>
</tr>
<tr>
<td>Culture</td>
<td></td>
</tr>
<tr>
<td>• Preventing obstacles</td>
<td>• Seating plans</td>
</tr>
<tr>
<td>• Signaling and responding to</td>
<td></td>
</tr>
<tr>
<td>Emergencies</td>
<td>• Chemicals and allergens</td>
</tr>
</tbody>
</table>

The AAC will be engaging an Accessibility Consultant to assist us in identifying current best practices to accommodate the widest possible variation in abilities, while meeting at least the minimum requirements of the Ontario Building Code and the Accessibility for Ontarians with Disabilities Act (AODA).
To eliminate dependence on fossil fuels
- Tight building envelope
- Energy-efficient and “smart” equipment
- Solar array

To improve the quality of life for those who use the space
- Optimal ventilation
- Temperature comfort
- Low VOC materials
- Biophilic design (e.g., living wall)
- Considerations of electromagnetic frequencies and sound

To minimize waste, extraction and exploitation
- Salvage and appropriate disposal during demolition
- Sustainable/ethical building materials
- Water conservation (reducing run-off, rainwater cistern for washing/flushing/watering)

To design now for future needs and opportunities, and with more severe weather in mind; a means of serving the community and planet

To encourage ongoing manifestation of our principles
- Prominent placement of recycling/compost bins
- Bicycle racks
- EV charging stations

“Help design a building that respects our commitments to the environment in a sustainable way. This includes defining our environmental goals, reviewing and prioritizing solution options, and seeking grants for financial aid.”
RELIGIOUS EDUCATION SPACES

**Overall Goals**
To provide a safe and fun spiritual home for our children, where they can learn our UU values.
To make it as easy as possible for our teachers.

**Goals and Desires**
- ✓ To offer high quality programing
- ✓ Security
- ✓ Privacy (especially during confidential OWL discussions)

**Constraints**
- ▪ Limited space and funds
- ▪ Rooms may have other users on weekdays; renters will vetted for children’s spaces
- ▪ How many leaders & helpers are available

**Unknowns**
We don’t know how many children will attend or in which age cohorts; we’ll adjust room assignments as needed depending on attendance patterns. Historically the OWL programs bring attendance to a peak, appealing to members and non-members.
Now that our architect has been able to bring engineers into the building for more thorough review, we know more about what the structure can accommodate.

- **Mezzanine levels are not elevator accessible**
  - There are 3 “mezzanines” in the existing structure (small partial floors which sit in-between the main levels). These levels will not be accessible by elevator because of structural limitations which cannot be resolved in a way that would create comfortable spaces for all users. (Even if the elevator shaft could be reinforced, at significant expense, the ceiling heights at the elevator doors would be too low)
  - We are committed to only running First’s programs in accessible spaces. This means that we will not use the first and second mezzanine’s for First. They will be available for rental only. The basement mezzanine is a set of washrooms which will be available for use; there is an accessible washroom on the basement level.

- **Glass tower will not fit in its current configuration**
  - Because of the tower height and the piers that form part of the façade of the building, we cannot install the tower in its current form. The original artist, Sarah Hall, is excited by the possibilities to redesign and reuse her glass panels. We are working with her delegate and our architects to create a striking new design which will form part of the Oakwood face of the building.

- **Rooftop structure is not sufficient for use as a meeting space**
  - The roof of the existing structure is not strong enough to be approved for a gathering space. It is feasible to reinforce the structure; however, this would be a significant cost item.
The cost estimates we received during due diligence gave us confidence that 473 Oakwood was the most affordable building we could purchase and plan to renovate. Before finalizing our layout and design decisions, we will need to be confident that the renovation plan is also affordable. Several factors will impact the decision-making:

Construction Costs
- Costs for construction materials and services are much higher than they were pre-pandemic – up to twice as high. We’ve also added scope by discovering things we didn’t know or didn’t consider in the first costing. The money we have in hand will cover significantly less than what it would have then, even though contingencies were included.

Choices
- When our Construction Manager is hired, they will conduct another round of costing; they and our architects will assist us in “value engineering”, i.e., finding solutions which meet our desired outcomes at a more affordable level. We will need to prioritize our desired outcomes and make choices.

