



THE REGIONAL MUNICIPALITY OF NIAGARA
PLANNING & ECONOMIC DEVELOPMENT COMMITTEE
FINAL AGENDA

PEDC 2-2019

Wednesday, February 20, 2019

1:00 p.m.

Council Chamber

Niagara Region Headquarters, Campbell West

1815 Sir Isaac Brock Way, Thorold, ON

	Pages
1. <u>CALL TO ORDER</u>	
2. <u>DISCLOSURES OF PECUNIARY INTEREST</u>	
3. <u>PRESENTATIONS</u>	
4. <u>DELEGATIONS</u>	
5. <u>ITEMS FOR CONSIDERATION</u>	
5.1 <u>PDS 1-2019</u> Matching Regional Incentive Funding Request for Lundy's Lane CIP	3 - 7
6. <u>CONSENT ITEMS FOR INFORMATION</u>	
6.1 <u>ED 1-2019</u> Economic Development Overview <i>Presentations will precede the discussion of this item.</i>	8 - 116
6.2 <u>PDS 2-2019</u> Environmental Planning Function Overview (and BE CIRCULATED to the Local Area Municipalities, Niagara Peninsula Conservation Authority (NPCA), and the Niagara Home Builders Association) <i>A presentation will precede the discussion of this item.</i>	117 - 157

6.3	<u>PDS 10-2019</u> Update on Natural Environment Work Program – New Regional Official Plan (and BE CIRCULATED to the Area Municipalities and the Niagara Peninsula Conservation Authority)	158 - 171
	<i>A presentation will precede the discussion of this item.</i>	
6.4	<u>PDS 3-2019</u> Development Applications Monitoring Report - 2018 Year End (and BE CIRCULATED to Local Area Municipalities, the Niagara Peninsula Conservation Authority, Niagara Home Builders Association, Niagara Industrial Association, local Chambers of Commerce and School Boards)	172 - 188
	<i>A presentation will precede the discussion of this item.</i>	
6.5	<u>PDS-C 3-2019</u> Update on the Status of GO Service to Grimsby	189 - 204
	<i>A presentation will precede the discussion of this item.</i>	
6.6	<u>PDS-C 4-2019</u> Niagara Falls GO Station Functional Design	205 - 208
6.7	<u>PDS-C 5-2019</u> Ramada Beacon Hotel Specialty Crop Designation	209 - 301
6.8	<u>PDS-C 7-2019</u> Niagara Region's draft comments: Amendment 1 to the Growth Plan (ERO 013-4504, 013-4505, 013-4506, 013-4507)	302 - 331

7. OTHER BUSINESS

8. CLOSED SESSION

There are no closed session items.

9. NEXT MEETING

The next meeting will be held on Wednesday, March 20, 2019 at 1:00 p.m. in the Council Chambers, Regional Headquarters.

10. ADJOURNMENT

If you require any accommodations for a disability in order to attend or participate in meetings or events, please contact the Accessibility Advisory Coordinator at 905-980-6000 (office), 289-929-8376 (cellphone) or accessibility@niagararegion.ca (email).

Subject: Matching Regional Incentive Funding Request for Lundy's Lane CIP

Report to: Planning and Economic Development Committee

Report date: Wednesday, February 20, 2019

Recommendations

1. That staff **BE DIRECTED** to continue to deliver Regional grant and incentive programs in 2019 that are presently under review and that were eligible as of December 31, 2018 subject to budget approval; and,
2. That a copy of Report PDS 1-2019 **BE CIRCULATED** to all Local Area Municipalities.

Key Facts

- The purpose of this report is to provide background on a request from the City of Niagara Falls for Niagara Region to partner in providing funding for a new Lundy's Lane Community Improvement Plan (CIP) that was approved by the City Council in 2018.
- Regional grant and incentive programs are currently under review. In 2018, Regional Council approved the delivery of existing programs in 2019 under the current structure, subject to budgetary approval, and the postponement of funding for new or revised CIP programs. (reports PDS-C 8-2018 and PDS 31-2018). The Lundy's Lane CIP is a new CIP program.
- The decision not to partner on new or revised CIP programs was due to budget pressures caused by the over-subscription of existing programs and pending program changes.
- Funding to deliver Regional grant and incentive programs in 2019 has not yet been approved by Regional Council. It is felt that making a decision to Regional funding participation in the Lundy's Lane CIP is premature and that the request should be considered along with other locally approved CIP incentive programs pending completion the Regional incentive review.

Financial Considerations

The 2018 budget for Regional planning and economic development incentive programs was \$8.7 million. This included funding for the Smarter Niagara Incentive Program (SNIP) of \$634,000. A review of SNIP and other Regional grant and incentive programs is currently in progress and 2019 budget decisions are pending regarding these programs.

Regional funding to support the Lundy's Lane CIP predominantly would fall under the Region's Smarter Niagara Incentive Program (SNIP). In 2016 and 2017, funding requests for simple grants and incentives (grants and incentives that have a fixed budget) exceeded the annual budget of \$634,000. Funding from the Region's Smart Growth Reserve (a reserve that was built up in the early years when programs were being established) was used to ensure that existing commitments were funded. This reduced the balance in the reserve to the current amount of \$201,000. In 2018, requests for simple grants were below the annual budget and the reserve was not utilized.

Most CIPs also include tax increment grants, which are funded through growth. Funding these tax-based grants has decreased the amount of funding available to pay for the Region's growth-related operating and capital costs.

As the programs requesting funding under the Lundy's Lane CIP (and the other three CIPs which may request funding) are a combination of simple and tax increment grant programs, including them as eligible for Regional funding would put increased pressure on Regional incentive budgets and the funding available for growth, particularly as uptake for programs in new CIP areas is higher in the first 1-2 years.

Analysis

In 2018, Regional Council twice confirmed its direction to staff to continue delivery of existing incentive programs, for 2018 (PDS-C 8-2018) and 2019 subject to budgetary approval (PDS 31-2018). Consistently since May 2017, Regional funding participation in eligible incentive programs in new or revised CIPs has been postponed pending completion of the Regional incentive review.

The decision to proceed with delivery of existing Regional incentive programs was intended to provide consistent support of incentives aimed at economic prosperity in long-standing programs and partnerships, while remaining fiscally responsible in light of serious budget pressures on incentive programs and the growth budget.

Participation in new or revised CIPs, of which there are four, was postponed pending completion of the ongoing incentive review for reasons including:

- Regional budget pressures which required substantial funding from reserves to meet existing commitments;
- Continued Regional participation in many incentives which remain available to certain projects in the new/revised CIP areas (e.g., brownfield programs);
- The ability of Local Area Municipalities to continue to offer incentives in the new/revised areas without Regional matching funding; and
- The desire for consistency in application of Regional incentive funding.

Niagara Region currently partners on well over 65 incentive programs. There has been increased uptake in funding requests from partners in recent years, particularly in the Smarter Niagara Incentive Program (SNIP) suite of incentive programs, under which funding would be requested for nearly all programs in the new/revised CIPs. Expanding the number of potential requests for this funding, particularly given that funding requests in the first 1-2 years of a new CIP are substantial, would increase pressures on both fiscal and staffing resources as existing programs must continue be administered while work on the incentive review is being completed.

The incentive review is currently expected to be completed by Q2 2019, with implementation of recommendations anticipated for 2020.

For the reasons above and as Council has not yet determined 2019 budget levels for delivery of existing programs, expanding access to often over-subscribed incentive programs is not recommended.

Alternatives Reviewed

The recommendation put forward in this report is to continue with delivery of Regional incentive program matching funding existing in 2018 as directed by Council.

Alternatives to this recommendation include:

- (1) Approve Regional matching funding participation for all of the eligible Lundy's Lane CIP grant programs, subject to the 2019 budget.** There is currently no budget for existing 2019 incentive programs; should budget be approved, this would increase potential funding requests for in-demand Regional matching dollars. In addition, access to new programs/program parameters may be limited and inconsistent pending possible program changes under the Regional incentive review. Approval of this request would likely result in three other requests for Regional funding in new/revised CIP programs, increasing the challenges outlined above. **(Not recommended)**
- (2) Approve Regional matching funding participation only for eligible tax increment grants in the Lundy's Lane CIP area, subject budget approval.** Tax increment grants have the longest commitment period (normally 10 years) and usually are for the largest amounts of nearly all Regional incentives. There continues to be significant demand on the Region's growth budget from which tax increment grants are funded, and expanding the potential for additional grants is likely to increase this budget pressure. In addition, there are two other tax increment grants already available in the Lundy's Lane CIP area for certain projects, through the City's Brownfield CIP and Gateway CIP programs, though not all tax increment projects anticipated through the Lundy's Lane CIP program would be eligible for these, depending on their use. **(Not recommended)**

Relationship to Council Strategic Priorities

This report is brought forward in response to a request made at the January 9, 2019 Planning and Economic Development Committee. The recommendation in this report supports strategic Regional objectives including economic prosperity, fiscal responsibility, program consistency and administrative efficiency.

Other Pertinent Reports

PDS 31-2018	Regional Incentive Delivery and Eligibility in 2019
PDS-C 8-2018	Regional Incentive Review and Community Improvement Plans
PDS 42-2017	Overview of 2018 Incentive Review
PDS 33-2017	Smarter Niagara Incentive Program 2017 Budget Update
PDS 6-2017	Town of Lincoln Request for the Region to Participate in its New Community Improvement Plan Incentives Program

Prepared by:

Marian Bannerman, PhD
Program Manager, Grants & Incentives
Planning and Development Services

Recommended by:

Rino Mostacci, MCIP, RPP
Commissioner
Planning and Development Services

Submitted by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

This report was reviewed by Doug Giles, BES, MUP, Director, Community and Long Range Planning.

Appendices

Appendix 1	List of Regional Incentive Programs Under Review	Page 6
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Appendix 1 – List of Regional Incentive Programs Under Review

1. Smarter Niagara Incentive Program (SNIP)

- Environmental Assessment Study Grant
- Building and Façade Improvement Grant/Loan
- Residential Grant/Loan
- Heritage Restoration and Improvement Grant/Loan
- Agricultural Buildings and Facilities Revitalization Grant/Loan
- Agricultural Feasibility Study Grant
- Community Improvement Plans (CIPs)/Planning Studies Grant
- Affordable Housing Grant/ Loan Program
- Property Rehabilitation and Redevelopment Tax Increment Grant/Loan
- Brownfield Tax Assistance Program
- Development Charge Reduction Grant

2. Public Realm Investment Program

3. Waterfront Investment Program

4. Niagara Investment in Culture Program

5. Gateway Economic Zone and Centre

- Gateway CIP Tax Increment Based Grant
- Gateway CIP Regional DC Reduction Grant

6. Industrial Development Charge Grant

7. Non-Profit Regional Development Charge Grant

8. Heritage Tax Rebate Program

NIAGARA ECONOMIC DEVELOPMENT OVERVIEW



PLANNING AND ECONOMIC DEVELOPMENT COMMITTEE

FEBRUARY 20, 2019

ROLE OF NIAGARA ECONOMIC DEVELOPMENT

To support the growth of Niagara's economy and ensure competitiveness by:

Promoting the Niagara Region through investment attraction and lead generation activities in strategically targeted sectors and geographies.

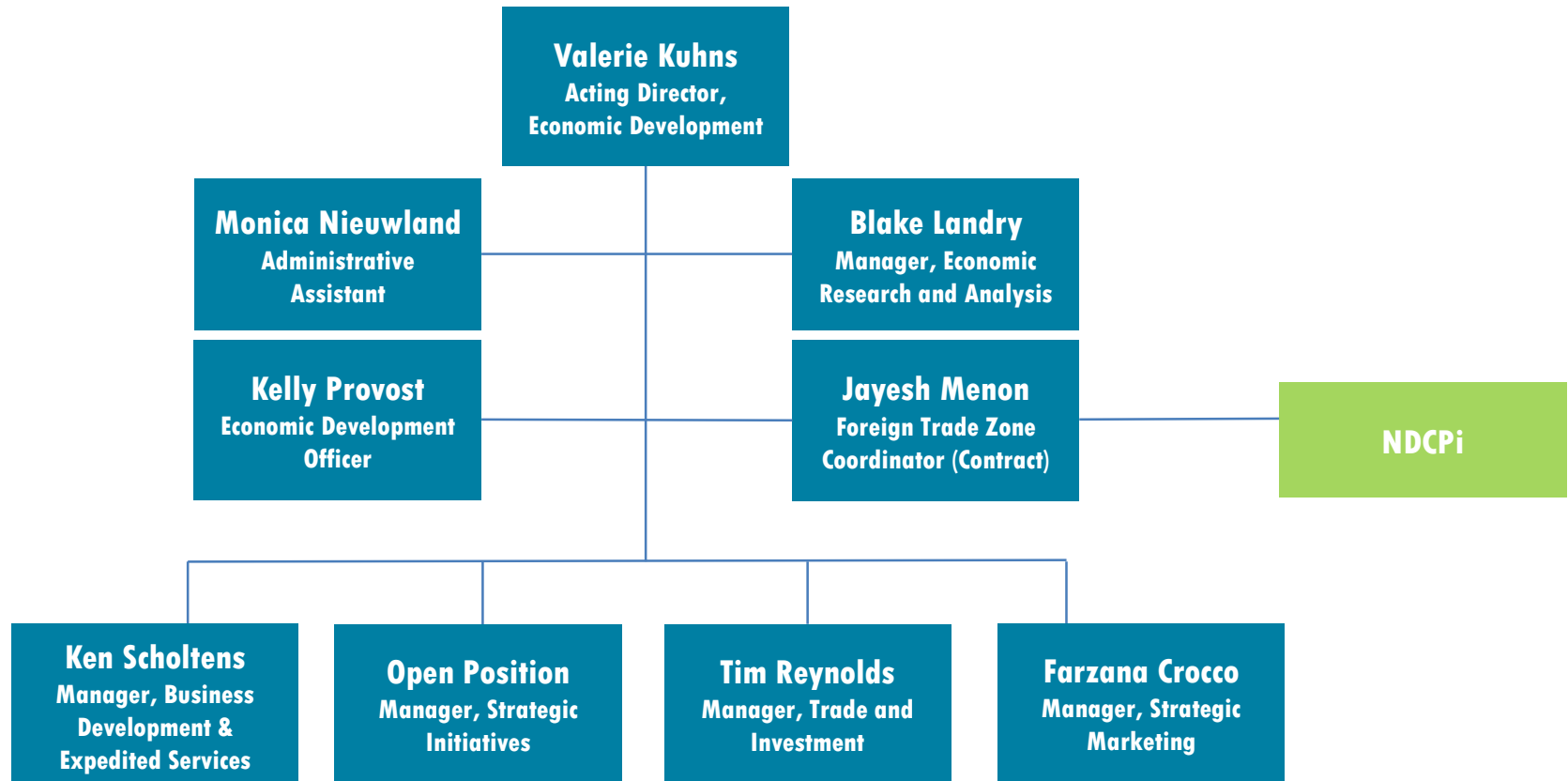
Providing expedited business services to support private sector development.

Conducting economic research and analysis to ensure an in-depth understanding of the region's economy.

Supporting advocacy to the provincial and federal government on behalf of regionally significant projects.

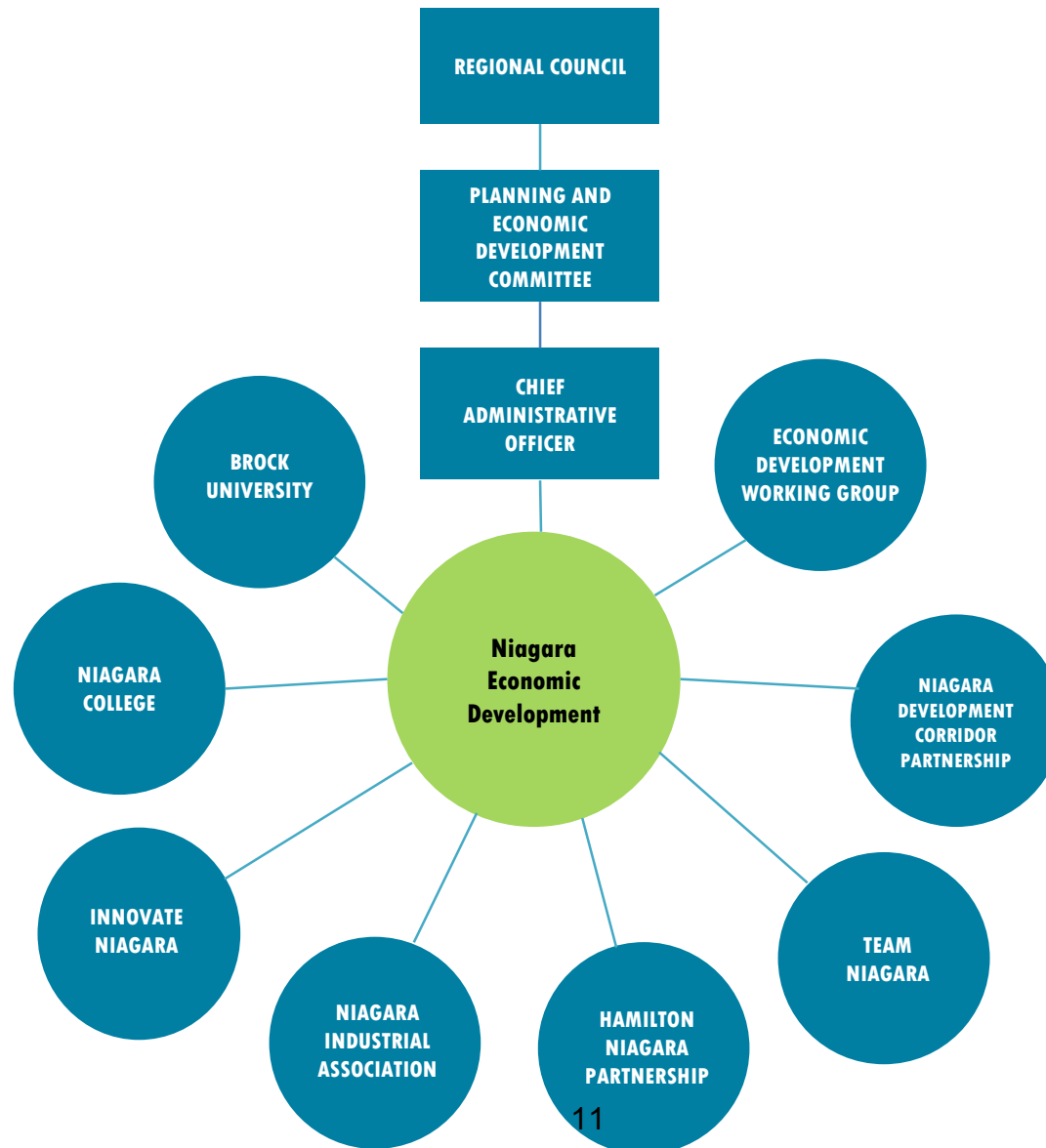
NIAGARA ECONOMIC DEVELOPMENT

TEAM ORGANIZATION



NIAGARA ECONOMIC DEVELOPMENT

PARTNERSHIPS AND REPORTING STRUCTURE



NIAGARA ECONOMIC DEVELOPMENT

TEAM NIAGARA MOU

NIAGARA ECONOMIC DEVELOPMENT MODEL

- **CAOs and Economic Development Officers from 12 municipalities wanted to work together collaboratively within a two-tiered economic development model**
- **EDTF 4-2012, May 16th 2012 Delineation of Economic Development Roles and Responsibilities between the Local Municipalities and Niagara Region Economic Development Services**
- **Regional role: Investment Attraction/regionally significant projects**
- **Local Area Municipality role: Business retention and expansion**

NIAGARA ECONOMIC DEVELOPMENT

TRADE & INVESTMENT

Primary function is to attract foreign direct investment (FDI) to Niagara region.

Geographic Market Focus

- $\pm 57\%$ of Ontario's FDI from the US
- $\pm 30\%$ FDI from the UK and Europe
- Focus resources on these markets

Dynamic & Complex Global Market

- US protectionism versus Canada's open for business position
- CETA • CUSMA • CPTPP • Brexit • Uncertainty
- Canada is and must be a trading nation

Moment in Time

- Qualified lead missions within - market lead generators
- Upcoming trade missions to US, UK, and Europe

NIAGARA ECONOMIC DEVELOPMENT

STRATEGIC MARKETING

Supports the promotion of Niagara as a place for business investment and resident attraction. Marketing activity involves marketing best practices and considers Niagara's competition.

Build Foundational Pillars

- Internal CRM
- Marketing plan
- Differentiation and key messaging

Key Marketing Activity

- Ad campaigns for business and resident attraction
- Active social media and online content
- Build marketing materials to support team needs

Develop Networks & Community

- Launch Niagara Ambassador program
- Launch e-newsletter
- Active media relations

NIAGARA ECONOMIC DEVELOPMENT

BUSINESS DEVELOPMENT & EXPEDITED SERVICES

Support business investment by acting as a single point of contact and providing concierge-type services to facilitate new investment.

Site Selection

- Respond to site selection inquiries
- Identify greenfield properties for new development opportunities
- Connect businesses with local commercial and industrial realtors

Grants & Incentives

- Administer Gateway CIP and Industrial Development Charge Grant Programs
- Liaise with federal and provincial counterparts to access additional funding programs

Expedited Services

- Work with local municipalities to support new investments
- Collaborate across departments to facilitate business investment by providing expedited development services

NIAGARA ECONOMIC DEVELOPMENT

STRATEGIC INITIATIVES

Strategic Initiatives have long term objectives and aim to position the Region for involvement in high level tactical projects in support of economic growth.

Strategic Planning

- Economic development strategy/advocacy
- Economic Trade Corridor designation/National Trade Corridors Fund
- St. Lawrence Seaway lands/port feasibility

Business Planning & Reporting

- NED Annual Business Plan (operational)
- Reporting to PEDC/Regional Council
- Economic Development Working Group
- Niagara Foreign Trade Zone

Partnerships & Funding

- Niagara Development Corridor Partnership Inc., Hamilton Niagara Partnership, Team Niagara
- Regional support for innovation
- Invest Canada Communities Initiative (ICCI)

NIAGARA ECONOMIC DEVELOPMENT

ECONOMIC DEVELOPMENT OFFICER

LAM Ec Dev Services

- **Non-EDO municipalities include:** Wainfleet, West Lincoln, Grimsby, Pelham, NOTL and Thorold
- **Support includes:** business attraction, business expeditor services, company visits as invited, informational requests, etc.

Sector Support

- **Advancing agriculture and tourism priorities. Examples include:**
 - Irrigation Strategy support
 - Canada Summer Games RFP opportunities
 - Niagara Gateway Information Centre contract

Project Management

- **Initiate and advance regionally significant projects. Examples include:**
 - Bid for the 2020 Brier
 - Brock Centre for Sport Management: Sport Tourism report
 - Niagara District Airport marketing and development

NIAGARA ECONOMIC DEVELOPMENT

ECONOMIC RESEARCH & ANALYSIS

Economic Research & Analysis is responsible for economic, business, trade, investment, and related information management and provision.

Research & Analysis

- Produce sector, trade, and related reports
- Maintain economic and business databases
- Respond to internal and external information inquiries

Regional Economic Indicators

- Track and monitor regional economic indicators and report on findings/issues/opportunities
- Produce annual Niagara Economic Update
- Maintain KPI dashboards

Stakeholder Engagement

- Niagara Workforce Planning Board
- Niagara Community Observatory (Brock)
- Niagara College
- Niagara Industrial Association

QUESTIONS

Connect with Niagara Economic Development

Website: Niagaracanada.com

Twitter: [@NiagaraEconomic](https://twitter.com/NiagaraEconomic)

LinkedIn: [Niagara Canada – Economic Development](#)



NIAGARA
CANADA

NIAGARA FOREIGN TRADE ZONE
**YOUR LAUNCHPAD
TO EXPORT SUCCESS**

What is a Foreign Trade Zone

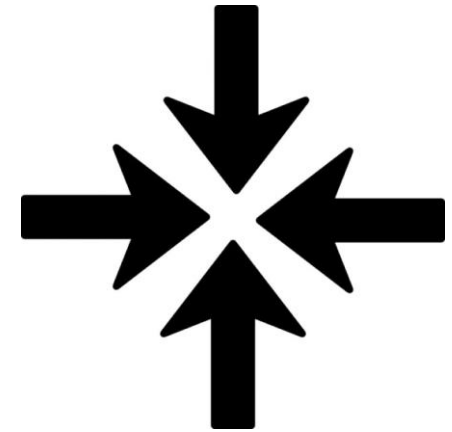
Companies are exempt from tariff and tax with respect to the local purchase or importation of raw materials, components or finished goods for exports or re-exports.

Canada's duty and tax relief is geographically flexible and can be enjoyed ***anywhere*** in the country.

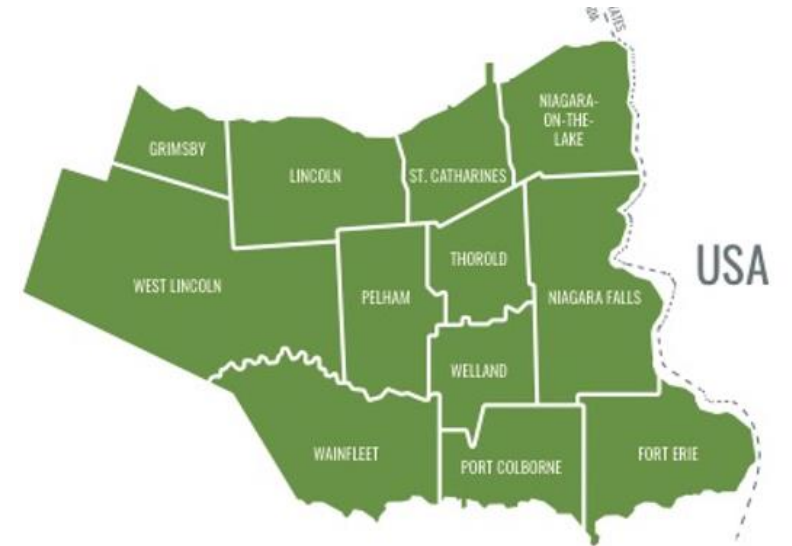


What is a Foreign Trade Zone Point

An FTZ Point refers to one of Canada's strategic locations for international trade; where an organization with a mandate to promote exports and foreign direct investments is uniquely supported by a single-point of access to information in relevant government policies and programs.



Foreign Trade Zone Point



Niagara Foreign Trade Zone Point : An Introduction

<https://vimeo.com/266544510>

NIAGARA
CANADA
nftz.ca

EXPORTING JUST GOT A WHOLE LOT EASIER!

The greatest benefit of the NFTZ is that all your exporting needs are addressed by **A SINGLE POINT OF CONTACT**



**ALL IT TAKES IS ONE
PHONE CALL OR EMAIL
TO ONE PERSON**

to access the programs
and professional advice
you need to improve your
company's trade efforts.

Benefits of Foreign Trade Zone Point

- One stop service for information
- Assist in your import / export activities
- \$\$\$ Cost Savings
- Improved Cash flow
- Reduced paper work
- Develop your international market and business opportunities



A TASK FORCE THAT REALLY REPRESENTS

PUBLIC SECTOR REPRESENTATION

THE NFTZ TASK FORCE is a collection of public and private stakeholders with the knowledge, perspectives and connections to help Niagara keep pace with the rapid pace of change in the international trade sector.



Canada Revenue
Agency

Agence du revenu
du Canada



Canada Border
Services Agency

Agence des services
frontaliers du Canada



Transports
Canada

Transport
Canada



Global Affairs
Canada

Affaires mondiales
Canada



Innovation, Science and
Economic Development Canada

Innovation, Sciences et
Développement économique Canada



Niagara  Region



WHO CAN THE NIAGARA FOREIGN TRADE ZONE HELP?

OPERATORS
IMPORTERS
LOGISTICS
PROVIDERS
MANUFACTURERS

TRANSPORTERS
BUSINESS OWNERS
EXPORTERS
PRODUCERS

JOIN THE GROWING LIST

**COMPANIES THAT ARE GROWING THEIR BOTTOM LINE
THROUGH SUPPORT FROM NIAGARA FREE TRADE ZONE**



TAKE THE NEXT STEP: GET STARTED ON YOUR PATHWAY TO WORLD MARKETS



Contact Details



Jayesh Menon, Foreign Trade Zone Coordinator



289-320-8969 or 905-980-6000 Ext. 3440



Jayesh.menon@niagararegion.ca



www.nftz.ca

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Subject: Economic Development Overview

Report to: Planning and Economic Development Committee

Report date: Wednesday, February 20, 2019

Recommendations

That Report ED 1-2019 **BE RECEIVED** for information.

Key Facts

- The purpose of this report is to provide the PEDC with an overview of the Economic Development Department and their activities.
- The primary role of the Niagara Economic Development Department (NED) is to support the growth of Niagara's economy and ensure competitiveness.
- Economic Development activities principally take place within four function areas: Trade and Investment; Business Development and Expedited Services for Business; Strategic Initiatives and Strategic Marketing Initiatives.

Financial Considerations

Funding for the activities described in this report has been included in the 2019 operating budget and is subject to approval by Council.

Analysis

This report introduces two presentations by the Niagara Economic Development team. These presentations aim to provide members of the PEDC with an understanding of the scope of the work of the Department as well as the Niagara Foreign Trade Zone. It also provides an overview of the development of the Economic Development Strategy.

Reporting and Delineation of Economic Development Responsibilities

Niagara Economic Development reports directly to the Chief Administrative Officer (CAO) and reports to Regional Council through PEDC. We work closely with economic development staff in the six municipalities who have economic development offices and with the CAOs in the municipalities where there are no economic development staff. Through a Memorandum of Understanding (MOU), drawn up by the 12 CAOs at the time in 2012, and approved by Regional Council, there is a clear delineation of economic development responsibilities, so as not to duplicate efforts. The MOU states that the local municipalities are best suited to deliver Business Retention and Expansion (BRE) services because of their unique knowledge of their respective municipalities.

NED is ideally positioned to deliver services that support economic development for the region as a whole, including investment attraction, lead generation and research. Team Niagara, which includes representation from all municipalities was formed to implement the MOU.

Economic Development Eco-System in Niagara region

Regional Economic Development team members operate within an eco-system of stakeholders in the Niagara region and beyond. Some of these relationships are formalised through funding agreements while others are informal working relationships. These stakeholders include but are not limited to Team Niagara, Niagara Development Corridor Partnership Inc., Brock University, Niagara College, Innovate Niagara, Chambers of Commerce and the Niagara Industrial Association.

Regional Economic Development Areas of Focus

There are four main functional areas identified within NED, each of which has a dedicated manager. These areas are Trade and Investment, Business Development and Expedited Services, Strategic Initiatives and Strategic Marketing. In addition, there is a Manager, Research and Analysis whose work supports all of our projects and an EDO who provides support to the tourism and agriculture sector as well as being a resource to the local area municipalities.

In addition, as part of the NED team, there is a coordinator role for the Niagara Foreign Trade Zone (NFTZ) point. Niagara Region has sub-contracted the day-to-day operations of the NFTZ to the Niagara Development Corridor Partnership Inc. (NDCPi) in Fort Erie, with oversight provided by NED. The coordinator is physically located in office space provided at the offices of the Fort Erie Economic Development and Tourism Corporation.

Economic Development Strategy

At the beginning of 2018, a partnership was formed between Niagara Region, Brock University and Niagara College to develop a Long Term Economic Development Master Plan, which looked forward 20 years. The objective of this Master Plan was to align the long-term goals of all three institutions to ensure economic growth and prosperity for the Niagara region. A consultancy company, Global Investment Attraction Group (GIAG), was awarded the contract in May 2018, following a competitive Request for Proposal (RFP) process. GIAG completed the research and analysis phase of the project and extensive stakeholder consultations, by the end of September. At that time, following a major change of direction, NED continued to develop a shorter-term strategy on its own, building on the work completed by GIAG and additional sector consultations. Our two partners have received all reports and will receive the final strategy document. The GIAG reports are attached to this report as appendices, for information. They include

the Economic Analysis and Forecasting Draft Discussion Paper, A Vision of Niagara Region in 2041 Discussion Paper and the Aggregated Stakeholder Consultation Report.

The shorter five year Economic Development Strategy is currently being finalised and the intention is to present a draft to PEDC for information.

Alternatives Reviewed

None applicable.

Relationship to Council Strategic Priorities

Economic development activities described in this report directly support three of Council Strategic Priorities:

- Fostering innovation, investment and entrepreneurship
- Building a labour-ready workforce
- Positioning Niagara globally

Other Pertinent Reports

None

Prepared and Submitted by:

Valerie Kuhns
Acting Director, Economic Development
Economic Development

Recommended by:

Ron Tripp, P.Eng.
Acting Chief Administrative Officer

Appendices

Appendix 1	Economic Analysis and Forecasting Draft Discussion Paper
Appendix 2	A Vision of Niagara Region in 2041 Discussion Paper
Appendix 3	Aggregated Stakeholder Consultation Report

Economic Analysis and Forecasting Draft Discussion Paper

Niagara Region Economic Development Master Plan

October 1, 2018



GLOBAL
INVESTMENT ATTRACTION
GROUP

Introduction

This discussion paper consists of an overview of key findings of the Economic Analysis and Forecasting review work undertaken as part of the Research, Consultation and Master Plan Development phase of the Economic Development Master Plan for Niagara project. It is intended to provide the reader with an understanding of the Niagara economy based on available background data.

This paper is organized into the following sections:

- Section 1: Demographic and Labour Force Trends;
- Section 2: Commuting Trends;
- Section 3: Economic Base and Sector Analysis;
- Section 4: Economic Outlook;
- Section 5: Export Activity.

Section 1: Niagara Demographic and Labour Force Trends

Population Levels and Growth

Niagara's 2016 population level was 447,888, which is 3.8% higher than its 2011 population level. The Niagara percentage population growth between 2011 and 2016 was slightly lower than Ontario (4.6%) and Canada (5.0%). Population growth varied by municipality in Niagara with the highest growth occurring in Niagara Falls (5,074) and population decrease (118) occurring in Port Colborne. Population levels and growth by municipality in Niagara are shown in the following exhibit.

Exhibit 1. Population Growth in Niagara Municipalities

Community	2011 Population	2016 Population	2011 - 2016 Change	2011-2016 % Pop. Growth	% of Niagara Population 2011	% of Niagara Population 2016
St. Catharines	131,400	133,113	1,713	1.3%	30.5%	29.7%
Niagara Falls	82,997	88,071	5,074	6.1%	19.2%	19.7%
Welland	50,631	52,293	1,662	3.3%	11.7%	11.7%
Fort Erie	29,960	30,710	750	2.5%	6.9%	6.9%
Grimsby	25,325	27,314	1,989	7.9%	5.9%	6.1%
Lincoln	22,487	23,787	1,300	5.8%	5.2%	5.3%
Thorold	17,931	18,801	870	4.9%	4.2%	4.2%
Port Colborne	18,424	18,306	-118	-0.6%	4.3%	4.1%
Niagara-on-the-Lake	15,400	17,511	2,111	13.7%	3.6%	3.9%
Pelham	16,598	17,110	512	3.1%	3.8%	3.8%
West Lincoln	13,837	14,500	663	4.8%	3.2%	3.2%
Wainfleet	6,356	6,372	16	0.3%	1.5%	1.4%
Niagara Region	431,346	447,888	16,542	3.8%	100.0%	100.0%

Source: Statistics Canada 2016 Census

Age Distribution

Niagara has an older population compared to Ontario and Canada. The median age of the Niagara population in 2016 was 45.7 years, compared to 41.3 years in Ontario and 41.2 years in Canada. Niagara has a higher portion of seniors with the population aged 65 and over in 2016 accounting for 21.4% of the total population. In comparison, seniors accounted for only 16.7% of the population in Ontario and 16.9% in Canada. Niagara's portion of the population 85 years and over (3.1%) is slightly higher than Ontario and Canada (2.2%).

Niagara has a lower portion of population in the prime working age group (25 to 44 years) at 22.2% compared to 25.7% for Ontario in 2016. See Exhibit 2 for the distribution of the population by age cohort.

Exhibit 2: Population by Age Distribution

Age Cohort	Niagara Population	Niagara Percent	Ontario Percent	Canada Percent
0 to 14 years	66,760	14.9%	16.4%	16.6%
15 to 19 years	25,710	5.7%	6.0%	5.8%
20 to 24 years	28,155	6.3%	6.7%	6.4%
25 to 29 years	25,130	5.6%	6.5%	6.5%
30 to 34 years	24,005	5.4%	6.4%	6.6%
35 to 39 years	23,950	5.3%	6.3%	6.5%
40 to 44 years	26,150	5.8%	6.5%	6.4%
45 to 49 years	29,145	6.5%	7.0%	6.7%
50 to 54 years	35,335	7.9%	7.9%	7.6%
55 to 59 years	34,995	7.8%	7.4%	7.5%
60 to 64 years	32,715	7.3%	6.3%	6.5%
65 years +	95,845	21.4%	16.7%	16.9%
Prime Working Age Group (25 to 44 Yrs.)	99,235	22.2%	25.7%	26.1%
Median Age		45.7	41.3	41.2

Source: Statistics Canada 2016 Census

Educational Attainment

Niagara has lower educational attainment levels compared to Ontario and Canada. A lower portion of the Niagara population aged 25 to 64 years in 2016 had a postsecondary certificate, diploma or degree compared to Ontario and Canada - 60% compared to around 65%. Niagara has a notably smaller portion of population aged 25 to 64 years who have attained a university certificate, diploma or degree at the bachelor level or higher – 20.7% compared to 31.9% and 28.5% for Ontario and Canada respectively. A higher portion (29.1%) of the Niagara population have College, CEGEP or non-university certificates or diplomas compared to Ontario (24.7%) and Canada (22.4%). See Exhibit 3.

Exhibit 3: Highest Educational Attainment – Population Aged 25 – 64 years

Highest certificate, diploma or degree	Niagara Number	Niagara Percent	Ontario Percent	Canada Percent
Population aged 25 – 64 years	229,125			
No certificate, diploma or degree	23,365	10.2%	10.4%	11.5%
Secondary (high) school diploma or equivalency certificate	68,355	29.8%	24.5%	23.7%
Postsecondary certificate, diploma or degree	137,400	60.0%	65.1%	64.8%
Apprenticeship or trades certificate or diploma	19,245	8.4%	6.2%	10.8%
Trades certificate or diploma other than Certificate of Apprenticeship or Certificate of Qualification	9,140	4.0%	3.0%	6.0%
Certificate of Apprenticeship or Certificate of Qualification	10,105	4.4%	3.1%	4.7%
College, CEGEP or other non-university certificate or diploma	66,645	29.1%	24.7%	22.4%
University certificate or diploma below bachelor level	4,000	1.7%	2.4%	3.1%
University certificate, diploma or degree at bachelor level or above	47,515	20.7%	31.9%	28.5%
Bachelor's degree	32,850	14.3%	21.0%	19.0%
University certificate or diploma above bachelor level	3,230	1.4%	2.1%	1.9%
Degree in medicine, dentistry, veterinary medicine or optometry	1,275	0.6%	0.9%	0.8%
Master's degree	9,010	3.9%	6.9%	5.9%
Earned doctorate	1,155	0.5%	1.0%	0.9%

Source: Statistics Canada 2016 Census

Compared to Ontario, a lower portion of the population aged 25 to 64 years in Niagara have attained postsecondary diploma, degree or certificate in business, management and public administration; or mathematics, computer and information sciences (lower by about two percentage points or more). Niagara has higher portion of its population with a postsecondary diploma, degree or certificate in health and related fields, and personal; protective and transportation services – about 3 percentage points higher than Ontario.

Exhibit 4: Major Field of Study, Population 25 – 64 Years

Major Field of Study	Niagara Total	Niagara Percent	Ontario Percent	Canada Percent
Education	8,745	6.4%	5.2%	5.9%
Visual and performing arts; and communications technologies	5,050	3.7%	4.1%	3.8%
Humanities	6,430	4.7%	5.7%	5.0%
Social and behavioural sciences and law	16,380	11.9%	13.8%	11.6%
Business; management and public administration	26,635	19.4%	21.8%	22.0%
Physical and life sciences and technologies	3,815	2.8%	4.0%	3.7%
Mathematics; computer and information sciences	4,365	3.2%	5.4%	4.6%
Architecture; engineering; and related technologies	27,535	20.0%	18.7%	20.6%
Agriculture; natural resources and conservation	3,010	2.2%	1.8%	2.2%
Health and related fields	23,765	17.3%	14.1%	14.3%
Personal; protective and transportation services	11,640	8.5%	5.5%	6.3%
Total Persons with Postsecondary diploma, degree of certificate	137,390	100.0%	100.0%	100.0%

Source: Statistics Canada 2016 Census

Labour Force

There were 226,595 persons in the Niagara labour force in 2016 which represents a participation level of around 61% of those 15 years of age and older (which is slightly lower than the participation rate for Ontario at 64.7%). The portion of the Niagara labour force that was employed in 2016 was 209,890 (92.6%). Niagara's unemployment rate was 7.4%, which is the same as the Ontario unemployment rate in that year. The size of the Niagara labour force increased by only 2.4% between 2011 and 2016, compared to a 4.0% increase in Ontario.

The percentage of the Niagara labour force by sector is comparable to Ontario and Canada for most sectors. Those sectors where there is a two percentage point or higher difference are noted below, with data shown in Exhibit 5:

- A total of 11.2% of the Niagara labour force were employed in the accommodations and food services sector in 2016, compared to 6.9% and 7.0% in Ontario and Canada respectively;
- Only 4.7% of the Niagara labour force were employed in the professional, scientific and technical services sector in 2016, compared to 8.1% and 7.3% in Ontario and Canada respectively;
- The arts, entertainment and recreation sector accounted for 4.1% of the Niagara labour force employment in 2016, compared to 2.1% in both Ontario and Canada;

- The finance and insurance sector only accounted for 3.0% of jobs of the Niagara labour force in 2016, which is lower than 5.5% in Ontario (although only 1.3 percentage points lower than Canada).

Exhibit 5: Labour Force by Sector

NAIC/Sector	Niagara Number	Niagara-Percent	Ontario Percent	Canada Percent
44-45 Retail trade	27,325	12.3%	11.2%	11.6%
62 Health care and social assistance	25,920	11.7%	10.8%	11.7%
72 Accommodation and food services	24,915	11.2%	6.9%	7.0%
31-33 Manufacturing	21,100	9.5%	9.8%	8.7%
61 Educational services	16,455	7.4%	7.6%	7.4%
23 Construction	16,065	7.2%	6.8%	7.5%
56 Administrative and support; waste management and remediation services	11,900	5.4%	4.9%	4.4%
91 Public administration	10,685	4.8%	6.0%	6.2%
54 Professional; scientific and technical services	10,505	4.7%	8.1%	7.3%
81 Other services (except public administration)	10,025	4.5%	4.3%	4.5%
48-49 Transportation and warehousing	9,440	4.3%	4.7%	4.8%
71 Arts; entertainment and recreation	9,100	4.1%	2.1%	2.1%
41 Wholesale trade	7,805	3.5%	3.9%	3.6%
52 Finance and insurance	6,715	3.0%	5.5%	4.3%
11 Agriculture; forestry; fishing and hunting	5,790	2.6%	1.5%	2.4%
53 Real estate and rental and leasing	3,425	1.5%	2.1%	1.8%
51 Information and cultural industries	2,845	1.3%	2.5%	2.3%
22 Utilities	1,370	0.6%	0.7%	0.7%
21 Mining; quarrying; and oil and gas extraction	515	0.2%	0.5%	1.5%
55 Management of companies and enterprises	180	0.1%	0.2%	0.2%
Total (excludes not applicable category)	222,080	100.0%	100.0%	100.0%

Source: Statistics Canada 2016 Census

Niagara has a notably larger portion of its labour force employed in sales and services jobs (29.1%) compared to Ontario and Canada (both at 23.4%). It has a lower portion in business, finance, and administration occupations; as well as natural and applied sciences and related occupations. See Exhibit 6.

Exhibit 6: Labour Force by Occupation

Occupation Classification	Niagara Number	Niagara Percent	Ontario Percent	Canada Percent
0 Management occupations	23,885	10.8%	11.3%	11.0%
1 Business; finance and administration occupations	29,220	13.2%	16.1%	15.7%
2 Natural and applied sciences and related occupations	10,120	4.6%	7.4%	7.0%
3 Health occupations	15,885	7.2%	6.4%	6.8%
4 Occupations in education; law and social; community and government services	23,585	10.6%	11.9%	11.7%
5 Occupations in art; culture; recreation and sport	5,485	2.5%	3.2%	3.1%
6 Sales and service occupations	64,735	29.1%	23.4%	23.4%
7 Trades; transport and equipment operators and related occupations	33,180	14.9%	13.3%	14.6%
8 Natural resources; agriculture and related production occupations	5,785	2.6%	1.6%	2.3%
9 Occupations in manufacturing and utilities	10,200	4.6%	5.2%	4.5%
All occupations (excludes not applicable category)	222,080	100.0%	100.0%	100.0%

Source: Statistics Canada 2016 Census

The 'jobs to labour force' ratio is a measure of 'complete communities' and is used to measure and track the opportunity for workers to hold a job in their community. The ratio is calculated by dividing the number of jobs in a community by the labour force residing in that community. Generally, communities strive to have a balanced jobs to labour force ratio of close to 1:1. Larger urban centres tend to have higher jobs to labour force ratios as they are economic centres attracting large inflows of labour.

The 'jobs to labour force' ratio varies by community throughout Niagara. At an overall regional level, Niagara has a slightly less than optimal ratio of jobs to labour force with a ratio of 0.94 jobs to every person in the labour force. Niagara has a high number of jobs to labour force in the management of companies and enterprises sector with 1,462 jobs but only 180 of the Niagara labour force working in that sector, as shown below.

Exhibit 7: Number of Jobs to Labour Force in Niagara, 2016

NAICS	Description	Jobs	Labour Force	Jobs to Labour Force Ratio
11	Agriculture, forestry, fishing and hunting	4,924	5,970	0.82
21	Mining, quarrying, and oil and gas extraction	309	515	0.60
22	Utilities	1,375	1,370	1.00
23	Construction	15,760	16,065	0.98
31-33	Manufacturing	18,297	21,100	0.87
41	Wholesale trade	8,025	7,805	1.03
44-45	Retail trade	27,245	27,325	1.00
48-49	Transportation and warehousing	6,684	9,440	0.71
51	Information and cultural industries	2,045	2,845	0.72
52	Finance and insurance	5,935	6,715	0.88
53	Real estate and rental and leasing	4,582	3,425	1.34
54	Professional, scientific and technical services	8,703	10,505	0.83
55	Management of companies and enterprises	1,462	180	8.12
56	Administrative and support, waste management and remediation services	12,077	11,900	1.01
61	Educational services	14,489	16,455	0.88
62	Health care and social assistance	24,829	25,920	0.96
71	Arts, entertainment and recreation	8,666	9,100	0.95
72	Accommodation and food services	25,333	24,915	1.02
81	Other services (except public administration)	9,806	10,025	0.98
91	Public administration	10,265	10,685	0.96
X0	Unclassified	3,300	4,335	0.76
	Total	214,110	226,595	0.94

Source: EMSI 2018.1 Dataset, Statistics Canada 2016 Census

Income

The average total household income in Niagara in 2015 was \$81,842 which represents a 13% increase from 2010, not taking into account inflation. This can be compared to an average total household income of \$97,856 in Ontario, which is a 14.1% increase from 2005, not considering inflation. A comparison of household income levels in Niagara against benchmark regions is provided later in this discussion paper.

Section 2: Commuting Trends

The Niagara region employed resident labour force was 209,890 in 2016, of which 171,345 persons worked at a usual place of work. An additional 22,940 worked at 'no fixed place of work' (such as landscapers and truck drivers); 13,955 persons worked at home; and 1,650 worked outside of Canada.

Statistics Canada reports on estimated commuting flows of persons 15 years of age or older that worked at a usual place of work in 2016 based on a 25% sample and flows of 20 persons or more.

The majority of jobs at usual places of work in Niagara were held by people living in Niagara. The largest inflow of workers from outside Niagara were from Hamilton (4,350) and Haldimand county (1,045). Data on place of residence of persons working at usual places of work in Niagara in 2016 is provided in Exhibit 8.

Commuting flows were estimated for 169,005 persons in the Niagara employed resident labour force in 2016 (98.6% of the total number of Niagara employed labour force with a usual place of work). The communities with the largest share of the Niagara resident labour force working in those communities were St. Catharines (48,250), Niagara Falls (34,425), Welland (14,195), Hamilton (11,840) and Niagara-on-the-Lake (9,710). About 84% or 144,320 (of the Niagara employed resident labour force that worked at usual places of work had jobs in Niagara. Under 25,000 persons worked outside of Niagara, with about half (48%) working in Hamilton. Data on commuting flows of the employed resident labour force with a usual place of work in 2016 is provided in Exhibit 9.

Exhibit 8: Municipality of Residence of Persons Commuting to Niagara for Work, 2016

Municipality	St. Catharines	Niagara Falls	Welland	NOTL	Lincoln	Fort Erie	Grimsby	Thorold	Port Colborne	Pelham	West Lincoln	Wainfleet	Total
Burlington	240	75	40	40	105		165	35					700
Fort Erie	950	1,895	455	225	70	5,670	30	195	375	35		25	9,925
Grimsby	600	115	85	95	680		2,710	60			230		4,575
Haldimand County	105	110	125		105	25	145	35	60	40	240	55	1,045
Hamilton	1,345	255	165	210	565	50	1,275	110	25	20	330		4,350
Lincoln	1,350	285	135	165	2,805	25	925	80	25	60	145		6,000
Mississauga	170	70	25	20	20	20	35						360
Niagara Falls	5,035	22,070	1,040	1,830	360	725	210	1,070	220	155	70		32,785
NOTL	1,365	840	105	2,325	100	65	45	120					4,965
Oakville	90	40		20	40		60						250
Pelham	1,515	600	1,110	200	215	45	100	380	120	1,140	80	30	5,535
Port Colborne	645	515	1,010	65	95	505		130	2,705	70	25	100	5,865
St. Catharines	29,800	4,435	1,280	3,785	2,040	315	825	1,980	210	265	240	35	45,210
Thorold	3,100	1,200	395	510	280	65	105	1,250	50	125	25		7,105
Toronto	215	140	55	85	45		30	30					600
Wainfleet	235	175	375	55	80	25	55	70	280	90	80	370	1,890
Welland	3,300	2,220	8,130	415	355	465	130	885	765	765	200	100	17,730
West Lincoln	355	75	75	40	390		440	80		155	1,125		2,735
Totals	50,415	35,115	14,605	10,085	8,350	8,000	7,285	6,510	4,835	2,920	2,790	715	151,625

Note: Totals exclude flows under 20 persons

Source: Statistics Canada - 2016 Census. Catalogue Number 98-400-X2016325.