Funding sources
- We will need to begin a fundraising campaign with higher goals than originally anticipated
- We can borrow from our own investments with a commitment to pay them back; we can look outside the congregation for loans that can be paid back at a manageable rate
- The amount of funding required will depend on further changes in costs and on our choices
FINANCIAL CONSIDERATIONS

This chart shows the current cash we have in our “Relocation Fund”, based on income from our sale plus other earnings, less the relocation expenses we have paid so far (to end of February.) It also shows other funds available for spending and/or borrowing.

Next Steps to affordability include:

1. Next estimate: new costing will be done by our Construction Manager (to be hired in April); expected to be more accurate and somewhat lower.

2. Value engineering: working with the CM and architect to find more affordable solutions

3. Choices: selecting our priorities

<table>
<thead>
<tr>
<th>Income</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Income from selling 175 St. Clair W.</td>
<td>12,259,578</td>
</tr>
<tr>
<td>Purchase 473 Oakwood</td>
<td>-7,373,871</td>
</tr>
<tr>
<td>Donations</td>
<td>133,215</td>
</tr>
<tr>
<td>Interest</td>
<td>208,005</td>
</tr>
<tr>
<td>Rental Income (473 Oakwood)</td>
<td>184,232</td>
</tr>
<tr>
<td></td>
<td><strong>5,411,159</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Insurance (473 Oakwood)</td>
<td>-10,245</td>
</tr>
<tr>
<td>Prop Tax 175 St Clair</td>
<td>-277,296</td>
</tr>
<tr>
<td>Architects, consultants, lawyers</td>
<td>-83,724</td>
</tr>
<tr>
<td>HST refunds owing</td>
<td>588,900</td>
</tr>
<tr>
<td>Deferred purchase payment</td>
<td>500,000 due in December/2022</td>
</tr>
<tr>
<td></td>
<td><strong>Total cash 6,128,794</strong></td>
</tr>
</tbody>
</table>

Other Available Funds

- Small capital campaign: 500,000 original goal
- Property Reserve: 300,000 property mgmt, expense avoidance
- Mission Fund: 500,000 available by congregational vote
- Heritage Fund: 50,000 available
- Opportunities Fund: 40,000 available
- Grants - sustainability: 100,000 guess based on current discussions
- Grants - accessibility: 50,000 guess

Adjusted total funds available: **7,668,794**

Additional Sources

- Larger Capital Campaign: tbd
- Borrow from Opportunity Allowance: 2,000,000
- Borrow from Property Reserve: 700,000
- Borrow from external party: tbd

A larger capital campaign would be required to pay back a loan from our own funds or an external source. These funds are critical to our long-term financial sustainability.
DRAFT FLOORPLANS
Please open the separate document of floorplans while reviewing the following pages which describe highlights for each floor.

IMPORTANT NOTE:
The layouts and features in the floorplans are the drafts used to get an updated estimate of the cost of the overall project from a Cost Consultant. Another round of costing will be performed by our Construction Manager when they come onboard in April. After that round of costing, we will be in a better position to make informed choices about what we can afford to keep in the plans and what must be eliminated or achieved with a more affordable solution.

These are not our final plans.
**OVERALL BUILDING SYSTEMS CONSIDERATIONS**

At this stage, we are beginning to investigate the options and costs related to all of the systems needed to operate and maintain a building. It is too soon to indicate which selections will be made; the notes below indicate some of the features we’ll be considering and costing.

<table>
<thead>
<tr>
<th>Systems</th>
<th>Currently Investigating options and costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lighting</td>
<td>Motion sensitive with on/off options; dimmers in some areas; zones</td>
</tr>
<tr>
<td>Elevators, Stairs, Ramps</td>
<td>Existing large elevator; new lift; new central convenience stair and other stairwell enhancements; 1:14-slope ramps for additional accessibility where required</td>
</tr>
<tr>
<td>Access and Security</td>
<td>Automated key systems; exterior security lighting; cameras at entrances for remote greeting</td>
</tr>
<tr>
<td>Doors and Windows</td>
<td>Office and meeting room doors will have windows to protect safety as well as privacy; lots of natural light through existing windows and new skylights</td>
</tr>
<tr>
<td>Mechanical and Electrical</td>
<td>Many options are being reviewed, primarily in the context of our environmental goals discussed elsewhere (including insulation, heating &amp; cooling, electricity, solar, backup power, etc.)</td>
</tr>
</tbody>
</table>
| Signage                              | Exterior signs (e.g., wayside pulpit, community billboard, building and congregational name, tenant signage)  
Interior signs – room numbers, directional signs, places to post information; signage systems with visual and hearing support |
BASEMENT LAYOUT HIGHLIGHTS