Exhibit 9: Commuting Flow of Niagara Labour Force by Place of Work, 2016 Census

Municipality of Work	Municipality of Residence												Total
	St. Catharines	Niagara Falls	Welland	Grimsby	Fort Erie	Lincoln	Thorold	Port Colborne	Pelham	West Lincoln	NOTL	Wainfleet	
St. Catharines	29,800	5,035	3,300	600	950	1,350	3,100	645	1,515	355	1,365	235	48,250
Niagara Falls	4,435	22,070	2,220	115	1,895	285	1,200	515	600	75	840	175	34,425
NOTL	3,785	1,830	415	95	225	165	510	65	200	40	2,325	55	9,710
Hamilton	2,400	685	665	3,405	155	1,605	310	125	345	1,805	130	210	11,840
Lincoln	2,040	360	355	680	70	2,805	280	95	215	390	100	80	7,470
Thorold	1,980	1,070	885	60	195	80	1,250	130	380	80	120	70	6,300
Welland	1,280	1,040	8,130	85	455	135	395	1,010	1,110	75	105	375	14,195
Grimsby	825	210	130	2,710	30	925	105		100	440	45	55	5,575
Toronto	675	405	130	345	85	160	85	75	145	90	160	45	2,400
Burlington	670	215	155	1,345	65	635	110	45	70	375	60	35	3,780
Mississauga	540	180	130	490	45	210	30	60	50	150	85	20	1,990
Oakville	435	195	120	580	40	290	50			95	80		1,885
Fort Erie	315	725	465		5,670	25	65	505	45		65	25	7,905
Pelham	265	155	765		35	60	125	70	1,140	155		90	2,860
West Lincoln	240	70	200	230		145	25	25	80	1,125		80	2,220
Port Colborne	210	220	765		375	25	50	2,705	120			280	4,750
Brampton	115	90	35	80	25	60	20			25	25		475
Milton	100	30	20	90		50	20			30			340
Vaughan	70	40				40							150
Kitchener	70												70
Markham	65										20		85
Haldimand County	65	35	85	45	40	60		95	95	240		170	930
Cambridge	65	40	20		20								145
Brantford	60		20	50						35			165
Guelph	50		25	25						25			125
Waterloo	50	20											70
Ottawa	45	20	25										90
Richmond Hill	35												35
Wainfleet	35		100		25			100	30			370	660
London	30	30					30						90
Halton Hills		20		25									45
	50,750	34,790	19,160	11,030	10,400	9,110	7,760	6,265	6,240	5,605	5,525	2,370	169,005

Source: Statistics Canada - 2016 Census. Catalogue Number 98-400-X2016325.

Section 3: Economic Base and Sector Analysis

Niagara – Job Growth in the Last Fifteen Years within Ontario and Canada Contexts

The total number of jobs in Niagara increased from 203,651 in 2003 to 222,202 in 2018, which is a growth of 9.1%. This is significantly lower than job growth in Canada and Ontario (roughly 22% each) over that period. There was significant job loss in Niagara in the aftermath of 2008 - 2009 Great Recession, particularly in the manufacturing sector. Between 2008 and 2013, Niagara lost over 8,400 of its total jobs, and its job level in 2013 (201,866) was lower than in 2003 (203,651). See Exhibit 1.

While Niagara had job growth in several services sectors between 2003 and 2018, the region suffered large job losses in the manufacturing sector as mentioned, which adversely impacted the total employment level in the region. Over the fifteen year period, the manufacturing sector in Niagara lost about 34% (9,802) of its jobs, which is a notably higher percentage job loss for this sector compared to Ontario (24.2%) and Canada (20.2%) over the period. The job loss in the manufacturing sector over this period was part of a broader trend towards restructuring of the sector, automation, and movement of some jobs to more cost competitive offshore locations. The loss of manufacturing sector jobs in Niagara also changed the relative importance of manufacturing as a job-intensive sector in the region: the manufacturing sector in Niagara accounted for 14.0% of jobs in the region in 2003, but that decreased to only 8.4% in 2018.

A decline in the manufacturing sector in Niagara has been underway for many years. For example, based on data from the Statistics Canada Labour Force Survey, the manufacturing sector accounted for around 47,300 jobs in the St. Catharines – Niagara CMA in 1987. By 1995, manufacturing jobs in the CMA had decreased to 32,700.

Over the fifteen year period between 2003 and 2018, there has been a decrease in the number of jobs in the agriculture, forestry, fishing and hunting sector in Niagara with a loss of 1,293 jobs. The percentage job loss in this sector at 21.3% is roughly midpoint of the percentage job loss in Ontario (18.9%) and Canada (23.3%).

The information and cultural Industries sector, a relatively small sector in Niagara, lost 441 jobs or 17.8% of sector jobs between 2003 and 2018. In comparison, the number of jobs in this sector increased by 15.5% and 9.4% in Ontario and Canada respectively over the fifteen year period.

Two other sectors that had some job loss in Niagara over the fifteen year period compared to significant job growth in Ontario and Canada were the transportation and warehousing sector with a 6.3% job loss compared to 28.7% and 25.6% job growth in Ontario and Canada respectively; and the finance and insurance sector with 13.5% job loss in Niagara, compared to 39.3% and 31.2% job growth in Ontario and Canada respectively.

Like Ontario and Canada, job growth has occurred in services sectors in Niagara, although generally to a lesser extent than in Ontario and Canada. See Exhibit 10.

Exhibit 10: Job Growth in Niagara Compared to Ontario and Canada, 2003 - 2018

NAICS	Description	2003 Jobs	2008 Jobs	2013	2018 Jobs	Change 2003 - 2018	Niagara % Change 2003 - 2018	Ontario % Change 2003 - 2018	Canada % Change 2003 - 2018
11	Agriculture, forestry, fishing and hunting	6,083	6,175	4,877	4,790	-1,293	-21.3%	-18.9%	-23.3%
21	Mining, quarrying, and oil and gas extraction	195	290	254	332	138	70.6%	53.5%	36.2%
22	Utilities	1,354	931	1,276	1,419	65	4.8%	9.5%	11.5%
23	Construction	13,162	15,759	15,153	16,466	3,304	25.1%	48.2%	55.7%
31-33	Manufacturing	28,593	21,179	17,025	18,791	-9,802	-34.3%	-24.2%	-20.2%
41	Wholesale trade	8,241	8,710	8,200	8,282	42	0.5%	10.9%	7.1%
44-45	Retail trade	23,738	26,711	26,020	27,666	3,928	16.5%	17.0%	16.2%
48-49	Transportation and warehousing	7,502	7,370	6,857	7,026	-476	-6.3%	28.7%	25.6%
51	Information and cultural industries	2,472	2,506	1,897	2,031	-441	-17.8%	15.5%	9.4%
52	Finance and insurance	6,598	6,313	5,825	5,705	-893	-13.5%	39.3%	31.2%
53	Real estate and rental and leasing	3,237	3,144	4,473	4,425	1,189	36.7%	48.7%	39.4%
54	Professional, scientific and technical services	7,698	8,361	8,009	9,119	1,420	18.5%	37.4%	38.6%
55	Management of companies and enterprises	1,266	1,372	1,749	1,470	204	16.1%	-12.2%	1.2%
56	Administrative & support, waste management/remediation	11,055	12,180	11,561	12,247	1,192	10.8%	24.6%	28.8%
61	Educational services	11,712	13,779	13,303	14,965	3,252	27.8%	33.5%	27.9%
62	Health care and social assistance	19,120	19,842	22,061	26,756	7,636	39.9%	53.7%	44.5%
71	Arts, entertainment and recreation	8,974	8,678	7,745	9,038	64	0.7%	30.8%	31.6%
72	Accommodation and food services	21,610	24,610	23,007	27,278	5,668	26.2%	40.9%	33.2%
81	Other services (except public administration)	10,420	11,041	9,900	9,810	-610	-5.9%	5.8%	6.0%
91	Public administration	9,195	9,226	9,869	10,748	1,553	16.9%	22.6%	22.1%
X0	Unclassified	1,428	2,100	2,804	3,839	2,411	168.9%	202.4%	209.7%
	Total Jobs	203,651	210,277	201,866	222,202	18,551	9.1%	22.4%	21.7%

Source: EMSI, 2018.1 Dataset

The level of job growth in Niagara over the past fifteen years has varied by community with the highest job growth occurring in Niagara Falls (5,205) and Welland (5,172) as shown in Exhibit 11. The highest percentage job growth occurred in West Lincoln, Grimsby, and Welland. Fort Erie and Wainfleet were the only two of the twelve municipalities in the region to lose jobs over the fifteen year period (297 and 314 jobs respectively). The job loss in Fort Erie was particularly high between 2003 and 2013 when the number of jobs decreased from 13,508 to 11,988. However, there was significant growth in the community between 2013 and 2018, with an increase of 1,223 jobs.

The share of jobs by community in Niagara has shifted slightly between 2003 and 2018. In particular, the largest community, St. Catharines, has a lower share of jobs in the region in 2018 (31.4%) compared to 2003 (33.6%); Welland's share of jobs increased from 10.9% in 2003 to 12.3% in 2018.

Exhibit 11: Job Growth by Community in Niagara – 2003 to 2018

Community	2003	2008	2013	2018	2003-2018 Change	2003-2018 Change	% Share of Niagara Jobs 2003	% Share of Niagara Jobs 2018
St. Catharines	68,378	69,889	65,415	69,870	1,492	2.2%	33.6%	31.4%
Niagara Falls	43,639	46,117	44,893	48,844	5,205	11.9%	21.4%	22.0%
Welland	22,183	24,262	23,576	27,355	5,172	23.3%	10.9%	12.3%
Niagara-on-the-Lake	11,822	12,279	11,038	13,062	1,240	10.5%	5.8%	5.9%
Fort Erie	13,508	12,756	11,988	13,211	-297	-2.2%	6.6%	5.9%
Lincoln	11,357	9,971	11,215	12,774	1,417	12.5%	5.6%	5.7%
Grimsby	7,975	9,075	8,762	9,977	2,002	25.1%	3.9%	4.5%
Thorold	8,456	8,375	7,631	8,782	326	3.9%	4.2%	4.0%
Port Colborne	6,802	7,107	6,769	6,946	144	2.1%	3.3%	3.1%
Pelham	4,317	4,659	4,521	5,094	777	18.0%	2.1%	2.3%
West Lincoln	3,703	4,526	4,898	5,089	1,386	37.4%	1.8%	2.3%
Wainfleet	1,512	1,262	1,160	1,198	-314	-20.8%	0.7%	0.5%
Niagara Region	203,652	210,278	201,866	222,202	18,550	9.1%	100.0%	100.0%

Source: EMSI, 2018.1 Dataset

Niagara – Job Changes in 2013 to 2018

A review of data on job levels and growth in Niagara over the last five years provides insight on recent changes in the economic base. Niagara has had strong job growth over the past five years with a 10.1% increase in the number of jobs, which is slightly higher than the percentage job increase in Ontario (9.4%) and higher than the percentage job increase in Canada (6.5%) between 2013 and 2018.

Data on the changes in the number of jobs by sector in Niagara between 2013 and 2018 and location quotients are provided in Exhibit 12. Location quotients are used to compare the relative concentration of each sector in a community to a reference area (in this case Ontario). The comparison uses a simple ratio of sector employment to total employment. The provincial average for each sector has a location quotient of 1. A location quotient higher than 1 indicates a higher employment concentration in that sector than the provincial average, while less than 1 indicates the concentration is lower than the provincial average. Greater location quotient variances mean higher or lower employment concentrations than provincial averages. In essence, location quotients allow us to identify which sectors are over- or under-represented relative to the province as a whole. High location quotients are indicative of a region's or community's sector specialization. Sectors with high location quotients are usually 'traded' or export sectors that bring new money into a region or community rather than just a recirculation of money already in a local economy.

Some of the key findings for Niagara from a review of data at the 2 digit NAIC level are:

- The most significant sectors as measured by location quotients are: agriculture, forestry, fishing, and hunting (1.94); arts, entertainment and recreation (1.92); and accommodation and food services (1.75).
- Manufacturing has a location quotient of 0.92, which is slightly below the Ontario average; however, Niagara had higher percentage job growth in this sector compared to Ontario over the five year period – 10.4% compared to 2.5%.
- The management of companies and enterprises sector has a location quotient of 1.40, which is slightly above the provincial average. However the sector lost 16.0% of its jobs between 2013 and 2018, which is higher than the percentage job loss in this sector in Ontario over that period (10.5%);
- Niagara has particularly low location quotients for information and cultural industries; finance and insurance; and professional, scientific and technical services sectors – roughly half the Ontario average.

A review of data for selected sectors is provided on the following pages. The discussion includes an overview of job levels and percentage job growth, location quotients and shift share analysis. Shift share¹ is a regional analysis method that is used to estimate how much of regional job growth can be

¹ For further information on shift share analysis, please see http://www.economicmodeling.com/wp-content/uploads/2007/10/emsj_understandingshiftshare.pdf

attributed to national trends and how much is due to unique regional factors or competitive advantages. Three measures are used in shift share analysis when analysing sector growth within a region such as Niagara: national growth effect (how much of the regional sector growth is explained by growth in the national economy), expected change (based on growth of sector at the national level) and regional competitiveness effect (which is calculated by taking the regional growth and subtracting the national growth). In the following sections, we note how the job growth by sector and subsector in Niagara compares to the level of job growth that would have been expected based on shift share analysis.

Exhibit 12: Job Growth by Sector in Niagara (2013 – 2018)

NAICS	Description	2013 Jobs	2018 Jobs	2013 - 2018 Change	Niagara 2013 - 2018 % Change	Ontario 2013 - 2018 % Change	LQ
11	Agriculture, forestry, fishing and hunting	4,877	4,790	-87	-1.8%	-17.2%	1.94
21	Mining, quarrying, and oil and gas extraction	254	332	78	30.7%	14.5%	0.41
22	Utilities	1,276	1,419	143	11.2%	2.1%	1.04
23	Construction	15,153	16,466	1,313	8.7%	12.7%	1.13
31-33	Manufacturing	17,025	18,791	1,766	10.4%	2.5%	0.92
41	Wholesale trade	8,200	8,282	82	1.0%	9.1%	0.75
44-45	Retail trade	26,020	27,666	1,646	6.3%	6.1%	1.17
48-49	Transportation and warehousing	6,857	7,026	169	2.5%	10.9%	0.71
51	Information and cultural industries	1,897	2,031	134	7.1%	8.0%	0.41
52	Finance and insurance	5,825	5,705	-120	-2.1%	8.2%	0.53
53	Real estate and rental and leasing	4,473	4,425	-48	-1.1%	12.5%	0.84
54	Professional, scientific and technical services	8,009	9,119	1,110	13.9%	12.6%	0.54
55	Management of companies and enterprises	1,749	1,470	-279	-16.0%	-10.5%	1.40
56	Administrative and support, waste management/remediation services	11,561	12,247	686	5.9%	4.1%	0.99
61	Educational services	13,303	14,965	1,662	12.5%	9.8%	0.99
62	Health care and social assistance	22,061	26,756	4,695	21.3%	16.7%	1.08
71	Arts, entertainment and recreation	7,745	9,038	1,293	16.7%	23.6%	1.92
72	Accommodation and food services	23,007	27,278	4,271	18.6%	19.6%	1.75
81	Other services (except public administration)	9,900	9,810	-90	-0.9%	0.0%	1.06
91	Public administration	9,869	10,748	879	8.9%	5.0%	0.82
X0	Unclassified	2,804	3,839	1,035	36.9%	35.0%	1.00
	Total	201,866	222,202	20,336	10.1%	9.4%	

Source: EMSI, 2018.1 Dataset

Agriculture

The percentage decrease in the number of jobs in the agriculture, forestry, fishing and hunting sector in Niagara over the past five years has been low (1.8%) compared to the significant decrease in the number of jobs in this sector in Ontario (17.2%).

Farms (NAIC 1111) is a significant subsector in Niagara and accounts for the vast majority of jobs in the agriculture, forestry, fishing and hunting sector at 4,750 jobs (out of 4,790 jobs in the broader sector in 2018). The number of jobs lost in the farming sector in Niagara between 2013 and 2018 was 82, which is significantly lower than the expected change based on shift share analysis (473).

Farms have a location quotient of 2.1 in Niagara, which is over two times the Ontario average.

Further information on the agriculture sector will be provided later in this discussion paper, using data from the Census of Agriculture.

Manufacturing

There have been significant job gains in the manufacturing sector in Niagara over the last five years with an increase of 1,766 jobs or 10.4% between 2013 and 2018, which is higher than the job growth in this sector in Ontario (2.5%) and Canada (1.5%).

The job growth in manufacturing in Niagara was considerably higher than expected using shift share analysis. Specifically, the expected change was only 251 jobs. Niagara's job growth in this sector beyond the level expected was 1,515 jobs.

Some of the most significant manufacturing subsectors are discussed below.

Beverage Manufacturing

Beverage manufacturing (NAIC 3121) is the largest manufacturing subsector in Niagara at the 4 digit NAIC level, with the majority of jobs being in wine production. Beverage manufacturing accounted for 2,519 jobs in Niagara in 2018 which is a 56.6% growth from 2013 (compared to a 20.5% growth in Ontario). This represents a growth of 910 jobs over the period which is close to double the expected change based on shift share analysis (471).

The beverage manufacturing segment in Niagara has high location quotient level at 4.87, which is about 5 times the Ontario average.

Motor Vehicle Manufacturing

The motor vehicle manufacturing subsector accounted for 2,048 jobs in Niagara in 2018 which is an increase of 439 jobs or 27.3% from 2017. This is a growth of 243 more jobs than expected based on shift share analysis. In comparison, the number of jobs in this subsector increased by 14.3% in Ontario between 2013 and 2018.

The motor vehicle manufacturing subsector in Niagara has a location quotient of 1.82, which is close to double the Ontario average.

Architectural and Structural Metals Manufacturing

Another significant manufacturing subsector in Niagara is architectural and structural metals manufacturing with 1,269 jobs in 2018 and an increase of 385 jobs (43.6%) between 2013 and 2018, compared to a 3% job growth in Ontario. Niagara's job growth in this subsector was marginally higher than expected based on shift share analysis (19 more jobs).

The location quotient for this segment is 1.93 which is about two times the Ontario average.

Manufacturing – Highest Growth Subsectors

Several manufacturing subsectors in Niagara have had job growth at much higher percentage levels than Ontario as shown in Exhibit 13. About half of these have location quotients that are roughly two times the provincial average or higher.

Exhibit 13: Highest Manufacturing Growth Segments in Niagara 2013 - 2018

NAICS	Description	2013 Jobs	2018 Jobs	2013 - 2018 Change	2013 - 2018 % Change	Ontario 2013 - 2018 % Change	LQ
3121	Beverage manufacturing	1,609	2,519	910	56.6%	20.5%	4.87
3361	Motor vehicle manufacturing	1,609	2,048	439	27.3%	14.3%	1.82
3323	Architectural and structural metals manufacturing	884	1,269	385	43.6%	3.0%	1.93
3312	Steel product manufacturing from purchased steel	392	586	194	49.5%	-6.3%	5.13
3261	Plastic product manufacturing	491	668	177	36.0%	9.3%	0.51
3262	Rubber product manufacturing	282	427	145	51.4%	-0.8%	2.55
3339	Other general-purpose machinery manufacturing	678	814	136	20.1%	5.3%	1.79
3272	Glass and glass product manufacturing	209	341	132	63.2%	-22.1%	3.57
3363	Motor vehicle parts manufacturing	528	640	112	21.2%	15.9%	0.32
3259	Other chemical product manufacturing	87	194	107	123.0%	23.2%	1.14
3335	Metalworking machinery manufacturing	429	531	102	23.8%	12.2%	1.01
3341	Computer and peripheral equipment manufacturing	24	101	77	320.8%	-2.4%	1.12
3255	Paint, coating and adhesive manufacturing	108	180	72	66.7%	5.1%	1.71
3364	Aerospace product and parts manufacturing	271	341	70	25.8%	9.3%	0.93
3328	Coating, engraving, cold and heat treating and allied activities	281	348	67	23.8%	10.6%	1.86
3253	Pesticide, fertilizer and other agricultural chemical manufacturing	49	99	50	102.0%	16.7%	2.74

Source: EMSI, 2018.1 Dataset

Tourism

The Tourism sector includes businesses, products and activities that cater to visitors, however, many of these also serve local residents and can be considered as part of the quality of place amenities such as restaurants, cultural and heritage attractions and activities, sporting and recreational facilities, etc. Accommodation facilities generally are used by visitors rather than local residents or local businesses, however, a portion of those facilities such as boardrooms, banquet halls and restaurants may also be used by the local businesses and population. Tourism is not a distinct sector in the North American Industry Classification (NAIC) system, but portions of what could be considered to be tourism-related

are included in specific NAIC codes within NAIC 71 - Arts, Entertainment and Recreation, NAIC 72 - Accommodation and Food Services, NAIC 48 – Transportation, and others.

As mentioned previously, the arts, entertainment and recreation sector in Niagara is one of the three most significant sectors as measured by location quotient at 1.92. The sector's percentage job growth between 2013 and 2018 was 16.7% (1,293 jobs), which was lower than the job growth in this sector in Ontario (23.6%). Based on shift share analysis, the job growth in the sector in Niagara was about 39 jobs lower than expected.

Niagara had relatively high percentage job growth in most of the industry segments within the arts, entertainment and recreation sector between 2013 and 2018 compared to Ontario. Job growth was lower in Niagara for heritage institutions (at 9.1% compared to 44.3% in Ontario). Like Ontario, Niagara lost jobs in gambling industries but had a higher percentage job loss (35.3%) compared to Ontario (21%) between 2013 and 2018. Five of the eight subsectors in the arts, entertainment and recreation sector (NAIC 71) in Niagara, as noted in Exhibit 14, have location quotients of around 2.5 or higher, with the highest being gambling industries with a location quotient of 5.7.

The one subsector in the accommodation and food services sector (NAIC 72) that has a job concentration notably above average is traveller accommodations with a location quotient of 4.8 – so roughly five times above the provincial average, which is an indication of the strength of the overnight tourism segment in Niagara.

Exhibit 14: Number of Jobs in Key Tourism-related Industry Segments in Niagara, 2013 - 2018

NAICS	Description	2013 Jobs	2018 Jobs	2013 - 2018 Change	2013 - 2018 % Change	Ontario 2013 - 2018 % Change	LQ
7111	Performing arts companies	581	896	315	54.2%	-8.3%	2.45
7112	Spectator sports	308	546	238	77.3%	15.7%	2.50
7113	Promoters (presenters) of performing arts, sports and similar events	161	305	144	89.4%	47.2%	0.97
7115	Independent artists, writers and performers	524	949	425	81.1%	17.2%	1.12
7121	Heritage institutions	928	1,012	84	9.1%	44.3%	4.04
7131	Amusement parks and arcades	282	605	323	114.5%	28.1%	4.01
7132	Gambling industries	3,106	2,011	- 1,095	-35.3%	-21.0%	5.71
7139	Other amusement and recreation industries	1,849	2,651	802	43.4%	42.8%	1.21
7211	Traveller accommodations	7,527	8,673	1,146	15.2%	16.7%	4.83
7212	Recreational vehicle (RV) parks and recreational camps	74	38	-36	-48.6%	14.8%	0.19
7223	Special food services	556	719	163	29.3%	21.1%	0.62
7224	Drinking places (alcoholic beverages)	548	347	-201	-36.7%	-20.1%	1.38
7225	Full-service restaurants and limited-service eating places	14,289	17,492	3,203	22.4%	21.2%	1.44
4871	Scenic & Sightseeing transportation - land	41	<10	<10	-	-	-
4872	Scenic & Sightseeing transportation – water	89	216	127	143.0%	96.5%	8.2

Source: EMSI, 2018.1 Dataset

Health Care and Social Assistance

There has been significant growth in the health care and social assistance sector in Niagara over the last five years, with a job growth of 21.3%. This has also been a growth sector in Ontario with a job growth of 16.7% between 2013 and 2018, partly fueled by the health and social assistance needs of an aging population.

The job growth in Niagara in the health care and social assistance sector between 2013 and 2018 was 686 jobs which is 115 more jobs than expected based on shift share analysis.

Only two subsectors in the health care and social assistance sector have location quotients that are approaching twice the provincial average – nursing care facilities and residential developmental handicap, mental health and substance abuse facilities, with location quotients of about 1.7 each. See Exhibit 15.

Exhibit 15: Job Growth in Health Care and Social Assistance Industry Segments

NAICS	Description	2013 Jobs	2018 Jobs	2013 - 2018 Change	2013 - 2018 % Change	Ontario 2013 - 2018 % Change	LQ
6211	Offices of physicians	1,803	2,482	679	37.7%	19.4%	1.00
6212	Offices of dentists	1,695	1,988	293	17.3%	18.9%	1.27
6213	Offices of other health practitioners	1,483	1,973	490	33.0%	32.6%	0.93
6214	Out-patient care centres	748	1,140	392	52.4%	19.5%	1.06
6215	Medical and diagnostic laboratories	337	419	82	24.3%	28.8%	1.02
6216	Home health care services	860	1,168	308	35.8%	24.5%	1.16
6219	Other ambulatory health care services	161	105	-56	-34.8%	12.0%	0.53
6221	General medical and surgical hospitals	5,008	5,685	677	13.5%	10.5%	0.94
6222	Psychiatric and substance abuse hospitals	0	0	0	0.0%	-0.8%	0.00
6223	Specialty (except psychiatric and substance abuse) hospitals	0	0	0	0.0%	14.7%	0.00
6231	Nursing care facilities	2,720	3,566	846	31.1%	23.7%	1.72
6232	Residential developmental handicap, mental health and substance abuse facilities	1,602	1,445	-157	-9.8%	-0.6%	1.69
6233	Community care facilities for the elderly	1,289	1,671	382	29.6%	13.1%	1.23
6239	Other residential care facilities	526	518	-8	-1.5%	-7.4%	1.02
6241	Individual and family services	1,857	2,457	600	32.3%	28.8%	1.16
6242	Community food and housing, and emergency and other relief services	103	104	1	1.0%	39.9%	0.85
6243	Vocational rehabilitation services	400	386	-14	-3.5%	1.5%	1.18
6244	Child day-care services	1,471	1,647	176	12.0%	14.7%	0.85

Source: EMSI, 2018.1 Dataset

Professional, Scientific and Technical Services

The number of jobs in the professional, scientific and technical services in Niagara increased by 13.9% between 2013 and 2018, which is slightly higher than the Ontario job growth (12.6%) in this sector over that period. The growth in the number of jobs in this sector in Niagara between 2013 and 2018 was 1,100, which is 390 more jobs than expected based on shift share analysis.

A notably high percentage job growth occurred in one subsector of professional, scientific and technical services sector in Niagara – specialized design services, with a 173% job growth compared to 52.1% growth in Ontario. However, this is a relatively small sector, with a lower than average location quotient at 0.67.

Almost all of the subsectors in the professional, scientific and technical services sector have location quotients that are significantly below the Ontario average, with only one being close to average – the accounting, tax preparation, bookkeeping and payroll services subsector has a location quotient of 0.85.

Exhibit 16: Job Growth in Niagara’s Professional, Scientific and Technical Services Sector

NAICS	Description	2013 Jobs	2018 Jobs	2013 - 2018 Change	2013 - 2018 % Change	Ontario 2013 - 2018 % Change	LQ
5411	Legal services	902	961	59	6.5%	7.0%	0.56
5412	Accounting, tax preparation, bookkeeping and payroll services	1,429	1,739	310	21.7%	12.6%	0.85
5413	Architectural, engineering and related services	1,766	1,818	52	2.9%	5.7%	0.74
5414	Specialized design services	202	552	350	173.3%	52.1%	0.67
5415	Computer systems design and related services	1,040	1,173	133	12.8%	31.9%	0.26
5416	Management, scientific and technical consulting services	1,014	1,046	32	3.2%	0.8%	0.46
5417	Scientific research and development services	271	203	-68	-25.1%	-36.8%	0.37
5418	Advertising, public relations, and related services	493	603	110	22.3%	17.4%	0.45
5419	Other professional, scientific and technical services	892	1,023	131	14.7%	13.4%	0.75

Source: EMSI, 2018.1 Dataset

Agriculture Sector

An overview of the Agriculture sector in Niagara is provided in this section. Detailed information on the sector is available through the Census of Agriculture and the Region of Niagara report, Niagara Agriculture Economic Impact Report, dated April 19, 2018.

Agriculture is a very important sector in Niagara. Niagara’s agriculture sector had gross farm receipts of in excess of \$838 million in 2015, which is a 15.5% increase from 2010. Niagara’s farms accounted for 12.6% of gross farm revenues in Southern Ontario in 2015, compared to 13.8% in 2011.

Niagara had 1,827 farms in 2016, with a decrease of 187 farms or 9.3% in the number of farms from 2011. Together five of the twelve municipalities in Niagara account for about 77% of the farms in the region. These include West Lincoln, Lincoln, Niagara-on-the-Lake, Wainfleet and Pelham. The number of farms by municipality in Niagara is shown in the following exhibit.

Exhibit 17: Number of Farms by Municipality

Community	2011	2016	Change	% Change
West Lincoln	444	391	-53	-11.9%
Lincoln	395	364	-31	-7.8%
Niagara-on-the-Lake	352	329	-23	-6.5%
Wainfleet	178	167	-11	-6.2%
Pelham	174	161	-13	-7.5%
St. Catharines	75	83	8	10.7%
Thorold	54	73	19	35.2%
Grimsby	105	72	-33	-31.4%
Fort Erie	77	68	-9	-11.7%
Port Colborne	72	61	-11	-15.3%
Niagara Falls	88	58	-30	-34.1%
Welland	-	-	-	-
Niagara Region	2,014	1,827	-187	-9.3%

Source: Census of Agriculture, 2016

Niagara has few very large farms, with around 88% of farms under 240 acres. Only 25 farms or about 1.4% of total farms in Niagara are 1,120 acres or more. The average size of farm varies across the region, with a high of 235 acres in Wainfleet to a low of 47 acres in St. Catharines. See Exhibit 18.

Exhibit 18: Number of Farms by Size

Total Farm Area	Niagara	Percent
Farms under 10 acres	359	19.6%
Farms 10 to 69 acres	858	47.0%
Farms 70 to 129 acres	228	12.5%
Farms 130 to 179 acres	90	4.9%
Farms 180 to 239 acres	79	4.3%
Farms 240 to 399 acres	97	5.3%
Farms 400 to 559 acres	46	2.5%
Farms 560 to 759 acres	22	1.2%
Farms 760 to 1,119 acres	23	1.3%
Farms 1,120 to 1,599 acres	7	0.4%
Farms 1,600 to 2,239 acres	9	0.5%
Farms 2,240 to 2,879 acres	6	0.3%
Farms 2,880 to 3,519 acres	0	0.0%
Farms 3,520 acres and over	3	0.2%
Total	1,827	100.0%

Source: Census of Agriculture, 2016

Niagara has a diverse agricultural base, with farms across numerous farm type classifications. The largest as measured by number of farms include: fruit and tree nut farming; oil and grain farming; greenhouse, nursery, and floriculture production; and soybean farming. These categories account for between 180 and 547 farms, with the largest being fruit and tree nut farming. There have been decreases and increases in number of farms in some categories between 2011 and 2016 as shown in the below exhibit.

Exhibit 19: Number of Farms in Niagara Classified by NAIC Codes

Description/NAIC Codes	2011	2016	Change
Fruit and tree nut farming [1113]	637	547	-90
Oilseed and grain farming [1111]	316	326	10
Greenhouse, nursery and floriculture production [1114]	283	254	-29
Soybean farming [111110]	196	180	-16
Other animal production [1129]	231	178	-53
Poultry and egg production [1123]	164	175	11
Other crop farming [1119]	159	142	-17
Floriculture production [111422]	156	128	-28
Broiler and other meat-type chicken production [112320]	111	118	7
Horse and other equine production [112920]	160	112	-48
Nursery and tree production [111421]	104	96	-8
Cattle ranching and farming [1121]	104	91	-13
Hay farming [111940]	108	85	-23
Vegetable and melon farming [1112]	64	73	9
Other vegetable (except potato) and melon farming [111219]	64	73	9
Other grain farming [111190]	65	66	1
Beef cattle ranching and farming, including feedlots [112110]	53	52	-1
All other miscellaneous crop farming [111999]	42	45	3
Wheat farming [111140]	9	42	33
Dairy cattle and milk production [112120]	51	39	-12
Corn farming [111150]	45	36	-9
Chicken egg production [112310]	31	35	4
Animal combination farming [112991]	33	34	1
Other food crops grown under cover [111419]	23	27	4
Sheep and goat farming [1124]	38	24	-14
Apiculture [112910]	24	20	-4
Hog and pig farming [1122]	18	17	-1
Sheep farming [112410]	27	15	-12
Turkey production [112330]	9	10	1
Goat farming [112420]	11	9	-2
All other poultry production [112399]	10	8	-2
All other miscellaneous animal production [112999]	11	7	-4
Fruit and vegetable combination farming [111993]	9	7	-2
Fur-bearing animal and rabbit production [112930]	3	5	2
Tobacco farming [111910]	0	4	4
Mushroom production [111411]	0	3	3
Poultry hatcheries [112340]	1	2	1
Combination poultry and egg production [112391]	2	2	0
Oilseed (except soybean) farming [111120]	0	1	1
Dry pea and bean farming [111130]	1	1	0
Maple syrup and products production [111994]	0	1	1
Total number of farms	2014	1827	-187

Source: Census of Agriculture, 2016

While the various different types of farming contribute to the Niagara economy, Niagara is especially well known for fruit farming, particularly grape production as input to wine-making and wine tourism in the region. A total of 386 farms in Niagara in 2016 were classified in the Census of Agriculture as 'grape farms'. This is 55 farms fewer than in 2011. However, the number of hectares used in grape growing in Niagara increased by 99 hectares over that period, with 6,366 hectares being used in grape growing in 2016.

Much of the grape growing in Niagara takes place in two municipalities: Niagara-on-the-Lake with 186 vineyards in 2016 and 3,772 hectares of land used for growing grapes; and Lincoln with 143 vineyards in 2016, with 1,835 hectares of land used for growing grapes. Together, these municipalities account for 88% of the hectares of land used for grape growing in Niagara.

The next largest segment of the fruit, berries and nut farming in Niagara is peach farming with 1,894 hectares in 2016. The number of farms and hectares by segment in the fruit, berries and nuts classification is shown in the following exhibit.

Exhibit 20: Number of Farms and Hectares in Niagara - Fruit, Berries and Nuts

Segment	# Farms 2011	# Farms 2016	Change	# Hectares 2011	# Hectares 2016	Change	% Change
Grapes	441	386	-55	6,267	6,366	99	1.6%
Peaches	188	156	-32	2,314	1,894	-420	-22.2%
Plums and prunes	182	144	-38	369	344	-25	-7.3%
Apples	153	134	-19	259	309	50	16.2%
Cherries (sour)	43	36	-7	351	276	-75	-27.2%
Cherries (sweet)	140	112	-28	160	104	-56	-53.8%
Strawberries	37	35	-2	55	64	9	14.1%
Apricots	66	51	-15	34	40	6	15.0%
Raspberries	57	47	-10	25	12	-13	-
Cranberries	0	0	0	0	0	0	-
Blueberries	21	15	-6	-	9	-	-
Saskatoons	2	4	2	-	1	-	-
Other fruit, berries and nuts	94	98	4	319	325	6	1.8%
Total	720	624	-96	10,483	10,073	-410	-4.1%

Source: Census of Agriculture, 2016

Jobs by Sector in Niagara Municipalities

The concentration of jobs by sector varies by community across the region. St. Catharines, being the largest community in the region, has the largest number of jobs in most sectors. There are relatively high concentrations of jobs in specific sectors in other communities. An overview of some of the key findings from reviewing data on number of jobs and location quotients by sector in communities in Niagara is provided below:

- The communities with a high concentration of jobs in agriculture as measured by location quotients are West Lincoln, Wainfleet, Lincoln, Niagara-on-the-Lake, and Pelham, with location quotients ranging from around 6.6 to close to 13.0.

- The communities with relatively high location quotients in the manufacturing sector are Fort Erie, Lincoln, West Lincoln, and Port Colborne, with location quotients ranging from 1.5 to around 1.7. St. Catharines' location quotient for the manufacturing sector is average, although it accounts for the largest number of manufacturing jobs in the region (5,857 out of 18,791, or about 31%). Niagara Falls accounts for the next highest number of jobs in this sector (2,720), followed by Lincoln, Fort Erie, and Welland (with the number of manufacturing jobs for these three communities ranging from 1,768 to 1,829).
- Niagara Falls has the highest number of jobs in tourism-related sectors: 12,939 jobs in accommodation and food services (about 21% of sector jobs in the region) and location quotient of about 3.8. St. Catharines has 5,717 jobs in this sector, followed by Welland and Niagara-on-the-Lake (with 2,804 and 1,609 sector jobs respectively). Aside from Niagara Falls, communities with the highest location quotients in this sector include: Niagara-on-the-Lake (1.76), Port Colborne (1.47) and Welland (1.46). Niagara Falls also has the highest number of jobs in the arts, entertainment and recreation sector with 4,614 jobs or about 51% of sector jobs in the region. Half the communities in Niagara have high location quotients for this sector: Niagara Falls, Niagara-on-the-Lake, Fort Erie, Lincoln, Pelham, and Wainfleet.

Data on number of jobs by sector in each community in Niagara is provided in Exhibit 21.

Exhibit 21: Jobs by Municipality and Sector

NAICS	Description	St. Catharines	Niagara Falls	Welland	NOTL	Fort Erie	Lincoln	Grimsby	Thorold	Port Colborne	Pelham	West Lincoln	Wainfleet
11	Agriculture, forestry, fishing and hunting	761	169	84	950	37	1,379	96	40	39	387	732	117
21	Mining, quarrying, and oil and gas extraction	<10	111	0	<10	<10	104	0	0	113	0	0	<10
22	Utilities	201	185	83	447	104	<10	54	273	0	0	59	<10
23	Construction	3,991	4,031	2,036	935	1,091	914	865	1,095	263	359	666	221
31-33	Manufacturing	5,857	2,720	1,768	1,210	1,826	1,829	1,084	383	1,113	166	796	39
41	Wholesale trade	2,096	1,654	701	717	442	944	604	391	284	167	216	67
44-45	Retail trade	10,556	4,861	3,733	1,552	1,413	961	1,262	749	1,185	863	477	54
48-49	Transportation and warehousing	1,797	1,180	754	610	758	466	271	347	268	17	513	45
51	Information and cultural industries	831	331	384	46	108	29	103	145	21	27	<10	<10
52	Finance and insurance	2,085	1,022	796	163	368	173	306	123	236	320	111	0
53	Real estate and rental and leasing	1,474	786	685	161	342	105	356	209	197	88	23	0
54	Professional, scientific and technical services	3,386	1,377	833	669	693	464	326	480	268	462	159	<10
55	Management of companies and enterprises	1,163	113	50	41	71	<10	<10	<10	0	0	<10	14
56	Administrative and support, waste management and remediation services	4,065	2,027	2,248	299	851	1,091	378	779	258	154	54	45
61	Educational services	6,492	1,599	3,008	747	524	594	536	365	378	261	333	128
62	Health care and social assistance	9,820	4,639	3,939	855	1,195	1,616	1,699	1,115	873	663	264	78
71	Arts, entertainment and recreation	1,350	4,614	308	978	755	426	148	19	96	212	<10	133
72	Accommodation and food services	5,717	12,939	2,804	1,609	928	879	762	386	717	336	177	24
81	Other services (except public administration)	3,152	1,669	1,479	353	628	278	750	434	270	442	278	76
91	Public administration	3,837	1,949	1,175	507	854	309	212	1,302	240	90	140	133
X0	Unclassified	1,237	870	486	215	221	198	164	144	127	80	82	15
	Total	69,870	48,844	27,355	13,062	13,211	12,774	9,977	8,782	6,946	5,094	5,089	1,198

Source: EMSI, 2018.1 Dataset

Number of Enterprises in Niagara

Based on Canada Business Counts data, Niagara had a total of 12,576 enterprises with employees in December 2017. More than double this number (26,289) had no employees.

The majority of enterprises can be considered small businesses or microenterprises:

- 6,322 are microenterprises (1-4 employees), accounting for about half of enterprises in Niagara that have employees;
- Another 5,987 (48%) can be considered small businesses (5 to 99 employees);
- 242 can be considered as medium-sized enterprises (100 to 499 employees);
- Only 25 are large enterprises (500 or more employees).

When enterprises in the indeterminate category are considered as well as very small or part-time businesses with gross revenues of less than \$30,000 (which are not represented in the Canada Business Counts database), it is clear that the vast majority of enterprises in Niagara are micro or small enterprises as measured by number of employees.

The large enterprises in Niagara are within the following sectors/subsectors (listed by NAIC codes):

Manufacturing:

- 336330 - Motor vehicle steering and suspension components (except spring) manufacturing (1)
- 336310 - Motor vehicle gasoline engine and engine parts manufacturing (1)
- 326220 - Rubber and plastic hose and belting manufacturing (1)

Retail Trade:

- 453220 - Gift, novelty and souvenir stores (1)
- 445120 - Convenience stores (1)

Transportation:

- 483115 - Deep sea, coastal and Great Lakes water transportation (except by ferries) (1)

Finance and Insurance:

- 522130 - Local credit unions (1)

Administrative and Support:

- 561420 - Telephone call centres (2)
- 561722 - Janitorial services (except window cleaning) (1)

Educational Services:

- 611110 - Elementary and secondary schools (3)
- 611310 – Universities (1)

Health Care Services:

621494 - Community health centres (1)

622111 - General (except paediatric) hospitals (3)

Accommodations:

721111 – Hotels (2)

721113 – Resorts (2)

Public Administration:

913910 - Other local, municipal and regional public administration (3)

See Exhibit 22 for data on number of enterprises in Niagara in 2017 by sector and number of employees.

Change in Number of Enterprises in Niagara – 2014 to 2017

The number of enterprises with employees in Niagara increased by 522 between 2014 and 2017, with most of the increase being in micro-enterprises and small businesses as shown in Exhibit 23. An earlier-years comparison cannot be done due to Statistics Canada significant methodology changes in business counts in 2014. The largest increase in number of enterprises with employees was in the construction sector (160) and in professional, scientific and technical services (99, of which 81 were micro enterprises with 1 to 4 employees).

Exhibit 22: Number of Enterprises in Niagara by Sector and Number of Employees, Dec. 2017

Sector	Indeterminate	Total With Employees	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 199	200 to 499	500+
11 - Agriculture, forestry, fishing and hunting	1,057	501	221	99	78	68	20	12	3	0
21 - Mining, quarrying, and oil and gas extraction	11	12	4	3	3	2	0	0	0	0
22 - Utilities	87	19	8	3	1	4	3	0	0	0
23 - Construction	2,392	1,594	901	393	174	95	21	7	3	0
31-33 - Manufacturing	491	624	196	127	92	120	58	23	5	3
41 - Wholesale trade	465	509	220	102	89	67	19	10	2	0
44-45 - Retail trade	1,210	1,626	578	424	341	183	55	33	10	2
48-49 - Transportation and warehousing	980	478	298	57	54	40	17	9	2	1
51 - Information and cultural industries	230	157	68	50	20	13	3	3	0	0
52 - Finance and insurance	1,647	417	215	87	74	26	10	1	3	1
53 - Real estate and rental and leasing	6,874	453	316	71	37	25	4	0	0	0
54 - Professional, scientific and technical services	2,324	977	706	128	93	36	8	4	2	0
55 - Management of companies and enterprises	263	41	11	6	8	7	4	5	0	0
56 - Administrative and support, waste management and remediation services	801	551	278	118	77	47	14	10	4	3
61 - Educational services	199	127	52	29	16	19	3	2	2	4
62 - Health care and social assistance	1,214	1,276	678	295	157	86	30	18	8	4
71 - Arts, entertainment and recreation	460	243	76	77	32	37	13	5	3	0
72 - Accommodation and food services	618	1,098	242	252	233	237	90	21	19	4
81 - Other services (except public administration)	1,642	1,167	732	256	107	52	18	1	1	0
91 - Public administration	2	20	1	1	2	2	2	7	2	3
Unclassified	3,322	686	521	101	37	21	4	1	1	0
Total	26,289	12,576	6,322	2,679	1,725	1,187	396	172	70	25

Source: Statistics Canada, Canada Business Counts, December 2014 and 2017

Exhibit 23: Change in the Number of Enterprises in Niagara by Sector and Number of Employees, 2014 to 2017

Sector	Indeterminate	Total With Employees	1 to 4	5 to 9	10 to 19	20 to 49	50 to 99	100 to 199	200 to 499	500+
11 - Agriculture, forestry, fishing and hunting	19	-14	-9	-4	-7	-5	3	5	3	0
21 - Mining, quarrying, and oil and gas extraction	-5	1	0	1	1	-1	0	0	0	0
22 - Utilities	33	-1	-2	0	0	1	0	0	0	0
23 - Construction	223	160	69	60	23	0	8	0	0	0
31-33 - Manufacturing	44	-5	-5	0	-9	9	4	1	-6	1
41 - Wholesale trade	3	-25	-3	-12	-12	1	-5	5	1	0
44-45 - Retail trade	2	47	-14	19	30	12	1	0	-1	0
48-49 - Transportation and warehousing	90	56	60	-10	10	-4	3	-2	-1	0
51 - Information and cultural industries	34	14	12	27	-20	-5	0	0	0	0
52 - Finance and insurance	395	36	13	13	36	-28	2	0	0	0
53 - Real estate and rental and leasing	964	8	8	8	-9	5	-3	-1	0	0
54 - Professional, scientific and technical services	108	99	81	-4	21	-2	2	2	-1	0
55 - Management of companies and enterprises	-332	-40	-33	-6	0	1	0	-1	-1	0
56 - Administrative and support, waste management and remediation services	54	22	28	-3	1	-5	4	-2	0	-1
61 - Educational services	49	6	-8	4	3	5	0	2	0	0
62 - Health care and social assistance	145	3	20	-24	-8	6	7	1	1	0
71 - Arts, entertainment and recreation	26	4	-46	34	8	6	3	-1	0	0
72 - Accommodation and food services	43	40	-3	5	-3	46	-4	-5	3	1
81 - Other services (except public administration)	299	-54	-57	0	2	4	3	-5	-1	0
91 - Public administration	-1	-1	-2	0	1	-1	1	0	0	0
Unclassified	762	166	113	41	7	8	-3	0	0	0
Total	2,955	522	222	149	75	53	26	-1	-3	1

Source: Statistics Canada, Canada Business Counts, December 2014 and 2017

Benchmarking

Niagara region was benchmarked against selected benchmark regions to show its relative situation. These regions were selected in consultation with the project Working Group for the Niagara Economic Development Strategy Master Plan project:

- Waterloo region (consisting of the cities of Waterloo, Cambridge, Kitchener; and townships of North Dumfries, Wellesley, Wilmot and Woolwich);
- Essex county (consisting of Windsor, and towns of Amherstburg, Essex, Kingsville, LaSalle, Lakeshore, Tecumseh; Municipality of Leamington; and Pelee township);
- Hamilton – city;
- Buffalo-Cheektowaga Niagara Falls MSA, New York – consisting of Erie County (including the city of Buffalo) and Niagara County (including Niagara Falls);
- Rochester MSA, New York - including Livingston County, Monroe County (including the city Rochester), Ontario County, Orleans County, Wayne County and Yates County.

Of the Ontario benchmark areas, the 2016 population levels range from 398,953 to 536,917, with Niagara's 2016 population level being 447,888, which is 87,266 and 89,029 lower than Waterloo region and Hamilton respectively, and is 42,564 higher than Essex county. Niagara's percentage population growth over the five year period has been roughly midrange at 3.8% with the lowest population growth in Essex county (2.6%) and the highest in Waterloo region (5.5%). Niagara region has the highest median age of the Ontario benchmark regions (45.7 years in 2016), lowest percentage with university degrees, and lowest household income.

Exhibit 24: Population Trends – Ontario Benchmark Areas

Area	Population 2011	Population 2016	Change	% Change	Median Age (2016)	% Postsecondary Completion	% With Degree(s)	Average Total Household Income 2010	Average Total Household Income 2015
Niagara region	431,346	447,888	16,542	3.80%	45.7	60.0%	20.7%	\$72,453	\$81,842
Waterloo region	507,096	535,154	28,058	5.50%	38.5	62.6%	28.7%	\$85,546	\$95,459
Essex county	388,782	398,953	10,171	2.60%	42.4	59.2%	24.0%	\$72,692	\$85,824
Hamilton	519,949	536,917	16,968	3.30%	41.5	61.6%	25.0%	\$84,273	\$87,775

Source: Statistics Canada, Census, 2016

The two New York state benchmark MSAs have larger population levels than the Ontario benchmark areas. The Buffalo-Cheektowaga-Niagara MSA had a population level of over 1.1 million in 2016, which is 0.3% lower than its 2011 population level. Most of the population resides in Erie county, which includes the city of

Buffalo. The Rochester MSA had a population level of over 1 million in 2016, with the largest population level in Monroe county (747,726) which includes the city of Rochester. The population level of the Rochester MSA decreased slightly (0.4%) between 2011 and 2016. The median age in both MSAs is notably lower than in Niagara (39.9 and 40.8 years of age in 2016). See Exhibit 25.

Exhibit 25: Population Trends – New York State Benchmark Areas

Area	2011 Population	2016 Population	% Change	2016 Median Age
Buffalo-Cheektowaga-Niagara MSA	1,135,850	1,132,867	-0.3%	40.8
Erie County (Buffalo)	920,113	921,092	0.1%	40.4
Niagara County (Niagara Falls)	215,736	211,775	-1.8%	42.9
Rochester MSA	1,082,663	1,078,853	-0.4%	39.9
Livingston County	64,859	64,218	-1.0%	40.4
Monroe County (Rochester)	747,696	747,726	0.0%	38.6
Ontario County	108,751	109,827	1.0%	43.3
Orleans County	42,697	41,351	-3.2%	42.6
Wayne County	93,276	90,812	-2.6%	43.4
Yates County	25,383	24,919	-1.8%	41.5

Source: Economic Modeling Specialists International (EMSI), customized data extraction, 2018

Job levels by 2 digit NAICs and job growth between 2013 and 2018 were reviewed for Niagara against the benchmark regions. Some of the key findings from this review are discussed below.

Agriculture

Niagara has the highest portion of jobs in the agriculture, forestry, fishing and hunting sector (primarily agriculture) of the benchmark regions with 2.2 % of jobs in this sector, being about the same as Essex county (2.1%). This sector accounted for 0.5% to 1.5% of total jobs in other benchmark regions.

While the number of jobs in this sector in Niagara decreased by 1.8% between 2013 and 2018, the number of jobs in this sector decreased at a much higher level in all the Ontario benchmark areas (8.0% to 14.8%). However, the number of jobs in this sector in the two New York state MSAs increased (2.1% and 4.7%).

Manufacturing

Essex county and Waterloo region had a high percentage of jobs in the manufacturing sector at 16.7% and 14.0% respectively. This can be compared to 8.5% for Niagara, which is close to the level in Hamilton, and just slightly lower than the Buffalo-Cheektowaga-Niagara MSA (9.0%) and Rochester MSA (10.4%).

Niagara had the highest increase in the number of manufacturing jobs of benchmark areas between 2013 and 2018 at 10.4% compared to a job loss of between 4.9% to a gain of 3.6% in other benchmark areas.

Tourism-related

Niagara has a slightly higher percentage of jobs than the benchmark regions in tourism-related sectors such as arts, entertainment, and recreation services (4.1% compared to 1.5% to 3% in benchmark regions) and

notably higher percentage in accommodation and food services (12.3% compared to 6.6% to 9.1% in benchmark regions).

Niagara's increase in the number of jobs in the arts, entertainment, and recreation services sector between 2013 and 2018 was 16.7%, which is low compared to Waterloo region (44.5%) and Hamilton (41.6%), but higher than Essex (7.7%). Niagara's percentage job growth in this sector is slightly higher than Buffalo-Cheektowaga-Niagara MSA (12.6%). In comparison, the Rochester MSA lost 4.0% of its jobs in this sector between 2013 and 2018. Niagara's job growth in the accommodation and food services sector (18.6%) is about the same as Waterloo region (18.2%), although higher than the other benchmark areas.

Data on job level, growth and sector share of total jobs at the 2 digit NAIC level is included in the following exhibits.

Exhibit 26: Job Levels and Change – Ontario Benchmark Areas

	Niagara region		Waterloo region		Essex county		Hamilton	
Description	2018 Jobs	% Change 2013 – 2018	2018 Jobs	% Change 2013 - 2018	2018 Jobs	% Change 2013 - 2018	2018 Jobs	% Change 2013 - 2018
Agriculture, forestry, fishing and hunting	4,790	-1.8%	3,784	-14.8%	3,900	-8.0%	2,857	-12.2%
Mining, quarrying, and oil and gas extraction	332	30.7%	210	13.7%	389	5.5%	100	-35.1%
Utilities	1,419	11.2%	573	-15.3%	745	-9.8%	877	1.2%
Construction	16,466	8.7%	23,828	18.8%	10,878	5.5%	20,174	10.2%
Manufacturing	18,791	10.4%	45,075	0.4%	30,295	3.6%	21,617	-4.9%
Wholesale trade	8,282	1.0%	18,294	14.1%	6,396	0.9%	9,428	8.9%
Retail trade	27,666	6.3%	35,955	6.4%	20,172	6.9%	28,399	5.3%
Transportation and warehousing	7,026	2.5%	12,259	4.7%	8,615	-0.1%	9,477	-2.3%
Information and cultural industries	2,031	7.1%	6,597	46.8%	1,499	-7.5%	3,072	-1.2%
Finance and insurance	5,705	-2.1%	19,501	15.2%	5,618	8.3%	7,568	2.7%
Real estate and rental and leasing	4,425	-1.1%	6,009	-4.0%	3,024	16.2%	5,894	11.2%
Professional, scientific and technical services	9,119	13.9%	21,808	21.4%	6,777	8.7%	13,769	11.8%
Management of companies and enterprises	1,470	-16.0%	41	-92.2%	1,046	29.1%	884	-6.4%
Administrative and support, waste management/remediation services	12,247	5.9%	15,595	13.0%	8,617	25.1%	13,868	-10.4%
Educational services	14,965	12.5%	26,816	14.1%	13,733	3.4%	26,334	10.3%
Health care and social assistance	26,756	21.3%	32,084	15.2%	22,973	5.0%	43,049	18.8%
Arts, entertainment and recreation	9,038	16.7%	5,396	44.5%	5,390	7.7%	5,244	41.6%
Accommodation and food services	27,278	18.6%	21,404	18.2%	13,448	11.0%	17,759	13.2%
Other services (except public administration)	9,810	-0.9%	11,242	-12.6%	7,713	-8.7%	12,186	-6.4%
Public administration	10,748	8.9%	10,185	-8.3%	7,042	-6.3%	12,919	7.5%
Unclassified	3,839	36.9%	5,798	37.8%	3,260	31.9%	4,493	32.5%
Total	222,202	10.1%	322,454	10.0%	181,531	5.0%	259,969	6.9%

Source: Economic Modeling Specialists International (EMSI), customized data extraction, 2018; EMSI, 2018.1 Dataset

Exhibit 27: Job Levels and Change – Niagara Compared to US Benchmark Areas

	Niagara Region		Buffalo- Cheektowaga- Niagara MSA		Rochester MSA	
Description	2018 Jobs	% Change 2013 - 2018	2018 Jobs	% Change 2013 - 2018	2018 Jobs	% Change 2013 - 2018
Agriculture, forestry, fishing and hunting	4,790	-1.8%	2,630	4.7%	8,013	2.1%
Mining, quarrying, and oil and gas extraction	332	30.7%	185	-37.5%	620	23.5%
Utilities	1,419	11.2%	1,463	-7.0%	1,631	1.2%
Construction	16,466	8.7%	23,585	9.9%	24,054	8.1%
Manufacturing	18,791	10.4%	51,838	0.8%	57,115	-4.4%
Wholesale trade	8,282	1.0%	19,980	-1.5%	15,982	-0.5%
Retail trade	27,666	6.3%	63,981	0.6%	56,766	0.0%
Transportation and warehousing	7,026	2.5%	16,197	7.1%	9,935	9.8%
Information and cultural industries	2,031	7.1%	6,981	-7.9%	8,253	-6.5%
Finance and insurance	5,705	-2.1%	29,880	16.9%	15,138	0.0%
Real estate and rental and leasing	4,425	-1.1%	8,357	13.9%	8,558	14.1%
Professional, scientific and technical services	9,119	13.9%	29,716	4.6%	31,644	13.3%
Management of companies and enterprises	1,470	-16.0%	13,120	-2.1%	10,770	-10.9%
Administrative and support, waste management/remediation services	12,247	5.9%	29,706	-12.0%	28,903	3.5%
Educational services	14,965	12.5%	16,196	2.5%	37,079	10.7%
Health care and social assistance	26,756	21.3%	82,451	8.6%	86,538	10.1%
Arts, entertainment and recreation	9,038	16.7%	10,277	12.6%	8,343	-4.0%
Accommodation and food services	27,278	18.6%	52,760	7.8%	39,080	4.4%
Other services (except public administration)	9,810	-0.9%	25,070	6.7%	22,719	3.2%
Public administration	10,748	8.9%	91,620	-0.4%	77,939	-0.6%
Unclassified	3,839	36.9%	1,762	182.4%	1,417	133.4%
Total	222,202	10.1%	577,755	3.5%	550,497	3.4%

Source: Economic Modeling Specialists International (EMSI), customized data extraction, 2018; EMSI, 2018.1 Dataset

Exhibit 28: Comparison of Benchmark Areas - Share of Total Jobs (2018) by Sector

Description	Niagara region	Waterloo region	Essex county	Hamilton	Buffalo-Cheektowaga-Niagara	Rochester
Agriculture, forestry, fishing and hunting	2.2%	1.2%	2.1%	1.1%	0.5%	1.5%
Mining, quarrying, and oil and gas extraction	0.1%	0.1%	0.2%	0.0%	0.0%	0.1%
Utilities	0.6%	0.2%	0.4%	0.3%	0.3%	0.3%
Construction	7.4%	7.4%	6.0%	7.8%	4.1%	4.4%
Manufacturing	8.5%	14.0%	16.7%	8.3%	9.0%	10.4%
Wholesale trade	3.7%	5.7%	3.5%	3.6%	3.5%	2.9%
Retail trade	12.5%	11.2%	11.1%	10.9%	11.1%	10.3%
Transportation and warehousing	3.2%	3.8%	4.7%	3.6%	2.8%	1.8%
Information and cultural industries	0.9%	2.0%	0.8%	1.2%	1.2%	1.5%
Finance and insurance	2.6%	6.0%	3.1%	2.9%	5.2%	2.7%
Real estate and rental and leasing	2.0%	1.9%	1.7%	2.3%	1.4%	1.6%
Professional, scientific and technical services	4.1%	6.8%	3.7%	5.3%	5.1%	5.7%
Management of companies and enterprises	0.7%	0.0%	0.6%	0.3%	2.3%	2.0%
Administrative and support, waste management/remediation services	5.5%	4.8%	4.7%	5.3%	5.1%	5.3%
Educational services	6.7%	8.3%	7.6%	10.1%	2.8%	6.7%
Health care and social assistance	12.0%	9.9%	12.7%	16.6%	14.3%	15.7%
Arts, entertainment and recreation	4.1%	1.7%	3.0%	2.0%	1.8%	1.5%
Accommodation and food services	12.3%	6.6%	7.4%	6.8%	9.1%	7.1%
Other services (except public administration)	4.4%	3.5%	4.2%	4.7%	4.3%	4.1%
Public administration	4.8%	3.2%	3.9%	5.0%	15.9%	14.2%
Unclassified	1.7%	1.8%	1.8%	1.7%	0.3%	0.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Economic Modeling Specialists International (EMSI), customized data extraction, 2018; EMSI, 2018.1 Dataset

Manufacturing Subsectors

A review was undertaken of the job levels and growth across manufacturing subsectors in Niagara, and this was compared to the benchmark regions. Key findings from this review include:

- Niagara has a high number of jobs in beverage manufacturing (mainly wine-making, with 2,519 jobs in 2018) and a 57% growth from 2013. This is a higher job number than any of the benchmark regions, with the next highest being the Rochester MSA (1,723 and 19% growth) and Essex county with 1,106 jobs and growth of 8.6%.

- Niagara has a high number of jobs in the transportation manufacturing subsector at 3,237 jobs in 2018, and a growth of around 22% from 2013. However, this is low compared to number of jobs in this subsector in some of the other benchmark regions: Waterloo region (9,107 jobs), Essex county (10,486 jobs), and Buffalo-Cheektowaga-Niagara MSA (5,411 jobs).
- The fabricated metal product manufacturing subsector in Niagara also has a relatively high number of jobs at 2,740, but this is significantly lower than Waterloo region (6,534) and the Buffalo-Cheektowaga-Niagara, and Rochester MSAs which have subsector job levels slightly higher than Waterloo region.

Data on the job levels and percentage growth for manufacturing subsectors for the benchmark regions is provided in Exhibits 29 and 30 on the following pages.

Exhibit 29: Job Changes in Manufacturing Subsectors in Ontario Benchmark Regions

		Niagara region		Waterloo region		Essex county		Hamilton	
NAICS	Description	2018 Jobs	% Change 2013 – 2018	2018 Jobs	% Change 2013 - 2018	2018 Jobs	% Change 2013 – 2018	2018 Jobs	% Change 2013 - 2018
311	Food manufacturing	1,372	-23.8%	5,812	-10.9%	1,608	-28.4%	2,701	-5.8%
312	Beverage and tobacco product manufacturing	2,519	56.6%	361	42.2%	1,106	8.6%	244	10.5%
3121	Beverage manufacturing	2,519	56.6%	361	49.7%	1,106	8.6%	244	10.5%
321	Wood product manufacturing	490	10.6%	970	4.6%	67	-16.9%	223	-24.2%
322	Paper manufacturing	405	-28.9%	435	-15.7%	51	-17.6%	107	-30.9%
323	Printing and related support activities	504	-19.1%	943	55.4%	1,283	5.8%	383	-23.9%
325	Chemical manufacturing	881	46.1%	845	4.3%	1,961	13.1%	763	-1.5%
326	Plastics and rubber products manufacturing	1,095	41.7%	3,093	21.2%	2,574	-4.9%	360	-16.7%
327	Non-metallic mineral product manufacturing	1,255	-2.8%	958	-7.0%	352	4.7%	560	-37.0%
331	Primary metal manufacturing	875	10.6%	810	9.8%	600	-1.7%	5,500	-5.8%
332	Fabricated metal product manufacturing	2,740	4.6%	6,534	-6.0%	2,001	-14.7%	2,635	-26.5%
3323	Architectural and structural metals manufacturing	1,269	43.6%	1,071	11.4%	962	26.9%	483	-34.0%
333	Machinery manufacturing	1,538	13.3%	4,929	16.9%	6,914	22.9%	1,947	10.7%
334	Computer and electronic product manufacturing	561	-13.3%	5,482	-27.4%	162	-29.1%	234	6.5%
335	Electrical equipment, appliance and component manufacturing	68	-9.3%	559	-38.1%	63	-27.2%	133	-24.9%
336	Transportation equipment manufacturing	3,237	21.5%	9,107	25.7%	10,486	5.4%	3,358	26.6%
3361	Motor vehicle manufacturing	2,048	27.3%	4,846	28.4%	6,315	8.0%	80	20.4%
3362	Motor vehicle body and trailer manufacturing	<10	-	395	-13.4%	57		79	7.4%
3363	Motor vehicle parts manufacturing	640	21.2%	2,465	18.5%	3,921	-0.8%	1,875	46.7%
3364	Aerospace product and parts manufacturing	341	25.8%	697	19.7%	130	50.7%	16	-48.3%
3365	Railroad rolling stock manufacturing	40	-7.0%	0	-	<10	-	1,218	7.1%
3366	Ship and boat building	150	-27.2%	<10	-	59	-	89	34.6%
3369	Other transportation equipment manufacturing	16	-	479	36.8%	<10	-	0	-
337	Furniture and related product manufacturing	286	16.3%	1,628	31.8%	410	17.3%	356	70.1%

Source: Economic Modeling Specialists International (EMSI), customized data extraction, 2018; EMSI, 2018.1 Dataset

Exhibit 30: Jobs Changes in Manufacturing Sector – Niagara Compared to US Benchmark Regions

		Niagara		Buffalo-Cheektowaga-Niagara		Rochester	
NAICS	Description	2018 Jobs	% Change 2013 - 2018	2018 Jobs	% Change 2013 - 2018	2018 Jobs	% Change 2013 - 2018
311	Food manufacturing	1,372	-23.8%	4,862	-7.8%	5,700	11.1%
312	Beverage and tobacco product manufacturing	2,519	56.6%	988	73.9%	1,771	22.4%
3121	Beverage manufacturing	2,519	56.6%	859	68.8%	1,723	19.1%
321	Wood product manufacturing	490	10.6%	782	-14.3%	634	60.1%
322	Paper manufacturing	405	-28.9%	1,422	-15.0%	2,028	11.9%
323	Printing and related support activities	504	-19.1%	2,149	12.3%	2,395	-6.3%
325	Chemical manufacturing	881	46.1%	4,987	5.7%	3,360	-43.7%
326	Plastics and rubber products manufacturing	1,095	41.7%	4,017	2.4%	5,334	6.9%
327	Non-metallic mineral product manufacturing	1,255	-2.8%	2,298	-7.4%	1,150	-1.2%
331	Primary metal manufacturing	875	10.6%	1,608	-8.8%	347	17.6%
332	Fabricated metal product manufacturing	2,740	4.6%	7,046	0.7%	6,989	-10.4%
3323	Architectural and structural metals manufacturing	1,269	43.6%	976	-13.3%	1,240	-7.1%
333	Machinery manufacturing	1,538	13.3%	4,897	-7.8%	8,781	-14.9%
334	Computer and electronic product manufacturing	561	-13.3%	3,193	4.6%	10,298	17.7%
335	Electrical equipment, appliance and component manufacturing	68	-9.3%	2,242	2.5%	899	-8.5%
336	Transportation equipment manufacturing	3,237	21.5%	5,411	31.0%	1,933	4.9%
3361	Motor vehicle manufacturing	2,048	27.3%	2	-	10	-89.0%
3362	Motor vehicle body and trailer manufacturing	<10	-	282	243.9%	127	-10.6%
3363	Motor vehicle parts manufacturing	640	21.2%	3,968	17.5%	1,671	13.7%
3364	Aerospace product and parts manufacturing	341	25.8%	1,005	62.9%	10	-58.3%
3365	Railroad rolling stock manufacturing	40	-7.0%	116	286.7%	28	211.1%
3366	Ship and boat building	150	-27.2%	38	216.7%	17	54.5%
3369	Other transportation equipment manufacturing	16	-	0	-100.0%	71	-26.0%
337	Furniture and related product manufacturing	286	16.3%	786	2.9%	811	0.6%

Source: Economic Modeling Specialists International (EMSI), customized data extraction, 2018; EMSI, 2018.1 Dataset

Tourism-related Subsectors

Niagara has a large number of jobs in a few tourism-related subsectors:

- It has 2,011 jobs in gambling industries but there has been a significant job loss in this subsector from 2013 (35%). The only benchmark region to have a comparable level of jobs is Essex county (1,917 jobs, with a job loss of 19% from 2013).
- The 'other amusement and recreation industries' subsector has a relatively large number of jobs in Niagara (2,651) but this level is comparable to some of the benchmark regions and lower than others.
- The travellers' accommodation subsector in Niagara accounts for a large number of jobs (8,673) which is significantly higher than the benchmark regions.
- The full-service restaurants and limited-service eating places subsector has the largest number of jobs of tourism-related subsectors in Niagara at 17,492 jobs which is similar to Waterloo, and significantly lower than in the Buffalo-Cheektowaga-Niagara, and Rochester MSAs. However, a large portion of the market for this subsector is the residential market – people residing in the benchmark regions and therefore the higher number of jobs in this subsector in the MSAs is expected given higher population numbers.

Data on the job levels and percentage growth for tourism-related subsectors for the benchmark regions is provided in Exhibits 31 and 32 on the following pages.

Exhibit 31: Job numbers and Growth in Tourism-related Subsectors in Ontario Benchmark Regions

		Niagara region		Waterloo region		Essex county		Hamilton	
NAICS	Description	2018 Jobs	% Change 2013 - 2018	2018 Jobs	% Change 2013 – 2018	2018 Jobs	% Change 2013 - 2018	2018 Jobs	% Change 2013 – 2018
7111	Performing arts companies	896	54.2%	449	2.6%	112	-39.2%	290	58.0%
7112	Spectator sports	546	77.3%	269	58.0%	145	38.9%	254	1.9%
7113	Promoters (presenters) of performing arts, sports and similar events	305	89.4%	429	54.0%	99	84.5%	140	80.9%
7114	Agents and managers for artists, athletes, entertainers and other public figures	64	Insf. Data	<10	-	0	-	18	13.6%
7115	Independent artists, writers and performers	949	81.1%	880	18.3%	472	18.6%	1,369	103.7%
7121	Heritage institutions	1,012	9.1%	171	96.5%	159	52.2%	301	38.4%
7131	Amusement parks and arcades	605	114.5%	<10	-	37	20.4%	137	70.7%
7132	Gambling industries	2,011	-35.3%	<10	-	1,917	-19.4%	138	-34.9%
7139	Other amusement and recreation industries	2,651	43.4%	3,181	60.4%	2,448	39.7%	2,597	30.1%
7211	Traveller accommodation	8,673	15.2%	1,750	15.0%	940	31.6%	728	49.2%
7212	Recreational vehicle (RV) parks and recreational camps	38	-48.6%	102	3.1%	201	13.5%	98	-26.7%
7223	Special food services	719	29.3%	1,109	28.7%	563	33.3%	1,599	25.8%
7224	Drinking places (alcoholic beverages)	347	-36.7%	536	-13.2%	366	2.1%	119	-54.3%
7225	Full-service restaurants and limited-service eating places	17,492	22.4%	17,889	19.5%	11,324	8.7%	14,964	11.9%
4871	Scenic and sightseeing transportation, land	<10	-	0	-	<10	-	0	-
4872	Scenic and sightseeing transportation, water	216	142.7%	0	-	<10	-	0	-

Source: Economic Modeling Specialists International (EMSI), customized data extraction, 2018; EMSI, 2018.1 Dataset

Exhibit 32: Job numbers and Growth in Tourism-related Subsectors in US Benchmark Regions

		Niagara		Buffalo-Cheektowaga-Niagara		Rochester	
NAICS	Description	2018 Jobs	% Change 2013 – 2018	2018 Jobs	% Change 2013 - 2018	2018 Jobs	% Change 2013 - 2018
7111	Performing arts companies	896	54.2%	668	20.6%	431	11.4%
7112	Spectator sports	546	77.3%	1,404	22.3%	940	-0.5%
7113	Promoters (presenters) of performing arts, sports and similar events	305	89.4%	930	55.0%	172	-13.6%
7114	Agents and managers for artists, athletes, entertainers and other public figures	64	Insf. Data	76	33.3%	57	-8.1%
7115	Independent artists, writers and performers	949	81.1%	801	9.7%	934	2.8%
7121	Heritage institutions	1,012	9.1%	792	36.6%	649	-7.3%
7131	Amusement parks and arcades	605	114.5%	186	5.7%	285	10.9%
7132	Gambling industries	2,011	-35.3%	336	-6.9%	30	-33.3%
7139	Other amusement and recreation industries	2,651	43.4%	5,084	3.4%	4,845	-6.6%
7211	Traveller accommodation	8,673	15.2%	5,079	24.8%	2,942	-5.2%
7212	Recreational vehicle (RV) parks and recreational camps	38	-48.6%	247	44.4%	155	18.3%
7223	Special food services	719	29.3%	4,719	1.0%	2,615	2.3%
7224	Drinking places (alcoholic beverages)	347	-36.7%	2,205	8.9%	1,613	6.0%
7225	Full-service restaurants and limited-service eating places	17,492	22.4%	40,507	6.6%	31,732	5.4%
4871	Scenic and sightseeing transportation, land	<10	-	61	-34.4%	34	325.0%
4872	Scenic and sightseeing transportation, water	216	142.7%	139	69.5%	21	-8.7%

Source: Economic Modeling Specialists International (EMSI), customized data extraction, 2018; EMSI, 2018.1 Dataset

Section 4: Economic Outlook

Published employment forecasts for Niagara, communities within the region and the St. Catharines-Niagara CMA are, for the most part, short term forecasts. There are also differences between the starting baseline employment numbers between the sources, with the EMSI reported employment levels being slightly higher than those reported by the Conference Board of Canada. For example, the 2017 employment number used in the Conference Board of Canada forecast for the St. Catharines-Niagara CMA is 198,100. Based on the EMSI data, the 2017 employment level for the CMA was 204,276. The Conference Board of Canada forecasted 2018 employment level was 204,900, while the EMSI reported employment level for the CMA in 2018 was 207,136. The Conference Board Metropolitan Outlook for the St. Catharines-Niagara CMA forecasts an employment level of 211,500 for 2022, which can be compared to a much higher EMSI forecast of 219,396 for the CMA in 2022.

A discussion of some of the forecast data from these two sources and how the outlook compares to Ontario and Canada is provided below. Total employment in the CMA is forecasted by the Conference Board of Canada to increase by 6.8% between 2017 and 2022, which is higher than the job growth forecasted for Ontario (5.9%) and Canada (4.9%) over this period. Relatively high job growth is forecasted in population serving sectors such as health care and social assistance and sectors that serve residents and tourists such as arts, entertainment and recreation and accommodation and food services. Relatively high growth is also expected in construction.

Exhibit 33: Forecasted Employment Growth in the St. Catharines – Niagara CMA ('000)

Sector	2017	2022	Change	2017 to 2022 % Change	Per Annum Average % Change
Construction	13.0	16.3	3.3	25.4%	5.1%
Health care and social assistance	24.7	29.9	5.2	21.1%	4.2%
Arts, entertainment, and recreation	7.8	9.1	1.3	16.7%	3.3%
Information and cultural industries	1.9	2.2	0.3	15.8%	3.2%
Accommodation and food services	24.4	28.1	3.7	15.2%	3.0%
Wholesale and retail trade	31.4	33.8	2.4	7.6%	1.5%
Transportation and warehousing	8.2	8.2	0	0.0%	0.0%
Finance, insurance, real estate, business, building and support services	19.5	19.5	0	0.0%	0.0%
Professional, scientific, and technical services	9.5	9.5	0	0.0%	0.0%
Public administration	8.5	8.5	0	0.0%	0.0%
Educational services	12.8	12.6	-0.2	-1.6%	-0.3%
Manufacturing	21.0	20.1	-0.9	-4.3%	-0.9%
Primary and utilities	5.7	5.1	-0.6	-10.5%	-2.1%
Other services (except for public administration)	10.0	8.4	-1.6	-16.0%	-3.2%
Total employment	198.1	211.5	13.4	6.8%	1.4%

Source: Conference Board of Canada, Metropolitan Outlook 2, St. Catharines-Niagara - Winter 2018

Employment forecasts are available for Niagara region from the EMSI Analyst program. The data is not immediately comparable to the Conference Board of Canada forecasts.

Based on the EMSI data, the number of jobs in Niagara is forecasted to increase by about 5.1% between 2018 and 2023.

Exhibit 34: Forecasted Job Growth in Niagara

NAICS	Description	2018 Jobs	2023 Jobs	Change	% Change	Average per annum % change
62	Health care and social assistance	26,756	30,366	3,611	13.5%	2.7%
72	Accommodation and food services	27,278	29,063	1,785	6.5%	1.3%
23	Construction	16,466	17,527	1,061	6.4%	1.3%
61	Educational services	14,965	15,835	870	5.8%	1.2%
44-45	Retail trade	27,666	28,437	771	2.8%	0.6%
31-33	Manufacturing	18,791	19,373	582	3.1%	0.6%
54	Professional, scientific and technical services	9,119	9,655	537	5.9%	1.2%
71	Arts, entertainment and recreation	9,038	9,551	513	5.7%	1.1%
41	Wholesale trade	8,282	8,616	334	4.0%	0.8%
56	Administrative and support, waste management and remediation services	12,247	12,572	325	2.7%	0.5%
91	Public administration	10,748	11,065	317	3.0%	0.6%
X0	Unclassified	3,839	4,069	230	6.0%	1.2%
48-49	Transportation and warehousing	7,026	7,212	186	2.6%	0.5%
53	Real estate and rental and leasing	4,425	4,594	168	3.8%	0.8%
22	Utilities	1,419	1,535	116	8.2%	1.6%
51	Information and cultural industries	2,031	2,088	57	2.8%	0.6%
52	Finance and insurance	5,705	5,755	50	0.9%	0.2%
21	Mining, quarrying, and oil and gas extraction	332	355	23	6.8%	1.4%
81	Other services (except public administration)	9,810	9,788	-22	-0.2%	0.0%
55	Management of companies and enterprises	1,470	1,426	-44	-3.0%	-0.6%
11	Agriculture, forestry, fishing and hunting	4,790	4,676	-114	-2.4%	-0.5%
	Total	222,202	233,559	11,357	5.1%	1.0%

Source: EMSI 2018.1 Data set

Longer term employment forecasts for Niagara are available from the Municipal Comprehensive Review (MCR) for the Region of Niagara. The Preferred Growth Option in the MCR is predicated on focusing growth in settlement areas where it can be best serviced. Forecasts of employment by municipality have been prepared as part of the MCR but these will need to be refined taking into account servicing and employment lands supply, and any final amendments to the Growth Plan. The forecasts of employment numbers by year in the MCR were prepared before the 2016 Census data and other data was available and therefore the allocations by year may change once base year information is revised in updates to the forecasts. The number of jobs in Niagara was forecasted to reach 213,830 in 2021 (which is significantly lower than the number of jobs that EMSI has estimated for Niagara in 2018 – 222,202). The total number of jobs estimated for the Region in 2041 is 265,020, which is an increase of 42,818 jobs or around 19% from the estimated 2018 job level based

on EMSI. The projected share of jobs by municipality in 2041 is generally similar to the estimated 2016 share in the MCR forecast and the 2018 share based on EMSI.

Exhibit 35: MCR Strategic Growth Option - Employment Forecasts

Municipality	2,016	2,021	2,031	2,041	Change	2041 Share
Fort Erie	12,460	13,270	14,920	17,240	4,780	6.5%
Grimsby	9,870	10,780	12,380	14,630	4,760	5.5%
Lincoln	11,280	11,870	13,040	14,600	3,320	5.5%
Niagara Falls	45,360	47,790	52,060	57,720	12,360	21.8%
Niagara-on-the-Lake	13,010	13,720	14,660	16,030	3,020	6.0%
Pelham	4,540	4,880	5,750	6,930	2,390	2.6%
Port Colborne	5,770	5,900	6,350	7,000	1,230	2.6%
St. Catharines	62,660	65,530	71,480	80,240	17,580	30.3%
Thorold	8,070	8,480	9,390	10,660	2,590	4.0%
Wainfleet	1,300	1,350	1,470	1,650	350	0.6%
Welland	23,590	24,490	26,220	28,760	5,170	10.9%
West Lincoln	5,150	5,770	7,270	9,560	4,410	3.6%
Niagara Region	203,060	213,830	234,990	265,020	61,960	

Source: Niagara Municipal Comprehensive Review, Phase 3 Summary Report, Nov. 2016

Based on Ontario's Long Term Report on the Economy, there are a number of trends that are expected to continue in the future and impact the level of employment and job sector growth. These include:

- Economic growth is expected to continue, but at a slower pace in the future, and this is primarily attributed to slower growth in the working age population, particularly with the retirement of the baby boom generation with a large portion retiring into the late 2020's. It is expected that the core working age group pace of growth will increase by 2031 but will still be lower than it has been historically;
- Employment is projected to grow at a slower pace than in the past. While the number of jobs in Ontario increased by an average growth of 1.4% per annum between 1982 and 2015, based on a medium growth scenario, job growth in Ontario is expected to average at 1.2% between 2016 and 2020, and 0.8% per annum between 2021 and 2041. The average annual projected employment growth rate by the Ministry of Finance for the period 2016 and 2040 as noted in Ontario's Long Term Report on the Economy is 0.9 percent. As noted in that report, this is slightly higher than the forecast by the Conference Board of Canada (0.8 percent) and slightly lower than the Institute for Policy Analysis at the University of Toronto (1.0 percent). However, these are small difference and the forecasts are generally comparable in terms of the long term growth of the economy in Ontario;
- Transformative technologies will create opportunities as well as challenges and could result in job loss due to automation in some industry segments;
- Increases in non-standard forms of employment such as part-time, contract and temporary work;
- Growth in the number of older workers continuing to work longer, and self-employment;
- Labour productivity is expected to continue to grow at its long-term historical pace;

- The shift from goods-producing sectors, particularly manufacturing, to service producing sectors is expected to continue, although at a slower pace. In Ontario, the manufacturing sector accounted for 17.5% of total jobs in 1996, but only 10.7% in 2016. Data on the shift towards services sectors is shown below.

Exhibit 36: Percentage Employment Share of Ontario Major Sectors

Sector	1996	2006	2016	Change 1996- 2016
Goods-Producing Sector	26.4	24.6	20.3	-6.1
Manufacturing	17.5	15.4	10.7	-6.8
Other Goods-Producing Industries	8.9	9.1	9.5	0.6
Private Services Producing Sector	51.7	53.8	55.5	3.8
Wholesale and Retail Trade	15.0	15.7	14.8	-0.2
Transportation and Warehousing	4.7	4.6	4.7	0.0
Information and Cultural	2.7	2.7	2.1	-0.6
Financial Services	5.2	5.4	5.8	0.6
Real Estate, Rental and Leasing	2.0	1.9	2.1	0.1
Professional, Scientific and Technical Services	6.1	7.0	8.5	2.4
Management, Administrative and Support	3.4	4.5	4.7	1.3
Arts, Entertainment, and Recreation	1.8	2.2	2.4	0.6
Accommodation and Food Services	6.0	5.8	6.5	0.5
Other Services	4.7	4.0	3.9	-0.8
Public Sector Services	21.9	21.6	24.2	2.3
Education	6.6	6.9	7.2	0.6
Health Care and Social Assistance	9.7	9.8	12.0	2.3
Public Administration	5.6	4.8	5.0	-0.6

Note: Other Goods-producing sectors include agriculture, fishing, forestry, mining, utilities and construction

Source: Ontario's Long Term Report on the Economy, using data from Statistics Canada, Labour Force Survey

Section 5: Export Activity

The total value of exports from Niagara in 2016 exceeded \$4.1 billion in 2016, which represents a growth of 13.9% from 2011. In comparison, the value of exports increased by 19.8% in Ontario over this period. Overwhelmingly, the majority of exports from Niagara are from establishments in the manufacturing sector, which accounted for close to 91% of the value of exports from Niagara in 2016. The manufacturing sector's share of export value in 2016 was about two percentage points lower than in 2011. Some sectors, while still having a low share of the overall value of Niagara exports, have shown significant growth between 2011 and 2016, such as agriculture; transportation and warehousing; finance and insurance; and wholesale trade. Some sectors have had a decrease in the levels of exports between 2011 and 2016 as shown below.

The manufacturing commodity group with the highest value of exports by Niagara companies is machinery, boilers, mechanical appliances, engines and parts. This commodity group accounted for about 39% of the value of Niagara exports in 2016. This was followed by nickel and articles thereof, at 16%. The following two commodity groups each accounted for just over 6% of the total – vehicles, parts and accessories thereof; and plastics and articles thereof.

Exhibit 37: Total Value of Exports by Industry Sector, Niagara Region, 2011 to 2016

Sector	2011	2016	% Change	% Total 2011	% Total 2016
Manufacturing	\$3,358,224,100	\$3,728,310,300	11.0%	92.99%	90.67%
Wholesale Trade	\$138,956,400	\$197,161,800	41.9%	3.85%	4.79%
Agriculture, forestry, fishing and hunting	\$47,082,200	\$109,247,600	132.0%	1.30%	2.66%
Transportation and warehousing	\$1,309,000	\$19,366,600	1379.5%	0.04%	0.47%
Construction	\$17,768,300	\$12,988,800	-26.9%	0.49%	0.32%
Admin Support, waste management, remediation	\$10,794,300	\$9,660,200	-10.5%	0.30%	0.23%
Retail trade	\$11,475,200	\$7,955,200	-30.7%	0.32%	0.19%
Professional, scientific & technical services	\$7,269,900	\$6,527,400	-10.2%	0.20%	0.16%
Other services (except public admin.)	\$2,410,100	\$5,533,000	129.6%	0.07%	0.13%
Arts, entertainment and recreation	\$7,126,900	\$4,646,400	-34.8%	0.20%	0.11%
Management of companies and enterprises	\$2,211,000	\$3,759,800	70.0%	0.06%	0.09%
Real estate rental and leasing	\$6,384,400	\$3,744,400	-41.4%	0.18%	0.09%
Finance and insurance	\$64,900	\$1,672,000	2476.3%	-	0.04%
Information and cultural industries	\$170,500	\$1,185,800	595.5%	-	0.03%
Educational services	\$85,800	\$216,700	152.6%	-	0.01%
Accommodation and food services	\$1,100	\$69,300	6200.0%	-	-
Public administration	\$5,500	\$7,700	40.0%	-	-
Mining, oil and gas extraction	\$9,900	\$5,500	-44.4%	-	-
Health care and social assistance	\$2,200	\$1,100	-50.0%	-	-
Total	\$3,611,351,700	\$4,112,059,600	13.9%	100.00%	100.00%

Source: Niagara Economic Development, Niagara Export Trade Overview

Niagara accounted for a small portion of export trade in Ontario at 2.17% in 2016, which is slightly lower than its share in 2011 (2.28%).

The number of exporters in Niagara region was 613 in 2016, which is an increase of 33 firms or 5.7% from 2011. The largest number of exporters are in the manufacturing sector accounting for about 40% of the total value number of exporting establishments in Niagara in 2016; followed by wholesale trade, accounting for about 19% of exporting businesses; and agriculture sector accounting for about 13% of exporting businesses. A comparison of the number of exporting enterprises by sector is shown in Exhibit 38.

Exhibit 38: Total Number of the Exporting Establishments by Industry Sector, Niagara Region

Sector	2011	2016	Change	% Total 2011	% Total 2016
Manufacturing	239	243	4	41.2%	39.6%
Wholesale Trade	117	119	2	20.2%	19.4%
Agriculture	69	77	8	11.9%	12.6%
Retail trade	36	46	10	6.2%	7.5%
Construction	16	22	6	2.8%	3.6%
Transportation and warehousing	13	18	5	2.2%	2.9%
Professional, scientific & technical services	20	16	-4	3.4%	2.6%
Other services (except public admin.)	16	15	-1	2.8%	2.4%
Admin Support, waste management remediation	10	11	1	1.7%	1.8%
Arts, entertainment and recreation	8	11	3	1.4%	1.8%
Management of companies and enterprises	6	-	-	1.0%	
Real estate rental and leasing	15	14	-1	2.6%	2.3%
Finance and insurance	-	-	-	-	-
Information and cultural industries	6	-	-	1.0%	-
Educational services	-	-	-	-	-
Accommodation and food services	-	-	-	-	-
Public administration	-	-	-	-	-
Mining, oil and gas extraction	-	-	-	-	-
Health care and social assistance	-	-	-	-	-
Total	580	613	33	100.0%	100.0%

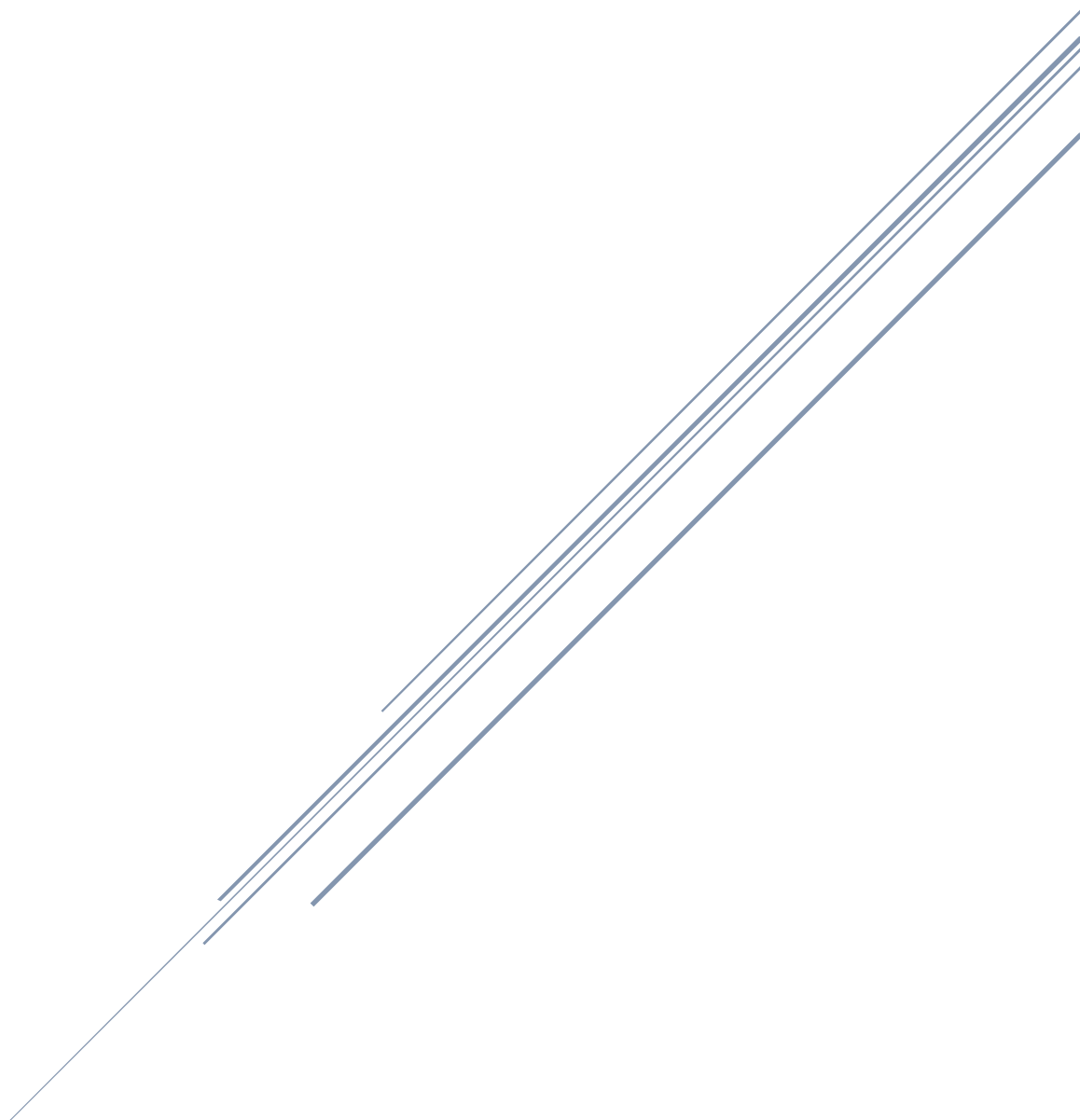
Note: establishment estimates counts of less than 5 are suppressed for confidentiality purposes and shown as '-'

Source: Niagara Economic Development, Niagara Export Trade Overview

The primary destination for Niagara exports is North America, accounting for about \$3.9 billion in 2016 or about 95% of the value of exports from Niagara in 2016. This is followed by Asia and Europe, with each accounting for about 1.7%.

A Vision of Niagara Region in 2041

Discussion Paper



A Vision of Niagara Region in 2041

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A Niagara Region Crystal Ball

The External Influences and Trends

This discussion paper is intended to provoke discussion among Niagara's economic development stakeholders about future external influences and trends and how these will impact and shape Niagara region's economic evolution of over the coming two decades.

Living in a World of Accelerating Change: All around us, technological change is occurring at dramatically accelerating rates that have commonly become exponential rather than linear. Change does not just involve the application of technology but is driven as well by new business models and influenced by global mega-trends. The speed of the transformation has reached a point where, some say, it may defy the ability of humans to adapt quickly enough to keep up. Others wonder the extent to which governments have the capacity to take sufficiently timely policy and regulatory decisions.

The tempo of change is dramatically illustrated by how quickly technology that debuted a decade ago has transformed people's lives and disrupted and radically altered the business landscape. Just over ten years ago, in 2007:

- The Apple iPhone was unveiled;
- Google launched Android;
- Twitter was spun off as a separate platform;
- Facebook had just been opened to people outside of colleges and high schools;
- Airbnb was conceived; and
- IBM began building a cognitive computer called Watson.¹

In June 2018, Apple, Alphabet, Microsoft, Amazon, and Facebook, ranked as the five most valuable companies by market capitalization – a very different line up than a decade previous.²

Niagara Region's Neighbourhood – Benefiting from Being Part of Something Bigger

Niagara region's future must be considered in the context of the opportunities and influences that its surrounding geography presents and how Niagara can capitalize on its location. In economic development, collaboration is growing and the "home" fields are becoming larger.

Niagara as Part of the Greater Golden Horseshoe Mega-Region: Niagara region benefits from being part of a major North American economic mega-region, the Greater Golden Horseshoe (GGH). Anchored by the city of Toronto, this population concentration of 9.4 million people³ extends into Niagara region. It ranks fifth among major US and Canadian metropolitan regions,⁴ contains over one-

¹ Thomas Friedman, "Thank You for Being Late: An Optimist's Guide to Thriving in the Age of Accelerations," November 2015.

² Corporate Information, Wright Investment Service (<https://www.corporateinformation.com/Top-100.aspx?topcase=b>), on June 20, 2018, largest companies by market cap.

³ Canadian Census 2016.

⁴ Based on a comparison with US "Combined Statistical Areas" in 2015 US Census. New York-Newark NY-NJ-CT-PA, Los Angeles-Long Beach CA, Chicago-Naperville IL-IN-WI, and Washington-Baltimore-Arlington DC-MD-VA-WV-PA are the four ahead, while San Jose-San Francisco-Oakland CA, Boston-Worcester-Providence MA-RI-NH-CT, Dallas-Fort Worth TX-OK and Philadelphia-Reading-Camden PA-NJ-DE-MD follow.

quarter of Canada's population, and attracts one in three new immigrants to Canada. As one of North America's fastest growing regions, the GGH population is forecast to reach 13.5 million by 2041.⁵

Such population growth presents Niagara with both challenges and opportunities. Niagara region's agricultural assets, coupled with its geographic proximity to the GGH's urban core, positions it ideally for Niagara producers to supply the GGH's daily food and beverage needs on a timely basis. For residents of the GGH, Niagara also offers an attractive change of pace, growing cultural and recreational options, and a quality of life, all readily accessible from the metropolitan core. Over time, facilitated by frequent two-way GO Transit rail and bus links, Niagara also can become an appealing location for enterprising lifestyle entrepreneurs who can choose their base of operations provided they have access to high-speed broadband networks. Over time, the area will be an increasingly attractive location for additional higher skill operational nodes for the financial and health care-related sectors, for example, to take advantage of talent graduating from post-secondary programs at Brock University and Niagara College. Among the faster-growing communities in the US and Canada in recent years have been university and college-centred cities on the perimeter of major metropolitan areas.

Niagara as a US-Canada Cross-Border Connector: Niagara peninsula is a vital bridge for the Canada-US relationship and the connector between the Greater Golden Horseshoe and Buffalo, Rochester, Syracuse and Albany in New York State. One hundred billion dollars in Canada-USA trade flows across Niagara's four border crossings every year.⁶ To facilitate international business, Niagara region was the first area in Ontario designated as a Foreign Trade Zone Point by the Federal government.

Though preferential NAFTA-style access to the US market remains an important consideration, Niagara region can position itself as a preferred North American site to enable firms to take fullest possible advantage of Canada's recent commitments to trade and economic pacts with the European Union and Pacific rim partners.

A Cross-Border Innovation and Prosperity Initiative, led by Brock University's Niagara Community Observatory and the University of Buffalo School of Architecture and Planning, continues to explore how assets on each side of the border could be meaningfully and strategically levered to strengthen innovation, prosperity and collective well-being. A binational Hamilton-Niagara-Buffalo health sciences corridor, facilitating access to two different health care systems and regulatory regimes, seeks to capitalize on Niagara's investment in state-of-the-art hospitals; the talent and research offered by Brock, Niagara College, and McMaster; and Buffalo's long-standing health sciences cluster and research and early-stage incubation facilities and funding resources.

In tourism, Niagara's unequalled international recognition is another common cross-border asset and opportunity, but one where a sense of competition may sometimes inhibit consideration of mutually-beneficial collaboration, including in the development and exploitation of new technologies applicable to the sector.

Growing Regional Collaboration in Economic Development: In economic development, there has been a marked increase in collaboration among likeminded but otherwise competing jurisdictions –

⁵ Ontario Ministry of Municipal Affairs (<http://www.mah.gov.on.ca/AssetFactory.aspx?did=10852>). Accessed on June 21, 2018.

⁶ Niagara Trade Zone, "Your Launch Pad to Export Success," April 2018 (https://niagaracanada.com/wp-content/uploads/sites/2/2018/05/NFTZ_Explanatory_Powerpoint_ENGLISH_FINAL_APRIL2018.pdf). Accessed on June 15, 2018.

something that has been labelled as “co-opetition” or “competi-mating.” The geographic footprint for collaborative ventures has been steadily expanding – as seen in the recent awards of Canadian government funding for five Superclusters. Niagara College is a member of the advanced manufacturing supercluster, Next Generation Manufacturing Canada. Amazon’s recent public Request for Proposals (RFP) for a second headquarters location stimulated many regionally based responses, including Niagara region’s collaboration with Western New York state partners.

Within Niagara region, there has been a continuing focus on building Team Niagara involving the 13 Niagara economic development programs. Spurred by the opportunities presented by the 2015 PanAm Games, Niagara region and Hamilton established Invest Hamilton Niagara. Niagara Economic Development is also a member of several collaborative Ontario-wide investment attraction arrangements that benefit from Federal and Ontario financial support. The Ontario Manufacturing Communities Alliance (OMCA), and the Ontario Food Cluster (OFC) are examples. This Niagara Region Economic Development Master Plan initiative involves Niagara College and Brock University in recognition of their critical economic development role.

Global Mega-Trends

Major global mega-trends are guide posts for those looking to the future. Lasting long-term impacts are inevitable. The main focus will often centre on how we manage the change. Frequently, these shifts require responses involving complex global systems. The status quo is not an option.

- 1. Rapid Technology Change – Disrupt or Be Disrupted:** What were linear rates of change have shifted to be exponential. All manner of businesses are being upended or radically changed by digital and technology-based disruptions. In the face of such change, governments have recognized that according a high policy priority to innovation is a national competitive imperative.

The convergence of digitally-based technologies has been a game changer that blurs traditional product sector boundaries, as technologies cut across and transform many products and services. Major thematic public policy initiatives – such as climate change – are also linked to commercial innovation across multiple sectors.

Just as multiple technologies converge to create ever more powerful and innovative impacts, an increasing number of novel business models will be built by companies that integrate various new platform technologies, often in highly customer-focused approaches that provide previously unavailable end-to-end experiences.⁷

Gartner, a US research and advisory firm, annually identifies a Hype Cycle of Emerging Technologies, those that show the most potential for delivering a competitive advantage over the next five to ten years. For 2017, the three dominant trends included “Artificial Intelligence (AI) Everywhere,” “Transparently Immersive Experiences,” and “Digital Platforms.” Prominent examples of AI enabled technologies are autonomous vehicles and machine learning. “Transparently Immersive Experiences” encompass augmented reality, virtual reality, 4-D printing,⁸ connected homes and

⁷ McKinsey and Company, “Competing in a World of Sectors without Borders,” July 2017 (<https://www.mckinsey.com/business-functions/mckinsey-analytics/our-insights/competing-in-a-world-of-sectors-without-borders>). Accessed on June 19, 2018.

⁸ 4-D Printing incorporates “shape memory” polymer fibers into composite materials so that a 3-D printer can be used to manufacture a 3-D object that, when later heated or cooled to a specific temperature, will transform into a different 3-D shape.

digital workspaces. According to Gartner, key platform enabling technologies are 5G, Blockchain, IoT Platforms, Quantum Computing, Neuromorphic Hardware, Digital Twin, Edge Computing, and Software-Defined Security.⁹

Digitization and Digital Technologies		
Artificial Intelligence (AI) Blockchain Manufacturing 4.0 Automotive Morphs to Mobility Precision Agriculture	The Internet of Things (IoT) Big Data Imaging Virtual & Augmented Reality Sensing Cybersecurity	3-D Printing Robotics High-Speed Broadband 5G Networks Quantum Computing
Advanced Technologies		
Gene Sequencing Nanotechnology	Biotechnology Neurotechnology	Geo-engineering Energy Storage

- 2. The Nature of Work:** Ontario has one of the world’s most educated populations. The Province leads all OECD jurisdictions in the proportion of the population that has achieved post-secondary completion. Niagara region exceeds the Ontario average for college completion, though it is below the provincial average in the numbers who have attained a university degree.

Technological change is however reverberating ominously in today’s workplace. Given the skills shifts associated with rapid technology advances, widespread concern has arisen over the potentially disruptive impact on the workforce, both in terms of threatened elimination of jobs and the rise of non-standard jobs (the gig economy).

Recent OECD studies on the potential impact of automation, which were released in March 2018, refined earlier predictions of the jobs that could be susceptible to automation. The adjusted estimates indicate that 14 percent of jobs in OECD countries are “highly automatable.” This is defined as having more than a 70 percent probability of automation. In addition, another 32 percent could face “significant change in how they are carried out.” The definition for “significant change” is having a risk of automation between 50 and 70 percent. For Canada, the estimates are close to these OECD averages. About 14 percent of jobs in Canada are “highly automatable,” while some 28 percent face a risk of “significant change,” that is a significant share of tasks, but not all, could be automated, thereby changing the skill requirements for these jobs.¹⁰

Retail is an example of an area of business facing major dislocation because the business model is shifting. The rapid growth in e-commerce is cutting into sales at traditional brick-and-mortar retail outlets, leading to downsizings, closures, and the repurposing shopping malls. The revamped new retail centre models adopt a mixed-use approach, incorporating residential, offices, shared work spaces, additional entertainment offerings, and other varied uses. Customer service call centres are another category under threat. Speech recognition technologies and automated intelligent enquiry

⁹ Gartner, “Top Trends in the Gartner Hype Cycle for Emerging Technologies, 2017,” August 15, 2017 (<https://www.gartner.com/smarterwithgartner/top-trends-in-the-gartner-hype-cycle-for-emerging-technologies-2017/>). Accessed on April 21, 2018.