Staff offices
• 5 small private offices dedicated to our staff at all times, with access to multiple meeting rooms for larger gatherings when required

Meeting rooms
• 3 medium sized rooms available for use by the RE program, committees and small groups
• 1 “bistro” meeting room which incorporates an existing kitchenette
• All rentable

Washrooms
• 1 accessible washroom on this level, which uses principles of universal-design and also houses a shower (there was not sufficient space to meet all of the principles of accessibility for the shower, depending on access needs)
• 2 additional existing washrooms reached via a half-stairway to the basement mezzanine level

Janitorial and Utilities
• Janitorial sink and supplies storage
• Existing sump rooms; transformer vault; electrical and mechanical equipment rooms
GROUND FLOOR LAYOUT HIGHLIGHTS

Welcoming Lobby
- Entry vestibule (which will help maintain heat in the lobby during winter)
- Reception area with space for a reception desk, welcome kiosk, signage
- Comfortable central stair; 1 large elevator; 1 smaller lift
- Lobby with comfortable seating space for casual discussions, waiting for transportation,

Meeting rooms
- 3 medium sized rooms available for use by the RE program, committees and small groups
- 1 large meeting hall with adjacent kitchenette and washrooms; foldable partition wall to separate large hall into two smaller rooms
- Small closets and countertops in each room
- All rentable

Washrooms, Janitorial and Utilities
- Children’s washroom adjacent to RE-use rooms; 2 accessible washrooms adjacent to large meeting hall
- Janitorial sink and supplies storage
- Storage space adjacent to rooms used by the RE program; sufficient for RE and other users

Mezzanine
- Small office; not accessible, therefore suitable for rental only
SECOND FLOOR LAYOUT HIGHLIGHTS

The second floor has the light, height, and continuous floor space required for our sanctuary and adult Sunday experience. The ground floor does not meet these requirements so it is not suitable for a sanctuary.

Meeting Halls
- 2 large meeting halls, one intended as the worship hall and one as a social space; both adjacent to a narthex and lobby area; all rentable
- Foldable doors to open the narthex for overflow seating from the worship hall
- Shelving in social space for library and bookstore functions
- East-facing worship hall, with large windows, stage and backdrop feature, 1:14 ramp to stage

Meeting Room
- 1 meeting room suitable for meetings, “green room”, distanced service attendance, nursing space; also designed as a “protect in place” safety room in case of fire; chair and table storage; coat closet and nametag storage; Rentable

Kitchen and Washrooms
- Generous kitchen with skylight, passthrough, and storage; adjacent to social space; rentable
- 1 private Universal washroom and 1 private washroom with urinal/toilet/sink
- 1 multi-user, accessible, gender-neutral washroom area

Mezzanine (half level above)
- 600 sq ft of unfinished space; not accessible, therefore suitable for rental only
EXTERIOR HIGHLIGHTS

Windows
- Walls of windows on east and west faces
- New layout of our stained glass (the design for this is a work in progress)

Greenspace and Parking space
- Small landscaping and outdoor seating area on the east side, taking over part of the current parking lot if allowed
- 5 or 6 parking spots will be retained; more can be kept if required, by not doing the greenspace

Ramps and Walkways
- 1:14+ ramps at front entrance on Oakwood and back entrance off Robina

Signage, Services and Amenities
- Exterior signage is a work in progress; we are looking at where to place a “wayside pulpit”, possibly a community billboard, signage for tenants
- We need to decide if we are going to name the building separately, or put the name of the congregation on it
- Bike rack area
- Garbage bin area
FEEDBACK PROCESS

Q&A Session
On March 27, you will hear presentations about this material. There will be a Q&A session to ensure you have a clear understanding of everything presented and the layouts/features being considered.

Providing Feedback
Before and after the meeting, you are invited to provide feedback on the current layout and design features. Your feedback will be considered as part of the overall weighing of design principles and goals. The next round of cost estimating for updated designs is scheduled for late April.

Please provide your feedback in response to these overall question:

1. Do you see any way in which the layout and features described today would not support our combined objectives? (i.e., Functionality, Accessibility, Gender Neutrality, Environmental Responsibility, Design Integrity, Rentability, Financial Affordability)

2. Do you have a suggestion for a way we could better meet our combined objectives?
3. What are the one or two most important features and/or principle of the design, to you?
4. What are the one or two the least important features and/or principle of the design, to you?