¹⁰ Nedelkoska, Ljubica, and Glenda Quintini, Organization for Economic Cooperation and Development. “Automation, Skills Use and Training,” Working Papers #202, March 2018 (<https://www.oecd-ilibrary.org/docserver/2e2f4eea-en.pdf?expires=1531768312&id=id&accname=guest&checksum=5B9F4B3DEF03EF637E9811D651A78C8C>). Accessed on July 16, 2018.

response systems have advanced to the point where it is difficult to distinguish between human and automated responses.

Whatever the mathematics of these types of analyses may be, there is definitely a more pervasive sense of economic and job insecurity in the wake of the financial crisis and in the face of future market prospects. Since the 2008-2009 downturn, fewer Canadians self-identify as middle class (and more as lower class). A sense of middle class decline poses a threat to economic, societal and political stability.¹¹ The rapidity of workforce change and the associated risks to employment have invited wider international discussion of guaranteed annual income support programs.

What Education and Training are Required for the Jobs of the Future? As the nature of future jobs can be increasingly difficult to foresee, a number of studies stress the need to focus on skills which will facilitate the progression of workers into new occupations. These skills involve higher cognitive functions, such as creativity, critical thinking, people management, communication and teamwork. In addition, digital literacy and digital problem solving skills will be in demand across all occupations and industries.¹² The responses to these shifts obviously need to engage and benefit from the insights of the players at all levels in the education system.

With the rapid pace of change, lifelong learning becomes an imperative. Available data indicates, however, that spending on workplace training in Ontario declined 37 percent in constant dollars from 1993 to 2015.¹³ The adequacy of government funding levels that support retraining in Ontario appears in need of re-examination, as do the alignment of programs with the new realities.

Growing Income Disparities: A current preoccupation in advanced economies centres on the fact that middle class workforce compensation has stagnated and does not appear to be keeping pace with overall growth of the economies (and the wealth being accumulated by the world's richest people). This is among the prominent areas of dissatisfaction that has been propelling political change. A measure of this disparity is the link over time between per capita GDP and median income. In Ontario, a growing divergence between per capita GDP and median adjusted income started in the early 1990s and has generally widened since.¹⁴ With lower levels of unemployment in developed economies, some upward pressure on wages appears to be emerging recently. It is uncertain whether this is a trend that will sustain itself.

3. Global Demographic Shifts: The global population is forecast to rise to a 8.6 billion in 2030 and 9.8 billion in 2050, with Africa leading the way.¹⁵

¹¹ Organization for Economic Cooperation and Development, "The Squeezed Middle Class in OECD and Emerging Countries: Myth and Reality," Issues Paper, December 1, 2016 (<https://www.oecd.org/inclusive-growth/about/centre-for-opportunity-and-equality/Issues-note-Middle-Class-squeeze.pdf>). Accessed on May 2, 2018.

¹² Institute for Competitiveness & Prosperity, "The Labour Market Shift: Training a Highly Skilled and Resilient Workforce in Ontario," Working Paper 29, September 2017 (<https://www.competeprosper.ca/work/working-papers/labour-market-shift-training-highly-skilled-and-resilient-workforce-ontario>). Accessed on May 14, 2018.

¹³ Institute for Competitiveness & Prosperity, "The Labour Market Shift: Training a Highly Skilled and Resilient Workforce in Ontario," Working Paper 29, September 2017 (<https://www.competeprosper.ca/work/working-papers/labour-market-shift-training-highly-skilled-and-resilient-workforce-ontario>). Accessed on May 14, 2018.

¹⁴ Ontario Ministry of Finance, "Ontario's Long-Term Report on the Economy," 2017 (<https://www.fin.gov.on.ca/en/economy/ltr/>). Accessed on May 8, 2018.

¹⁵ United Nations, "World Population Prospects – Volume II: Demographic Profiles – 2017 Revision," (https://esa.un.org/unpd/wpp/Publications/Files/WPP2017_Volume-II-Demographic-Profiles.pdf). Accessed on June 16, 2018.

The aging of society affects multiple areas and has wide spread impact. According to the United Nations, population aging is poised to become one of the most significant social transformations of the 21st century, with implications for financial and labour markets and the demand for goods and services. In Canada in 2017, 23 percent of the population was sixty years and over. By 2050, the proportion will rise to 32.4 percent. This will be less than Europe (34.2 percent) but higher than the US (27.9 percent).¹⁶ Though living longer and drawing a greater share of social services, more seniors will look to be engaged and want to contribute to society. Niagara region has an older population profile than Canada and Ontario,¹⁷ a situation that has invited Brock and Niagara College to focus on aging.

In the developing and emerging economies, a global success story has been the marked – though still incomplete – progress on reducing global poverty. Nearly 1.1 billion people moved out of extreme poverty (less than \$US 1.90 per day) between 1990 and 2013, even as the world’s population grew by 1.9 billion. The 767 million still in poverty in 2013 represent an even bigger challenge.

One of the most economically relevant trends has been the growth of the global middle class, especially in Asia. Standing at 3.2 billion people in 2016, the middle class is expected to become a majority of the global population for the first time ever around 2020. Slower growth will occur in developed countries (one-half to one percent annually). Higher rates of 6 percent or more will be the norm for emerging countries. As a result, eight out of nine people in the million members of middle class who will be added globally between 2016 and 2022 will be Asian. Households entering the middle class will seek to purchase consumer durables, as well as services including tourism, entertainment, health, education and transport.¹⁸ The economic potential is dramatically illustrated by the growth in travel from Asian and Latin American countries to Ontario in 2017. Arrivals from China were up 7 percent over 2016, from South Korea by 25 percent, India 32 percent, Mexico 64 percent, and Brazil 24 percent.

Of concern in terms of global instability is the continuing progression of the world-wide refugee crisis and the humanitarian and political challenges that accompany it. In 2017 for the fifth straight year, there were record number of displaced people – 68.5 million in total – in places such as the Democratic Republic of the Congo, South Sudan, the mid-east and north Africa, and Myanmar.

Without immigration, Ontario’s talent pool will no longer grow. The entry of Canadian-born talent into the workforce is now plateauing, adding to the importance of immigration to grow employable talent. The diversity that results is viewed as a competitive advantage.

¹⁶ United Nations, “World Population Aging,” 2015 (http://www.un.org/en/development/desa/population/publications/pdf/ageing/WPA2015_Report.pdf). Accessed on June 20, 2018.

¹⁷ In 2016, Niagara region’s median age was 45.7 years versus 41.3 years in Ontario and 41.2 years in Canada. In Niagara region, 21.4% of the population was 65 years and over compared to 16.7% in Ontario and 16.9% in Canada.

¹⁸ Kharas, Homi, Brookings Institute, “The Unprecedented Expansion of the Global Middle Class: An Update,” Global Economy & Development Working Paper 100, February 2017 (https://www.brookings.edu/wp-content/uploads/2017/02/global_20170228_global-middle-class.pdf). Accessed on June 19, 2018.

Ontario Population Growth: The Ontario government's projection for provincial population growth foresees slowing from current average annual increases of 1.3 percent to 0.8 percent by 2040. A notable shift will occur in age distribution, with the cohort from 15 to 64 years dropping from nearly 68 percent to just under 60 percent, while the proportion of those 65 years and over swells from 16 to 25 percent (Exhibit 1).

In a continuation of the longer-term trend to urbanization, the rates of population growth will be greatest in cities, with the Greater Toronto Area (GTA) having the highest in Ontario (42 percent), followed by the remainder of the Golden Horseshoe just beyond the GTA (24 percent).

Exhibit 1 Demographic Projections for Ontario to 2040 Ontario Ministry of Finance		
DEMOGRAPHICS	2016	2040
Ontario's Population	13,983,000	17,802,000
Average Annual Population Growth	1.3%	0.8%
Age Distribution (Share)		
0-14 Years	15.9%	15.0%
15-64 Years	67.8%	59.8%
65+ Years	16.4%	25.2%
Ancillary Observations: <ul style="list-style-type: none"> • More people now turn 65 than young people turn 15. Therefore, future growth of people in the working age group (15-65 years) will come exclusively from net migration to Ontario (domestic and international). • In 2016, 110,011 international immigrants came to Ontario, of which 41.0% were economic immigrants, the lowest proportion among provinces and territories (Immigration, Refugees and Citizenship Canada). 		
Source: Ontario's Long-Term Report on the Economy, 2017, Ontario Ministry of Finance		

4. **Globalization:** A wave of nativism, nationalism and protectionism presents important challenges to aspects of globalization. Nonetheless, even if national borders regain greater importance as a result of more inward-looking economic and immigration policies, the hyper-connectivity that facilitates international exchanges has been embedded by digital technologies, while global supply chains have become ubiquitous. The service and intellectual property quotient in international commerce (rather than just goods) is also becoming more dominant and is less susceptible to border measures, except for the movement of the people who possess or deliver the knowledge and the skills. Within Canada, the provinces are closer to eliminating long-standing internal trade barriers. As a wine, cider, beer and spirits producer, Niagara will benefit if collaborative national arrangements can be forged.
5. **Climate Change and Energy:** Though controversial and influenced by political outcomes, the direction of government and corporate climate change and environmental policies is moving inevitably – even if unevenly – toward greater sustainability, alternative energy sources, CO₂ and pollution reduction, zero emission outcomes, water quality initiatives, and energy efficient buildings. The competitiveness of alternative energy sources will be greatly heightened when lower-cost high-capacity energy storage technology becomes available.

Environmental risks have gained prominence in recent years, and are identified in the World Economic Forum's 2018 "Global Risks Report"¹⁹ as an area of special concern for the future. Extreme weather events, natural disasters and the failure of climate-change mitigation and adaption rank as the top three global environmental risks in terms of impact. The likelihood of biodiversity

¹⁹ World Economic Forum, "The Global Risks Report 2018 – 13th Edition," January 17, 2018 (<https://www.weforum.org/reports/the-global-risks-report-2018>). Accessed on June 4, 2018.

loss and ecosystem collapse and man-made environmental disasters also ranked highly, in the World Economic Forum's estimation.

Fresh water remains a limited and therefore especially valued resource. As climate change leads to higher temperatures in water challenged areas and as demand grows, Niagara is fortunate to be in a temperate climatic zone in the Great Lakes region. Assured access to fresh water represents a vital competitive advantage.

Niagara's iconic Falls, abundant protected natural terrain, and conservation areas predispose many to hope that Niagara is a guardian of its natural heritage. An assumed reputation for sustainability can be part of the calculus in the choice of Niagara as a location to visit or live. Longstanding Ontario government planning policies that govern development, such as the Greenbelt, the Escarpment and conservation areas, have set a framework that supports retention of lands for agriculture and agriculture-related and recreational uses and favours environmentally sensitive development.

Climate change will impact Niagara's agriculture. Warmer temperatures will expand the range of varieties – for example, of grapes – that can be cultivated in Niagara, though in other parts of the world – such as California's wine regions – hotter weather may be damaging. As is pointed out however, by experts such as Dr. Tony Shaw, a Fellow at Brock's Cool Climate Oenology and Viticulture Institute, climate change also brings greater risks of volatility in the weather, involving greater extremes, including more serious frosts in the winter that can adversely affect vines.

If it chooses, Niagara region is afforded the opportunity to demonstrate, through concerted action, world-class leadership that can ensure and enhance a balanced reputation and commitment to sustainability in ways which will deliver longer-term benefit and return from its natural assets, while protecting them.

Advanced technologies can play a role. Areas for attention are Great Lakes water quality and transportation including for pleasure cruising; how to limit environmental impact in what is a heavily travelled Canada-US land transportation corridor; developing environmentally-sensitive active and shared transportation models for people; and greenhouse management efficiencies to sustain long-term competitiveness. Clean technology innovation presents abundant business opportunities for which there are supportive funding programs. Brock and Niagara College are active research partners in developing answers.

Economic Trends

Global economic growth has been on a lower trajectory since the Great Recession in 2008-2009, explained in part by weak productivity growth and an aging population. Though more modest and variable, growth has nonetheless been sustained for the decade since the downturn. Along with a somewhat stronger recent growth outlook in 2018 and 2019, the S&P stock index continues its second longest bull run. Concerns are emerging, however, as to how long the run of GDP growth will continue. Many economists believe that rising US government deficits, the significant stimulus of the 2018 US tax cuts, and an already low US unemployment rate invite the return of inflation. This is among the factors

that heighten the risk of a major economic correction by the early 2020s.²⁰ The US and global outlook is also threatened and complicated by protectionist and nationalist tendencies and economic policy uncertainties. The US Administration's "America First" policies have affected cross-border flows of goods, while influencing some companies to invest in the US.

The Niagara economy grew at 2.1 percent in 2015 and 1.7 percent in 2016, levels just below Ontario averages.²¹ For 2018, the Conference Board of Canada forecast for the Niagara CMA is 1.4 percent, the lower end of the range of 1.4 to 2.4 percent for Southern Ontario cities.²² Positive recent signs have emerged. In February 2018, the Niagara CMA registered its lowest unemployment rate in 18 years (5.2 percent), while investment in commercial and industrial building construction in 2017 reached decade high levels.

Looking ahead over the coming two decades, the Ontario Ministry of Finance forecasts that average annual economic growth rates to 2040 will be just over 2 percent, or a half percentage lower than the average from 1982 to 2015 (Exhibit 2). Labour force growth and labour participation rates will also be lower, as the population ages. For people 65 and over, an increase in the number remaining in the workforce is already discernible, a trend that is likely to grow further.

Exhibit 2 Economic and Labour Force Projections for Ontario to 2040 Ontario Ministry of Finance		
Metric	Actual (Annual Average) 1982-2015	Projection (Annual Average) 2016-2040
Real Gross Domestic Product (GDP)	2.6%	2.1%
Exports	3.4%	2.2%
Imports	4.0%	2.1%
Housing Starts	66,000	71,300
Primary Household Income	5.0%	3.9%
Labour Market		
Participation Rate	67.3%	63.2%
Labour Force Growth	1.4%	0.8%
Employment Growth	1.4%	0.9%
Unemployment Rate	7.7%	5.8%
Labour Productivity	1.2%	2.2%

Source: Ontario's Long-Term Report on the Economy, 2017, Ontario Ministry of Finance

Global Foreign Direct Investment: International greenfield foreign direct investment (FDI)²³ flows – though significant in absolute terms – have yet to recover to peaks prior to the 2008-2009 recession.

²⁰ Dodge, David, Richard Dion, Serge Dupont, John Weekes, and Michael Horgan, Bennett Jones, "Economic Outlook." Spring 2018 (<https://www.bennettjones.com/Spring2018EconomicOutlook>). Accessed on June 12, 2018.

²¹ Conference Board of Canada.

²² Conference Board of Canada, Media Release, "Economic Slowdown on the Horizon for Southern Ontario Cities," March 13, 2018 (<https://www.newswire.ca/news-releases/economic-slowdown-on-the-horizon-for-southern-ontario-cities-676649683.html>). Accessed on May 8, 2018.

²³ "Greenfield" investment projects involve investment at entirely new locations or involve an expansion of an existing investment. Greenfield investment does not include mergers and acquisitions (M&A).

Since the global downturn, annual levels of FDI flows have been uneven and well below the annual levels registered prior to the global downturn.²⁴

The United States has traditionally been the largest source of foreign direct investment (FDI). China's outward FDI has increased significantly in recent years. In 2017 however, China adopted more cautious policies on investment abroad and slipped to third place in FDI outflows behind Japan, but ahead of the United Kingdom, Hong Kong, Germany and Canada.²⁵ In the first FDI wave, the Chinese concentrated on foreign acquisitions, especially those that secure needed basic agricultural commodities and resources. Prior to the 2018 US-China trade confrontation, Chinese investment in North American manufacturing and in the technology sector emerged as a growing segment, with an increasing number of greenfield investments.

Looking ahead, major influences in 2018 will be repatriation of profits held abroad by US-based multinationals and US tax reform which will encourage investment and expansion in the US. The nearer-term FDI outlook is clouded by international policy uncertainty and protectionist tendencies that will adversely affect FDI location decisions.

Foreign Direct Investment in Canada: Since the Great Recession in 2008-2009, the stock of foreign direct investment (FDI) in Canada showed steady growth from 2011 to 2015. Increases in 2016 and 2017 were modest however, with the flow of direct investment in 2017 at \$33.8 billion being the lowest since 2010, well behind the record of \$126.1 billion in 2007.²⁶

The total stock of FDI in Canada at the end of 2017 was \$824.0 billion. By country, the US stock of FDI in Canada has declined by a few percentage points over recent years but still hovers around 50 percent of the total. European FDI has been up marginally, with its stock representing just over one-third of the total. The larger, growing European sources over the last decade are The Netherlands, Switzerland and Germany. Asia represents about 10 percent.

In the Canadian manufacturing sector, the stock of FDI in 2017 was slightly less than 2008 in absolute terms, falling as a proportion of all FDI in Canada from nearly one-third to just over one-fifth. Food manufacturing fared well, however, nearly doubling since 2008, with the greatest gains being registered prior to 2015. Significant sectors that showed growth over the 2008 to 2017 span were mining and oil and gas extraction which grew strongly to 2014 but has declined since; finance and insurance; wholesale and retail trade and transportation and warehousing; and the management of companies and enterprises.²⁷

Ontario attracted 114 foreign greenfield projects in 2017, down 18 percent over 2016, but still ranked fourth among provinces and states after California, New York and Texas. These projects involved investment of \$6.9 billion.²⁸

Though reliable statistics are not available, strategic expansions in Ontario by existing foreign investors appear to have been the most notable and reliable source of increased FDI in southern Ontario in recent

²⁴ United Nations Conference on Trade and Development (UNCTAD), "World Investment Report 2018," June 7, 2018.

²⁵ United Nations Conference on Trade and Development (UNCTAD), "World Investment Report 2018," June 7, 2018.

²⁶ Statistics Canada, The Daily, March 1, 2018 and April 25, 2018.

²⁷ Statistics Canada, International Investment Position, Foreign Direct Investment in Canada by NAICS, Table 36-10-0009-01.

²⁸ fDi Intelligence, "The fDi Report 2018: Global Greenfield Investment Trends," 2018.

years, especially in manufacturing. Foreign investors who are already established in Ontario know their own milieus well and possess relationships, including with post-secondary institutions. This allows them to move quickly and confidently to scale-up existing operations, including being well positioned to hire highly qualified people and to take advantage of tax rates, incentives and arrangements that support innovation. This underlines the importance of business retention and expansion activities in economic development.

Niagara region has many foreign-affiliated investors, including General Motors, Rich Products, Convergys, Airbus Helicopters, THK, Rexroth Bosch Group, and Jungbunzlauer. Recently, Niagara has attracted important new domestic and foreign investment – the GE Brilliant Factory and Northern Gold being examples.

Challenges to Realizing Ontario's and Niagara's Longer-Term Potential

What CEOs and Futurists Say About Ontario's Potential: In 2017, Ontario's Institute for Competitiveness and Prosperity interviewed selected CEOs of companies headquartered or operating in Ontario and conferred with "futurists," who advise such companies on strategy relative to disruptive technologies and new business opportunities.²⁹ The objective was to identify where Ontario can "win" over the next 10 to 20 years and what businesses, government and post-secondary educational institutions need to do to realize Ontario's future potential.

The key points that emerged from the sessions with the CEOs and futurists were:

1. Talent is Ontario's greatest strength;
2. Ontario "stands tall" on research, though it lacks the capacity to commercialize this research;
3. The biggest thing holding Ontario back is a cautious attitude to risk; and
4. Attracting global talent, visitors and international capital is hard and, above all, requires a compelling "Why Canada?" value proposition.

The Institute's report issued a challenge:

"... Ontario must change. The elements of competitiveness that gave the province its advantages in the past can no longer sustain or ensure the future. Instead, concerted efforts must be made toward innovating, investing in technologies, and making big, bold moves across clusters."

"Big Ideas:" Leaders offered five "Big Ideas" for Ontario to reach its potential based on its existing strengths, primarily around talent and innovation. These proposals crystalize points often made about where Ontario (and Canada) must do better.

1. Embrace disruption and see technologies and consumer trends as once-in-a-lifetime opportunities to grab new markets and secure new customers through the world;

²⁹ Institute for Competitiveness & Prosperity, "The Future Is Not Destiny: CEO Perspectives on Realizing Ontario's Potential," Working Paper 30, September 2017 (<https://www.competeprosper.ca/work/working-papers/the-future-is-not-destiny-ceo-perspectives-on-realizing-ontarios-potential>). Accessed on June 5, 2018.

2. Market Canada and Ontario to the world by defining our competitive differentiators and then by creating a simple and compelling narrative around them to be broadcast to the world – to investors, visitors, and domestic and international talent;
3. Adopt lifelong education and work-integrated learning to keep Ontarians on the cutting edge of 21st century skills in the digital age;
4. Take risks and be leaders, rather than followers, in order to capture the full value of technology and innovation; and
5. Woo the world’s best talent to Canada, especially high-achieving students, experienced STEM talent, and executives with track records, especially in scaling-up companies.

Like the Institute’s recent assessment, expert commentaries and reports have identified the critical areas where Canada and Ontario have been underperforming other competitor countries – for which the US is often the benchmark – and need to do better. The lists commonly include:

1. Productivity, where Canada has fallen further behind the US with Canadian business under-investing in machinery, equipment, information technology and systems, and intellectual property;
2. Competitiveness, principally involving higher electricity costs, personal taxes, and, in light of the recent US tax cuts, corporate tax levels;
3. Infrastructure maintenance and investment, notably the transportation infrastructure needed to mitigate costly congestion, especially in the Greater Golden Horseshoe;
4. Innovation, a telling indicator being Canada’s declining R&D intensity;³⁰ and
5. Lower than desirable levels of post-graduate study and retention, and private sector investment in skills training.

Sectors of Opportunity

National Priorities: Based on the proposals of the Federal government’s Advisory Council on Economic Growth, the Canadian government has established private-sector led Economic Strategy tables to recommend a focused and comprehensive approach to “clear the path” to make Canada a global leader in six high-potential sectors:

- | | | |
|--------------------------|-----------------------|---------------------------|
| • Agri Food | • Health/Bio-Sciences | • Digital Industries |
| • Advanced Manufacturing | • Clean Technology | • Resources of the Future |

The Advisory Council chose the agri-food sector to illustrate the type of ambitious, targeted coordinated approach that should be envisaged in order to move Canada up in the rankings, for example compared to The Netherlands and Brazil.³¹

³⁰ Council of Canadian Academies, Expert Panel on the State of Science and Technology and Industrial Research and Development in Canada, “Competing in a Global Innovation Economy: The Current State of R&D in Canada,” 2018

³¹ Advisory Council on Economic Growth, “Unleashing the Growth Potential of Key Sectors,” February 6, 2017 (<https://www.budget.gc.ca/aceg-ccce/pdf/key-sectors-secteurs-cles-eng.pdf>). Also see information on the Economic Strategy Tables at <https://www.ic.gc.ca/eic/site/098.nsf/eng/home>. Accessed on June 14, 2018.

Niagara Priorities: At the regional level, Niagara's region-wide strengths and opportunities, according to Niagara Economic Development, lie in:

- Agri-Business
- Manufacturing
- Transportation and Logistics
- Tourism

These were chosen taking into account the priorities of the 12 Team Niagara municipal partners.³²

The Outlook for Agri-Business in Niagara: Ontario's Greenbelt policies, together with those applicable to the Niagara Escarpment and conservation areas, ensure preservation of Niagara's highly productive agricultural lands, including specialized and intensive land-use for higher value crops such as grapes, tree fruits, berries, and greenhouses. Niagara is an agricultural powerhouse. The gross farm receipts from Niagara region's 1,827 farms totaled \$838 million in 2015 representing 43 percent of all farm receipts in the entire Golden Horseshoe. With the legalization of recreational use, cannabis production is becoming a fast growing part of the mix and a highly significant economic development opportunity, not just for cannabis flower production but for value added products such as oils and edibles which are claiming growing market shares in legalized recreational markets. Still uncertain is the extent of its impact on the greenhouse and other segments and whether (as some forecast) over production in a few years is a potentially disruptive risk.

Agricultural producers in Niagara face major competitive challenges including increased minimum wages, availability of talent, a degree of uncertainty or demanding processes regarding seasonal immigrant workers, and competition from increasingly efficient lower wage jurisdictions able to capitalize on logistics advances. The major steps forward in controlled greenhouse environments and precision agriculture, involving the application of a host of technologies, provides a suite of potential responses. Autonomous vehicles are already planting, spraying and harvesting crops. Greenhouses can be managed remotely. Integrated systems incorporate satellite data, GPS, weather data and forecasts, drone and aerial imaging, and variable application of nutrients. Greenhouses benefit from LED lighting, climate controlled environments, and computer controlled irrigation and nutrient systems. Cannabis growers are setting an even more ambitious technological pace, adopting state-of-the-art systems, including high security. Canada has a first mover advantage to supply cannabis to newly opened export markets for medical use. An emerging leading edge concept is intensive vertical indoor farming within and on the edges of major urban concentrations, providing at least daily delivery of fresh and flavourful leafy greens and herbs produced in operations that employ robots, sensors, and controlled environments. Niagara, though part of the trend, is only beginning to exploit this growth opportunity in spite of its experience with advanced greenhouse technologies and favourable access for the production to the GTA market.

Adding value to Niagara agriculture produce through more direct-to-market retail channels locally and processing operations in Niagara afford additional opportunities to get higher returns for Niagara producers. Wine and craft beverage start-ups face complex and overlapping regulatory regimes. A pilot project in Peterborough developed an expedited and integrated all-levels-of-government approach to

³² A Summary Chart on Municipal Economic Development has been prepared by GIAG based on a review of municipal websites including landing pages directly related to economic development, standalone economic development pages and Economic Development Strategies, Municipal Strategic Plans and Annual Reports. The review examines structure, areas of focus, sectors covered and any issues identified. At the time of preparation, stakeholder interviews had not been conducted with the municipalities. Planned interviews with appropriate stakeholders will provide more accurate and detailed information for updating this report as part of regional context.

overcoming the complexities of overlapping regulation. This could be replicated in Niagara to make Niagara a favoured location to launch of new craft beverage ventures.³³

Niagara region's two post-secondary educational institutions and the Vineland Research and Innovation Centre (VRIC), plus neighbouring institutions such as the University of Guelph, afford immense competitive advantage through their research, prototyping, trial and training programs, which have a Niagara-specific relevance.

The Future of Manufacturing in Niagara: Though Niagara's manufacturing sector represents a much smaller portion of the total workforce than in the past, Niagara has deep and resilient manufacturing traditions on which to build, as Industry 4.0 – the fourth industrial revolution – transforms manufacturing globally. Niagara region, moreover, attracted one of the world's leading proponents and developers of Industry 4.0 systems, General Electric, which created a new state-of-the-art Welland plant adopting its Brilliant Factory systems, now to be operated under the ownership of Advent International. Airbus Helicopters Canada provides an important aerospace and advanced composites presence.

Looking to the needs of Niagara's agri-businesses, manufacturing opportunities are available to service the requirements of producers and processors – including cannabis growers – for highly advanced technology and supportive software systems. The Netherlands stands as an example of technological leadership in agri-tech. By purposely creating and adopting the latest advances, the country ranks as the world's secondary largest global exporter of food after the United States, despite its small land area. The Niagara manufacturing sector can capitalize on support from Niagara College, the Vineland Research and Innovation Centre, and Brock University. Niagara locations are well positioned to be innovative North American production and software systems development bases for Canada and the US, taking advantage of European – especially Dutch partnerships – that can take advantage of personal heritage and of Canada's Comprehensive Economic and Trade Agreement (CETA) with the European Union.

The automotive sector – still an identifiable component of Niagara region's manufacturing base – is in transition globally towards becoming the mobility sector in which business models, powertrains and autonomous vehicles are redefining whose technology, integration, and revenue streams win. This invites an evaluation of future vulnerabilities and exploration of what it will take for Niagara to retain the presence of firms such as GM and THK and sustain a meaningful stake over the longer term.

Tourism and Niagara: Niagara owns one of the world's most recognizable and enduring tourism brands with a legacy that dates well before many of today's best branded destinations were conceived. Challenges to realizing its still greater potential lie in growing and enriching the experience and creating the desire on the part of visitors to return; making Niagara the recreational, wine and culinary, and arts, festival and culture get away; and generating revenue-enhancing overnight stays. The Falls remains an anchor but the region's offerings have immense potential to further broaden visitor options and the experience. Tourism has been transformed by the shared economy, smart phones, social media, and mapping and GPS. Technology promises important further advances, especially augmented and virtual reality, multiple language speech recognition technologies, and intelligent processing of voice enquiries. These systems could be a focus for aggressive development in Niagara region, possibly through cross-border partnerships, as a demonstration of the region's tourism leadership.

³³ Association of Municipalities Ontario, "Reducing Business Burdens: Great Ideas from Five Innovative Ontario Municipalities," May 31, 2017 (<https://www.amo.on.ca/AMO-PDFs/Reports/2017/ReducingBusinessBurdensGreatIdeasfromFiveInnovativ.aspx>). Accessed on June 13, 2018.

Niagara region has had success in attracting major international, national and provincial sports events, though structures to support sports tourism bids are needed. The region also has the potential to expand business meeting and incentive travel attraction.

Niagara's Transportation and Logistics Sector: Niagara sees opportunities in supporting the movement of goods and people by leveraging its central Canada-US border location that places it within a one-day trip of half of the Canada-US population. As well, Niagara is intersected by the Great Lakes Seaway system and two class one railways, and has access to seven nearby airports. Niagara region's designation as a Foreign Trade Zone Point seeks to mitigate processes that impose barriers and costs. The Niagara corridor is of strategic national commercial importance, meriting Federal government involvement and investment. As Niagara looks ahead, it needs to determine how – whether through increased physical capacity or technology adoption – it can ensure that congestion and border processes will not impede the corridor's smooth functioning and growth. Transportation and logistics will continue to experience fundamental business model and technology transformations – driven by the use of autonomous trucks, on demand buses, driverless shuttles, and Uber and Lyft type ride hailing services.

Exhibit 3 Prominent Emerging Technology Platforms and Their Potential Impact		
	Outlook	Considerations for Niagara Region
Industry 4.0	Industry 4.0, also referred to as the fourth industrial revolution, is the name attached interconnected automation and digitization that brings together multiple advanced technologies to transform manufacturing. It encompasses cyber-physical systems, such as the Internet of Things, Big Data, robotics, 3-D software and printing, and cognitive computing (AI).	<ul style="list-style-type: none"> • Niagara region can call upon its strong manufacturing tradition and today's innovative programs at Niagara College and Brock as it taps into the new Industry 4.0 paradigm • GE's new Welland facility is adopting the company's advanced Brilliant Factory Industry 4.0 platform systems • Other global Industry 4.0 leaders include Bosch and Siemens
Artificial Intelligence (AI)	AI – based on neural networks and machine learning, ideas dating to the 1940s – has emerged in the last five years to be one of the technology industry's brightest hopes. Applications currently rely on supervised learning where computers are told what to do in millions of cases. An area of focus is also on using AI to augment human capabilities. Artificial General Intelligence (AGI) systems that are near human intelligence are judged likely to take longer, maybe decades. ³⁴ Canada is a recognized leader with Montreal, Toronto and Edmonton having emerged as the Canadian hubs.	<ul style="list-style-type: none"> • AI is a major and rapidly moving area of advances that will have wide-spread impact, including creation of autonomous systems • Multilingual speech recognition technologies and enquiry response systems can enhance tourism offerings, but may replace some call centre operations, of which there are some significant ones in Niagara region. AI is critical to Mobility applications and will grow rapidly in health care diagnosis. AI can also take the massive amounts of tourism-related data that can be captured to determine patterns and preferences and to predict future opportunities.³⁵

³⁴ Bloomberg Businessweek, "Apple and Its Rivals Bet Their Futures on These Men's Dreams," May 17, 2018 (<https://www.bloomberg.com/news/features/2018-05-17/apple-and-its-rivals-bet-their-futures-on-these-men-s-dreams>). Quoting Yann LeCun, University of Toronto. Accessed on June 4, 2018.

³⁵ Ie, "Technology: Disruptive Innovation in the Tourism Industry," October 17, 2017 (<https://www.ie.edu/corporate-relations/insights/technology-disruptive-innovation-in-the-tourism-industry/>). Accessed on June 18, 2018.

Exhibit 3 (Continued)		
Prominent Emerging Technology Platforms and Their Potential Impact		
	Outlook	Considerations for Niagara Region
Internet of Things (IoT)	The Internet of Things is a typically wireless network of physical devices, including machines, vehicles and appliances, embedded with electronics, sensors, actuators and connectivity which enables them to connect and exchange data, creating greater digital integration. IoT is widely applicable, including in the home, manufacturing, agriculture, health care, transportation, and within municipalities. The number of IoT devices (8.4 billion) surpassed the global population in 2017 and is forecast to reach 20.4 billion in 2020. ³⁶	<ul style="list-style-type: none"> • Bell, Huawei and BeWhere are undertaking a pilot IoT project in Niagara, using Bell's advanced cellular network, with Henry of Pelham that uses sensors to remotely monitor temperature and water levels and prevent vine disease. • IoT is at the centre of smart city initiatives, connecting and engaging with tourists, and Industry 4.0.
Broadband Optical Fibre	High-speed broadband is an essential part of basic infrastructure, like water, sewage, electricity, and phone connections. The Canadian Radio-television and Telecommunications Commission (CRTC) declared broadband internet a basic telecommunications service in December 2016. Generally, Niagara has good access, in part because major cross-border high-speed optical fibre is routed through the Niagara peninsula. Demand for greater capacity and speed continues to grow. Nielsen's Law of Internet Bandwidth, for example, states that a high-speed user's connection speed grows by 50% a year. This rate of growth is only slightly less than the 60% a year postulated by Moore's Law which addresses computing speed. ³⁷	<ul style="list-style-type: none"> • To apply the latest technology and utilize advanced software systems, high-speed broadband is essential to businesses and agricultural enterprises • Providing tourists with wireless access to online information and social media tools, requires broadband and WiFi access
5G Networks	The Ontario, Quebec and Canadian governments announced a \$400 million partnership (ENCQOR – Evolution of Networked Services through a Corridor in Quebec and Ontario for Research and Innovation) in March 2018 with five private sector partners to create a Montreal to Waterloo corridor of 5G test beds which will become operational by early 2019. 5G networks will be critical to autonomous vehicles and IoT applications.	<ul style="list-style-type: none"> • 5G network access will become a basic requirement for autonomous vehicles and for many IoT networks, all important to Niagara

³⁶ Gartner, "Gartner says 8.4 billion connected things will be in use in 2017," 7 February 2017 (www.gartner.com/newsroom/id/3598917). Accessed on June 4, 2018.

³⁷ Nielsen Norman Group, "Nielsen's Law of Internet Bandwidth," (<https://www.nngroup.com/articles/law-of-bandwidth/>). Accessed on May 10, 2018.

Exhibit 3 (Continued)		
Prominent Emerging Technology Platforms and Their Potential Impact		
	Outlook	Considerations for Niagara Region
Cyber Security	Today's increasingly digitized and digitalized systems bring inevitable risks of hacking and data and identity theft. Cyber breaches recorded by businesses have almost doubled in five years, from 68 per business in 2012 to 130 per business in 2017. ³⁸	<ul style="list-style-type: none"> A high level of security is vitally important for the cannabis sector, the integrity of systems in business and the public sector, and for personal data protection.
Precision Agriculture	Driven by the cost and constraints on the availability of labour, precision agriculture researchers and companies have developed systems incorporating drones and autonomous vehicles using satellites and GPS to plant and fertilize; robotic harvesters with vision sensors and software to scan plants; picking platforms; controlled environments with LED lighting and computer controlled irrigation and nutrient systems; water jet lettuce harvesting methods; and robotic apple picking machines. ³⁹	<ul style="list-style-type: none"> The competitiveness of Niagara region agriculture is dependent on aggressive development and adoption of advanced technologies and software systems, supported by research, development, testing, prototyping and talent development at Niagara's post-secondary institutions and VRIC. Of note is the NSERC Chair in Precision Agriculture and Environmental Technologies at Niagara College. Innovation may be spurred by creating locations where ag-tech clusters can grow.
Mobility, including Autonomous Vehicles	By 2030, internal combustion engines (ICE) will still represent a significant portion of the market in North America, but battery electric vehicles (BEV) will near cost competitiveness with major reductions in battery cost. Level 4 robotaxis, shuttles and commercial vehicles will be adopted worldwide, along with deployment of Level 4 vehicles for personal use. There will be full availability of vehicle to vehicle (V2V) infrastructure with continuing expansion of vehicle to infrastructure capability. 26.2% of global distances travelled will be shared, with vehicle sharing models largely adopted in urban areas. Adhesives will be the primary joining material. Manufacturing will see possible integration of all industrial machinery, collaborative robots, inventory and logistics systems talking to each other, not only in a plant but across the company and suppliers, with high utilization of renewable energy. ⁴⁰	<ul style="list-style-type: none"> Trends in the mobility sector will be critical to the longer-term future of GM's St. Catharines Propulsion plant which produces V6 and V8 engines and transmissions, and to companies in its supply chain. Technology holds out the promise of increasing the vehicle capacity on highways, potentially offering options other than just constructing more high capacity highways.

³⁸ Accenture, "Cost of Cyber Crime Study," 2017 (<https://www.accenture.com/ca-en/insight-cost-of-cybercrime-2017>). Accessed on June 4, 2018.

³⁹ CNBC, Jeff Daniels, "Agriculture Robotics May Ease Farm Labour Crunch," March 8, 2018 (<https://www.cnbc.com/2018/03/08/wave-of-agriculture-robotics-holds-potential-to-ease-farm-labor-crunch.html>). Accessed on June 4, 2018.

⁴⁰ Center for Automotive Research, Ann Arbor, Michigan, "Technology Roadmap Analysis – Current Year to Beyond 2030," February 28, 2017 (Prepared for Innovation, Science and Economic Development Canada)

Exhibit 3 (Continued)		
Prominent Emerging Technology Platforms and Their Potential Impact		
	Outlook	Considerations for Niagara Region
Augmented and Virtual Reality	Virtual reality is a computer-generated recreation of real life environments and situations that immerse the user by making them feel like they are part of the environment. Augmented reality layers computer-generated enhancements atop an existing realty recreation. Augmented reality will find early applications in health care and energy.	<ul style="list-style-type: none"> • Brock's Cool Climate Oenology & Viticulture Institute (CCOVI) is establishing a first-of-its-kind Mediated Reality Wine Lab for researchers to study how factors within an environment affect customers' consumer choices regarding wines. • Augmented reality will be a valuable tool specific skills and situational training. • Augmented and Virtual Reality can enhance tourists' experiences though storytelling and by providing views and access to locations and situations not otherwise readily available
Blockchain	Blockchain is an open, distributed ledger that can record transaction between two parties in a verifiable and permanent way. By design, a blockchain is resistant to modifications of the data.	<ul style="list-style-type: none"> • Blockchain is being widely applied to transportation and supply chains and associated contracts and financial transactions, an apparent natural fit for Niagara

Aggregated Stakeholder Consultation Report

January 31, 2019

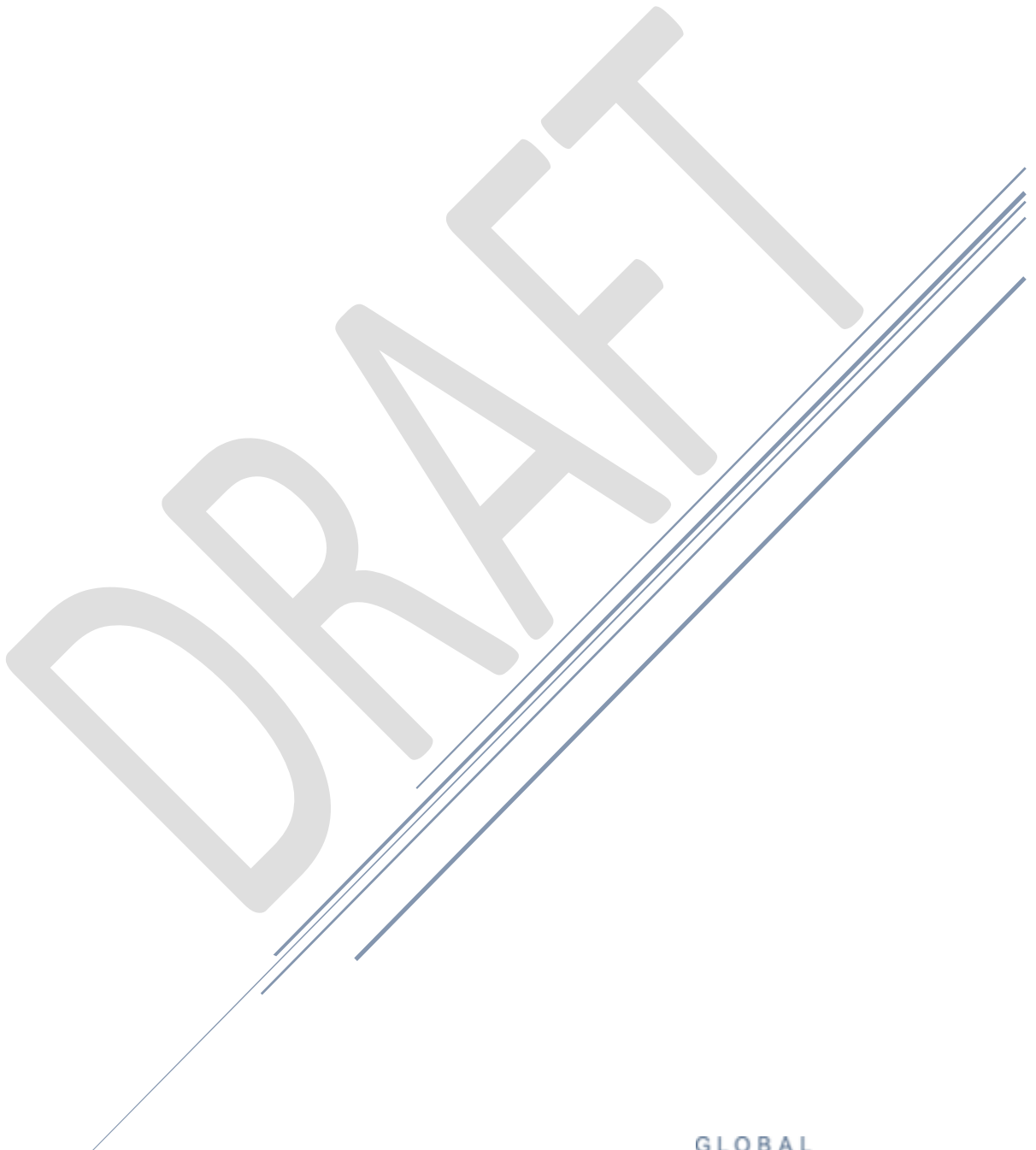


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Introduction

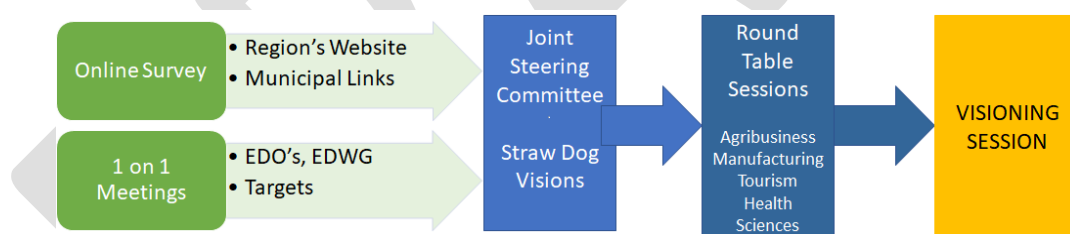
The economic development process influences the economic well-being of communities and regions, including job and wealth creation and the general quality of life. Due to the number of Stakeholders engagement, collaboration and partnerships are an important part of the undertaking.

As a component of the Niagara Region Economic Development Master Plan, it was crucial to involve representative organizations and business engaged in the local economy. Collaboration and meaningful consultation help create tangible buy-in from those who have been engaged and see their perspectives and contributions reflected in the Master Plan.

Stakeholder consultations were designed to provide primary research, building upon the secondary research conducted in the Economic Base Analysis and the resulting Situational Analysis. Capturing this real-world experience helps validate the Phase 1 background review, research and analysis as well as statistical analysis.

The Stakeholder Consultation Plan included:

- Working Group (who were responsible for day to day project management and were part of Joint Steering Committee, see - Addendum 2) session for orientation and feedback
- A public online survey listed on Region's website and links from municipalities and associations
- Facilitated "Straw Dog"¹ session with the Joint Steering Committee (Addendum 2)
- Sector Roundtable Sessions for Agriculture, Tourism, Manufacturing and Health & Wellness
- One on one meetings with selected stakeholders including the Economic Development Working Group (Addendum 1)



Global Investment Action Group (GIAG) provided three background discussion papers; Economic Analysis and Forecasting, Comparison of Niagara Region Municipal Economic Development and A Vision of Niagara Region in 2041. These discussion papers were shared with stakeholders prior to engagement.

After consultation with the Working Group, stakeholders in the below categories were solicited for interviews:

Ag Production	Business Associations
CAO / EDO of Niagara Region municipalities	Economic Development Working Group
Food & Beverage	Health and Wellness
Innovation and Entrepreneurship	Joint Steering Committee
Manufacturing	Niagara Region Senior Management Team
Ontario Ministries – Economic Development / Ag	Post Secondary Education
Real Estate and Development	Tourism

¹ A brainstorming roundtable that generated discussion of relevant economic topics meant to provoke the generation of new and better ideas, visions and actions for the future.

A total of sixty-four (64) interviews were completed, following a preplanned Interview Guide (Addendum 3) which was developed in collaboration with the Working Group. The guide was adapted as required for each group / sector to target specific areas of relevance to the stakeholder relating to their presence in Niagara Region. Confidentiality was offered to each in return for candid feedback.

We have aggregated key feedback and themes from our interviews under the most common comment areas.

Agriculture, Food and Beverage

- ☐ Irrigation needs to be resolved
- ☐ Cannabis can be a threat
- ☐ Need natural gas
- ☐ Increase markets
- ☐ Development of environmental packaging an opportunity
- ☐ Climate change will provide challenges and opportunities
- ☐ Manufacturing / grapes / flowers / cannabis need to be leaders – not crop producers, need automation, software, more value above primary
- ☐ VRIC a leader in automation, artificial intelligence – need funding to expand core operations, not capital projects
- ☐ Opportunity to build the technology base – make the sector bigger
- ☐ Associations don't play a role – staffing not experienced enough
- ☐ Individuals are successful, not the industry; need to start investing as an industry
- ☐ Economic development needs a representative with knowledge and skill in the industry
- ☐ Crush pad – shared space for cider / wine; sell out of one storefront start to incubate – lots of wealthy retirees in the region, what kind of capital is needed
- ☐ No net in-migration, only farm workers – need to target big immigration
- ☐ Need food processing and food processing technology
- ☐ Big data / climate change – all in downtown Toronto
- ☐ Need for a bio control company. Several living at MaRS as post seed start ups. Get them to come to Niagara (another MaRS Landing)
- ☐ Opportunity for micro-processing food incubator

Cannabis

- ◆ Development of associated technologies
- ◆ Most entities in the region are reactive rather than proactive; wait and see attitude
- ◆ Build the technology base - technology for cannabis doesn't exist, no genetics etc., complete whitespace
- ◆ Growing cannabis is low value – what are the products / inputs up the value chain
- ◆ Opportunity in genomics services. Cannabis seed business \$1 billion – Cargill / Monsanto can't do it due to US regulations

Tourism

- ☐ Tourism is a large revenue generator for Niagara region
- ☐ Safety for Visitors is a plus
- ☐ Proximity to the US market
- ☐ Canada has an exchange rate advantage

- ☐ Proximity to the GTA, including its multi-ethnic population
- ☐ Boomers are moving to Niagara
- ☐ Opportunity to be a destination for sports tourism (e.g. Canada Summer Games 2021)
- ☐ Niagara has international reach
- ☐ International students are being used as 'welcomers' by Gateway Tourism in Grimsby
- ☐ Transportation choices are a plus, including Niagara District Airport, GO Rail and Buffalo International
- ☐ Transportation challenges include intra-regional public transit, getting employees of tourism establishments to and from work, the need for a new Niagara – Hamilton Airport Highway (formerly known as Mid-Peninsula), and facilitating people (in addition to goods) movement over the bridges on the border
- ☐ Growth of the local population only adds to the pressure on transportation
- ☐ Urgency to improve the infrastructure situation
 - ◆ Skyway expansion will create notable disruption and leave negative impressions
 - ◆ Track record for completion of major public projects not good, in part because of governmental layers
- ☐ Survey following a national Federation of Canadian Municipalities (FCM) convention in Niagara indicated that the #1 issue for attendees was getting to and from Niagara – over 50% were not satisfied
- ☐ Toronto Pearson International Airport is important to Niagara, as it is second only to JFK in New York for international passenger traffic among North American airports
- ☐ External perceptions about ease of access are the problem
- ☐ There is more to do beyond the historic Niagara image – The Falls:
 - ◆ Need to work together to present a bigger message
 - ◆ Raise standards of service and encourage over-night and long term stays
 - ◆ Expand the narrative about Niagara
 - ◆ Expose options
- ☐ Employees – lack of connectivity by public transportation
- ☐ Tourism industry in Niagara needs more international thinking – e.g. acceptance of Chinese payment cards (Alipay and WeChat Pay), meeting expectations of international guests
- ☐ Niagara post-secondary institutions have linkages with the local tourism needs:
 - ◆ Craft beverages/wineries
 - ◆ Courses, research and co-ops
 - ◆ Hospitality programs and gaming
 - ◆ Business cases, including marketing
 - ◆ Heritage projects
- ☐ No post-secondary hotel degree program; Niagara industry draws on Ryerson and Guelph for grads
- ☐ Professors could promote holding conferences in Niagara to the principal academic organizations to which they belong (e.g. IEEE)
- ☐ Potential for post-secondary extension programs
- ☐ Staff from tourism business (e.g. chefs) often are instructors in post-secondary institutions
- ☐ Attitudes of the local population and councils in Niagara are not always helpful
- ☐ Leadership is needed in the industry
- ☐ Major challenges with availability, retention and training of the workforce, along with public transport to and from work
- ☐ Need greater awareness of product away from The Falls

- ☐ Significant investments and gains have been made in off-season promotions, including casinos, wineries and Shaw Festival, so that the major low traffic period to remedy is now Monday to Thursday
- ☐ Sport tourism is a major opportunity, but requires a bid fund; students can be a resource; need more hockey ice pads in order to attract tournaments
- ☐ Commitment by the Region is required

Manufacturing

- ☐ Location/Access to Markets is a competitive advantage
- ☐ Supply chain: Can find a source of almost anything needed within 100 miles; Aids competitiveness
- ☐ Transportation
- ☐ Training and Trades (Mohawk and Niagara College)
- ☐ Seaway access, though it could be better
- ☐ "Niagara discount"
 - ◆ Cost of living and homes cheaper
 - ◆ An attraction to mid to 'C' level employees; not such a strong drawing card for entry level employees
 - ◆ Canada-US Border provides proximity to the US but some tariff challenges
- ☐ Niagara has a "workplace mindset" founded on tradition and trades such as welding, forging, heat treatment, etc.
- ☐ Cross-border funnel
- ☐ Post-secondary educational institutions
- ☐ Manufacturing has left environmental damage that often must be remedied
- ☐ Water available for processing from Welland Canal, though a fee has been introduced by the Seaway Corporation
- ☐ Fermentation skills and relevant graduates available
- ☐ A major gap is the shortage of machinists
- ☐ Reinvention
 - ◆ Niche markets
 - ◆ Innovations
 - ◆ Move quickly
 - ◆ Be different
 - ◆ Many under 50 employees
 - ◆ Success or find gaps to exploit
 - ◆ Upward pressure on wages coming from Toronto ("The Toronto Effect")
 - ◆ "China price" survivors
- ☐ What advantages can be delivered in Niagara
 - ◆ Lower land costs
 - ◆ Incentives
 - ◆ Post-secondary education institutions
 - ◆ Lifestyle
- ☐ Economic Development in Niagara – What's Needed
 - ◆ One Stop
 - ◆ Learn from losses – act on what needs fixing
 - ◆ Regional transportation

- ☐ Require retraining – does not count for funding; need to get change to programs
- ☐ One company developed its own program with Brock's Goodman School of Business
- ☐ Lobby Ontario government on apprentice program
- ☐ Retraining needs to be individually centred
- ☐ Secondary schools should return to offering more exposure to trades
- ☐ How to repeat GE
 - ◆ Welland was one of 27 sites considered
 - ◆ Talent/Legacy of trades
 - ◆ Water
 - ◆ Supply chain
 - ◆ Need to market region more aggressively/effectively
- ☐ SME breakthrough growth
- ☐ Access IRAP, SR&ED and FedDev programs
- ☐ Business retention activity helps attract investment
- ☐ Protect industrial land (Welland example)
- ☐ Regulatory threats
- ☐ Expectations are now shorter-term
- ☐ Need assurances of continuity
- ☐ In the past when Niagara had larger companies, today's manufacturers were their supply chain partners (95%). With departure of large firms, things have shifted and companies who have stayed and survived have expanded their customer base more widely
- ☐ Make Niagara's manufacturers collectively North America's machine "Shop," "local" suppliers to North America, offering X lathes, etc.
- ☐ Unionization: Perception become reality
- ☐ High electricity costs
- ☐ Put best foot forward, with NIA as the voice
- ☐ Get Niagara College back on side with trades
- ☐ Are Germany's Mittelstand companies an example for Niagara's SME manufacturers?

Health and Wellness

- ☐ The Niagara Peninsula (Niagara Health System) owns its own health care
- ☐ Niagara is building a system of care, including the St. Catharines General Hospital and the new South Niagara hospital (to be expected in 6 to 8 years)
- ☐ The system is integrated – moving from silos to partnership
- ☐ Collaboration on the talent front is strong with Brock and Niagara College
- ☐ Brock
 - ◆ Health and wellness is important to a community
 - ◆ Comprehensive programs
 - ◆ Nursing program
 - ◆ Public Health
 - ◆ Partnership in condos for seniors
 - ◆ Masters in gerontology expected next year
 - ◆ Centre for Health and Wellness
 - ◆ I-EQUIP
 - ◆ Conference on the "Future of Health" being developed for June 2019
- ☐ New LINC at Brock
 - ◆ Experiential

- ◆ Profit, Place and People
- ◆ Social innovation
- Niagara College
 - ◆ Course-based research
 - ◆ Continuing education
 - ◆ Career ready
 - ◆ Rehab clinic
 - ◆ Health care thought leadership, including from alumni
 - ◆ Social innovation and cross-training (e.g. dementia)
 - ◆ Age-friendly network
 - ◆ Program Advisory Committees (PACs) ensure “world ready” focus
- Hotel Dieu Shaver
 - ◆ Parkinsons Rehab
 - ◆ Cancer Rehab
- Pain Points in system
 - ◆ Security of data and information
 - ◆ Data silos
 - ◆ Mobility
 - ◆ AI
 - ◆ EMS (Niagara is a leader)
- A strong health care system is a plus in attracting the talent that will then lead to investment – Power of Place
- Commercialization
 - ◆ Ecosystems
 - ◆ Partnerships
 - ◆ Forums
 - ◆ Link systems
 - ◆ Calculated risk taking
 - ◆ Hack events
 - ◆ Medical maker
- Governance model needed to bring people together – e.g. integrated health record (WiFi)
- Engage Region and municipalities
- Communication
- Digital is an opportunity
- Pro-active model
- Need for Public Transit/Active transport

Challenges

- Succession planning
- Parochialism
- Sense of entitlement / resistance to change
- Not investment ready / investment hesitant
- Companies are risk adverse, conservative
- No dreamers, only dabblers

Education

- ☐ More skills development
- ☐ Skilled trades responding to industry needs
- ☐ Encouragement of STEM participation
- ☐ Experiential learning
- ☐ Better industry / education collaboration

External linkages

- ☐ Focus on exports, value add
- ☐ Mobilize supply chain
- ☐ Hamilton Niagara Seaway
- ☐ Binational collaboration with WNY

Governance

- ☐ “One stop shop”, eliminate red tape
- ☐ Equal promotion across all areas of the region
- ☐ Advocacy for streamlined governance & regulations by outside agencies and senior levels of government
- ☐ Amalgamation of the region needed

Growth opportunities

- ☐ Bi- national cooperation
- ☐ Cannabis
- ☐ Healthcare
- ☐ Aging and related health / wellness
- ☐ Retirement community
- ☐ Tourism growth across the region
- ☐ Sports & Recreation
- ☐ Identify and grow local supply chains
- ☐ Unique, craft orientated manufacturing
- ☐ Value added agriculture in all areas
- ☐ Very active SME's with development of diversified entrepreneurial small business, need more offices

Immigration

- ☐ Foreign student post secondary grad retention
- ☐ Immigrant attraction program
- ☐ Increase multiculturalism

Infrastructure

- ☐ Mid Peninsula Highway

- ☐ GO Train
- ☐ Multi - modal (water, road, rail, air) including Seaway / Canal
- ☐ Inter-regional transit
- ☐ First mile / last mile
- ☐ Natural gas
- ☐ 5G broadband
- ☐ Seaway / Canal development
- ☐ Reduce electrical costs
- ☐ Infrastructure backlog needs to be identified and qualified

Leadership

- ☐ A need for collaboration
- ☐ Initiate and promote “open for business”
- ☐ Need a better culture of innovation
- ☐ More rapid adoption of technology
- ☐ Develop Centres of Excellence
- ☐ Business mentorship and support at all levels, not just start ups
- ☐ Overhaul of political structure and leadership
- ☐ Demand political accountability
- ☐ Stronger linkage between business and economic development
- ☐ Need to achieve the opportunities and potential long exposed in Niagara region
- ☐ Need Top 10 point plan
- ☐ No trust

Real Estate & Development

- ☐ Balance growth
- ☐ Equalize incentives across the region
- ☐ Develop effective zoning
- ☐ Increase shovel ready lands
- ☐ Remove DCs
- ☐ Expedite planning approval process

Talent & Workforce

- ☐ Youth retention
- ☐ Post secondary grad retention
- ☐ Better workforce development a must
- ☐ Workforce retention
- ☐ Talent attraction
- ☐ More support for entrepreneurship
- ☐ Post secondary must respond to industry needs
- ☐ Recognize Gray Power an asset

Addendum 1 – Economic Development Working Group

<i>Economic Development Working Group Committee</i>		
Name	Sector Represented	Company/Organization
Dominic Ursini	Economic Development	Director, Niagara Region Economic Development
David O’Kane	One Business Representative of the Finance Sector	Commercial Banker, Scotiabank
Gervan Fearon	Two representatives of the post-secondary education sector	President and Vice Chancellor, Brock University
Dan Patterson		President, Niagara College
Tom Beach	One business representative within the industrial sector	President, Handling Specialty
Greg Chew	One business representative of the real estate sector	Real Estate Salesman, Colliers International Niagara Ltd
Tim Nohara	One business representative within the innovation sector	President and CEO, Accipiter Radar
Mark Cherney	One labour representative	Business Manager and Financial Secretary, I.B.E.W.
Kevin Jacobi	One representative with business experience in international trade	Executive Director, CanadaBW Logistics Inc.
Euan McKendrick	One representative of the transportation/logistics sector	Claire’s Delivery and Transportation
Ian Hamilton	One business representative of the marine transportation sector	President and CEO, Port of Hamilton
Anthony Annunziata	One representative of the regional tourism sector	President, Niagara Tourism Partnership
Dwayne Charette	Two business owners (manufacturing, tourism, and agribusiness)	Director, Global Supply Chain and Manufacturing, Airbus
Serge Paquin		CEO, Sky Comp

Addendum 2 – Joint Steering Committee

<i>Joint Steering Committee</i>		
Name	Title	Organization
Gervan Fearon	President and Vice-Chancellor	Brock University
Tim Kenyon	Vice President Research	Brock University
Dan Patterson	President	Niagara College
Fiona Allan	Dean, Academic and Liberal Studies	Niagara College
Greg Medulun	Vice President, External Relations	Niagara College
Jim Thibert	General Manager	Ft. Erie Economic Development and Tourism
Dwayne Charette	COO	Airbus
Domenic Ursini	Director	NED
Valerie Kuhns *	Manager, Strategic Economic Initiatives	NED
Lyndon Ashton *	Innovation Centre Manager, Canadian Food and Wine Institute	Niagara College
Charles Conteh *	Associate Professor, Director - Niagara Community Observatory	Brock University

* Working Group Committee Member

Addendum 3 - Stakeholder Discussion Guide - Niagara Region

Current conditions

- What was the genesis of the establishment of your business in Niagara Region?
- What is attractive about the Niagara Region as a destination for businesses to locate?
- What is the nature, strength and prospects of your business sector in Niagara? Are your supply chain interests well served by a Niagara location? Are there supply chain partners that have invested or might invest in Niagara or elsewhere in Ontario or Canada?
- What medium to long-term changes do you anticipate for your business over five, ten or even twenty years?
 - Size and nature of the physical space your business occupies in Niagara?
 - Talent and workforce implications and needs?
 - How will these changes, if any, impact the evolution of your strategies and the company in the coming years
- What are the advantages and disadvantages associated with a Niagara business presence?
 - Are utilities readily available and cost competitive to meet your needs – hydro, water/wastewater/natural gas, and telecommunications? Are there adequate and affordable broadband services in Niagara to meet your requirements? How important will access to 5G networks be?
 - Is there a suitable supply of land and buildings for business retention, expansion and attraction?
 - How big a role does transportation and warehousing play, if at all, in your business? [If has a role] Is the existing supply adequate with room to grow if required?
- Have the Regional and local governments been helpful to businesses like your own? Why do you have that opinion? What meaningful roles can the Regional government and regional / local organizations play in future years that will contribute to your company's success?
- Are you aware of incentive programs at the local, regional and federal level that can enhance your business and assist with growth?
- Are you a member of an association for your sector? If so, what programs, initiatives are offered that are beneficial to your business? Do you have recommendations for initiating programs that would be beneficial to the sector?
- What major infrastructure investments will be required in Niagara over the next two decades to help enable more prosperity in the Region?
- Does Niagara afford lifestyle requirements for your workforce? (Housing, recreation, entertainment etc.)? What role can the Regional government play in attracting and retaining talent, including immigrants?
- How do you see a Niagara location in the context of the Greater Toronto Hamilton Area (GTHA), the Great Golden Horseshoe (GGH), and the broader North American context? Is it more attractive or less attractive as a place to do business...? Than the GTHA.... than the GGH? Why do you have that opinion?
- Are there external geographic / corporate (ON, Canada, NA, Global) linkages that you see as beneficial to growing your business?
- Is proximity to the U.S. border a strategic advantage for your business? If so, how?
- If you are a foreign owned company, can you tell us more about where the Niagara operations fit in the broader corporate strategies and the challenges and opportunities in sustaining and growing the Niagara presence?
- What are the main obstacles to growth and expansion for your business?

- How would you rate the overall business cost competitiveness in Niagara?

Education, training, research and development

- What is the availability and quality of regional university and college graduates? Skilled labour? Semi-skilled labour?
- Are there adequate training and educational opportunities? How can universities and colleges adapt to meet future talent and workforce requirements?
- To what extent do Brock University and Niagara College provide you with some of the talent and skills you need to run your business?
- As your business grows over the next 25 years and adjusts to changes in technology and markets, what kinds of new talent and skills will you likely need to run and grow your business?
- To what extent do Brock University and Niagara College permit you to access the research and development assistance you need to run your business?
- Are you aware of the education, training, research and development incentives available to assist your company and help with growth?
- As your business grows over the next 25 years and adjusts to changes in technology and markets, what kinds of research and development assistance will you likely need to run your business?
- What other meaningful roles can the university and college play in future years that will contribute to your company's success?

Economy and Future Trends

- Has your company/organization been affected by recent changes in the economy or the workforce? For example, hiring or retaining skilled talent, younger versus older workers, the Internet of Things, automation, digitization, remote working opportunities, currency fluctuations etc.
 - How has your company/organization adapted to these changes? Internal HR changes, new technological investments, etc.?
- Between now and 2041, what are the changes that will most impact your business/organization? For example, currency fluctuation, growing Chinese middle-class, Brexit, Trade Agreements, US protectionism, Manufacturing 4.0, electric self-driving vehicles, workforce development, data analytics, artificial intelligence, etc.
 - What plans do you have for adapting to these changes?
- Some economists believe that we are heading into "the most transformational times in history." How do you think these global changes will affect the Niagara economy? What steps/actions, if any, should be taken or considered? (This could be from the private or public sector. Municipal, Provincial, or Federal level of government)
 - What are some of the positive changes that the Niagara region could benefit from?
 - What are some of the negative changes that should be an area of concern?
- The Niagara economy has changed dramatically over the past 25 years, however, its geographic location and proximity to the US border has continued to be an economic strength. Do you believe this will remain one of Niagara's competitive advantages?
 - If so, how does Niagara leverage its proximity to the border in the future?
 - If not, what should it focus on?
- What areas of the economy do you believe provide Niagara Region distinct advantages or opportunity for "Centres of Excellence"?
 - Will these be relevant moving forward?
 - Are there current nascent opportunities to be planned and developed?

- Does Niagara's population and cultural diversity provide opportunity as the economy continues to develop and change?
- What do you believe to be the number one challenge or issue facing the Niagara region in the next 25 years?
- What could Niagara do to attract more prosperity to the region?
- What is your vision for Niagara in 2041?

Stakeholder Questionnaire

1. What is the economic development related competitive strengths you associate with Town/City/Region?
2. What is Town/City/Region's greatest weaknesses and challenges related to economic development?
3. What are the greatest external threats to future economic growth in Town/City/Region?
4. Are there global linkages that provide international leverage for Town/City/Region and its businesses to exploit?
5. What future opportunities do you see for Town/City/Region in growing its economic base and its businesses?
 - a. What sectors do you think will drive future economic growth and why?
6. Is Town/City/Region's workforce and talent aligned with the future requirements of businesses?
 - a. If not, what improvements are needed?
7. How do you perceive Town/City/Region as a location for new businesses and investment?
 - a. How does this vary by type of investment/sector?
8. What is your vision for Town/City/Region?

Addendum 4 – Roundtable Discussion Guide

1. What is your sector's unique competitive advantage?
 - a. Sustainable compelling advantages
 - b. Disadvantages of concern
2. Where will your sector fit into the regional, national and global prosperity chain?
3. What are the key opportunities / threats in your sector for Niagara looking forward to 2041?
4. What is Brock University's and Niagara College's involvement and impact in Niagara Region?
 - a. Talent
 - b. Training
 - c. Research, Development, Commercialization
 - d. Thought leadership

5. What does 2041 look like?
 - a. Technological change
 - b. Political change
 - c. Workplace change
 - d. What drives prosperity
 - e. Sector opportunities
 - f. Global economy
6. What should the key takeaways / actions be from today's session?

DRAFT

Environmental Planning Function Overview



Background

- Protocol for Plan Review and Technical Clearance between the Region and NPCA
 - First approved in 2008
 - Updated and approved in January 2018

Policy Framework



Natural Heritage System

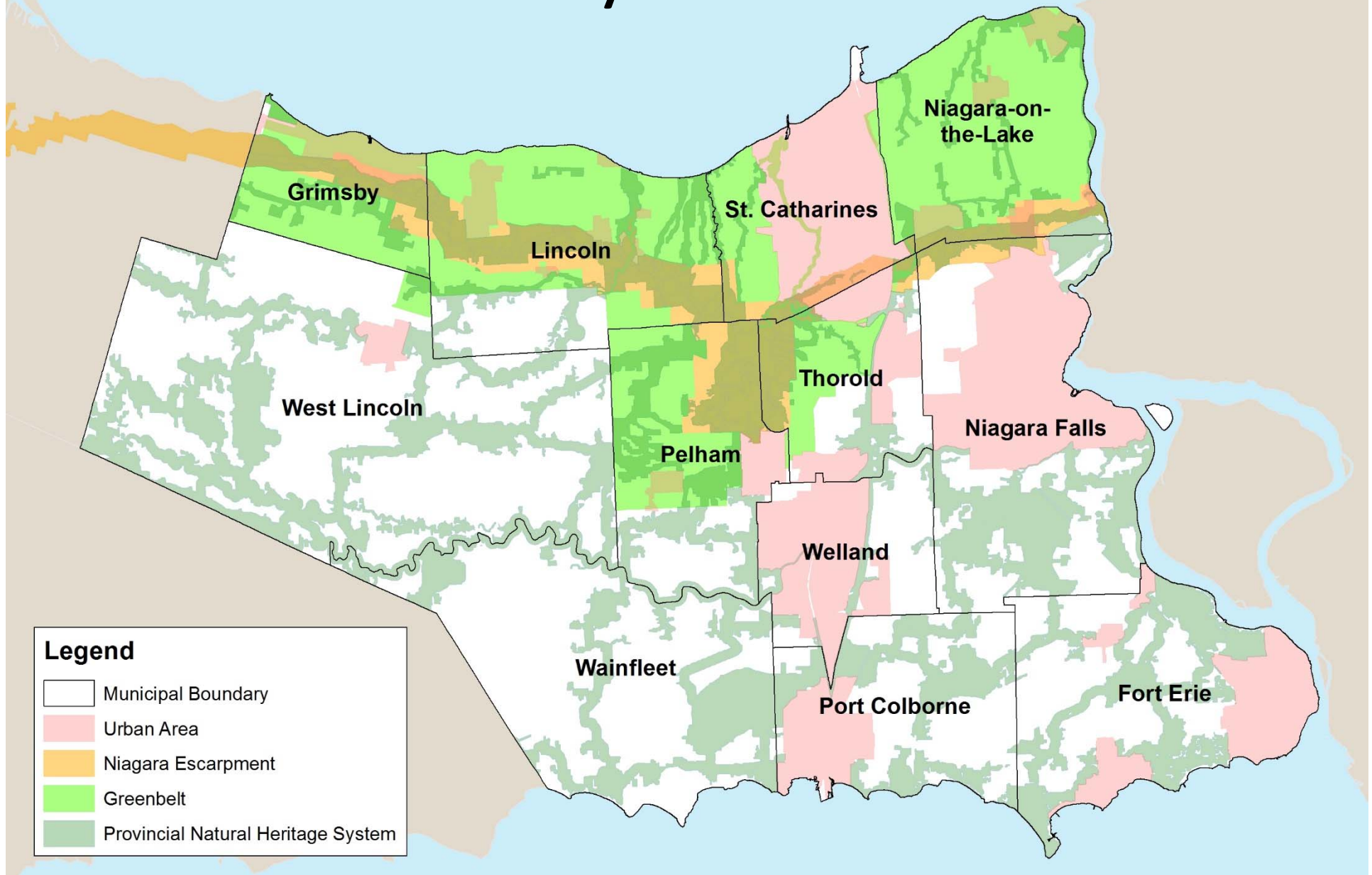
- *“A system made up of natural heritage features and areas, and linkages intended to provide connectivity...and support natural processes which are necessary to maintain biological and geological diversity, natural functions, viable populations of indigenous species, and ecosystems....”*

– Provincial Policy Statement

Natural Heritage System

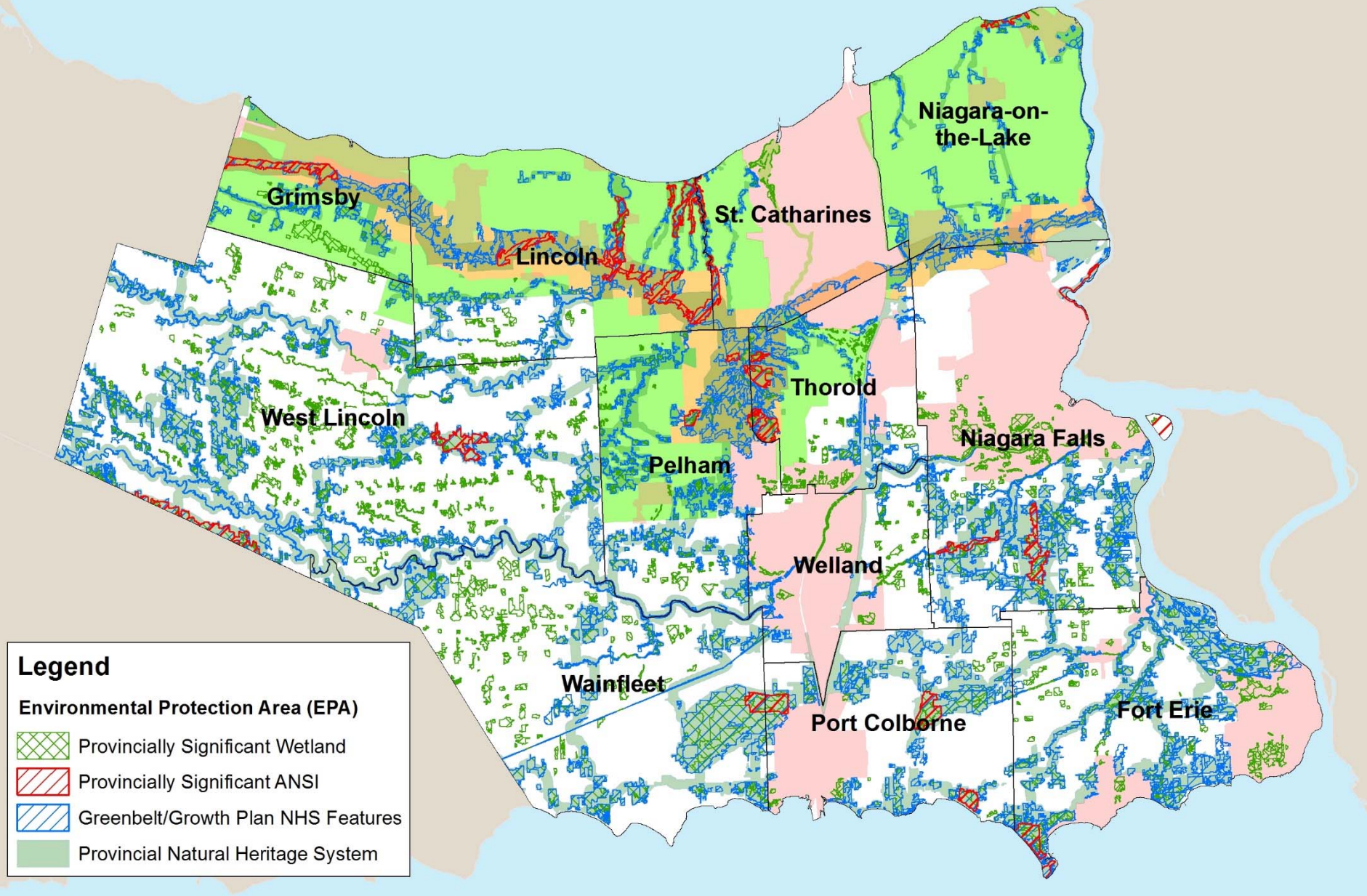
Feature/Area	PPS 2014	Growth Plan 2017	Greenbelt Plan 2017
Significant Wetlands	X	X	X
Significant Woodlands	X	X	X
Species at Risk Habitat	X	X	X
Significant Wildlife Habitat	X	X	X
Significant Valleylands	X	X	X
Fish Habitat	X	X	X
Linkages	X	X	X
Significant Area of Natural and Scientific Interest	X		
Life Science Area of Natural and Scientific Interest		X	X
Wetlands		X	X

Provincial Policy Framework



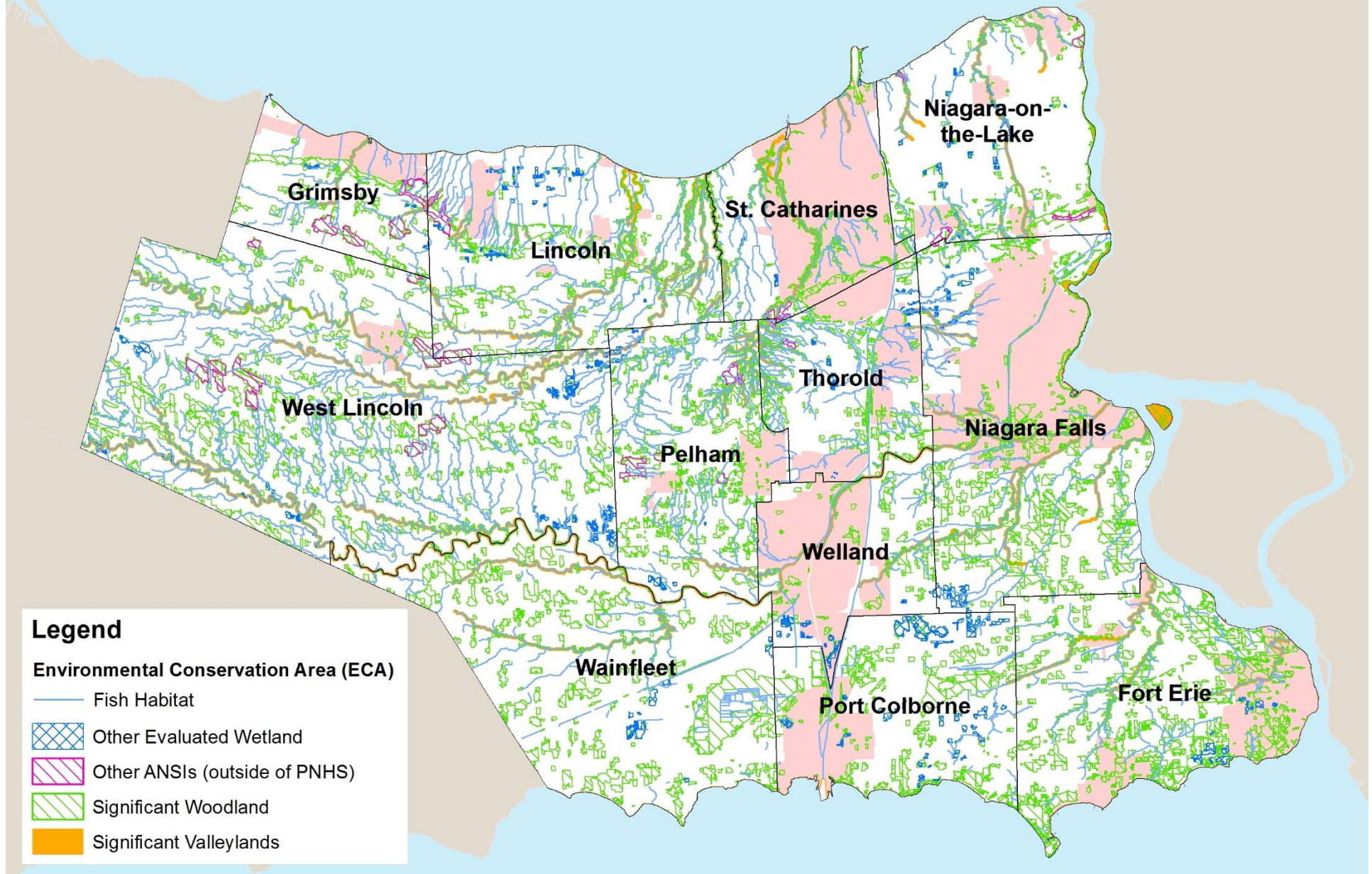


Environmental Protection Areas





Environmental Conservation Areas

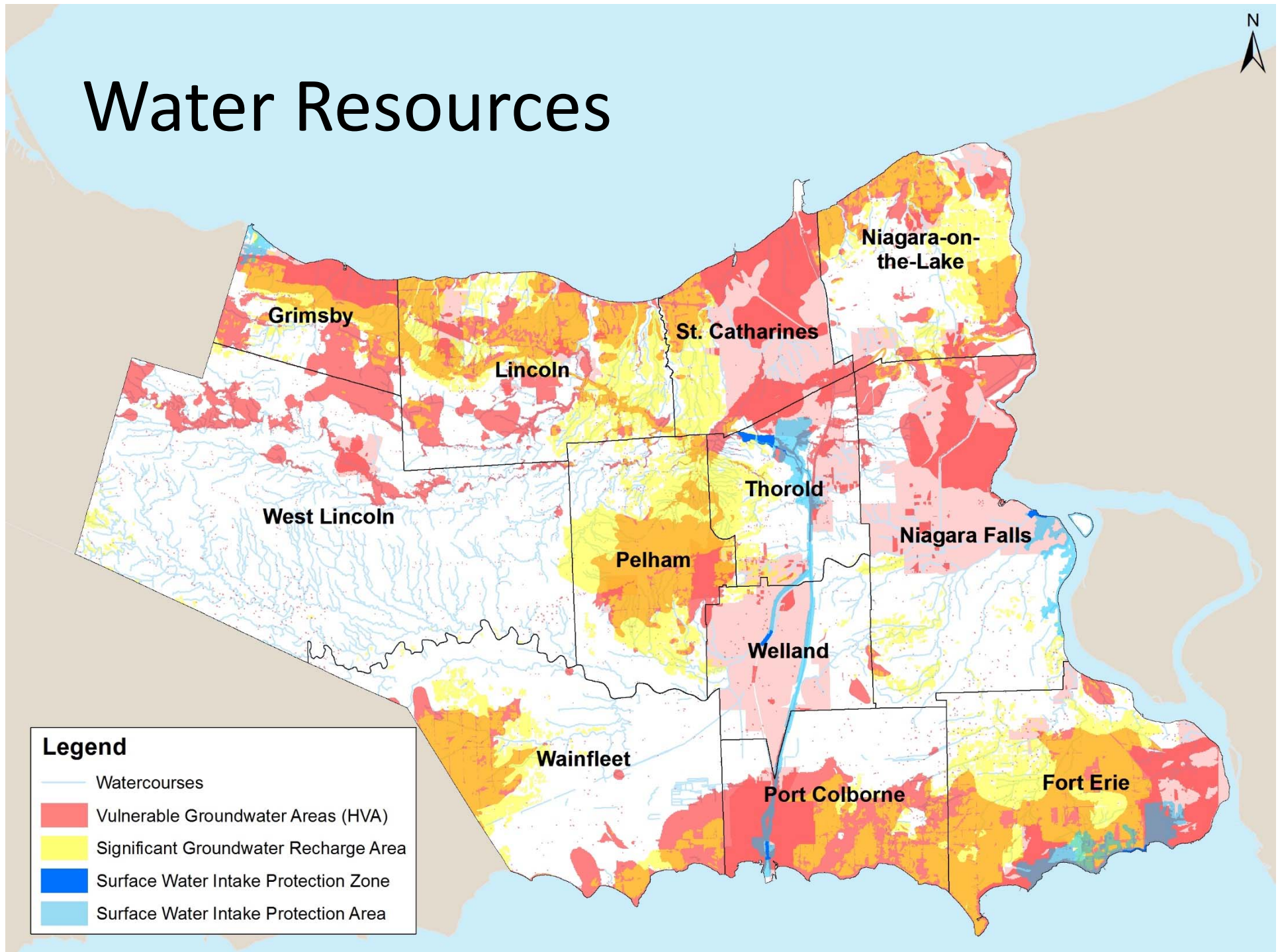


Water Resources System

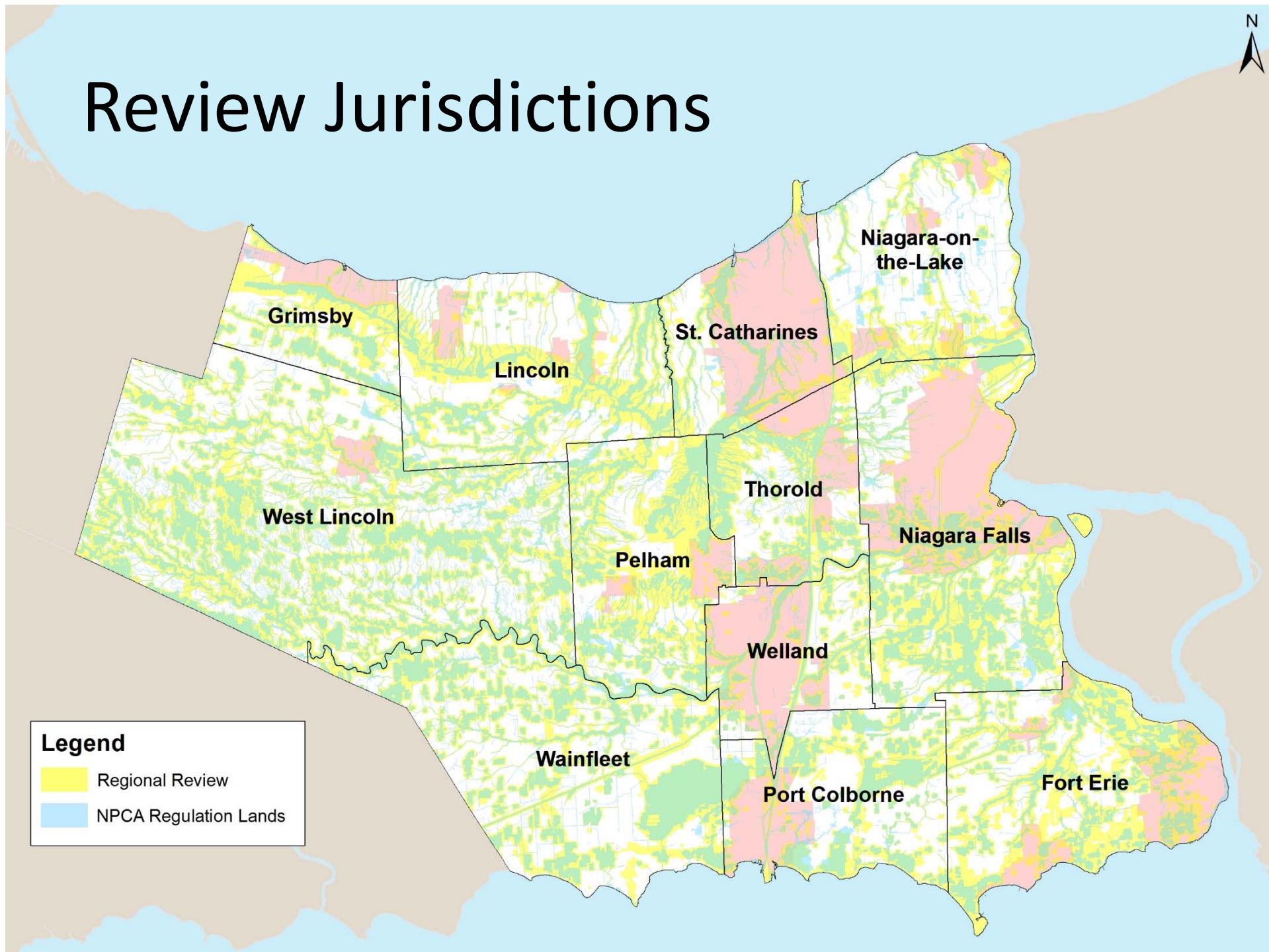
- *“Planning Authorities shall protect, improve or restore the quality and quantity of water by...identifying water resource systems consisting of groundwater features, hydrologic functions, natural heritage features and areas, and surface water features including shoreline areas, which are necessary for the ecological and hydrological integrity of the watershed.”*

– Provincial Policy Statement

Water Resources



Review Jurisdictions



Planning Review Process



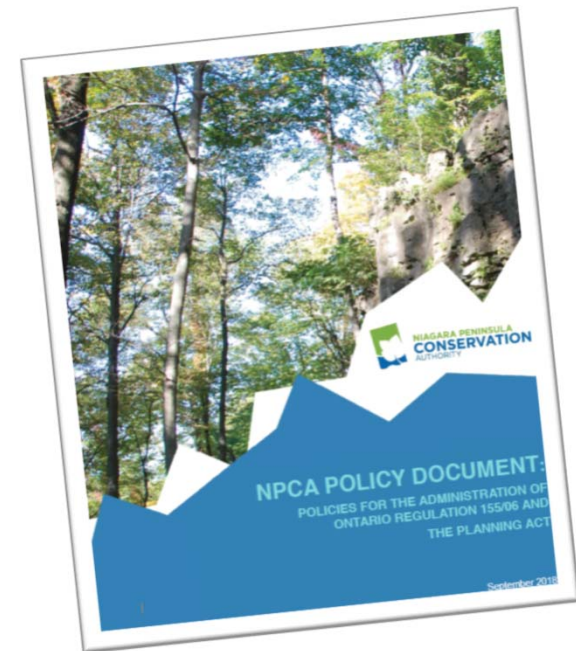
Region Roles & Responsibilities

- Technical clearance with respect to natural heritage features
 - Wetlands
 - Significant Woodlands
 - Significant Wildlife Habitat
 - Significant Valleylands
 - Significant ANSIs
 - Fish Habitat
 - Water Resources



NPCA Roles & Responsibilities

- Technical clearance with respect to natural hazards
 - Flooding hazards
 - Beach and erosion hazards
 - Hazardous lands and sites
 - Regulated watercourses
 - Wetlands
- Legislated by the *Conservation Authorities Act*



Environmental Impact Study

- Planning tool to address environmental considerations
 - Existing conditions/field work
 - Constraints analysis
 - Ecological Impact Assessment
 - Mitigation Measures
- EIS Guidelines permit waiving for small scale residential and agricultural developments
- Administrative updates planned in 2019

Woodland By-Law (30-2008)

- Administered and enforced by NPCA
- Good Forestry Practices Permit required for:
 - Commercial tree harvesting
 - Non-commercial removals in EPA
- Exemptions
- To be reviewed in 2019, including public consultation

Review Responsibilities Summary

Environmental Features/Considerations	NPCA	Region
Flooding Hazards	X	
Beach and Erosion Hazards	X	
Hazardous Lands and Sites	X	
Regulated Watercourses	X	
Wetlands	X	X
Wildland Fires		X
Species at Risk Habitat		X
Significant Woodlands		X
Significant Wildlife Habitat		X
Significant Valleylands		X
Significant ANSIs		X
Fish Habitat		X
Water Resources		X

Subject: Environmental Planning Function Overview

Report to: Planning and Economic Development Committee

Report date: Wednesday, February 20, 2019

Recommendations

1. That Report PDS 2-2019 **BE RECEIVED** for information; and,
2. That a copy of Report PDS 2-2019 **BE CIRCULATED** to the Local Area Municipalities, Niagara Peninsula Conservation Authority (NPCA), and the Niagara Home Builders Association.

Key Facts

- The purpose of this report is to outline the roles and responsibilities of the Region for the delivery of environmental planning services versus those of the NPCA.
- The Region is responsible for review of planning applications, secondary plans, and studies to ensure compliance with Regional Official Plan and Provincial policies related to the natural environment.
- As per the Protocol for Planning Services between the Regional Municipality of Niagara (the Region) and the Niagara Peninsula Conservation Authority (NPCA) (first approved in 2008 and updated in 2011, 2014 and 2018), the NPCA assumed responsibility for environmental planning reviews on the Region's behalf until 2018, after which the NPCA returned the responsibility to the Region.
- The NPCA continues to be responsible for review of planning applications in NPCA-regulated areas in accordance with the Conservation Authorities Act and Ontario Regulation 155/06, as well as interpretation and enforcement of the Niagara Region Tree and Forest Conservation Bylaw.

Financial Considerations

Financial costs resulting from the Region resuming responsibility for review of natural environmental matters can be accommodated through the proposed 2019 Operating Budget. The proposed budget includes a Regional fee for environmental review of planning applications taking effect in April 2019.

Analysis

Background

In 2007, the Niagara Region, Local Area Municipalities, and NPCA signed a Memorandum of Understanding (MOU) which transferred to the NPCA the responsibility for review of all planning applications (e.g., Draft Plans of Subdivision or Condominium, Official Plan or Zoning Bylaw Amendments, Consents/Boundary Adjustments, etc.) with respect to natural heritage interests and stormwater management. As outlined in the MOU and subsequent *Protocol for Planning Services between the Region and the NPCA* (2008), the NPCA agreed to ensure applications were compliant with all Regional Official Plan and relevant Provincial policies related to the natural environment. This transfer of review responsibility from the Region to the NPCA was premised on a consolidated 'one window' approach since the NPCA is also involved in planning application reviews pursuant to the *Conservation Authorities Act* and Ontario Regulation 155/06: Regulation of Development, Interference with Wetlands and Alterations to Shorelines and Watercourses. Funding was provided to the NPCA to support this increased role.

In September 2017, the NPCA informed Niagara Region that it would no longer take on the responsibility for planning application and stormwater management reviews from a Regional and Provincial natural heritage perspective. The *Protocol for Planning Services between the Region and the NPCA* was updated to reflect this change in consultation with the Local Area Municipalities Working Group (Area Planners) and the Niagara Home Builders Association. The Updated Protocol was approved by Council in January 2018 (Appendix 1) and a transition plan was implemented, including the use of consulting services until operationalization of the Regional Environmental Planning team in mid- 2018.

Key Policy Considerations

The 2014 Provincial Policy Statement (PPS) contains overall policy direction for the protection and management of natural heritage and water resources, as well as other Provincial interests. The Growth Plan for the Greater Golden Horseshoe (2017), together with the Greenbelt Plan (2017) and the Niagara Escarpment Plan (2017), builds on the PPS to identify where future growth should occur and what must be protected. Through Official Plans, Zoning Bylaws and other tools, Niagara Region and its Local Area Municipalities are responsible for ensuring local planning decisions are consistent with all Provincial and Regional policies.

According to Provincial and Regional policies, development or site alteration is not permitted within features referred to in the Regional Official Plan as Environmental Protection Areas (EPA). Subject to the findings of an Environmental Impact Study (EIS), development or site alteration is permitted on lands adjacent to EPAs and within or

adjacent to features referred to in the Regional Official Plan as Environmental Conservation Areas (ECA).

The Core Natural Heritage System (NHS) in Niagara Region consists of EPA and ECA features, plus the Water Resources System and potential natural heritage corridors connecting these features. The Core NHS is generally shown on Regional Official Plan Schedule C and internal Geographic Information Systems (GIS) mapping. However, the boundaries may be defined more precisely, or additional areas identified, through an EIS or other studies required through the planning process.

EIS Guidelines

The Region's EIS Guidelines (PDS 8-2018) outline the EIS process, requirements, and criteria by which the EIS requirements may be waived for small scale developments. Administrative updates are planned to reflect changing Provincial legislation, and provide clarifications and additional checklists. It is anticipated that the updated guidelines will be circulated to the Planning and Economic Development Committee for information purposes in mid-2019.

Niagara Region Roles and Responsibilities

As per the Protocol (Appendix 1), the Region is responsible for review of planning applications and technical clearance services related to the above-listed EPA and ECA natural heritage features. In addition, the Region is also responsible for water resources, including the protection of both groundwater and surface water features, sensitive areas, and stormwater management. Generally, the Region's Environmental Planning team involvement in planning applications includes:

- Participation in pre-consultation meetings as required, including identification of EIS triggers or alternatives to reduce EIS or other study requirements;
- Site visit(s), EIS scoping and Terms of Reference approval;
- Review and comment on EIS/EIS Addendums; and
- Clearance of conditions.

Regional Official Plan policies currently state that within Settlement Areas (urban boundaries), the local municipality must be satisfied with the EIS, in consultation with the Region and NPCA. Outside Settlement Areas, the Region must be satisfied with the EIS, in consultation with the local municipality and NPCA.

With respect to Species at Risk (SAR) (i.e., endangered or threatened species), Regional staff currently require sign-off on the development application from the Ministry of Natural Resources and Forestry (MNRF) when the EIS identifies the potential for impacts to SAR habitat.

Stormwater management responsibilities (Appendix 1) are currently conducted through Infrastructure Planning and Development Engineering within the Planning and Development Services Department.

NPCA Roles and Responsibilities

As per the 2001 MOU between Conservation Ontario, the Ministry of Natural Resources and Forestry (formerly the Ministry of Natural Resources), and the Ministry of Municipal Affairs and Housing, the NPCA continues to be responsible for Provincial policy interests related to natural hazards as outlined in Section 3.1 of the PPS. In addition, the NPCA is also responsible for planning application, policy and technical clearance reviews related to regulated watercourses and wetlands in accordance with the *Conservation Authorities Act* and Ontario Regulation 155/06.

The NPCA Policy Document (November 2018) provides the policies for administration of NPCA's mandate under Ontario Regulation 155/06 and its delegated roles and responsibilities within the planning and approvals process.

NPCA planning application review responsibilities overlap with those of the Region when development or site alteration is proposed within or adjacent to wetlands, or when a natural heritage feature is also regulated by the NPCA (e.g., significant valleylands that provide wildlife habitat and linkage functions are also susceptible to erosion and flooding, a regulated watercourse provides fish habitat, etc.). Where there may be policy conflicts between the Regional Official Plan and the NPCA Regulation and/or Board adopted policies, currently the NPCA Regulation takes precedence.

Niagara Region Tree and Forest Conservation Bylaw

The NPCA has administered and enforced the Niagara Region Tree and Forest Conservation Bylaw on the Region's behalf since August 1, 2008. The Bylaw currently requires that a Good Forestry Practices permit be obtained prior to any commercial tree harvesting or non-commercial removals in EPAs or designated Natural Areas under the Niagara Escarpment Plan. Its overarching purpose is to prohibit the clearing of woodland, with the following key exceptions:

- To remove dead or hazard trees;
- To remove diseased trees as per a Forest Management Plan;
- For municipal purposes, by a municipality;
- For agricultural purposes, with conditions;
- In accordance with a Tree Saving Plan approved as part of a development project; or
- Where a building permit has been issued by a local municipality.

The Bylaw was last updated in 2008. As such, updates are planned to reflect changing Provincial legislation, better align the Bylaw with current Niagara Region Official Plan policies, and provide enhanced processes for administration and enforcement. It is anticipated that the Bylaw will be updated through a public consultation process, inclusive of Local Area Municipality representatives and agency stakeholders. It is anticipated that an information report regarding the proposed Bylaw update program will be presented to Planning and Economic Development Committee by mid-2019.

Alternatives Reviewed

Delivery of environmental planning services is obligatory pursuant to the *Ontario Planning Act* (1990), Provincial Policy Statement (2014) and other legislation. No alternatives were reviewed as this report is for information purposes only.

Relationship to Council Strategic Priorities

Doing Business Differently was a strategic priority of Regional Council. Updates to the Protocol will improve the delivery of planning services across the region and provide more certainty and clarity for current and future property owners and investors.

Other Pertinent Reports

- PDS 8-2018 – Environmental Impact Study Guidelines – Administrative Update (March 7, 2018)
- PDS 2-2018 – Protocol for Planning Services Between the Regional Municipality of Niagara (The Region) and the Niagara Peninsula Conservation Authority (January 10, 2018)
- PDS 49-2017 – MOU Planning Services in Niagara (November 8, 2017)

Prepared by:

Jennifer Whittard, B.E.S., PMP
Manager, Environmental Planning
Planning and Development Services

Recommended by:

Rino Mostacci, MCIP, RPP
Commissioner
Planning and Development Services

Submitted by:

Ron Tripp, P.Eng
Acting Chief Administrative Officer

This report was reviewed by Diana Morreale, MCIP, RPP, Director, Development Approvals, Adèle Labbé, B.Sc., MPlan, Senior Environmental Planner, and Sean Norman, PMP, MCIP, RPP, Senior Planner.

Appendices

Appendix 1 Protocol for Planning Services Between the Regional Municipality of Niagara (The Region) and the Niagara Peninsula Conservation Authority (January 2018)

Protocol
For Planning Services
Between
the Regional Municipality of Niagara (The Region)
And
the Niagara Peninsula Conservation Authority (NPCA)

January 2018

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1.0 Basis

In 2007, the Niagara Region, local area municipalities and NPCA signed a Memorandum of Understanding (“MOU”) for improving the planning function in Niagara with the ultimate goal of having *“an integrated and seamless planning system that is embraced and easily understood by Councils, the public, applicants and staff that encourages participation in policy development and application processing.”*

Part 3 of the MOU - *Consolidation of the Review of Planning Applications as they Relate to the Natural Environment* - assigned to the NPCA certain responsibilities as part of its review of development applications¹ and proposed policy, and providing technical clearance services with respect to compliance with the Regional Official Plan and Provincial Policies and Plans. Specifics of this assignment of function were detailed in the *Protocol for Plan Review and Technical Clearance* (“Protocol”) between the Region and NPCA, which was approved in 2008.

The MOU was reviewed and revised in 2011 and again in 2014. The Protocol has not been updated since its inception in 2008.

The MOU and Protocol have succeeded in managing relationships, reducing duplication and effecting continuous improvements. Since that time changes have occurred in Niagara in terms of legislation, relationships, resources, and growth that have impacted the established roles and responsibilities, particularly with respect to the review of environmental matters.

Through this revised Protocol, the NPCA and the Region will establish a new framework within which the NPCA will provide specified updated services to the Region.

This 2018 Protocol is intended to replace in its entirety the 2008 Protocol. Subsequent to the approval of the 2018 Protocol, the MOU will be updated to incorporate the approved revised functions and other aspects of the planning program in Niagara Region.

This Protocol has been prepared for the Niagara Region and NPCA by an Area Planners MOU Working Group consisting of senior representatives from Niagara Region, NPCA and local municipalities.