Please input your feedback here, by April 3: FirstUnitarianToronto.org/feedback
APPENDICES
Our Real Estate History

Since our founding, First has managed its real estate strategy to manage both our financial and our congregational sustainability:

July 1845 - Founding of First Unitarian Congregation of Toronto
- 113 George Street, 400-seat gabled white frame building
- rented first, then purchased; then sold

1852 – 1854
- purchased land to build a church at Jarvis & Dundas
- held services in Ontario Hall, a local courtroom, in the meantime

November 1854
- moved to newly constructed 300-seat Gothic sanctuary on Jarvis St.
- survived two fires; added basement in 1876; other renovations in 1878

1947
- sold Jarvis St. building as part of a Simpson’s development
- purchased land on St. Clair Ave. W; renovated
- from 1949 to 1951, met in the International Cinema on Yonge St

1951
- moved to new modernist building at 175 St. Clair Ave. W

1990-1992
- renovated 175 St. Clair W; services at Deer Park United
OUR REAL ESTATE HISTORY

When Shawn was called to be First’s Minister in 2007, the congregation indicated it was planning to move. Four committees have played a role in getting us here, with members working together through a process of steps with assistance from external consultants and input from the congregation.

**Property Options Task Force**, 2006-7 Chair: Richard Kirsh
Environmental scan of decision factors; recommendation to keep studying

**Vision & Property Task Force**, 2007-8 Chair: Nancy Lee
Vision Statement as context for future real estate decisions

**Building for the Future**, 2012-14 Chairs: Nancy Lee, then Karen Dunk-Green
Property valued at $5-7 million. Developer proposals for a condo above us were deemed not financially viable or desirable. Need renovation study.

**Real Estate Task Force**, 2016 onward, Chair: Karen Dunk-Green

**2016, Renovation Assessment and Decision**
Renovation costs and outcomes (including elevator improvements, more and more accessible washrooms) deemed unaffordable and unsatisfying. Sept 2016, the congregation voted to sell 175 St. Clair Ave. W.

**2017 to 2019, Marketing and Selling**
Sale finalized Nov/18. Closing date (+extensions) December 2019
Leaseback arrangement (extended) until June 2022

**2019 to 2021, Searching for a new home**
Many dozens of sites considered; 11 offers made, 6 rejected by owner, 5 withdrawn by us after diligence
In November 2018, First finalized the sale of 175 St. Clair W. to Plaza Developments for $15MM. Ownership was then transferred to St. Clair Developments by Plaza. The closing date for the sale was extended multiple times at the request of the new owner, who paid fees to First of $1.13MM for these extensions, increasing the net income to $15.75 after deductions for tax and fees.

Using funds from the sale, the Board established two new invested, funds totaling $3MM, (Building Reserve and Operating Allowance) to support First’s long term financial sustainability. After deducting other expenses, there is ~$12.4MM available to spend from the proceeds of the sale of our building. This amount will need to cover the cost of purchasing a new or existing building and the cost of renovations and the cost of the land on which it will reside. Fundraising and credit may be necessary.

### Income from sale of 175 St. Clair Ave. W.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sale price</td>
<td>15,000,000</td>
<td>$500,000 holdback until Dec 2022</td>
<td></td>
</tr>
<tr>
<td>Closing Date Extension income</td>
<td>1,130,000</td>
<td>buyer requested several extensions</td>
<td></td>
</tr>
<tr>
<td>Less:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Real Estate Agent Fees</td>
<td>-364,538</td>
<td>2% of sale price</td>
<td></td>
</tr>
<tr>
<td>HST on Real Estate Fees</td>
<td>-47,390</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>less rebate on HST</td>
<td>33,027</td>
<td>70%</td>
<td></td>
</tr>
<tr>
<td><strong>Total Sale</strong></td>
<td><strong>15,751,099</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Allocations and Expenditures

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Reserve Fund</td>
<td>-1,000,000</td>
<td>capital to be preserved other than by congregational vote</td>
<td></td>
</tr>
<tr>
<td>Operating Allowance</td>
<td>-2,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Property taxes during lease period (estimate)</td>
<td>-343,426</td>
<td>adjusted for 40% charitable rebate</td>
<td></td>
</tr>
<tr>
<td>Moving expenses, legal fees</td>
<td>-16,463</td>
<td>[corrected]</td>
<td></td>
</tr>
<tr>
<td><strong>Total allocations and expenditures</strong></td>
<td><strong>-3,359,889</strong></td>
<td>[corrected]</td>
<td></td>
</tr>
</tbody>
</table>