2.0 Purpose

The purpose of this Protocol is to:

- Redefine, clarify and set out a new Protocol within which the NPCA will provide specified planning application, policy and technical review services to the Region;
- Identify the respective roles and responsibilities of the NPCA and the Region in Ontario’s Land Use Planning System with respect to environmental matters;
- Provide direction for consistent and streamlined circulation and review procedures for all applications under the *Planning Act*, *Environmental Assessment Act*, and *Niagara Escarpment Planning and Development Act*;
- Reinforce the positive relationship between the NPCA and the Region;
- Allow the NPCA and Region to focus on provincially mandated responsibilities, and
- Provide increased decision making autonomy.

¹ Including *Planning Act*, *Niagara Escarpment and Development Act* applications, and *Environmental Assessments*

3.0 Definitions

3.1 Planning Application Review means:

- The review of planning applications (including formal preconsultation) under the *Planning Act, the Niagara Escarpment Planning, and Development Act and the Environmental Assessment Act*;
- The identification of the need for and review of related technical reports (including scoping); and
- The identification of conditions of approval.

3.2 Policy Review means:

- The review of existing or new policy documents, including but not limited to stormwater management guidelines, watershed studies, secondary plans and background studies; and
- The identification of the need for and review of related technical reports.

3.3 Technical Clearance Review means:

- The assessment of technical reports submitted by a proponent of development to determine if the reports satisfy the specified requirements; and
- The clearing of conditions.

3.4 Lead Agency means:

- The organization responsible for the principal review of an environmental feature located within or in proximity to land subject to a planning application to ensure compliance and conformity with all applicable legislation and regulations; and
- The organization responsible for the principal review of proposed policies, studies, guidelines or Environmental Assessments as they relate to environmental features to ensure compliance and conformity with all applicable legislation and regulations.

3.5 Environment Feature means:

- All of the environmental features identified in the first column of Table 1 of this Protocol.

3.6 Natural Hazards means:

- Those environmental features identified in Table 1 of this Protocol as natural hazards and/or identified in the 2014 Provincial Policy Statement Section 3.1.

4.0 Principles

This Protocol is based upon the following principles:

1. Adoption of improvements to the planning application processes which results in streamlining and consistency.
2. Direction that interpreting policy is the responsibility of the organization writing and approving that policy unless delegated by the approving authority.
3. Continuing cooperation between the NPCA and the Region.
4. Effective communication and collaboration.
5. Effective, proactive planning².
6. Effective leveraging of resources to deliver planning application, policy and technical clearance reviews.
7. Eliminate overlap in planning application review processes to the extent possible.

5.0 Jurisdiction

This Protocol applies to those lands within the Regional Municipality of Niagara.

² Proactive planning refers to preparing new or updating existing comprehensive studies and guidelines that assist in the early identification of issues and the need for additional study, and include, but are not limited to, watershed and sub-watershed planning, stormwater guidelines, master servicing plans, updates to Schedule C of the Regional Official Plan, etc.

6.0 Roles and Responsibilities

6.1 NPCA

- 6.1.1 The NPCA, through the *Memorandum of Understanding between Conservation Ontario, the Ministry of Municipal Affairs and Housing and the Ministry of Natural Resources and Forestry*, is responsible for providing the Provincial interest comments on policy documents and development applications related to natural hazards (Section 3.1 of the Provincial Policy Statement except Section 3.1.8). See Appendices A and B. Specifically, the NPCA will provide planning application, policy and technical clearance reviews to ensure consistency with the Provincial Policy Statement related to flooding hazards, erosion hazards, dynamic beach hazards, unstable soils and unstable bedrock. This function is not impacted by this Protocol.
- 6.1.2 The NPCA has legislated responsibilities under the *Conservation Authorities Act* (see Appendix C) and will continue to provide planning application and technical clearance reviews pursuant to the NPCA Regulation, as administered through Board approved policies. This function is not impacted by this Protocol.
- 6.1.3 The NPCA will provide the services as identified in Table 1, Table 2 and Table 3.
- 6.1.4 The NPCA will review Region-initiated studies and projects, pursuant to the NPCA Regulation, as administered through Board approved policies, and to the Memorandum of Understanding between the Province and the Conservation Authorities, as a commenting agency without fee to the Region.
- 6.1.5 The NPCA will provide comments on Environmental Assessments pursuant to the NPCA Regulation, as administered through Board approved policies, and pursuant to the Memorandum of Understanding between the Province and the Conservation Authorities.
- 6.1.6 The NPCA will actively participate in formal pre-consultation meetings with developers and landowners when environmental features identified in Table 1 (when the NPCA is the Lead Agency) have potential to be impacted. To help ensure a consistent planning application review and a coordinated message, the NPCA and Region, together with the local municipality, will participate in pre-consultation meetings at the same time with the proponents. The NPCA will work to scope the complete application requirements related to environmental matters prior to the preconsultation meeting. Should the NPCA determine that no environmental features (where the NPCA is identified as the Lead Agency as shown in Table 1) will be impacted, the NPCA will notify the approving authority and may not attend the pre-consultation meeting.
- 6.1.7 The NPCA will scope Environment Impact Studies (EIS) and review the Terms of Reference (ToR) for EIS and similar reports to ensure *natural hazards* and NPCA Regulation/Policy are addressed.
- 6.1.8 Where the NPCA is identified as the Lead Agency on Table 1, the NPCA will provide Technical Clearance on the EIS with respect to those environmental features only.
- 6.1.9 The NPCA will copy the Region on all responses to requests for comment on development planning, technical clearance and policy matters.
- 6.1.10 Nothing in this Protocol shall limit the NPCA from independently appealing a decision or lack of a decision to the Ontario Municipal Board (OMB) or other tribunal. The NPCA will provide notice of an appeal to the Region and local municipality at the time of appeal.
- 6.1.11 The NPCA will provide the Region with its Regulatory Screening Map and provide regular updates.

6.2 Niagara Region

- 6.2.1 The Region will provide planning application review and technical clearance services as identified in Tables 1, 2 and 3, to ensure consistency with the Regional Official Plan, Provincial Policies, Provincial Plans, the Provincial Policy Statement (except Section 3.1 Natural Hazards policies 3.1.1 to 3.1.7), and matters of Provincial Interest.
- 6.2.2 The Region shall circulate to the NPCA for planning application review and/or technical clearance, all Regionally led planning applications, studies or Environmental Assessments that are located in or adjacent to a NPCA property or within a regulated feature/area.
- 6.2.3 The Region in its review of *Planning Act* and *Escarpment Planning and Development Act* applications and *Environmental Assessments* will comment on stormwater management, as identified in Table 3, in accordance with MOECC Stormwater Management Guidelines as well as the NPCA Stormwater Management Guidelines until such time as new stormwater management guidelines are approved by the Region.
- 6.2.4 The Region will review NPCA-initiated studies and projects without fee to the NPCA.
- 6.2.5 The Region will actively participate in formal preconsultation meetings with developers and landowners. To help ensure a consistent planning application review and a coordinated message, the NPCA and Region, together with the local municipality, will participate in preconsultation at the same time with the proponents.
- 6.2.6 Prior to a formal pre-consultation meeting, the Region will work to scope the complete application requirements related to environmental features by identifying environmental features that will be need to be addressed in an Environment Impact Study³ (EIS). Where the NPCA, Region and/or local municipality have identified interests, the Lead Agency (see Table 2) will consult with those parties on the review of the EIS Terms of Reference.
- 6.2.7 Where the Region is identified as the Lead Agency on Table 1, the Region will provide Technical Clearance on EIS with respect to those environmental features.
- 6.2.8 Nothing in this Protocol shall limit the Niagara Region from independently appealing a decision or lack of a decision to the Ontario Municipal Board (OMB) or other tribunal.
- 6.2.9 The Region will be responsible for preparation and maintenance of a comprehensive natural environment screening map, incorporating the NPCA Regulatory screening map as provided and updated by the NPCA.

7.0 Coordination of Environmental Comments on Development Applications

The MOU, as may be revised, gives overall directions for the coordination of development applications, policy and Environmental Assessments review. For the purposes of clarity with respect to environmental features, the NPCA will review the following list of applications in accordance with the Conservation Ontario MOU with the Province and ensure that they are consistent with the NPCA Regulation, NPCA Board adopted Policies and Section 3.1. Natural Hazards of the Provincial Policy Statement (except Section 3.1.8). This may include providing comments directly to MMAH as part of the provincial one window process. The NPCA will copy the Region and local municipality on all correspondence.

- Regional Official Plan and Amendments
- Local Official Plans and Amendments

³ Includes characterisation reports, natural heritage systems reports and other environmental reports.

- Zoning By-laws and Amendments
- Subdivisions/Condominiums
- Environmental Assessments
- Other Development Applications including: Site Plan, Consents, Minor Variances and NEC Development Permits

8.0 Protocol Terms and Implementation

The Region and NPCA agree to the following:

8.1 Monitoring and Cancellation

This Protocol will be reviewed and amended concurrent with the Memorandum of Understanding between the local municipalities, NPCA and Region to:

- Reflect any changing policies or programs at the provincial, watershed, or regional level, and
- Assess its effectiveness, relevance and appropriateness with respect to the affected parties.

8.2 Transition of Responsibilities

When a complete⁴ development application, Notice of Commencement for an Environmental Assessment (EA) or major study (such as a Secondary Plan) has been received by the NPCA from a local area municipality or the Region prior to the effective date of this Protocol, the NPCA will continue to review the application consistent with the NPCA's roles and responsibilities identified in the 2008 Protocol in accordance with a matrix of open files to be prepared by the Region and NPCA, after which the files will transition to the 2018 Protocol provisions and the Region will assume responsibility.

In an effort to continue the timely reviews of development applications, EAs and major studies during the transition period, the NPCA may support the Region by providing expertise as needed on a fee for service basis; alternatively the Region may hire consultants as necessary.

8.3 Overlapping Mandate

There will be occasions when the responsibilities of the NPCA and the Region overlap. On those occasions, both parties shall work together to provide consistent and sound comments. This will be accomplished by maintaining open dialogue and a good working relationship.

8.4 Conflict

- a) Where this Protocol is in conflict with the 2014 MOU, this Protocol will take precedence.
- b) Where there is conflict between new (changing) legislation and this Protocol, new legislation will take precedence.
- c) Subject to paragraph (d) below, where there is a conflict between the Region's Official Plan, the NPCA Regulation and/or Board adopted policies, the Regulation shall take precedence.

⁴ As determined by the approving authority generally as identified through pre-consultation and shown on the Pre-consultation Form/Letter.

- d) Where there are policy conflicts only, Regional, NPCA and local municipal staffs will work together to resolve the issue. If all efforts fail to resolve a policy conflict, a decision will be made by the approval authority, as per Table 2.

8.5 Streamlining

Further streamlining of the planning review process, as it relates to Provincial, NPCA and regional/local interests, is encouraged.

8.6 Information Sharing / Open Data

Any information or data sources generated by the Province, NPCA or Region, or generated through municipal or watershed studies will be shared, where possible.

8.7 Fees

- a) The Region will collect the NPCA Fee for applications to amend the Region's Official Plan and remit any fees collected upon circulation of the application to the NPCA; fees for planning review and technical clearance services will be set by the NPCA;
- b) The NPCA will be responsible for collecting any further processing, approvals and/or Final Clearance Fees, if required; and,
- c) The NPCA will provide the Region and the local municipalities with an approved schedule of fees and updates.

8.8 Effective Date

This Protocol will take effect on the last date signed by the parties to this Protocol.

Date of Regional Council approval _____.

Date of NPCA Board approval _____.

Table 1: Responsibilities for Planning Application Review with Respect to Environmental Features

Environmental Features	Lead Agency	Mandate Authority	Planning Application and Policy Review Agency	Technical Clearance Review
Natural Hazards ⁵				
Flooding Hazards, Floodways and Floodplains	NPCA	PPS Section 3.1, MOU with Province, O. Reg. 155/06	NPCA	NPCA
Dynamic Beach and Erosion Hazards	NPCA	PPS Section 3.1, MOU with Province, O. Reg. 155/06	NPCA	NPCA
Hazardous Lands and Hazardous Sites	NPCA	PPS Section 3.1, MOU with Province, O. Reg. 155/06	NPCA	NPCA
Riverine Hazards	NPCA	PPS Section 3.1, MOU with Province, O. Reg. 155/06	NPCA	NPCA
Regulated Watercourses	NPCA	PPS Section 3.1, MOU with Province, O. Reg. 155/06	NPCA	NPCA
Wildland Fires	Region	PPS Section 3.1.8	Region	Region
Natural Heritage				
Wetlands	NPCA/Region	O. Reg. 155/06 PPS Section 2.1, ROP	NPCA/Region	NPCA/Region
Habitat of Endangered and Threatened Species	MNRF	Endangered Species Act (Federal and Provincial), ROP	Region	MNRF
Significant Woodlands	Region	PPS Section 2.1, ROP	Region	Region
Significant Wildlife Habitat	Region	PPS Section 2.1, ROP	Region	Region

⁵ For the purposes of this document reference to PPS Section 3.1 includes Policies 3.1.1 to 3.1.7 only.

Environmental Features	Lead Agency	Mandate Authority	Planning Application and Policy Review Agency	Technical Clearance Review
Significant Valleylands	Region	PPS Section 2.1, ROP	Region	Region
Significant ANSIs (life and earth)	Region	PPS Section 2.1, ROP	Region	Region
Fish Habitat	DFO	Fisheries Act, PPS Section 2.1, ROP	Region	DFO
Water Resource				
Vulnerable Groundwater Areas	Region	PPS Section 2.2, ROP	Region	Region
Groundwater Features	Region	PPS Section 2.2, ROP	Region	Region
Stormwater Management	Region	PPS Section 2.2, ROP	Region / Local	Region
Key Hydrologic Features	Region	Provincial Plans, ROP	Region	Region
Sensitive Water Features	Region	PPS Section 2.2, ROP	Region	Region
Significant Groundwater Recharge Areas	Region	Provincial Plans, ROP	Region	Region
Significant Surface Water Contribution Areas	Region	Provincial Plans, ROP	Region	Region
Intake Protection Zones/Vulnerable Surface Water Features	Local	Clean Water Act 2006 PPS Section 2.2, ROP	Region /Local	N/A

Acronyms from Table 1

DFO – Depart of Fisheries and Oceans

NEC – Niagara Escarpment Commission

O. Reg. 155/06 - Provincial Legislation with respect to the Niagara Peninsula Conservation Authority: Regulation of Development, Interference with wetlands and Alteration to Shorelines and Watercourses.

PPS - Provincial Policy Statement 2014

ROP – Regional Official Plan

Table 2: Implementation Responsibilities

Processes / Reports / Submissions	Lead Agency	Responsibility for Final Approval
Application Processes		
Regional Official Plan/Amendments	Region	Region
Local Official Plan/Amendments	Local	Local / Region ⁶
Zoning By-Law/Amendments	Local	Local
Draft Plans of Subdivision	Local	Local
Site Plan	Local	Local
Draft Plan of Condominium	Local	Local
Minor Variance/Permissions	Local	Local
Consent/Boundary Adjustments	Local	Local
NEC Applications	NEC	NEC
Building Permits	Local	Local
Aggregate Licence	Local / Region / MNRF	MNRF
Environmental Assessments	Local / Region / Province	Local / Region / Province
Reports / Studies		
EIS in a NPCA Regulated Area	NPCA	NPCA
EIS outside Settlement Area ⁷	Region	Region
EIS inside Settlement Area ⁸	Local	Local
Watershed Studies	Region	Region
Subwatershed Studies	Local	Local
Technical Reports for Natural Hazard Identification	NPCA	NPCA
Regional Master Servicing Plans	Region	Region
Regional Stormwater Guidelines	Region	Region

Notes for Table 2:

- (i) The responsibility for the Review of Environmental Features is as noted in Table 1
- (ii) The responsibility for Technical Clearance of Environmental Features is as noted in Table 1

⁶ Regional Official Plan Policies 14.E.7 and 14.E.8 identify criteria under which approval of Local Official Plan Amendment amendments may be delegated to the local Council for approval.

⁷ Notwithstanding the EIS is outside the Settlement Area, if the EIS includes a NPCA Regulated Area, the NPCA shall be the Lead and responsible for Final Approval of the EIS for the regulated features.

⁸ Notwithstanding the EIS is within the Settlement Area, if the EIS includes a NPCA Regulated Area, the NPCA shall be the Lead and responsible for Final Approval of the EIS for the regulated features.

Table 3: Responsibilities for Stormwater Management Review with Respect to Area of Interest

Area of Interest	NPCA	Region	MOECC	Local
Determination of need for Stormwater Report – Quality and Quantity		✓		✓
Review of Stormwater Report		✓	✓	✓
Location of Facility with Respect to Vision of Area				✓
Location of Facility with Respect to Natural Hazards	✓			
Location of Facility with Respect to Functionality		*		✓
Confirmation of Drainage Areas		*		✓
Sizing of Facility with Respect to Quality, Erosion and Quantity Controls, including Release Rates and Settling Calculations		✓		✓
Other Potential Impacts on Receiving Watercourse (e.g. thermal, water balance, etc)		✓		
Outlet Structure and Spillway Design		✓	✓	✓
Outlet to Watercourse (if necessary)	✓		✓	
Safety – Side Slopes, Grating, Grading, Emergency Access		✓		✓
Landscaping/Re-vegetation				✓
Long Term Maintenance			✓	✓
Major and Minor Flow Conveyance (internal to subdivision)				✓
Hydraulic Gradeline Analysis of Storm Sewer and Outlet				✓

*The Region will be involved in instances where the drainage of a Regional Road may be impacted.

Appendix A - Excerpt from the Memorandum of Understanding on Procedures to Address Conservation Authority Delegated Responsibility

Conservation Ontario, Ministry of Natural Resources & Ministry of Municipal Affairs and Housing

Memorandum of Understanding on Procedures to Address Conservation Authority Delegated Responsibility

2001

Purpose of the MOU

The MOU defines the roles and relationships between Conservation Authorities (CAs), the Ministry of Natural Resources (MNR), and the Ministry of Municipal Affairs and Housing (MMAH) in planning for implementation of CA delegated responsibilities under the Provincial One Window Planning System...

Roles and Responsibilities

Conservation Authorities (CAs)

- a) The CAs will review policy documents and development proposals processed under the Planning Act to ensure that the application has appropriate regard to Section 3.1 of the PPS. [see Appendix C]
- b) Upon request from MMAH, CAs will provide comments directly to MMAH on planning matters related to Section 3.1 of the PPS as part of the provincial one window review process.
- c) Where there may be a potential conflict regarding a Conservation Authority's comments on a planning application with respect to Section 3.1 of the PPS and comments from provincial ministries regarding other Sections of the PPS, the Ministry of Municipal Affairs and Housing will facilitate discussions amongst the affected ministries and the Conservation Authority so that a single integrated position can be reached.
- d) CAs will apprise MMAH of planning matters where there is an issue as to whether there has been "regard to" Section 3.1 of the PPS to determine whether or not direct involvement by the province is required.
- e) Where appropriate, CAs will initiate an appeal to the OMB to address planning matters where there is an issue as to whether there has been "regard to" Section 3.1 of the PPS is at issue. CAs may request MMAH to support the appeal.
- f) CAs will participate in provincial review of applications for Special Policy Area approval.
- g) CAs will work with MMAH, to develop screening and streamlining procedures that eliminate unnecessary delays and duplication of effort.

Appendix B - Excerpt from the Provincial Policy Statement 2014 – Conservation Responsibility for Natural Hazards

3.1 Natural Hazards

3.1.1 Development shall generally be directed to areas outside of:

- a. hazardous lands adjacent to the shorelines of the Great Lakes - St. Lawrence River System and large inland lakes which are impacted by flooding hazards, erosion hazards and/or dynamic beach hazards;
- b. hazardous lands adjacent to river, stream and small inland lake systems which are impacted by flooding hazards and/or erosion hazards; and
- c. hazardous sites.

3.1.2 *Development and site alteration* shall not be permitted within:

- a. the dynamic beach hazard;
- b. defined portions of the flooding hazard along connecting channels (the St. Marys, St. Clair, Detroit, Niagara and St. Lawrence Rivers);
- c. areas that would be rendered inaccessible to people and vehicles during times of flooding hazards, erosion hazards and/or dynamic beach hazards, unless it has been demonstrated that the site has safe access appropriate for the nature of the development and the natural hazard; and
- d. a floodway regardless of whether the area of inundation contains high points of land not subject to flooding.

3.1.3 Planning authorities shall consider the potential impacts of climate change that may increase the risk associated with natural hazards.

3.1.4 Despite policy 3.1.2, *development and site alteration* may be permitted in certain areas associated with the *flooding hazard along river, stream and small inland lake systems*:

- a. in those exceptional situations where a *Special Policy Area* has been approved. The designation of a *Special Policy Area*, and any change or modification to the official plan policies, land use designations or boundaries applying to *Special Policy Area* lands, must be approved by the Ministers of Municipal Affairs and Housing and Natural Resources prior to the approval authority approving such changes or modifications; or
- b. where the *development* is limited to uses which by their nature must locate within the *floodway*, including flood and/or erosion control works or minor additions or passive non-structural uses which do not affect flood flows.

3.1.5 *Development* shall not be permitted to locate in *hazardous lands* and *hazardous sites* where the use is:

- a. an *institutional use* including hospitals, long-term care homes, retirement homes, pre-schools, school nurseries, day cares and schools;
- b. an *essential emergency service* such as that provided by fire, police and ambulance stations and electrical substations; or
- c. uses associated with the disposal, manufacture, treatment or storage of *hazardous substances*.

3.1.6 Where the *two zone concept* for *flood plains* is applied, *development* and *site alteration* may be permitted in the *flood fringe*, subject to appropriate floodproofing to the *flooding hazard* elevation or another *flooding hazard* standard approved by the Minister of Natural Resources.

3.1.7 Further to policy 3.1.6, and except as prohibited in policies 3.1.2 and 3.1.5, *development* and *site alteration* may be permitted in those portions of *hazardous lands* and *hazardous sites* where the effects and risk to public safety are minor, could be mitigated in accordance with provincial standards, and where all of the following are demonstrated and achieved:

- a. development and site alteration is carried out in accordance with floodproofing standards, protection works standards, and access standards;
- b. vehicles and people have a way of safely entering and exiting the area during times of flooding, erosion and other emergencies;
- c. new hazards are not created and existing hazards are not aggravated; and
- d. no adverse environmental impacts will result.⁹

3.1.8 *Development* shall generally be directed to areas outside of lands that are unsafe for *development* due to the presence of *hazardous forest types for wildland fire*.

Development may however be permitted in lands with hazardous forest types for wildland fire where the risk is mitigated in accordance with wildland fire assessment and mitigation standards.¹⁰

⁹ Policy 3.1.7 of the PPS was added to the PPS in 2014, and was not part of the Memorandum of Understanding on Procedure to Address Conservation Authority Delegated Responsibility in 2001 between Conservation Ontario, Ministry of Natural Resources & Ministry of Municipal Affairs and Housing. However, Policy 3.1.7 provides clarity to Policies 3.1.2 and 3.1.5 and therefore could be considered part of the NPCA mandate.

¹⁰ Policy 3.1.8 of the PPS was added to the PPS in 2014, and was not part of the Memorandum of Understanding on Procedures to Address Conservation Authority Delegated Responsibility in 2001 between Conservation Ontario, Ministry of Natural Resources & Ministry of Municipal Affairs and Housing. As wildland fire is a new hazard, it should not be considered part of the NPCA mandate unless the Province gives further direction on this matter.

Appendix C - Excerpt from the Ontario Regulation 155/06 Niagara Peninsula Conservation Authority: Regulation of Development, Interface with Wetlands and Alterations to Shorelines and Watercourses

Development prohibited

2. (1) Subject to section 3, no person shall undertake development or permit another person to undertake development in or on the areas within the jurisdiction of the Authority that are,

(a) adjacent or close to the shoreline of the Great Lakes-St. Lawrence River System or to inland lakes that may be affected by flooding, erosion or dynamic beaches, including the area from the furthest offshore extent of the Authority's boundary to the furthest landward extent of the aggregate of the following distances:

(i) the 100 year flood level, plus the appropriate allowance for wave uprush shown in the most recent document entitled "Lake Ontario Shoreline Management Plan" available at the head office of the Authority,

(ii) the 100 year flood level, plus the appropriate allowance for wave uprush shown in the most recent document entitled "Lake Erie Shoreline Management Plan" available at the head office of the Authority,

(iii) the predicted long term stable slope projected from the existing stable toe of the slope or from the predicted location of the toe of the slope as that location may have shifted as a result of shoreline erosion over a 100-year period,

(iv) where a dynamic beach is associated with the waterfront lands, the appropriate allowance inland to accommodate dynamic beach movement shown in the most recent document entitled "Lake Ontario Shoreline Management Plan" available at the head office of the Authority, and

(v) where a dynamic beach is associated with the waterfront lands, the appropriate allowance inland to accommodate dynamic beach movement shown in the most recent document entitled "Lake Erie Shoreline Management Plan" available at the head office of the Authority;

(b) river or stream valleys that have depressional features associated with a river or stream, whether or not they contain a watercourse, the limits of which are determined in accordance with the following rules:

(i) where the river or stream valley is apparent and has stable slopes, the valley extends from the stable top of bank, plus 15 metres, to a similar point on the opposite side,

(ii) where the river or stream valley is apparent and has unstable slopes, the valley extends from the predicted long term stable slope projected from the existing stable

slope or, if the toe of the slope is unstable, from the predicted location of the toe of the slope as a result of stream erosion over a projected 100-year period, plus 15 metres, to a similar point on the opposite side,

(iii) where the river or stream valley is not apparent, the valley extends the greater of,

(A) the distance from a point outside the edge of the maximum extent of the flood plain under the applicable flood event standard, to a similar point on the opposite side, and

(B) the distance of a predicted meander belt of a watercourse, expanded as required to convey the flood flows under the applicable flood standard, to a similar point on the opposite side;

(c) hazardous lands;

(d) wetlands; or

(e) other areas where development could interfere with the hydrologic function of a wetland, including areas up to 120 metres of all provincially significant wetlands and wetlands greater than 2 hectares in size, and areas within 30 metres of wetlands less than 2 hectares in size. O. Reg. 155/06, s. 2 (1); O. Reg. 71/13, s. 1 (1-3).

(2) All areas within the jurisdiction of the Authority that are described in subsection (1) are delineated as the "Regulation Limit" shown on a series of maps filed at the head office of the Authority under the map title "Ontario Regulation 97/04: Regulation for Development, Interference with Wetlands and Alterations to Shorelines and Watercourses". O. Reg. 71/13, s. 1 (4).

(3) If there is a conflict between the description of areas in subsection (1) and the areas as shown on the series of maps referred to in subsection (2), the description of areas in subsection (1) prevails. O. Reg. 71/13, s. 1 (4).



making our mark

NIAGARA

OFFICIAL PLAN

PDS 10–2019

Update on Natural Environment Work Program

February 20, 2019 – Presentation to Planning and Economic
Development Committee



Background

- **PDS 41-2017** outlined the 8 major background studies required to support the New Regional Official Plan
- **PDS 6-2018** was the project initiation report and sought direction for preliminary consultation
- **PDS 18-2018** was the project framework report



Drivers for Natural Environment Work Program

- Conformity with Provincial requirements
- Need to develop new natural system(s) and policies to address concerns from a range of stakeholders and other users:
 - Feedback has been that existing policies are out-of-date and difficult to use.
Mapping also requires review and update
- Need to have a system that considers, and is compatible with agriculture and other land uses



Scope for Natural Environment Work Program

In-Scope	Out-of-Scope*
<ul style="list-style-type: none"> • Natural Heritage Features <ul style="list-style-type: none"> • Woodlands, wetlands, habitat, habitat of endangered and threatened species, fish habitat, etc. • Hydrologic Features <ul style="list-style-type: none"> • Streams, seepage areas, wetlands, etc. • Region's watercourse identification and mapping project • Water Resource Systems <ul style="list-style-type: none"> • Groundwater systems • Surface water systems • Natural Hazards <ul style="list-style-type: none"> • Flooding hazards, erosion hazards, and dynamic beach hazards, etc. • Wildland fires as per Section 3.1.8 of the PPS • Provincial Natural Heritage Systems <ul style="list-style-type: none"> • Greenbelt Natural Heritage System and Urban River Valley designation • Growth Plan Natural Heritage System • Niagara Escarpment Plan as it relates to the municipal planning process • Watershed Planning & Stormwater Management 	<ul style="list-style-type: none"> • Aggregates & Petroleum Resources • Source Water Protection

*Official Plan policy development for out-of-scope items to be addressed separately¹⁶²



Project Overview – Natural Environment

Project Phase	Activities
1	Project Initiation and Procurement <i>[Complete]</i>
2	Background Study and Discussion Papers for Mapping and Watershed Planning Priority Areas <i>[Ongoing]</i>
3	1 st Point of Engagement: Inform on Background Study
4	Develop Options for Natural System(s)
5	2 nd Point of Engagement: Consultation on Options for the Natural System(s)
6	Develop Regional Natural System(s)
7	Develop OP Policies & Finalize Mapping
8	3 rd Point of Engagement: Draft OP Policies and Schedules
9	Other Implementation Tools



Key Issues to be Addressed

- The scale and methodology that natural environment features and systems are mapped by the Region
- A framework for watershed planning in the Region
- Offsetting, compensation, mitigation, vegetation protection zones, and buffers
- Woodlands, shorelines, invasive species, and climate change





Progress to Date

- Consulting team has been retained
- Technical Advisory Group (TAG) has been formed and engagement has begun
- Meetings with mapping working group in support of high-priority Mapping Discussion Paper



Next Steps

- Complete the high-priority Mapping and Watershed Planning Discussion Papers and Comprehensive Background Study
- 1st major point of engagement - focusing on education and sharing information:
 - Stakeholders
 - Planning Advisory Committee (PAC)
 - Public
 - Local Councils
 - Planning and Economic Development Committee



Subject: Update on Natural Environment Work Program – New Regional Official Plan

Report to: Planning and Economic Development Committee

Report date: Wednesday, February 20, 2019

Recommendations

1. That Report PDS 10-2019 **BE RECEIVED** for information; and,
2. That Report PDS 10-2019 **BE CIRCULATED** to the Area Municipalities and the Niagara Peninsula Conservation Authority (NPCA).

Key Facts

- This purpose of this report is to provide an update on the natural environment work program for the new Regional Official Plan including background, work completed to date, and next steps.
- Natural environment planning is a complex and evolving science. There is a wide range of changing Provincial requirements, guidance, and direction; scientific and technical requirements; industry best practices; and local context that must be taken into consideration.
- Natural environment planning is highly-integrated with agricultural system planning. Both natural environment and agricultural systems are foundations of the new Regional Official Plan.
- PDS 6-2018 was the Project Initiation Report for the natural environment work program. The report was presented to Planning and Economic Development Committee on January 31, 2018 and sought direction to begin the consultation program and to prepare a more detailed project framework.
- PDS 18-2018 was the detailed project framework for the natural environment work program, and was endorsed by Planning and Economic Development Committee on April 25, 2018.

Financial Considerations

The costs associated with the natural environment work program can be accommodated within the Council approved Regional Official Plan project budget.

Analysis

Background

Since approval in 1973, first as the Regional Policy Plan, the Regional Official Plan has not been comprehensively updated. The historical structure of the Regional Official Plan never contemplated the comprehensive long range planning guidance required by the current contemporary Provincial planning requirements. A new Regional Official Plan that reflects Provincial Policy and up-to-date current planning practice is required.

By approval of Report PDS 40-2016, Council endorsed the approach of the preparation of a new Regional Official Plan from start to finish rather than a series of site specific topic amendments.

Subsequently, PDS 41-2017 outlined eight background studies that needed to be initiated as a first priority towards the development of the new Regional Official Plan. Four of these are generally classified as they relate to growth: land needs assessment, employment lands strategy, urban structure, and a regional housing strategy. The remaining four are generally classified as resource and environment related: aggregates, climate change, agriculture, and natural environment.

PDS 6-2018 was the project initiation report for the natural environment work program and sought direction to consult with Area Planners and local municipal planning staff. During that consultation process the scope, methodology, and key issues to be incorporated in the work program were confirmed. PDS 18-2018 provided a summary of the early consultation process; framework for the work program moving forward; an outline of the proposed consultation and engagement process; and a schedule for reporting to Committee and Council. That reporting scheduled identified that a status report on the project would be made in Q1 2019.

Scope

Through early consultation with the Area Planners group and other stakeholders the scope of the natural environment work program was refined and confirmed. The natural environment work program will include evaluation and consideration of:

- Natural Heritage Features:
 - All features as identified in the PPS (Provincial Policy Statement) and Provincial Plans including woodlands, wetlands, wildlife habitat, habitat of endangered and threatened species, fish habitat, significant valleylands, etc.

- Hydrologic Features:
 - All features as identified in the PPS and Provincial Plans including streams, seepage areas, wetlands, etc.
 - Significant work to date on the Region's watercourse identification and mapping project (known as the "contemporary mapping of watercourses")
- Water Resource Systems:
 - Groundwater systems
 - Surface water systems
- Natural Hazards:
 - All features as identified in the PPS and Provincial Plans including flooding hazards, erosion hazards, and dynamic beach hazards, etc.
 - Wildland Fires as per Section 3.1.8 of the PPS.
- Provincial Natural Heritage Systems:
 - Greenbelt Natural Heritage System and Urban River Valley designation
 - Growth Plan Natural Heritage System
- Niagara Escarpment Plan as it relates to the municipal planning process
- Watershed Planning & Stormwater Management

Although there will be a connection with some of the 'in scope' items, this project will not result in the development of Official Plan policies related to:

- Aggregates & Petroleum Resources
- Source Water Protection

Framework for Natural Environment Work Program

As outlined previously in further detail in PDS 18-2018, the natural environment work program will be undertaken as follows. A consulting team has now been retained to undertake Phases 2-6 and to support Region staff with Phase 7 and 8. Phase 9, which is the development of other implementation tools is outside of this work program and will be considered once the Regional Official Plan policies have been developed and endorsed.

- Phase 1 - Project Initiation and Procurement
- Phase 2 - Background Study and Discussion Papers for Mapping and Watershed Planning Priority Areas
- Phase 3 - 1st Point of Engagement: Inform on Background Study
- Phase 4 - Develop Options for the Natural System(s)

- Phase 5 - 2nd Point of Engagement: Consultation on Options for the Natural System(s)
- Phase 6 - Develop Regional Natural System(s)
- Phase 7 - Develop Official Plan Policies & Finalize Mapping
- Phase 8 - 3rd Point of Engagement: Draft OP Policies and Schedules
- Phase 9 – Other Implementation Tools

Work Completed to Date

Since the endorsement of PDS 18-2018, Region staff have completed Phase 1 of the work program which included: preparing a request for proposal (RFP) document, undertaking a procurement process, and retaining a consulting team. A Technical Advisory Group (TAG) comprising of local, NPCA, and provincial planning staff has also been formed.

Phase 2 of the work program is well underway and has included a meeting of the TAG as well as several meetings with a mapping working group which was formed to support the development of the high-priority mapping discussion paper.

Next Steps

The next steps in the work program are the completion of mapping and watershed planning discussion papers, followed by the comprehensive background study. These studies will provide the necessary background information for the system and policy development and are the foundation of the work program moving forward.

Following this is the 1st major point of engagement with the full range of stakeholders. The purpose of this point of engagement is to educate and share the findings of the background studies. Public open houses and presentations to local councils will also be completed during the 1st point of engagement.

Alternatives Reviewed

N/A

Relationship to Council Strategic Priorities

The natural environment work program is part of the new Regional Official Plan which will assist in implementing Council's Strategic Priority of Innovation, Investment, & Entrepreneurship.

Other Pertinent Reports

- PDS 40-2016 – Regional Official Plan Update
- PDS 41-2017 – New Official Plan Structure and Framework
- PDS 3-2018 – New Official Plan Update
- PDS 6-2018 – Natural Environment Project Initiation Report
- PDS 18-2018 – Natural Environment – Project Framework

Prepared by:

Sean Norman, PMP, MCIP, RPP
Senior Planner
Planning and Development Services

Recommended by:

Rino Mostacci, MCIP, RPP
Commissioner
Planning and Development Services

Submitted by:

Ron Tripp, P. Eng
Acting Chief Administrative Officer

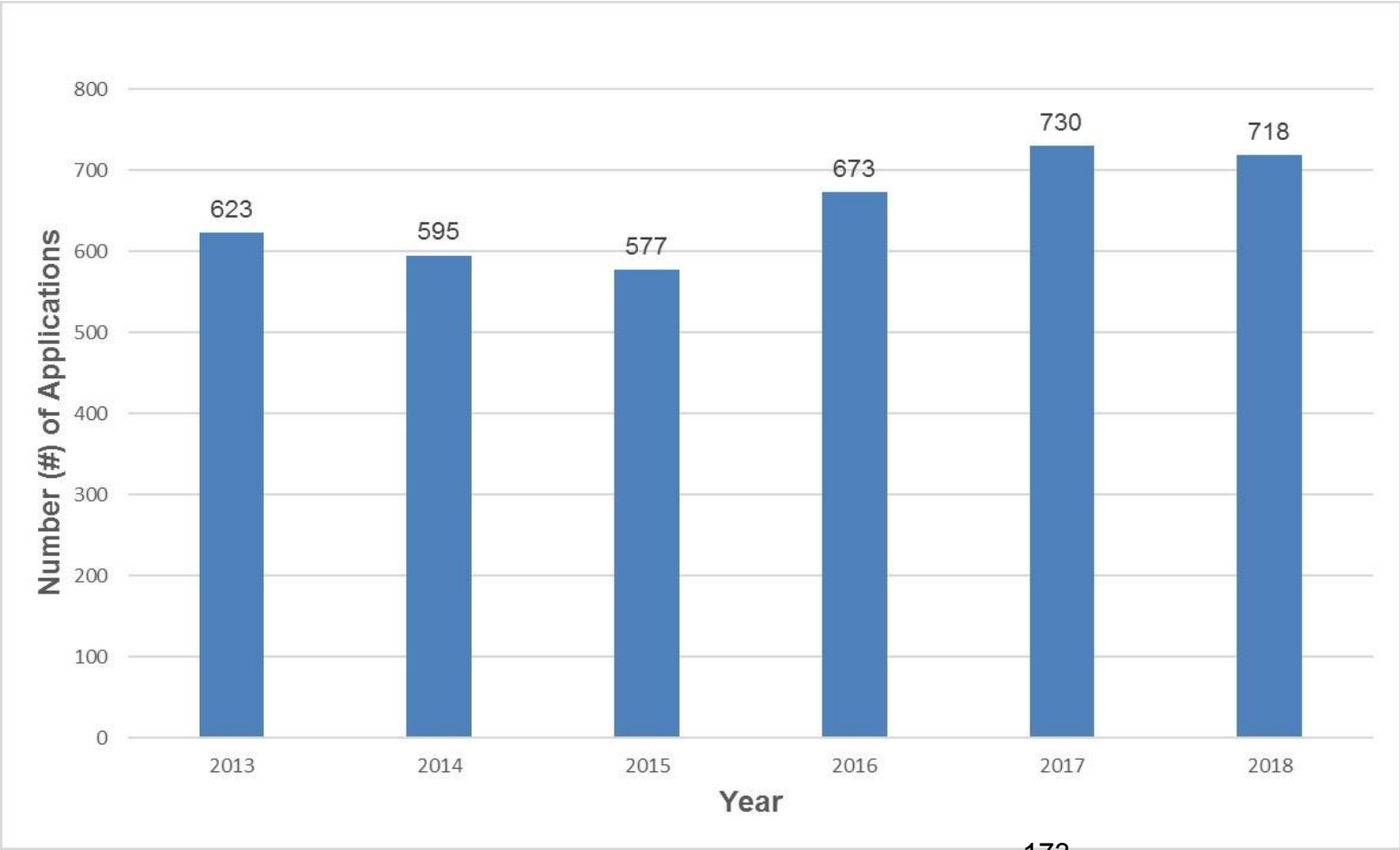
This report was prepared in consultation with Karen Costantini, Planning Analyst – Regional Official Plan, and reviewed by Erik Acs, MCIP, RPP, Manager, Community Planning, Dave Heyworth, MCIP, RPP, Official Plan-Policy Consultant, and Doug Giles, Director, Community and Long Range Planning.

NIAGARA REGION

**DEVELOPMENT APPLICATIONS
MONITORING REPORT
2018 YEAR END**

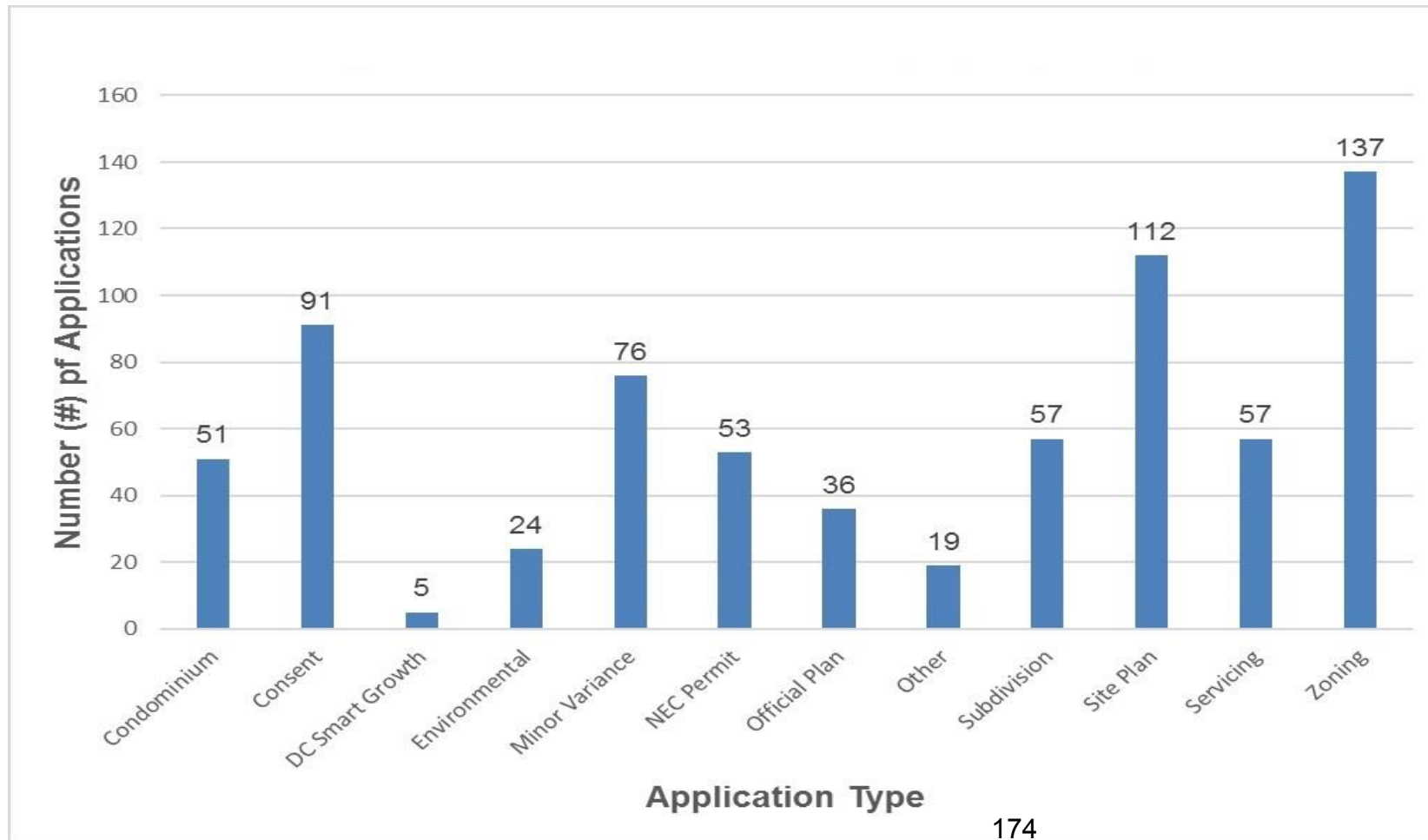
FEBRUARY 20, 2019- PLANNING & ECONOMIC DEVELOPMENT COMMITTEE

Total Applications (2013-2018)



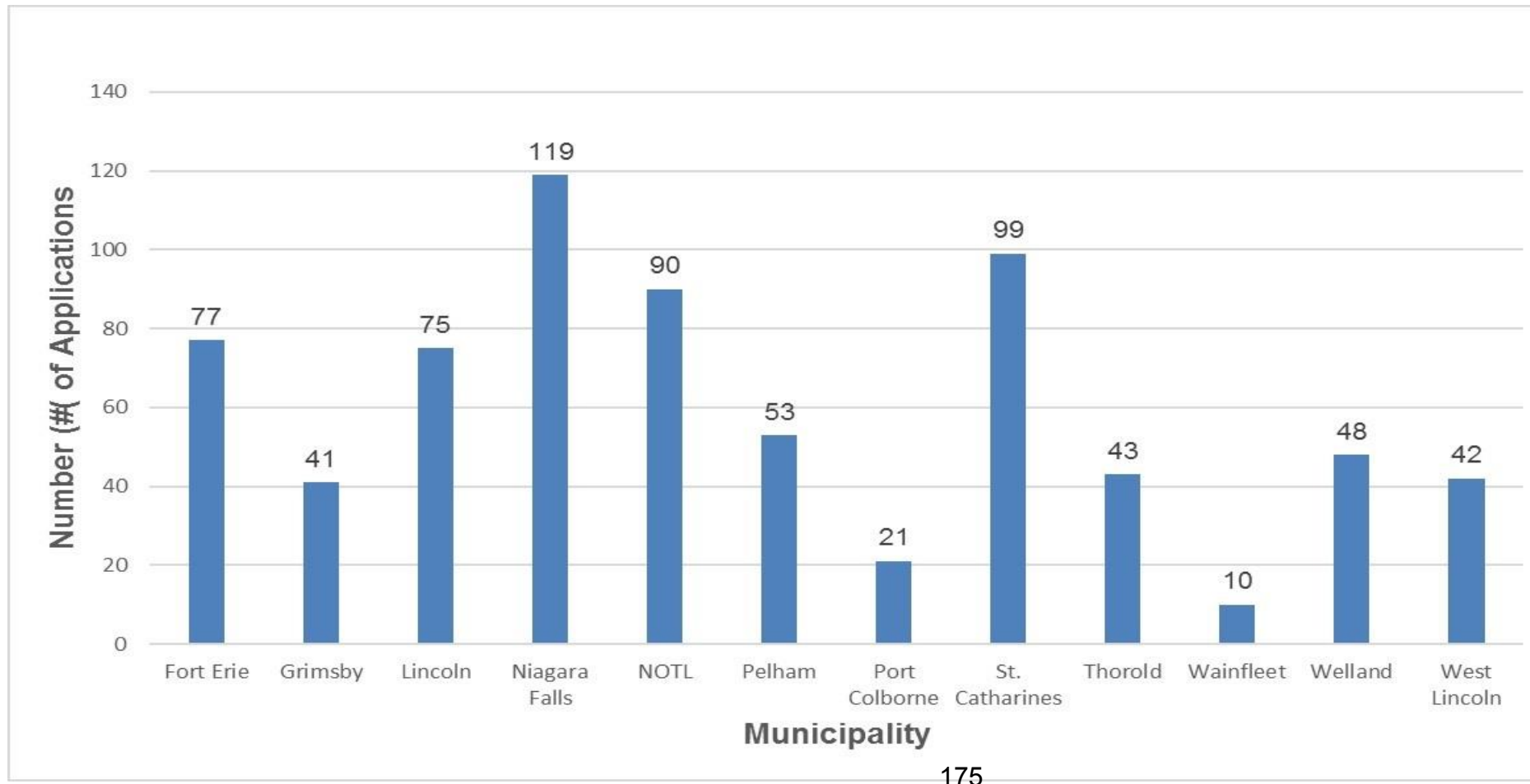
- 1.6% for 2018

Total Applications by Type (2018)

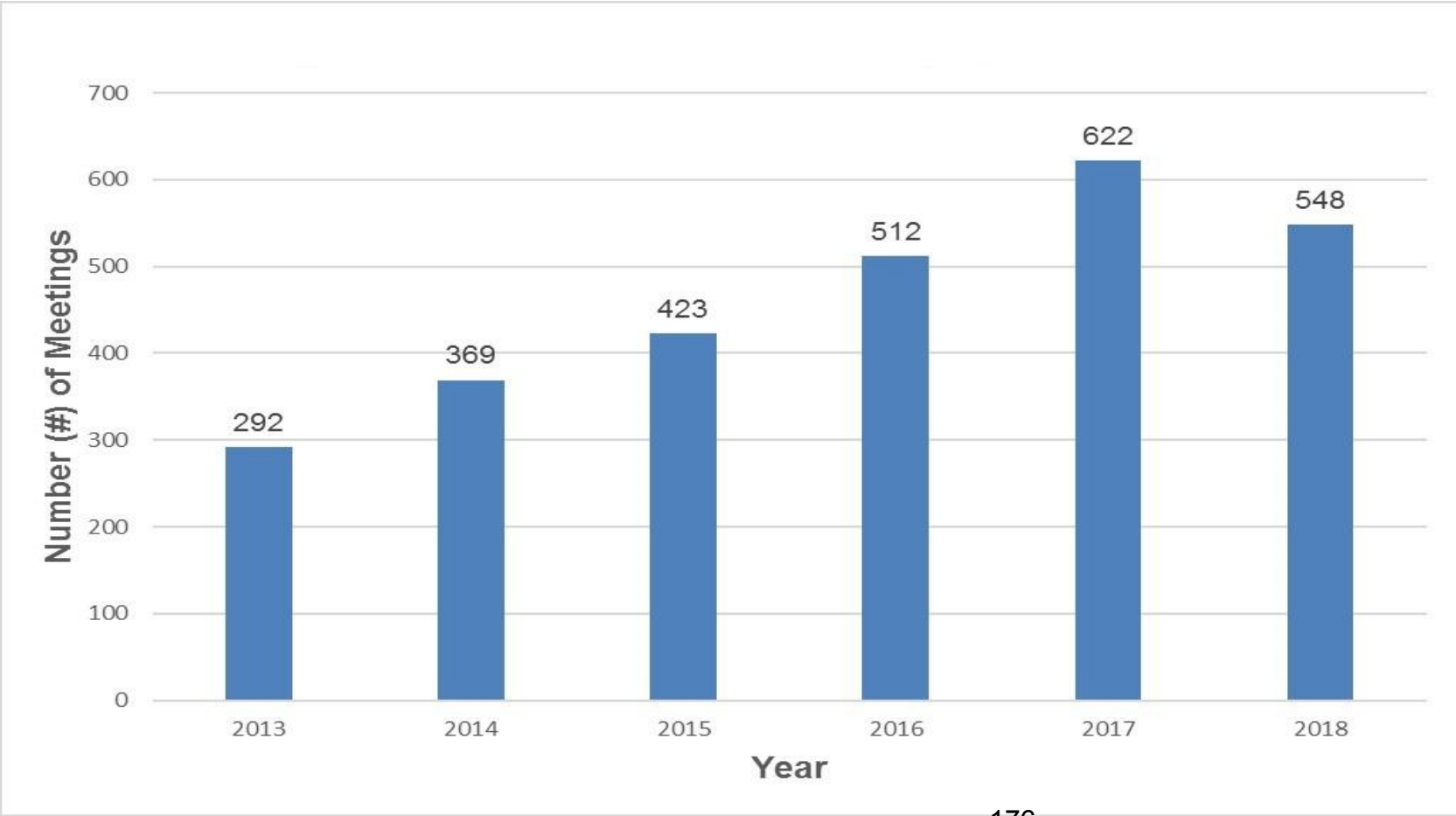


174

Total Applications by Municipality (2018)

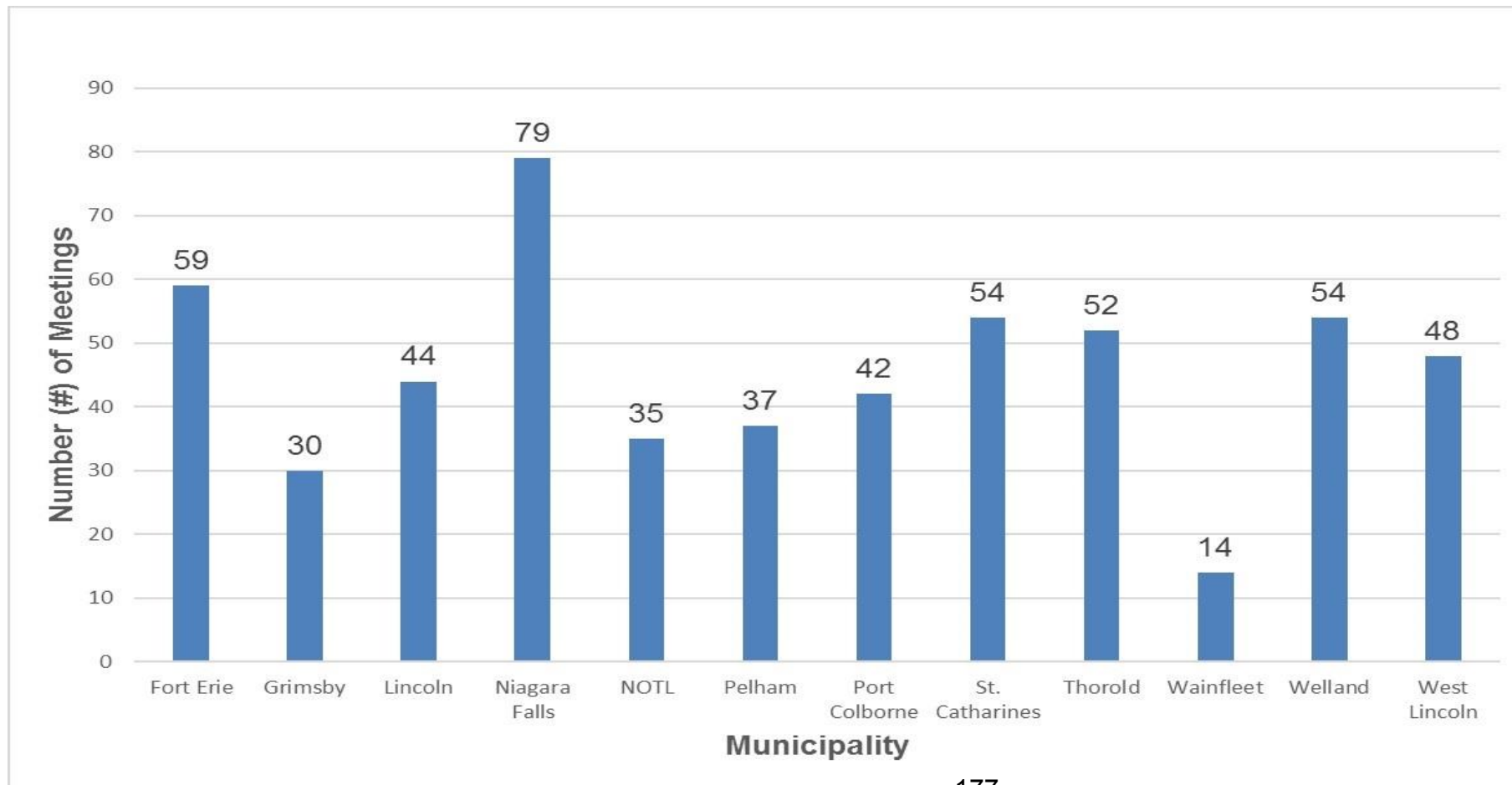


Preconsultation Meetings (2013-2018)

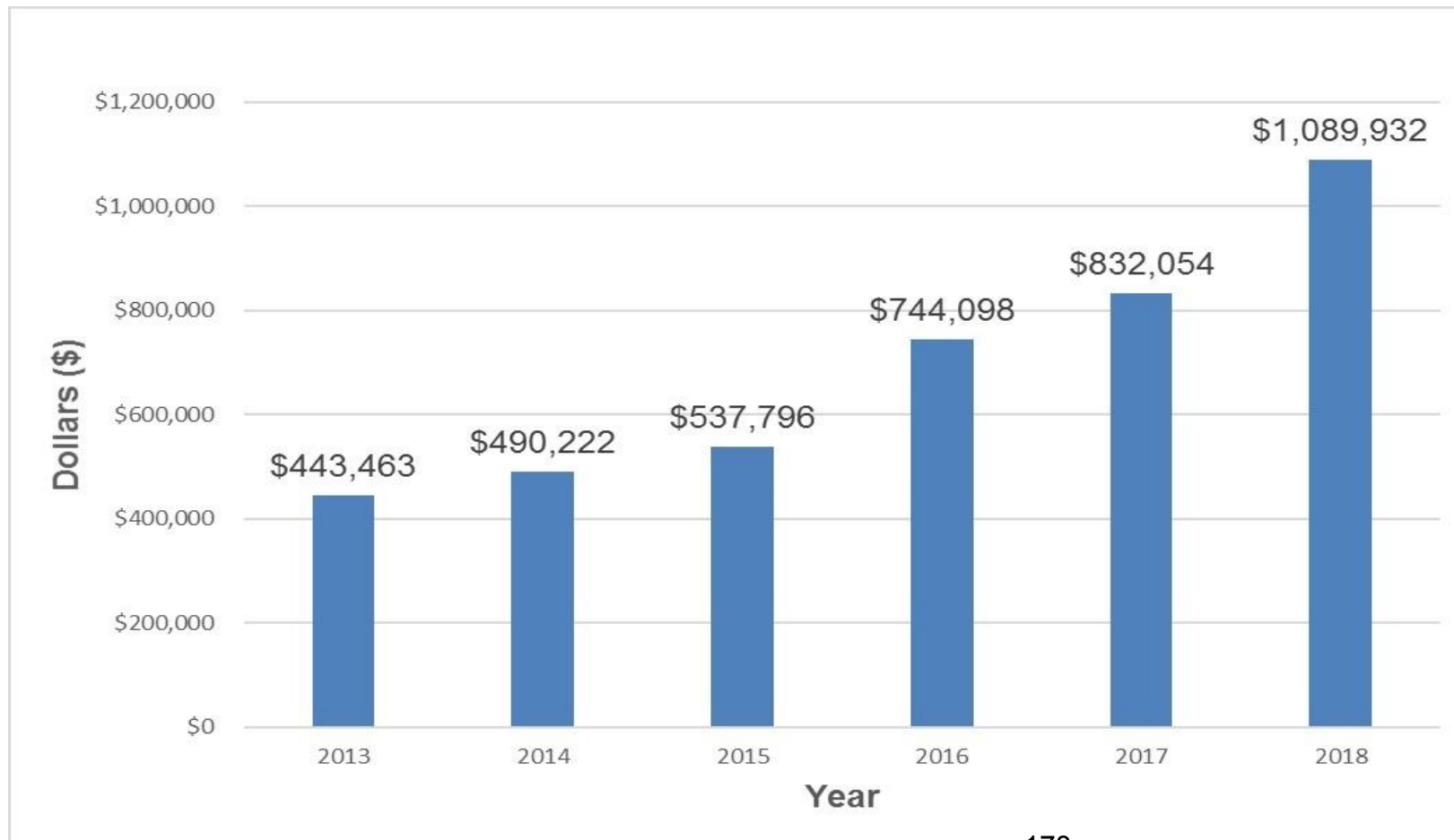


- 12% for 2018

Preconsultation Meetings by Municipality (2018)



Regional Review Fees Collected (2013-2018)



+ 31% for 2018

Application Review Timeline Targets (2013-2018)





QUESTIONS?

Subject: Development Applications Monitoring Report - 2018 Year End

Report to: Planning and Economic Development Committee

Report date: Wednesday, February 20, 2019

Recommendations

1. That Report PDS 3-2019 **BE RECEIVED** for information; and,
2. That a copy of Report PDS 3-2019 **BE CIRCULATED** to Local Area Municipalities, the Niagara Peninsula Conservation Authority, Niagara Home Builders Association, Niagara Industrial Association, local Chambers of Commerce and School Boards.

Key Facts

- The purpose of this report is to inform Regional Council of 2018 development application activity in Niagara Region.
- Regional Development Planning and Engineering staff reviewed 718 development applications in 2018.
- Regional Development Planning and Engineering staff attended 548 Pre-Consultation Meetings in 2018.
- The Region received \$1,089,932 in review fees for development applications in 2018 (31% increase over 2017 fees).

Financial Considerations

There are no direct financial implications associated with this report.

Analysis

Development Applications

Regional Development Services staff reviewed 718 development applications in 2018 representing a minimal 1.6% decrease over the 2017 application total (730). Figure 1 illustrates the number of applications considered by Development Planning and Engineering staff from 2013 to 2018 indicating high development activity levels and a general upward trend plateauing over the past few years. These development applications are circulated to the Region based on Provincial legislation requirements and the existing Memorandum of Understanding between the Region and local area municipalities for planning in Niagara.

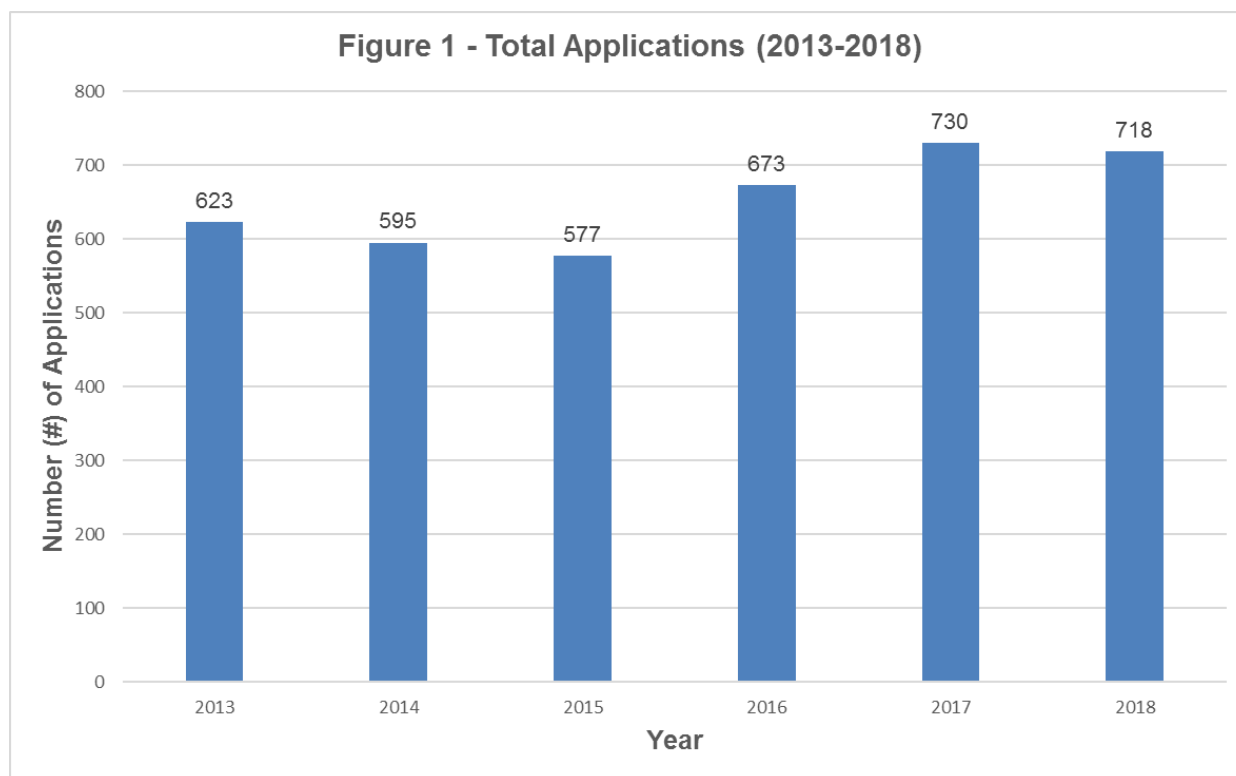
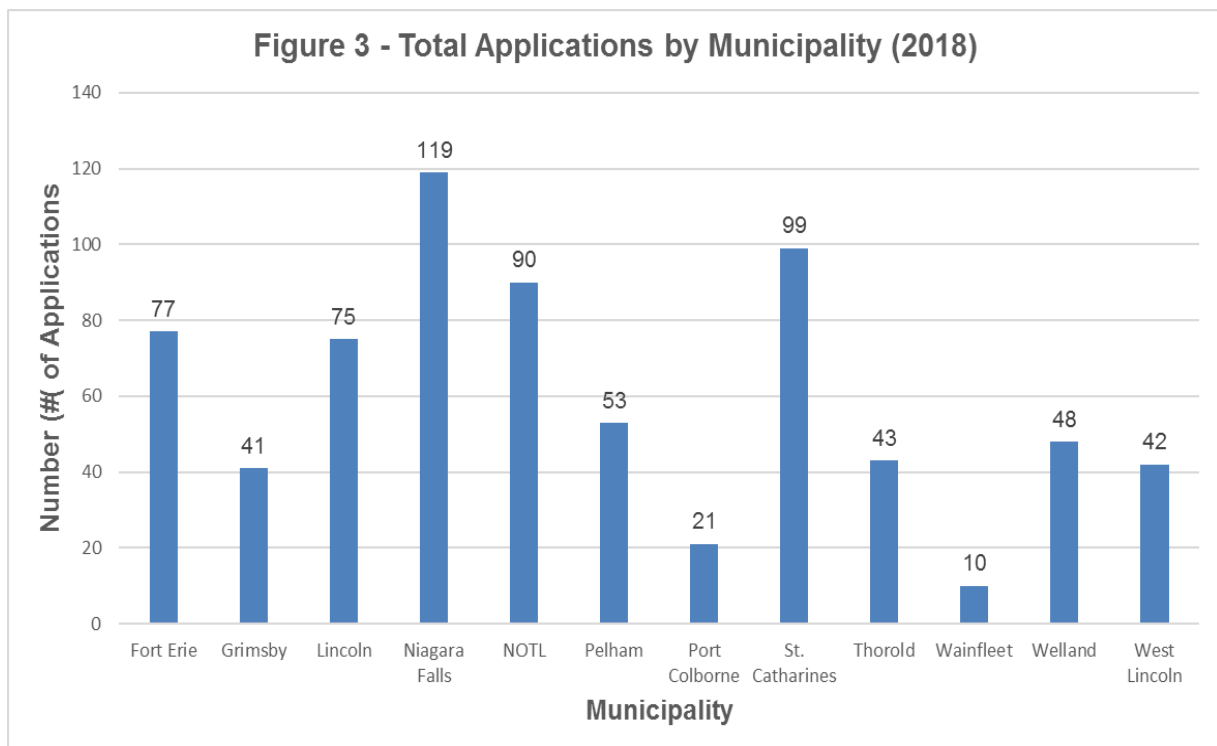
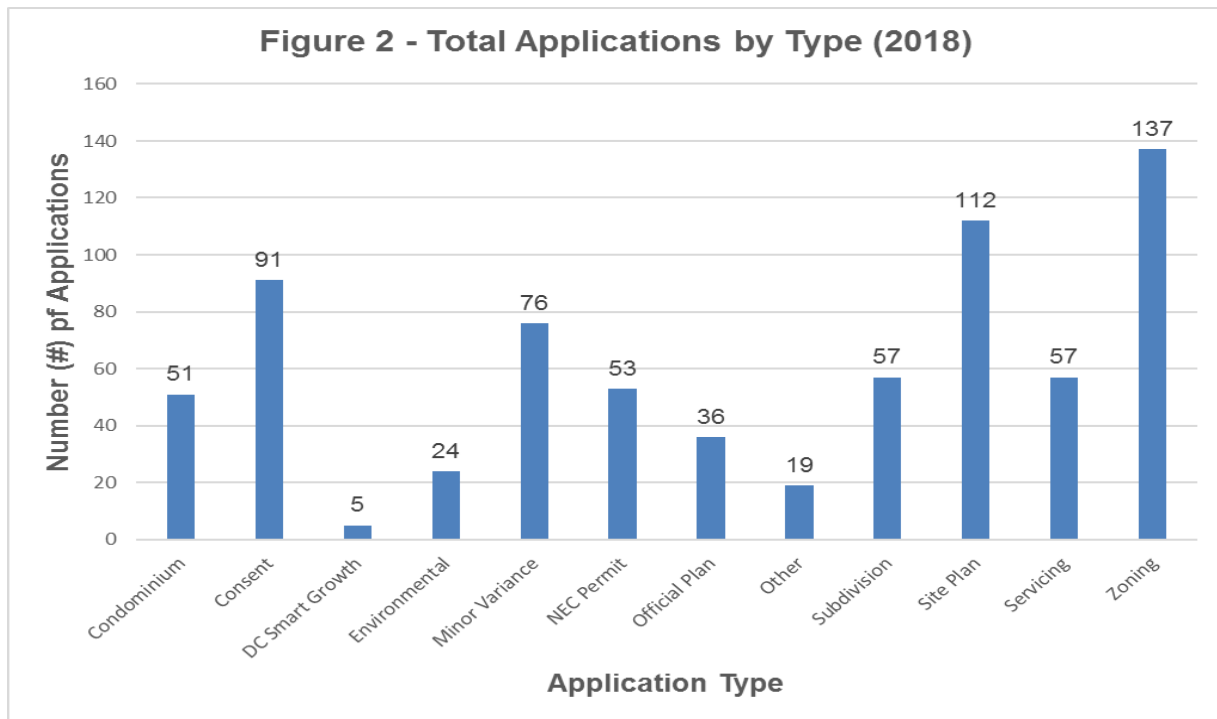


Figure 2 provides the breakdown of the development application types reviewed by Regional staff in 2018. The more complex development proposals often require multiple planning approvals. As an example, subdivision and condominium applications may also need amendments to the municipal Official Plan and Zoning By-law to facilitate the development. The categories with the most applications considered by Regional staff were Zoning By-law amendments (137), followed by Site Plan (112), Consent/ Severance (91), and Minor Variance (76).

The distribution of applications circulated to the Region by local area municipalities during 2018 is shown on Figure 3. This information indicates relatively high levels of development activity in several communities. The municipalities with the most applications in the year were Niagara Falls (119), St. Catharines (99), Niagara-on-the-Lake (90), Fort Erie (77), and Lincoln (75).



Preconsultation Meetings

Development Services staff are scheduled to attend regular preconsultation meeting sessions two days each month in each local municipal office. These meetings with developers, property owners, local staff and agencies determine complete application submission requirements and assist in the processing of applications. In 2018, Regional staff attended 548 preconsultation meetings which is a 12% decrease compared to the 2017 total (see Figure 4). It is not uncommon for municipalities to experience these reduced numbers (in applications and preconsultation meetings) during a municipal election year. As the number of preconsultation meetings is an indicator of future development applications, Regional staff are expecting that development applications and preconsultation meeting numbers will resume an upward trend for 2019.

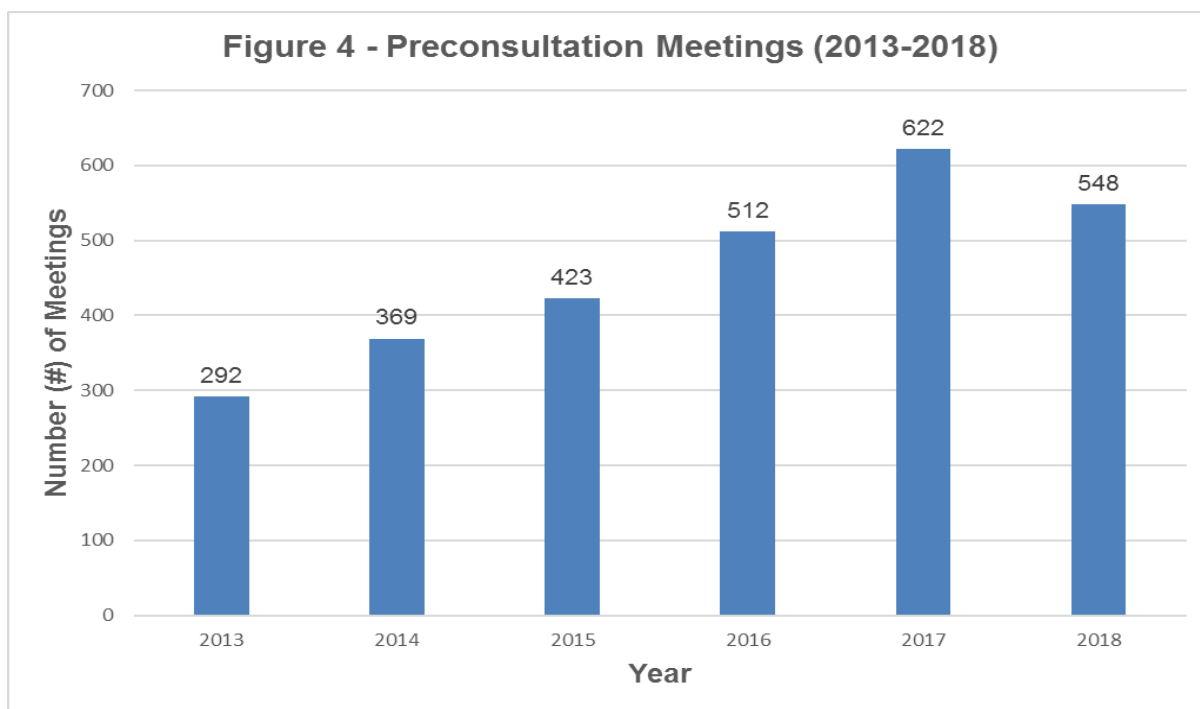
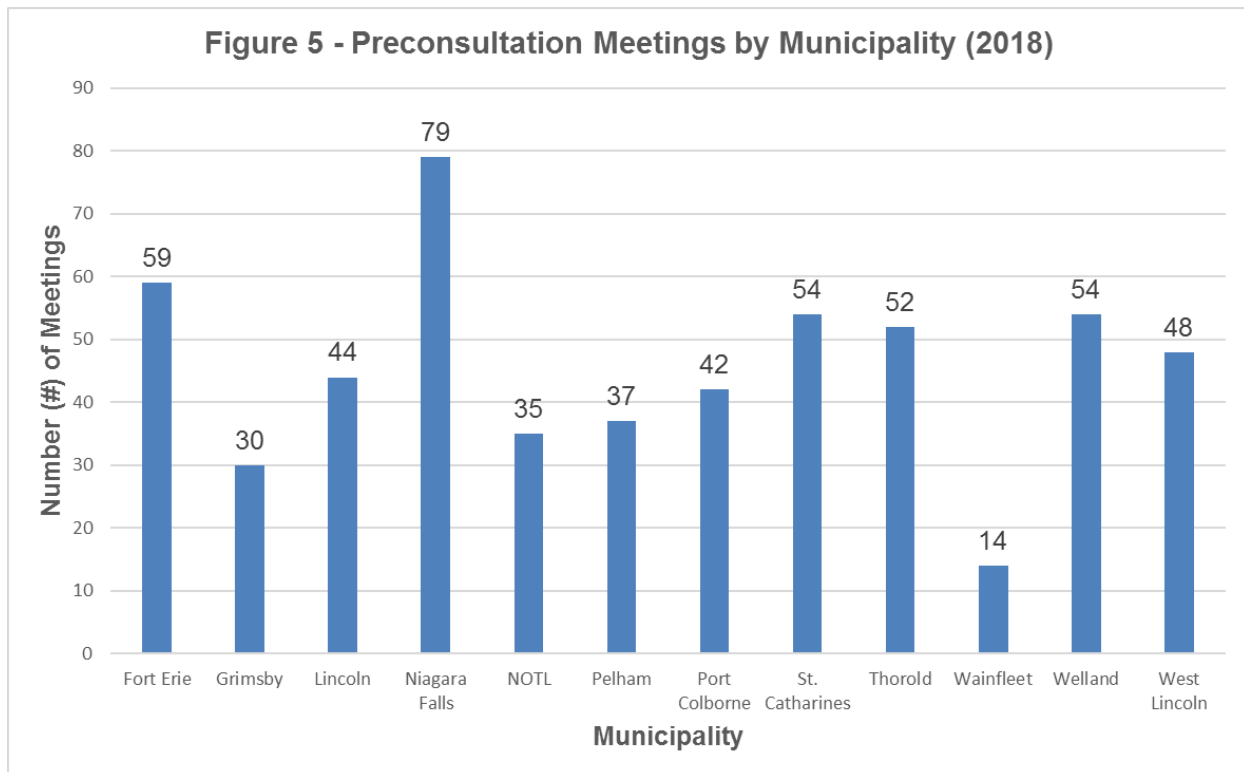
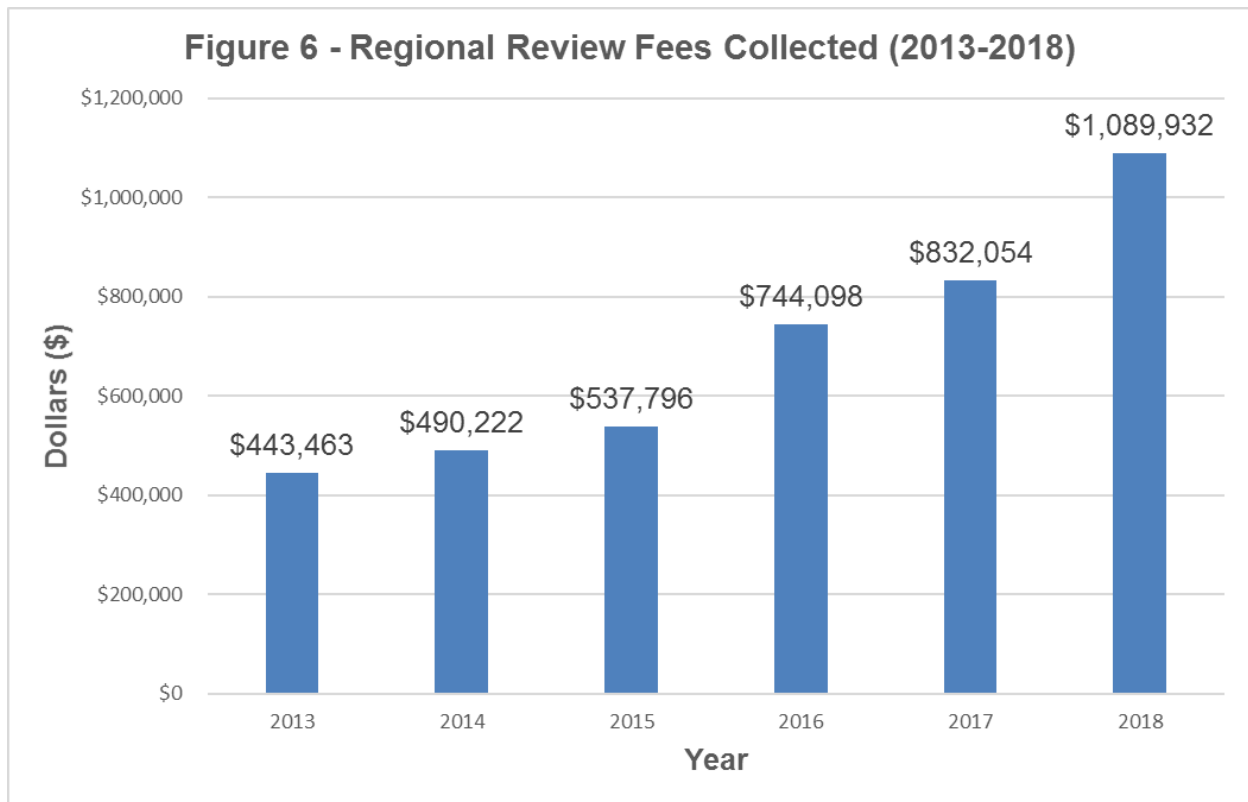


Figure 5 illustrates the number of Preconsultation Meetings by municipality in 2018 that involved Regional staff. The municipalities with the highest levels of preconsultation activity were Niagara Falls (79), followed by Fort Erie (59), St. Catharines and Welland (54 each) and Thorold (52).



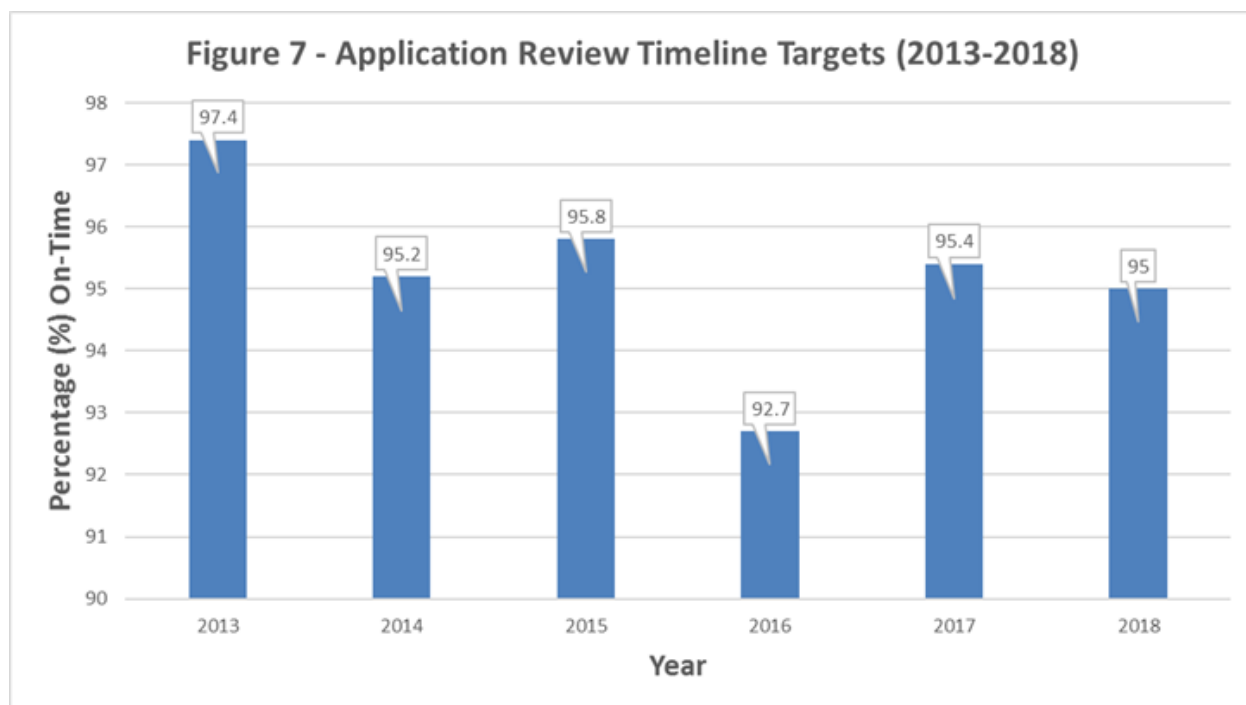
Regional Review Fees

Regional review fees are intended to offset Regional costs for the development review service. Figure 6 summarizes the fees collected between 2013 and 2018 for the Regional review of development applications. The 2018 total of \$1,089,932 represents an increase of 31% over 2017. The 31% increase is due to a number of large development applications (i.e. Prudhommes Landing Subdivision); the increase in our review fee schedule; and the addition of Urban Design and Stormwater Management Reviews.



Application Review Timelines

Timeline response targets for municipal and agency files vary according to application type (complexity) and are established by Planning Act regulations and the current Memorandum of Understanding between the Region and the local area municipalities. The Region consults with municipal staff to establish local priorities and in several cases, extensions were granted to initial comment periods. This arrangement allowed for the resolution of issues, submission of additional information where required and addressed workload demands. Based on this consultation and cooperation with local municipal staff, Regional staff provided review comments satisfying timeline targets for 95% of all Development Planning and Engineering applications with due dates in 2018 as outlined in Figure 7.



Commissioner Comments

In 2018, Regional Development Services assumed the responsibility for review of the Natural Heritage policies in the Region's Official Plan in accordance with the revised Environmental Protocol with the Niagara Peninsula Conservation Authority.

In order to review service delivery and ensure Regional Planning continues to add value to the application review and approval process for local municipalities and developers/investors, an update to the Memorandum of Understanding is nearing completion.

The increased level of development in recent years represents a "new normal" for the Region. Regional Development Planning has adjusted its approach and practices to be solution oriented and proactive. By providing ongoing support to our local Municipalities, the Region strives to realize complete community planning outcomes that encourage the best possible development throughout the Region.

It is important to keep in mind that the development approval process is not intended to be a substitute for community planning. While some municipalities have relied on the development approval process in past to achieve their land use objectives, this is not a best practice and cannot be sustained on a go forward basis – municipalities will have to invest and increase their capacity for proactive planning such as Secondary Plans and Neighbourhood Plans in order to achieve desirable result and meet expectations.

Alternatives Reviewed

None.

Relationship to Council Strategic Priorities

This report provides information on development application activity that contributes to strong economic prosperity throughout the communities within the Niagara Region.

Other Pertinent Reports

- PDS 25-2018: Niagara Region Mid-Year 2018 Growth Monitoring Report
- PDS 23-2018: 2017 Year End Development Planning Applications Monitoring Report

Prepared by:

Lindsay Earl, MCIP, RPP
Senior Development Planner
Planning and Development Services

Recommended by:

Rino Mostacci, MCIP, RPP
Commissioner
Planning and Development Services

Submitted by:

Ron Tripp, P. Eng
Acting Chief Administrative Officer

This report was reviewed by Pat Busnello, MCIP, RPP, Manager Development Planning and Diana Morreale, MCIP, RPP, Director, Development Approvals.



MOVING TRANSIT FORWARD

February 20, 2019

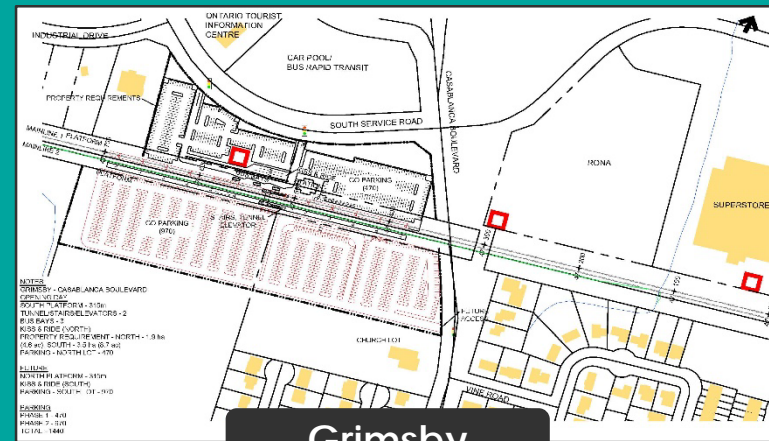
An overview of Niagara's GO Rail Expansion

Planning & Economic
Development Committee

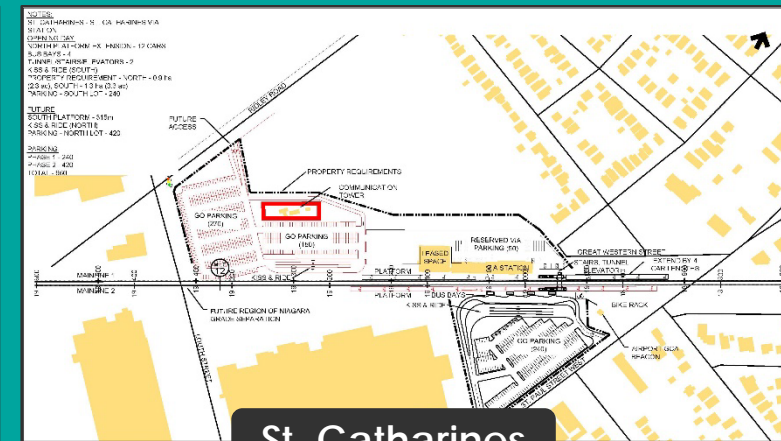
The Catalyst

Environmental Study Report

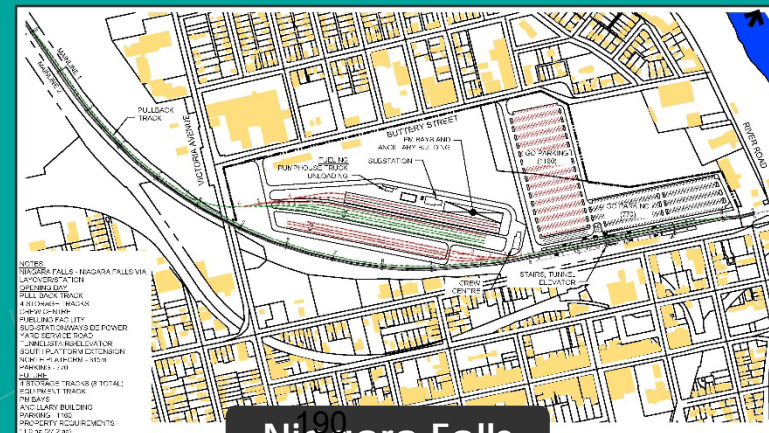
- GO Transit's **Niagara Rail Service Expansion** ESR approved in 2011
- Study included Niagara as a continuation of Hamilton expansion
- Stations at Grimsby, St. Catharines, & Niagara Falls, with a 'future potential station' identified at Lincoln
- Region understood the need for proactive planning
- In 2014, a united Regional Council lobbied the Province to take action



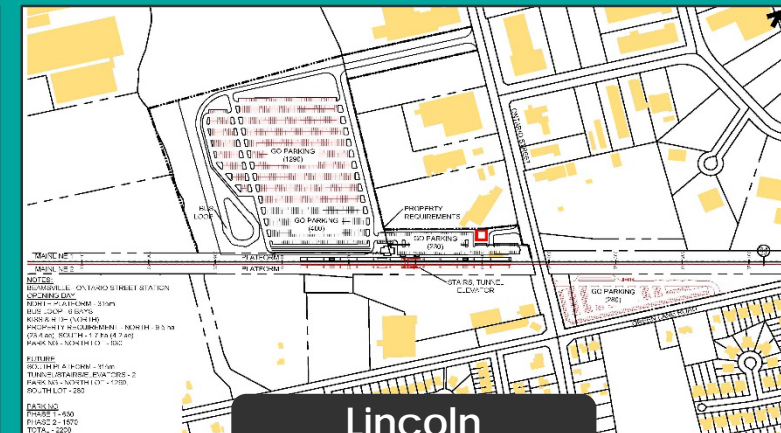
Grimsby



St. Catharines



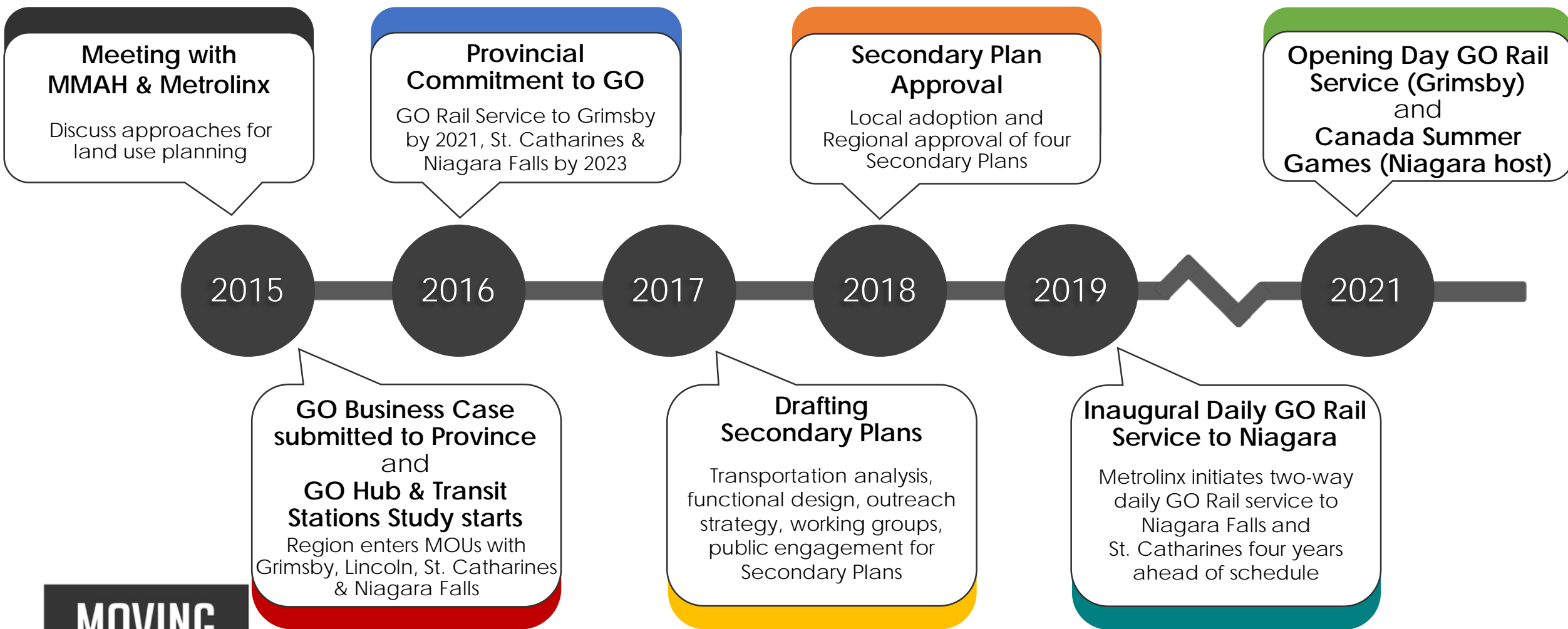
Niagara Falls



Lincoln

*future potential station

Key Niagara GO Milestones



Proactive efforts

Niagara's GO Business Case - (2015)

- Based on 2011 ESR, proactively submitted to Province to justify need for GO Rail service expansion to Niagara
- Council dedicated funds for GO implementation

GO Hub & Transit Stations Study (GHTSS) - (2015)

- Confirmed station locations of GO's 2011 ESR
- Adopted local Secondary Plans that established transit-supportive policy and design around stations
- Identified enabling capital work projects for safe and efficient access to each GO Station
- Developed GO Station design precincts around Niagara's identified GO Station sites



MOVING
TRANSIT
FORWARD



Enabling transit-oriented development (TOD)

- Municipalities across the Greater Golden Horseshoe are **leveraging transit investment to drive growth**.
- Provincial investment presents a **unique opportunity to proactively plan** land uses, transportation networks and infrastructure around the GO station.
- The Province's Growth Plan **directs** municipalities to plan for intensification around GO stations.
- Transit station areas serve an **important function** within the regional transportation system.
- A secondary plan is the **best mechanism** to proactively plan for change and enables the Town to **set its priorities for change**.

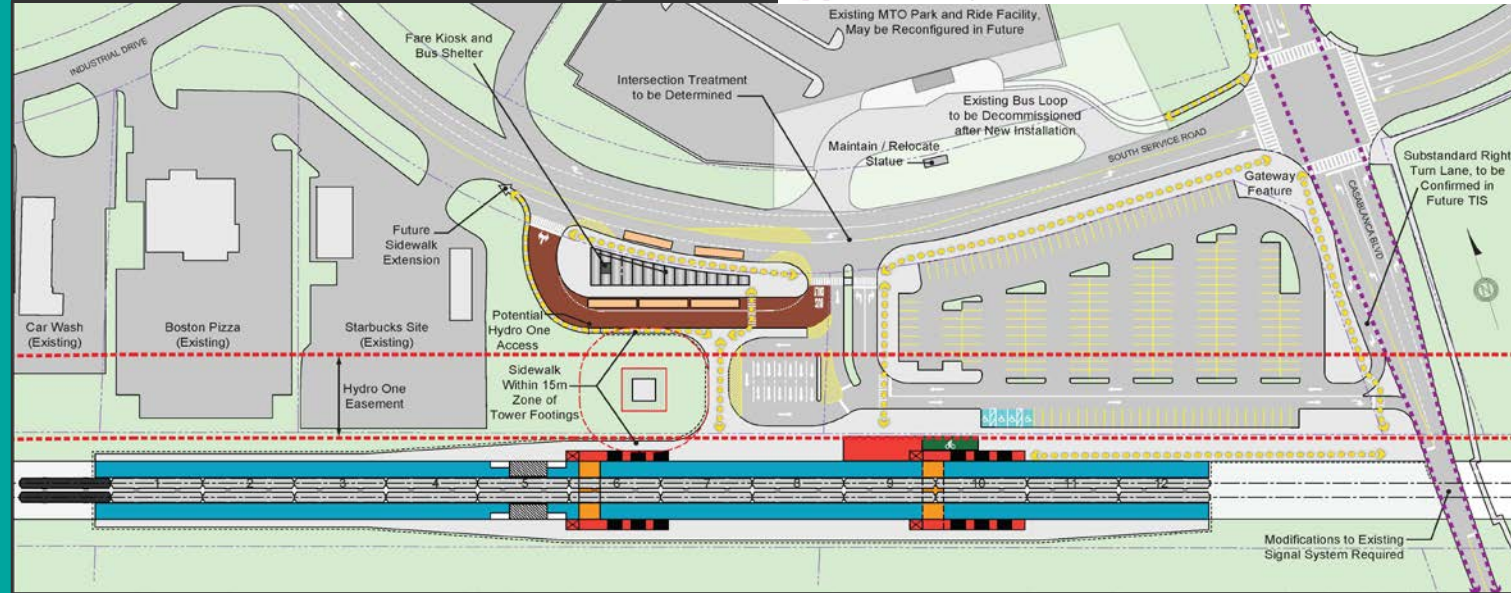


Evolving transit hub in Kitchener (GO rail and LRT station)

Grimsby GO Station

- MX completed functional design (shown left). Detailed design in progress.
- MX now pursuing a “market-driven approach” to station construction at Province’s direction.
- Province has reaffirmed its commitment for GO Rail service to Grimsby by 2021.
- Greenbelt Plan permits linear public infrastructure on specialty crop lands.
- Region-owned lands south of rail line are envisioned to be used for future municipal transit infrastructure.

Metrolinx Functional Design

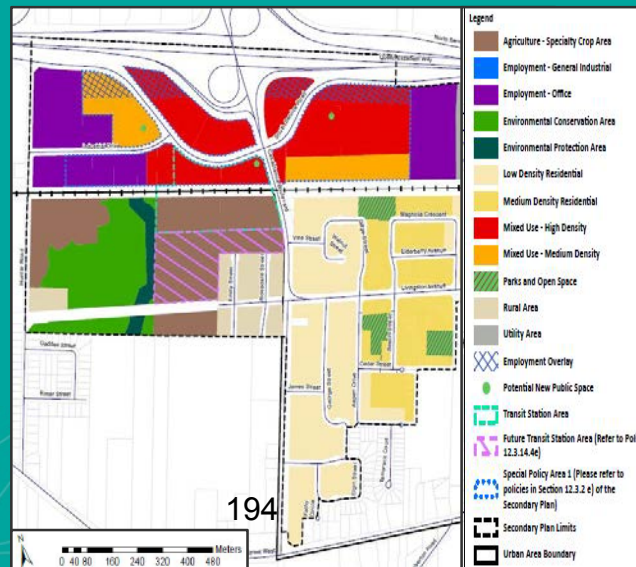


Legend



STATISTICS:

PARKING	221 CARS
BF PARKING	4 CARS
PPUDO	12 CARS



Parcel Ownership

1	Metrolinx
2	Niagara Region
3	Losani Homes
4	Casa. Holdings
5	MTO

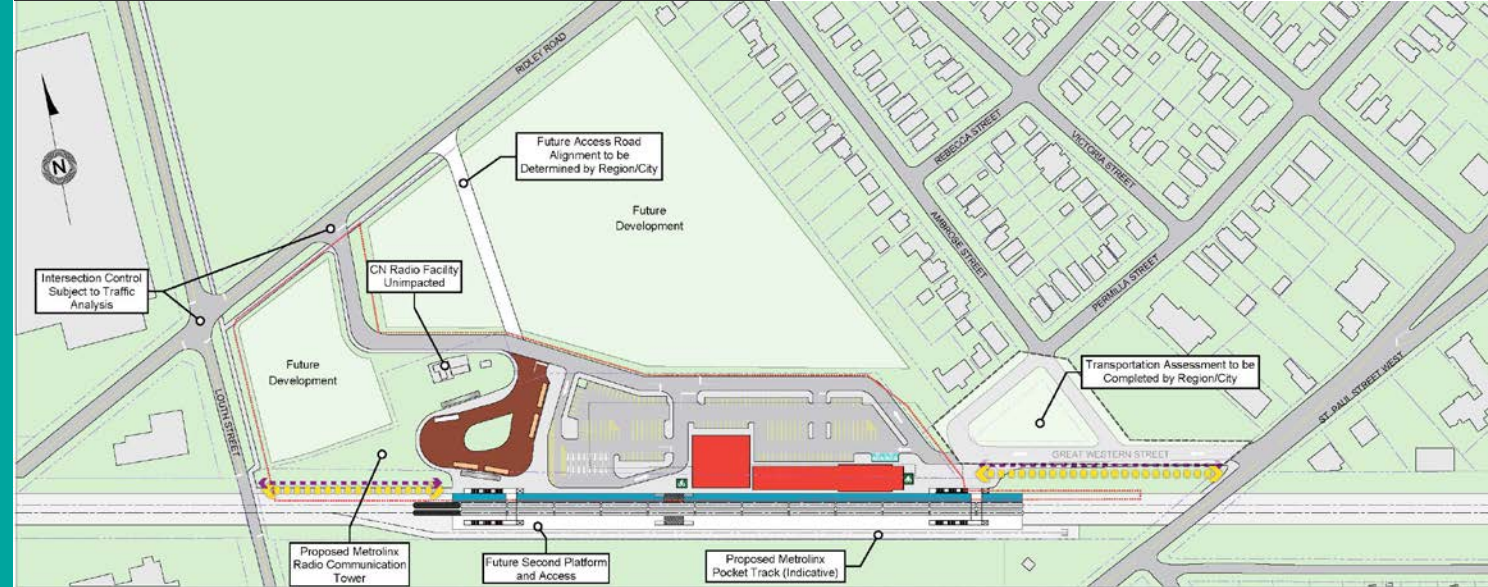


MOVING
TRANSIT
FORWARD

St. Catharines GO Station

- Region & City submitted joint comments identifying desirable station elements / amenities for functional design.
- MX has completed functional design. Detailed design in progress.
- Detailed design will confirm feasibility and location of functional design elements.
- Existing station has federal heritage designation.
- Extensive public outreach with Proactive Advisory Group (PAG) for all GHTSS-related capital projects and background studies.