**Building Sale Income available after allocations** | **12,391,210** | [corrected]
### WORKING TEAMS – SO FAR!

**REAL ESTATE STEERING COMMITTEE (FRET)**  
*Karen Dunk-Green, Beth Ann McFadden, David Priebe, Greg Suttor, Loo Russell, Richard Kirsh, Rev. Shawn Newton*

<table>
<thead>
<tr>
<th>ACCESSIBILITY ADVISORY COMMITTEE</th>
<th>ENVIRONMENTAL ADVISORY COMMITTEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Richard Kirsh, RSC Liaison; Peter Hughes, Adele Massena, Barb Wentworth, Bob Sherman, Guy Le Ny, Kate Chung, Ken Wulff, Nacia Miller, Paul Fraser, Susan Vaile, Wayne Lepine</td>
<td>David Priebe, RSC Liaison; Donald Cole, Cathy Brown, Kate Chung, Linda Heron, Mike Muller, Leslie Solomonian, Greg Suttor, Marg Wiebe</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WORSHIP/SANCTUARY</th>
<th>AESTHETICS ADVISORY COMMITTEE</th>
<th>ON THE MOVE</th>
<th>ADMIN AND OPERATIONS</th>
</tr>
</thead>
</table>
| Beth Ann McFadden, RSC Liaison; Rev. Shawn Newton, Dallas Bergen, Lynn Harrison, Matt Rideout | Beth Ann McFadden, RSC Liaison; Karen Dunk-Green, Beth Ann McFadden, Loo Russell, Susan Low-Beer, Aleza Coldevin | Loo Russell, RSC Liaison  
Art Brewer, Jane Larimer, Judy Clarke  
+16 functional leads and member/friend teams doing purging and packing | Loo Russell, RSC Liaison  
Greg Russell, Sue Berlove, Matt Rideout, Carmen Schulz, Walter Snow, others tbd |

<table>
<thead>
<tr>
<th>RELIGIOUS EDUCATION</th>
<th>MEMORIES, CELEBRATIONS</th>
<th>KITCHEN AND EVENT SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loo Russell, RSC Liaison; Angela Klassen</td>
<td>Margaret Bryant, Margaret Kohr, Jennifer Beer, Rona Macdonald, others TBD</td>
<td>Beth Ann McFadden, RSC Liaison; Loo Russell, Hope Paul, Janine Gliener, Wendy Peebles</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ADMIN AND OPERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loo Russell, RSC Liaison; Greg Russell, Sue Berlove, Matt Rideout, Carmen Schulz, Walter Snow, others tbd</td>
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</table>
## PROFESSIONAL TEAM

<table>
<thead>
<tr>
<th>BA Consulting Group Ltd – Traffic Consultants</th>
<th>Levitt Goodman Architects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entuitive – Structural Engineer</td>
<td>Dean Goodman, Jason Ruhl, Kara Burman</td>
</tr>
<tr>
<td>InVision – Mechanical Engineer</td>
<td><a href="https://lga-ap.com/">https://lga-ap.com/</a></td>
</tr>
<tr>
<td>Miller Thomson – Tax Lawyer</td>
<td>TMS Consulting</td>
</tr>
<tr>
<td>Robins Appleby LLP – Real Estate Lawyer</td>
<td>Tracey Sullivan, Project Manager</td>
</tr>
<tr>
<td>SGL Planning – Planning and Urban Design</td>
<td><a href="https://tmsconsulting.ca/">https://tmsconsulting.ca/</a></td>
</tr>
<tr>
<td>SVNG - Surveyors</td>
<td>[RFP in progress]</td>
</tr>
<tr>
<td>Soberman Engineering – Elevator Consultant</td>
<td>Construction Manager</td>
</tr>
<tr>
<td>UrbanX – Surveyor</td>
<td>TBD</td>
</tr>
<tr>
<td>Vermeulens – Cost Consultant</td>
<td><strong>Project Partners</strong></td>
</tr>
<tr>
<td>John Wilcox – Stain Glass Consultant</td>
<td></td>
</tr>
<tr>
<td>Zon Engineering – Environmental Consultant</td>
<td></td>
</tr>
<tr>
<td>TBD – Accessibility Consultant</td>
<td></td>
</tr>
<tr>
<td>TBD – Interior Designer</td>
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</tbody>
</table>

**As-Needed Partners**