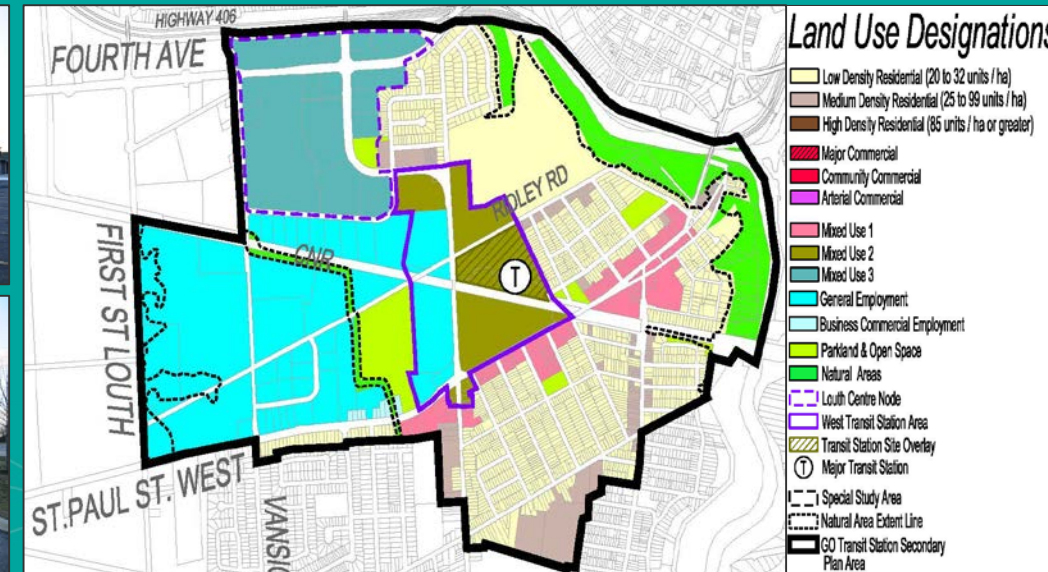
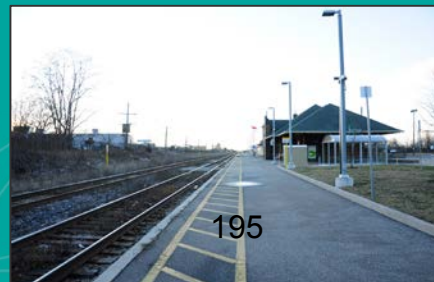
Metrolinx Functional Design



Legend

Heritage Station Facility	Pedestrian Circulation
Platform	Pedestrian Crosswalk
Bus	Planned / Proposed Bike Facility
Bus Shelters	Bicycle Shelter
Future Facilities	Mini-Platform
2011 EPR Boundary	Barrier Face Parking
Extent of Existing Parking	

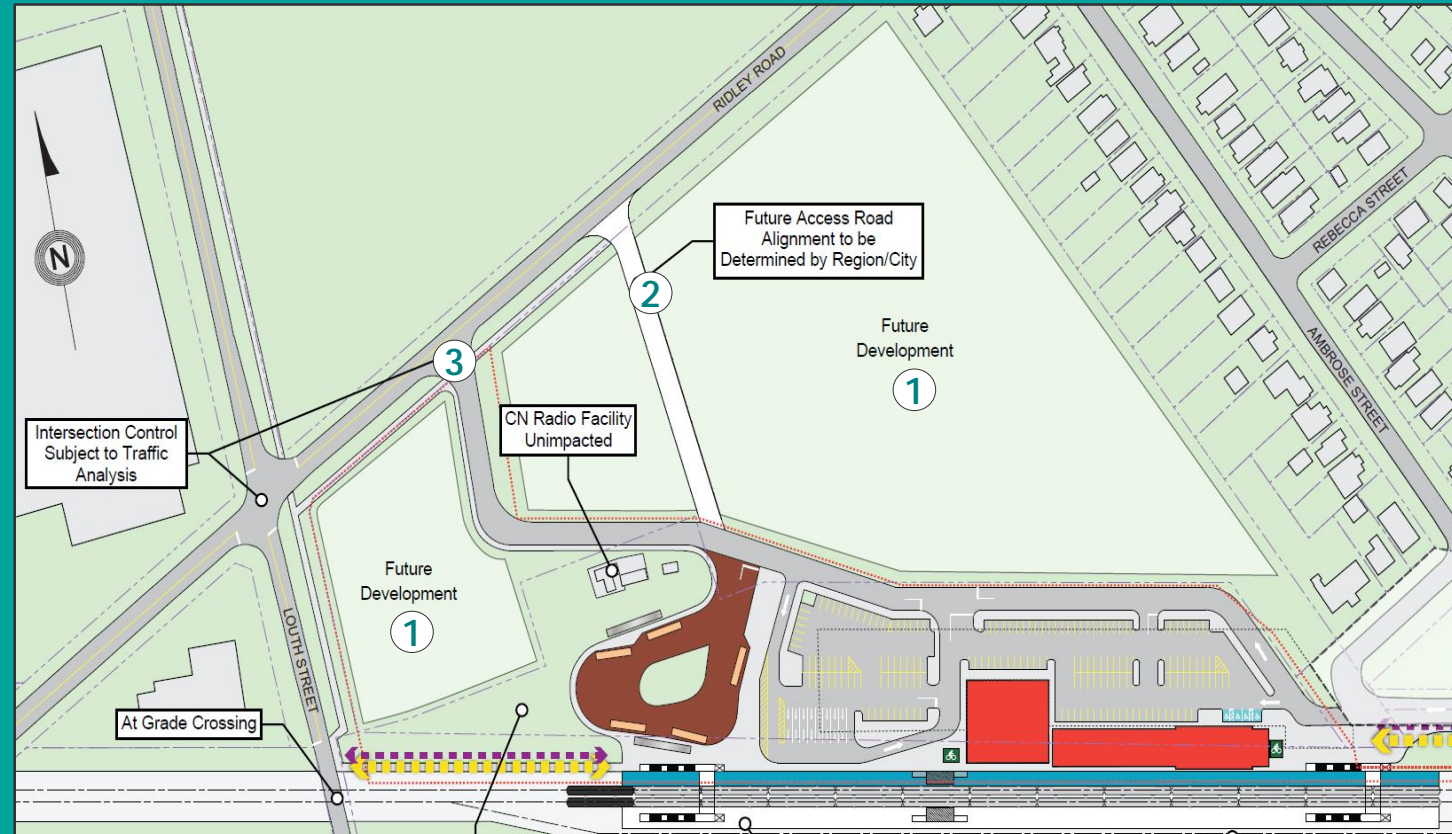
STATISTICS:	
PARKING	165 CARS
BF PARKING	4 CARS
PPUDO	16 CARS



**MOVING
TRANSIT
FORWARD**

St. Catharines GO Station: Primary Station Access

- GO's 2011 ESR station area limits Metrolinx's ability to locate the primary station access (#3).
- Region, City, and Ridley College are undertaking an MOU to establish a dedicated public road access (#2).
- Access will be determined through a Plan of Subdivision application.
- MOU is expected to be brought to PEDC for endorsement Q1 2019.
- Region and City pre-emptively waived review fees associated to Ridley College's Plan of Subdivision application.



1

Ridley College owned lands

2

Region, City, and Ridley College agree a primary station access located mid-point along Ridley Rd. is more desirable

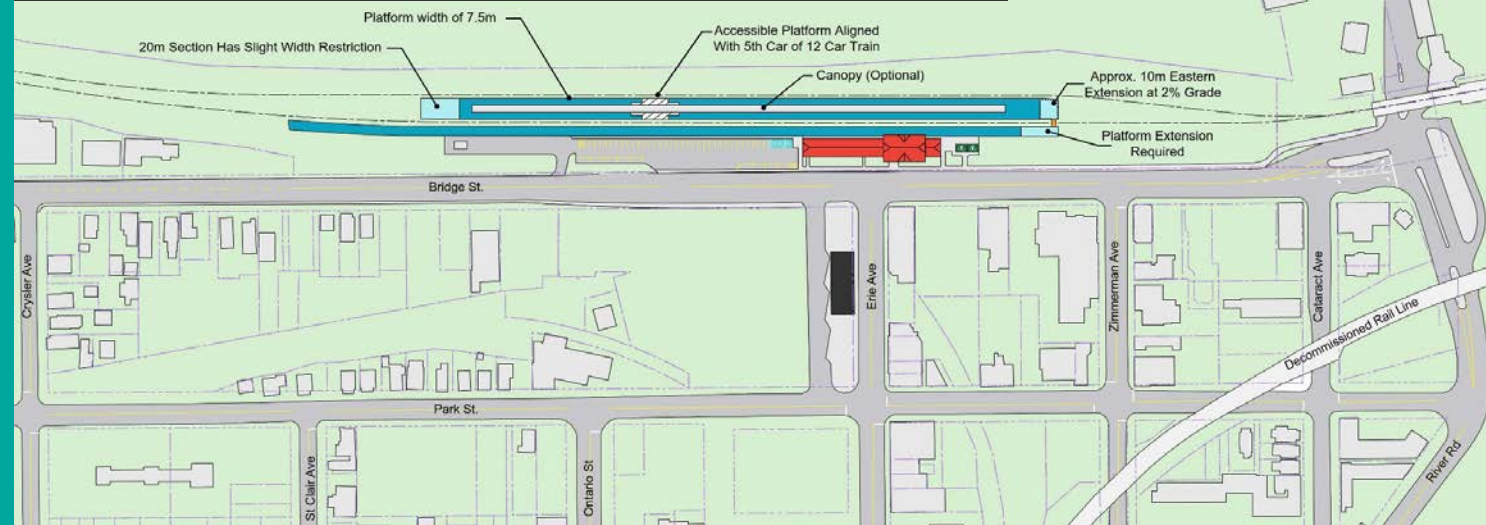
3

Metrolinx's identified primary access to the GO Station if no alternative primary access road is established by Region & City

Niagara Falls GO Station

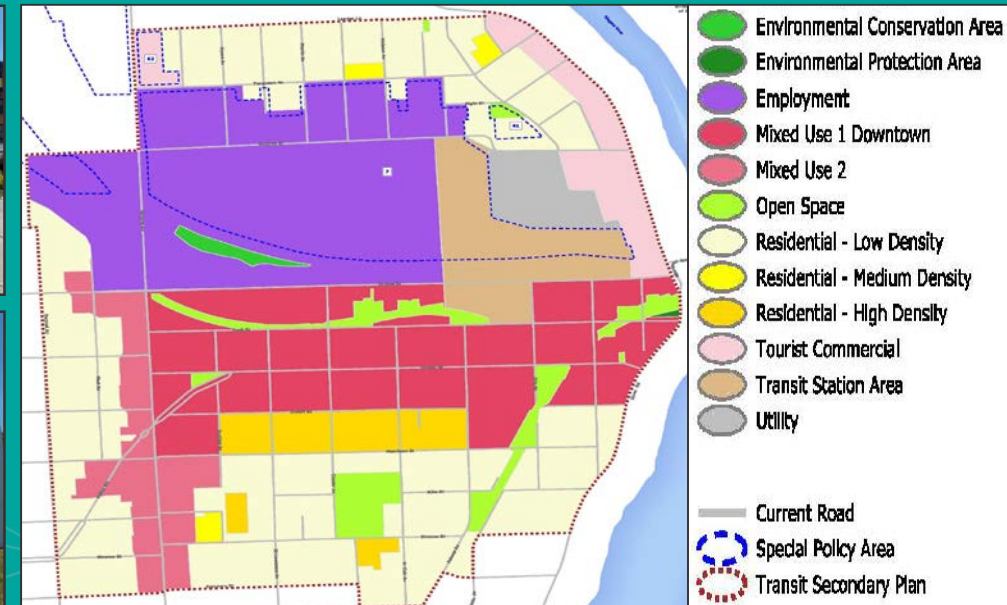
- Region and City have worked closely with MX and have submitted comments identifying desired station elements/amenities.
- MX completed functional design. Detailed design in progress.
- Detailed design will confirm feasibility and location of functional design elements.
- Existing station has federal/municipal heritage designation.

Metrolinx Functional Design



Legend

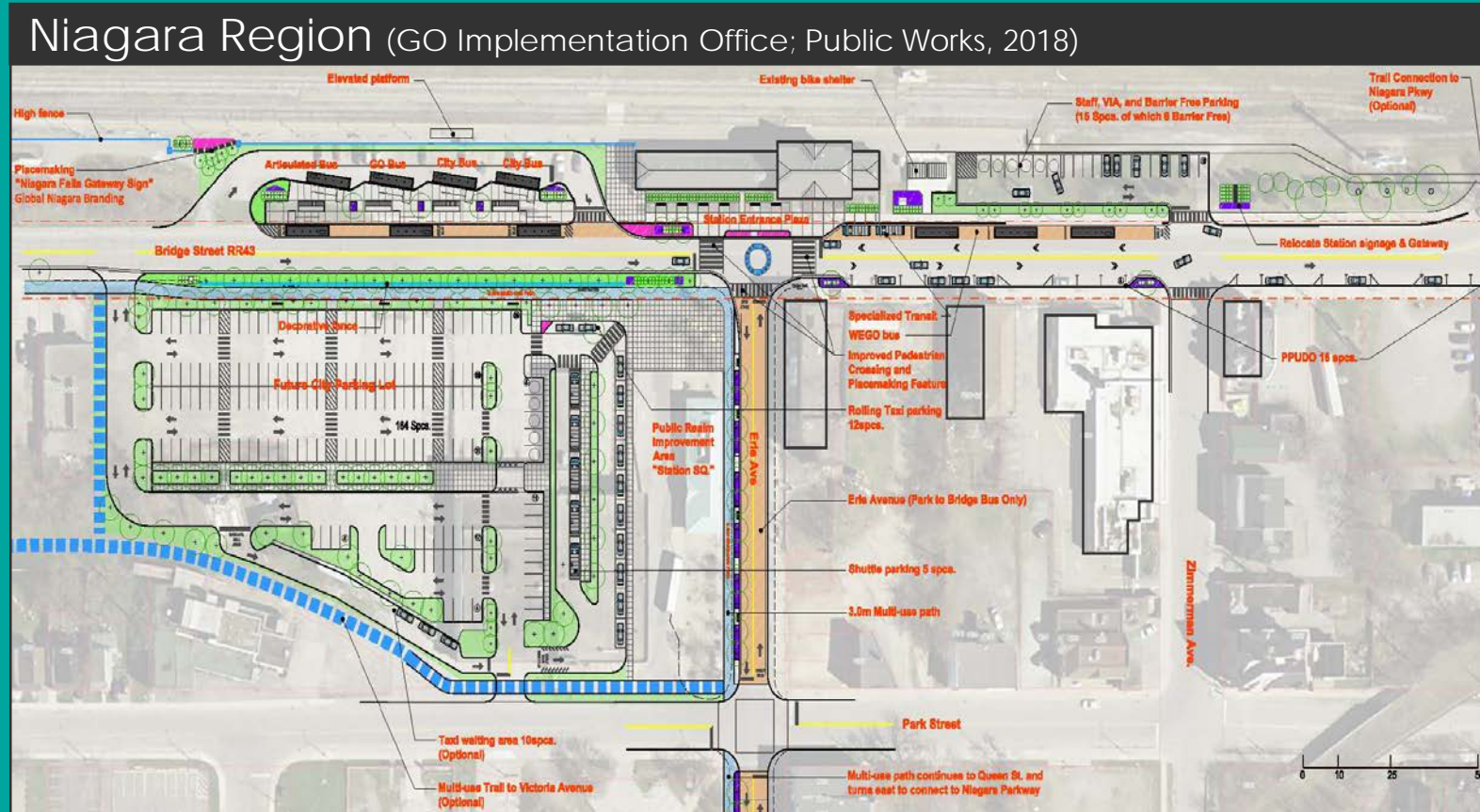
■ Heritage Station Facility	Bicycle Shelter
■ Platform	Mini-Platform
■ At grade crossing	Barrier Free Parking
■ Barriers	



**MOVING
TRANSIT
FORWARD**

Niagara Falls GO Station Area Vision

- Region & City have partnered to create a broader vision for the Niagara Falls GO Station area.
- Elements are identified and recommended within Secondary Plan policy.
- MX has recognized and incorporated elements of this vision into its functional design concept.
- Region's Bridge Street EA will further refine detailed design of streetscape.
- Region & City will budget for, coordinate, and implement these elements in upcoming successive budget years.



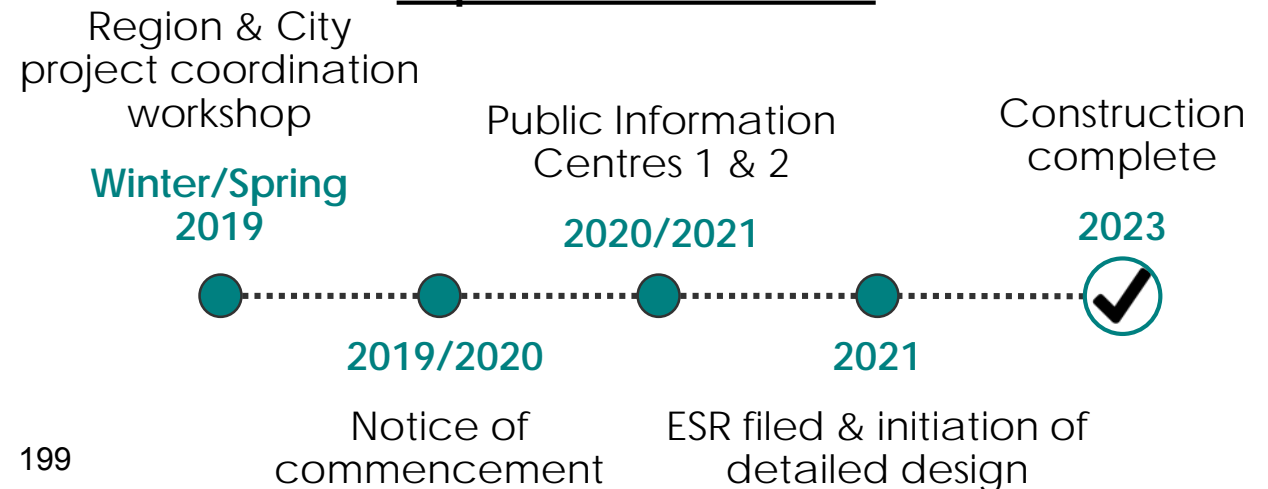
NIAGARA FALLS

Bridge Street Reconstruction EA

- Design will dove-tail with Thorold Stone Rd. Extension Phase II, which includes the new roundabout at Victoria Ave and Bridge St.
- EA design and considerations will take direction from the Niagara Falls GO Secondary Plan and Regional Transportation Master Plan.
- EA will design a new bus loop* at the GO Station as envisioned within the Region and City's broader GO Station area precinct.
- Region and City will coordinate phasing and budget for all capital improvements in this area to ensure alignment and sequencing.



Aspirational Timeline



**Requires approval from CN & VIA*

ST. CATHARINES St. Paul St. West CNR Bridge Reconstruction EA

- Evaluated and determined need for immediate replacement due to aging.
- Existing sight line constraints when accessing Great Western St.
- Reconstruction will enhance safety and travel experience for all transportation modes.
- EA will be coordinated with the City.

1922

year of original bridge construction.

97

years

age of St. Paul St. West CNR bridge.



Aspirational Timeline

Notice of
commencement

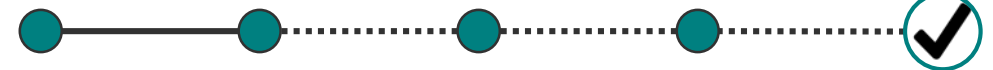
Winter 2019

ESR filed & initiation of
detailed design

Spring/Summer 2019

Construction
complete

2020/2021



Spring 2019

2020

200

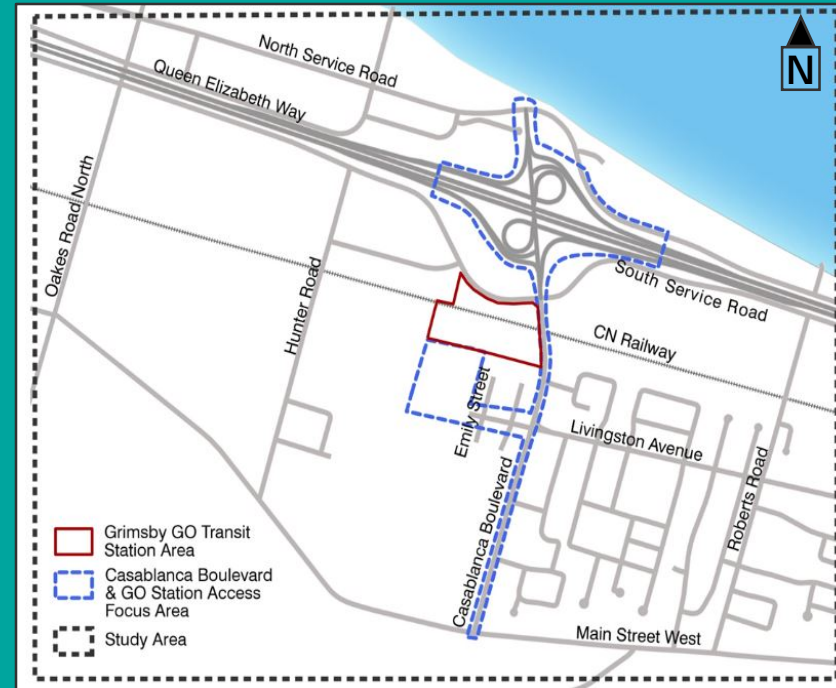
Public Information
Centre

Construction
begins

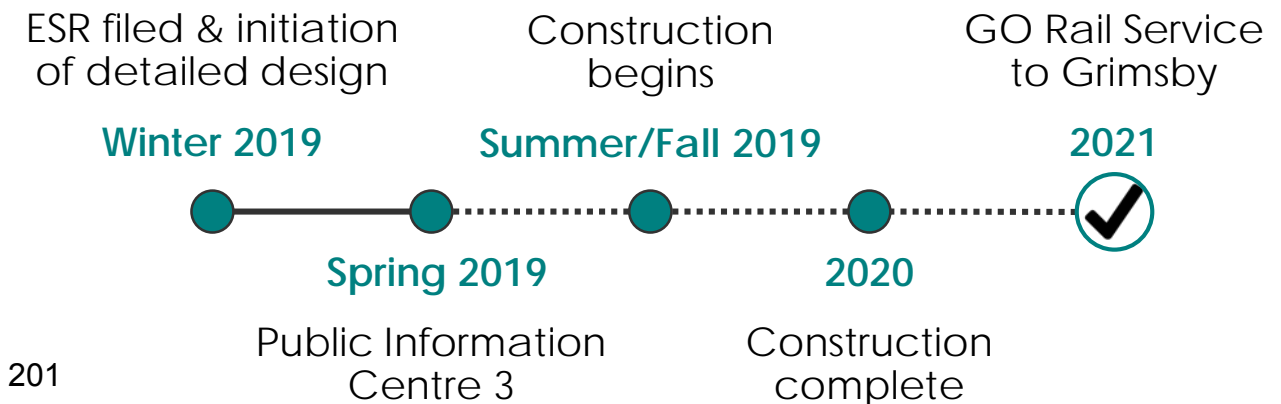
MOVING
TRANSIT
FORWARD

Casablanca Boulevard Reconstruction

- Identified as a key capital work improvement in the Grimsby GO Secondary Plan.
- Improvement area includes Casablanca Blvd. and GO Station access (from North Service Rd. to Main St.) and access to Region-owned lands on the south side of the CN rail line off of Livingston Ave.
- Does not include portion of Livingston Ave. through the woodlot to Main St.
- ESR details planning process and preferred alternative, including how public and agency input was incorporated.



Aspirational Timeline





Next steps

- Local zoning by-law updates
- Enhance municipal transit services
- Understand MX TOD delivery framework
- MX public engagement (2019)
- File Casablanca ESR (Feb. 2019)
- GO Rail Service to Grimsby (by 2021)
- Work with MX to increase GO service frequency through Niagara corridor

Grimsby



St. Catharines



Niagara Falls



Lincoln



MEMORANDUM

PDS-C 3-2019

Subject: Update on the Status of GO Service to Grimsby

Date: February 20, 2019

To: Planning and Economic Development Committee

From: Matt Robinson – Director, GO Implementation

Further to the recent announcement by Ontario's Minister of Transportation Jeff Yurek and Niagara West MPP Sam Oosterhoff regarding the expansion of daily GO train service in Niagara effective January 7, 2019, staff wanted to provide Regional Council with an update on the status of GO service particularly as it relates to Grimsby.

While the delivery of the Grimsby station will now be procured differently based on the provincial government's direction to explore partnerships with the private sector (referred to as Transit-Oriented Development), the commitment to the 2021 service plan and delivering train service to Grimsby as quickly as possible remains in place. As such, many enabling projects in support of a GO Station in Grimsby are moving forward in alignment with the 2021 service timeline.

There are three key areas where work is moving forward regarding Grimsby's status in relation to GO:

#1. Regional infrastructure projects are underway to ensure Grimsby is well positioned to receive GO train service, including:

- Casablanca Boulevard and South Service Road improvements completed by 2021 through the Casablanca EA. These improvements will accommodate existing and future traffic volumes.
- Implementing a Regional transit strategy to support GO train rider access to the station (including a study to determine what West Niagara transit infrastructure would be located on the Region-owned parcel adjacent to the GO station)
- Inclusion of extensive active transportation infrastructure on the north and south sides of the GO Station to ensure residents and GO riders can access the new station using walking or cycling options.

#2. Representatives from Niagara Region and the Town of Grimsby continue to work closely with Metrolinx and the Provincial Government to ensure the project meets capital and operating milestones.

Led by Council's GO Working Group (Regional Chair, Mayors and CAOs from Grimsby, Lincoln, St. Catharines and Niagara Falls) all parties meet regularly and remain in continual contact regarding the station, its design and the project's timelines. These important meetings ensure that the project continues to progress well and it successfully meets the 2021 timeframe set forth by the Province. It also advances and engages executive level discussions that allow for comprehensive and informed decision making across the whole Niagara Expansion program delivery.

#3: The 2021 timeline for service extension to Grimsby outlined by the Provincial Government continues to remain in place.

Minister Yurek's recent announcement to extend daily GO train service to Niagara, MPP Oosterhoff's recent strong and supportive statements (including affirmation for this memo), a recent all-party endorsed motion in the provincial legislature by Welland MPP Jeff Burch, as well as Niagara's active partnership with Metrolinx, have all worked to reaffirm the timelines in place for GO service to Grimsby. Significant work to deliver a GO Station and daily service to Grimsby continues with the expectation that the building could be delivered sooner if a transit-oriented development through a public private partnership is in place for the station construction project. With the introduction of daily GO service to St. Catharines and Niagara Falls four (4) years ahead of the original 2023 timeline, GO trains are now running in both directions through Niagara. Based on the above commitments, daily GO trains in Grimsby are still expected by 2021.

Respectfully submitted and signed by,

Matt Robinson
Director, GO Implementation

MEMORANDUM

PDS-C 4-2019

Subject: Niagara Falls GO Station Functional Design

Date: February 20, 2019

To: Planning and Economic Development Committee

From: Cheryl Selig, MCIP, RPP, Planning Lead – GO Implementation Office

The purpose of this memo is to notify Planning and Economic Development Committee that Metrolinx has issued a 'Notice of Completion' for its Niagara Falls GO Station Functional Site Plan. Metrolinx has been working in partnership with Niagara Region and City of Niagara Falls staff throughout the process.

Functional design is the first step of Metrolinx's GO Station design process. The purpose of functional design is to identify and recommend the location of GO Station elements to ensure that all users accessing the station are accommodated in a safe and efficient manner. Subsequent to 'Notice of Completion', Metrolinx will initiate its detailed design process. The purpose of detailed design is to evaluate the feasibility of recommended functional design elements and refine elements as necessary to guarantee practical operation.

Metrolinx used its GO Rail Station Access Plan while drafting the Niagara Falls GO Station Functional Site Plan. The Station Access Plan identifies station elements that Metrolinx must be considered when developing a functional station design.

Functional Design – Niagara Falls GO Station

Based on the functional design, the future Niagara Falls GO Station has been confirmed at the site of the existing VIA Station building located on the northern edge of Bridge Street, at the Erie Avenue intersection. On December 10, 2018, Metrolinx issued its 'Notice of Completion' for the Niagara Falls GO Station Functional Site Plan. The preferred functional site plan is attached to this memo as Appendix 1.

Region staff have reviewed the completed Niagara Falls GO Station Functional Site Plan and have observed the absence of some station design elements and considerations recommended within the Station Access Plan. Metrolinx has based the site plan on technical feasibility; policy direction; and, input submitted by Niagara Region, the City of Niagara Falls, and other stakeholders.

Although not shown within the functional site plan which is providing what will be required for service in 2023, further expansion of the GO Station may be required as ridership and service frequency grows. Expansion could occur on the vacant lands

located north of the existing rail line within Transit Station Area approved within GO Transit's *Niagara Rail Service Expansion Environmental Study Report (2011)*.

Proposed Public Realm Improvement Design – Niagara Falls GO Station

Included in Metrolinx's completed Niagara Falls GO Station Functional Site Plan is a Proposed Public Realm Improvement Design (attached as Appendix 2 to this memo). The proposed design is a vision developed in partnership between Niagara Region and the City of Niagara Falls to exhibit how the future GO Station could become better integrated with the existing community and Downtown core.

Elements shown within Appendix 2 are for demonstration purposes only. Some envisioned elements, such as the bus loop, will be considered during future Environmental Assessments (EAs) undertaken by Niagara Region and the City of Niagara Falls.

Conclusion

Metrolinx's completed functional site plan as shown in Appendix 1 will serve as a foundation for subsequent detailed design led by Metrolinx's Capital Projects Group (CPG). CPG is responsible for all decisions related to detailed design and construction phasing. The Niagara Falls GO Station Functional Site Plan is subject to change pending further detailed design, technical analysis, and funding availability.

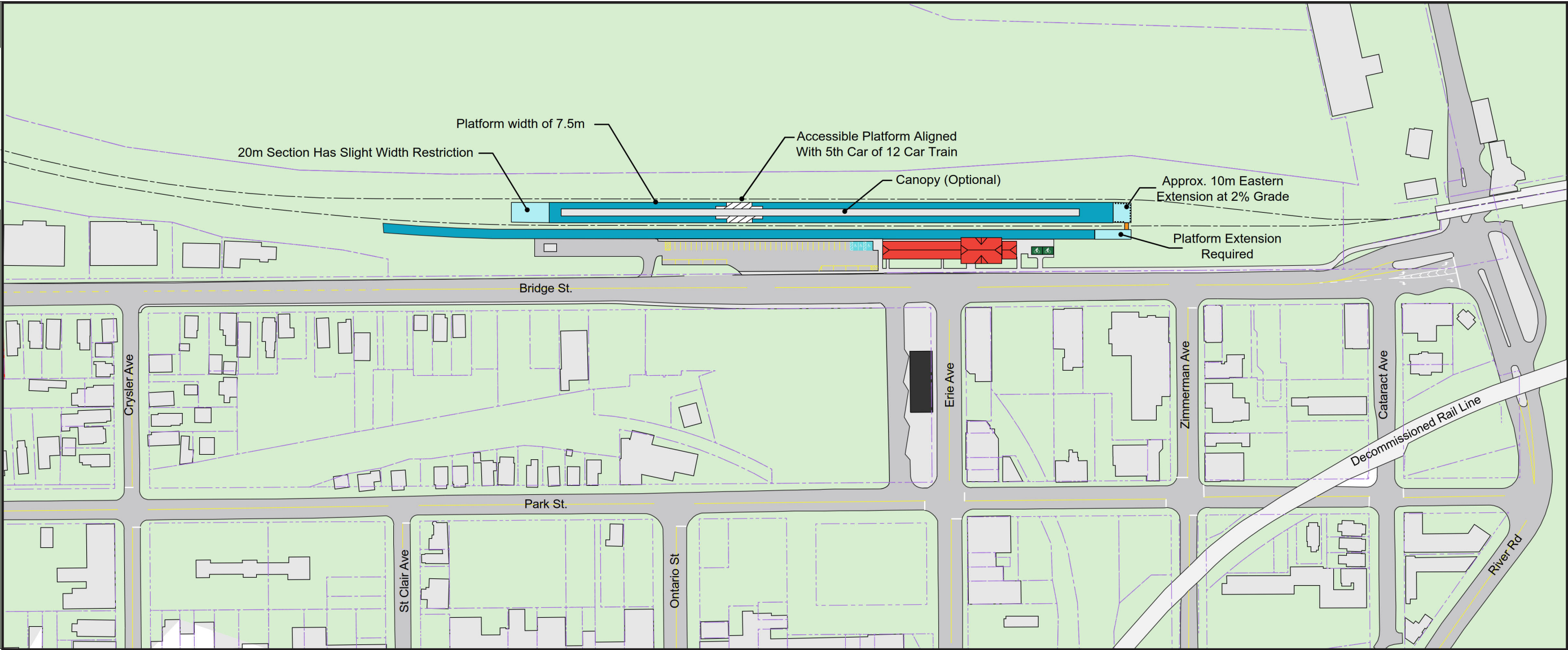
Niagara Region and the City of Niagara Falls will continue to work closely with Metrolinx to ensure the successful and efficient operation of daily GO Rail Service to Niagara Falls.

Respectfully submitted and signed by,





Cheryl Selig, MCIP, RPP

Planning Lead – GO Implementation Office
Public Works, Niagara Region

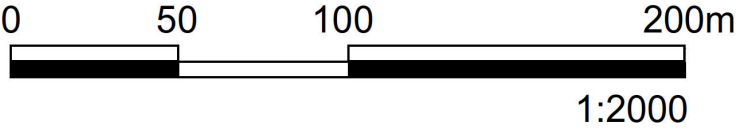
Appendix 1: Niagara Falls GO Station Functional Design
Appendix 2: Proposed Public Realm Improvement Design Precinct



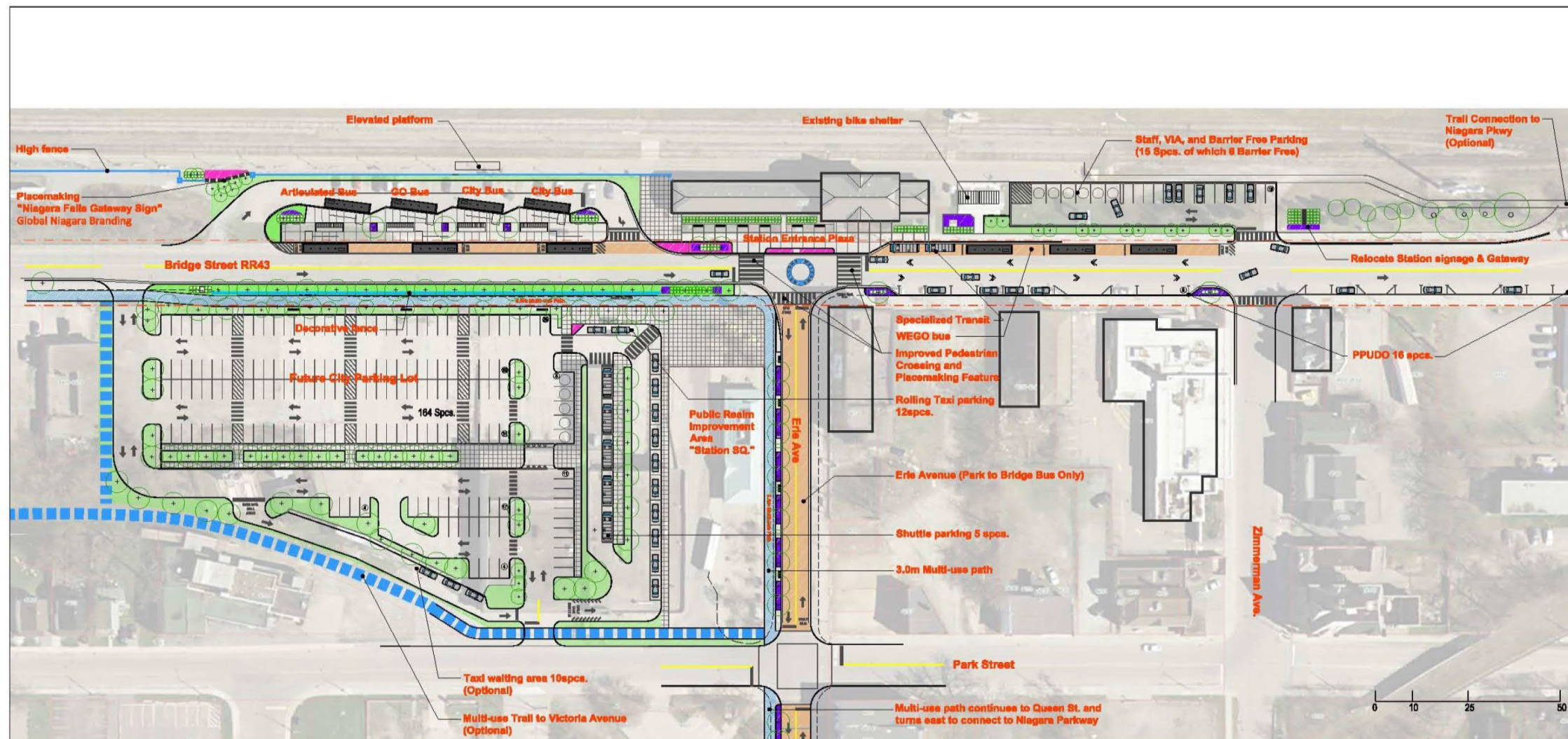
Legend

- | | |
|---|--|
|  Heritage Station Facility |  Bicycle Shelter |
|  Platform |  Mini-Platform |
|  At grade crossing |  Barrier Free Parking |
|  Barriers | |

OPEN DAY (2021)
DRAFT FINAL
(OPTION 2)



Niagara Falls Station Precinct Concept (Proposed Station Area Layout)



MEMORANDUM

PDS-C 5-2019

Subject: Ramada Beacon Hotel Specialty Crop Designation

Date: February 20, 2019

To: Planning and Economic Development Committee

From: Erik Acs, MCIP, RPP, Manager of Community Planning

The Purpose of this memo is to provide a background for the attached correspondence item, a submission to the Ontario Ministry of Municipal Affairs & Housing (MMAH) from MacNaughton Hermsen Britton Clarkson Planning Limited on behalf of their client Ramada Beacon Hotel (Beacon) who operate a hotel, restaurant and marina on Beacon Boulevard, in the Town of Lincoln.

The Beacon is requesting to remove their property from the “Specialty Crop Area” designation of the Greenbelt Plan to facilitate its redevelopment in accordance with the land use designation of the recently approved Prudhommes Secondary Plan.

The hotel property is located on a narrow strip of land between the Queen Elizabeth Way and Lake Ontario. The area has a history of development dating back to the late 1800’s as a shipping port and was developed as its current hotel use in the 1960’s. Despite being fully developed, serviced and zoned for non-agricultural uses, the Province included this and surrounding developed lands east of the Jordan Harbour as Specialty Crop when the Greenbelt Plan was created in 2005.

Through the Coordinated Policy Review (CPR) undertaken by the Province in 2015, the Region and the Town of Lincoln both submitted Council endorsed comments to the Province proposing to create a “Special Policy Area” to recognize the existing uses and allow for limited expansions and changes of use for the Beacon and adjacent lands. The Provincial Government of the day did not address this request.

In 2016, the Town of Lincoln and Region undertook the development of Secondary Plan for the Prudhommes area. Based on existing non-agricultural development and the Council position through the CPR, the Beacon and surrounding industrial properties were included in the Prudhommes plan area. The Prudhommes Secondary Plan was adopted by the Town of Lincoln Council identifying appropriate land use designations which would allow the transition of the area to a more complete development pattern. While it supported this approach in principle, Regional Council approved the Secondary Plan with a “Deferral” for the lands east of the Jordan Harbour in order to maintain conformity with the Greenbelt Plan.

The attached submission echoes a request made by Regional Council in 2018, and communicated to the MMAH through a letter dated December 20, 2018 (see appendix II). Both submissions include additional background and mapping to support the removal of the Specialty Crop Area designation. This request will also allow for the Deferral to be lifted for the balance of the Secondary Plan area.

Should Regional Council be inclined to support this request, Planning Staff recommend that it should do so for all lands east of the Jordan Harbour in order to fully implement the scope and intent of the Prudhommes Secondary Plan.

Respectfully submitted and signed by,

Erik Acs, MCIP, RPP
Manager of Community Planning

This memo was prepared in consultation with Kirsten McCauley, MCIP, RPP, Senior Planner.

Appendices:

Appendix I: Request to Remove Specialty Crop Designation, Greenbelt Plan, 2017
2777 & 2793 Beacon Boulevard, Town of Lincoln, Region of Niagara Page 3

Appendix II: December 20, 2018 Letter to Minister of Municipal Affairs Page 82



KITCHENER
WOODBRIDGE
LONDON
KINGSTON
BARRIE
BURLINGTON

February 6, 2019

Attn: Jae Truesdell
Minister's Office
Ministry of Municipal Affairs & Housing
777 Bay Street, 17th Floor
Toronto ON M5G 2E5

Dear Mr. Truesdell:

**RE: Request to Remove Specialty Crop Designation, Greenbelt Plan, 2017
2777 & 2793 Beacon Boulevard, Town of Lincoln, Region of Niagara
OUR FILE 18324A**

Request to Minister

On behalf of our client, 1093823 Ontario Ltd. (Ramada Beacon Hotel), we respectfully request that the Minister remove the specialty crop designation from 2777 & 2793 Beacon Boulevard in the Town of Lincoln, as designated in the Greenbelt Plan, 2017. This request is necessary to allow the subject lands to move forward consistent with the municipally supported and approved Prudhommes Secondary Plan. In addition, this request is consistent with the Ontario Government's ongoing review of the agricultural systems mapping and opportunities to increase housing supply.

Purpose for Request

The Ministry of Municipal Affairs and Housing's recent opposition to including the lands within an urban area – despite the support and approval of the Town of Lincoln and Region of Niagara – compounded by the arbitrary and incorrect specialty crop designation is effectively and improperly preventing this urban property consisting of a hotel, restaurants and a marina from its time-sensitive need to move forward with modernization and revitalization in conformity with the approved secondary plan.

Removing the specialty crop designation from the subject lands is a precondition to moving forward with the municipal direction provided for these lands in the Prudhommes Secondary Plan.

Basis for Request

This request is submitted on the basis of the developed nature of the subject lands, for which urban uses date back to the 1950s, existing zoning permissions for urban uses, lack of any agricultural capability as evidenced through provincial soils mapping, and the local and regional planning direction provided in the Prudhommes Secondary Plan. In addition, both the Town and Region support this request and have also asked the Minister to remove the specialty crop designation.

The property is a small and slender remnant parcel created during the original construction of the QEW. As well, a portion of the site was created by imported landfill sourced from QEW earthmoving. Accordingly, there is no opportunity for agriculture or any form of farming on the subject lands. The inclusion of these lands in the specialty crop area appears to have been an error in the Greenbelt Plan and should have been corrected in the 2017 Plan in accordance with submissions from the Town and Region.

Removing the specialty crop designation from the subject lands would unnecessary barrier to providing additional housing supply in Niagara Region as supported by the Region and Town.

Please find enclosed a planning review/rationale to support the request for the removal of the specialty crop designation, with supporting figures and reports.

We look forward to your response on this request. Please do not hesitate to contact the undersigned should you have any questions.

Yours truly,

MHBC

A handwritten signature in black ink, appearing to read 'NDR', with a long horizontal stroke extending to the right.

Neal DeRuyter, BES, MCIP, RPP
Partner

cc. Ramada Beacon Hotel – Matt Tokuc
Region of Niagara – Kirsten McCauley
Town of Lincoln – Kathleen Dale

Encl.



KITCHENER
WOODBRIDGE
LONDON
KINGSTON
BARRIE
BURLINGTON

PLANNING JUSTIFICATION **REPORT**

REMOVAL OF SPECIALTY CROP DESIGNATION
GREENBELT PLAN 2017

2777 & 2793 Beacon Boulevard
Town of Lincoln

Date:

January 2019

Prepared for:

1093823 Ontario Ltd. (Ramada Beacon Hotel)

Prepared by:

MacNaughton Hermsen Britton Clarkson Planning Limited (MHBC)

540 Bingemans Centre Drive, Suite 200

Kitchener, Ontario

T: 519.576.3650

F: 519.576.0121

Our File 18324A

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7.0	Conclusion	12

Figures

Appendices

Appendix A	Town of Lincoln Staff Report, April 9, 2018
Appendix B	Letter from Ministry of Municipal Affairs, May 7, 2018
Appendix C	Region of Niagara Staff Report, July 18, 2018
Appendix D	Region of Niagara Planning & Economic Development Committee Minutes (PEDC 10-2018), July 18, 2018
Appendix E	Letter of Support from Town of Lincoln, December 20, 2018

1.0 Overview

In support of this request to remove the specialty crop designation from 2777 & 2793 Beacon Boulevard in the Town of Lincoln, we have reviewed the existing and adjacent land uses, reviewed mapping and policies of the 2005 and 2017 Greenbelt Plans, assessed the local and regional policies including existing zoning permissions and reviewed provincial soils mapping. Relevant background and technical information is outlined below with supporting documentation included as appendices where noted.

2.0 Existing Uses and Site Context

The subject lands are located along Beacon Boulevard in the Town of Lincoln between the QEW and Lake Ontario. The subject lands are approximately 3.6 ha in size and are almost entirely developed with a hotel, restaurants and marina (**Figure 1 – Aerial Site Context**). The Ramada Beacon Hotel was constructed in the 1950s and contains two restaurants and conference facilities. The building is three to four storeys and is over 90,000 ft² in size. There are approximately 225 parking spaces on the subject lands. These uses were developed well before the Greenbelt Plan and associated specialty crop designation came into place in 2005.

The subject lands include the Beacon Harbourside Yacht Club, a marina located in a basin created by stone breakwaters located to the east of Jordan Harbour. The marina currently contains approximately 90 boat slips with the potential to accommodate approximately 500 slips. The Beacon Harbourside Yacht Club is the only marina located in the Town of Lincoln, and is located approximately 9 km west from the Port Dalhousie Pier Marina in St. Catharines and 15 km east of the marinas in Grimsby Harbour.

The subject lands also include a small vacant lot which was previously occupied by a gas station.

From the QEW to Lake Ontario, the lands undergo a significant change in elevation which would likely not be suitable for most crops and agricultural uses. This change in elevation is illustrated in **Figure 2 – Elevation Plan**.

In addition to the existing uses on the subject lands, it is important to understand the surrounding land uses when assessing specialty crop mapping and identifying long-term planning direction (**Figures 3 & 4 – Aerial Surrounding Context**):

1. The lands are located immediately north of the QEW and are located within approximately 300m of the interchange with Jordan Road.
2. The QEW and Lake Ontario physically define the area and the types of uses that occur. There are limited agricultural uses in this area given the constrained lot sizes (range between 20 and 200 m from QEW to the shoreline).
3. East of the subject lands are a building contractor use, office/warehouse complex (Avondale Food Stores, 1-800-Got-Junk, Stevenson Sprinkler), Moyer Diebel (commercial dishwasher manufacturer), the QEW/Jordan Road interchange and residential uses.
4. South of the subject lands are Beacon Boulevard (a local road), the QEW and Jordan Harbour, a large natural harbour at the mouth of Twenty Creek.
5. West of the subject lands are the Lake House restaurant, the Prudhommes urban area (including large areas being developed with residential and commercial uses) and the QEW/Victoria Avenue interchange.

3.0 Provincial Soils Mapping

According to soils mapping prepared by the Province since the 1980s, the subject lands do not have a soil classification due to the existing urban uses as seen in **Figure 5 – Region of Niagara Generalized Soil Map** and **Figure 6 – Canada Land Inventory Soils**. This remains the case in the Agricultural System mapping released by the Province last year. The fact the lands do not have a soil classification on agricultural maps dating back to the 1980s further highlights the unsuitability of the lands for specialty crop uses.

According to the Ministry of Agriculture's Soils of the Regional Municipality of Niagara, areas that were not mapped include the following: *"built-up areas of towns and cities; areas adjacent to built-up areas where construction was occurring and soil was being disturbed; four-lane highways and interchanges; airports; golf courses; gravel pits; quarries; and areas of intensive strip development along roads"* (p. 40, 1989).

4.0 Provincial Plans

4.1 Greenbelt Plan, 2005

The Greenbelt Plan, 2005, was established by the Lieutenant Governor in Council under Section 3 of the Greenbelt Act. The Greenbelt Plan *"identifies where urbanization should not occur in order to provide permanent protection to the agricultural land base and the ecological features and functions occurring on this landscape"* (Section 1.1). The Greenbelt Act requires that all decisions on planning applications shall conform to the policies of the Greenbelt Plan.

The Greenbelt Plan identifies a Protected Countryside that is made up of an Agricultural System and Natural System, together with a series of settlement areas. The Plan states that settlements of all types are found throughout the Protected Countryside, and that "Towns/Villages" and "Hamlets" are identified on Schedule 1.

The subject lands were designated as "Hamlet" on Schedule 1 in the Greenbelt Plan 2005 (**Figure 7 – Greenbelt Plan 2005, Schedule 1**). However, on Schedule 2 they were not shown as "Hamlet" but rather as "Tender Fruit and Grape Lands" (i.e. specialty crop area) (**Figure 8 – Greenbelt Plan 2005, Schedule 2**).

The Greenbelt Plan, 2005 stated that *"hamlets, as identified in municipal official plans and within their approved boundaries as they existed on the date this Plan came into effect, continue to be governed by municipal official plans... and are not subject to the policies of this Plan"* (Section 3.4.3.1). As of the date the Greenbelt Plan came into effect (December 16, 2004), the subject lands were designated "Recreational Commercial" in the local official plan, which permitted a range of urban uses. The lands were outside of the "Unique Agricultural" area identified by the regional and local official plans that were in-effect at that time.

It is unclear why the subject lands were not identified as "Hamlet" on Schedule 2 which identifies specialty crop area. As a result of this supposed error, the lands are no longer designated as Hamlet in the current Greenbelt Plan, 2017 (see Section 4.3 of this report).

4.2 *Growth Plan for the Greater Golden Horseshoe, 2006*

To help implement the policies of the Growth Plan, the government released mapping of the “built boundary” for municipalities in the Greater Golden Horseshoe including Niagara Region. The built boundary consisted of delineated built-up areas and undelineated built-up areas.

The Province’s built boundary mapping (2008) shows the subject lands as within or directly adjacent to an “Undelineated Built-up Area”, which is defined in the supporting documentation as “*smaller, unserved or partially-served settlement areas, which have limited capacity to accommodate significant future growth*” (Section 3). These undelineated built-up areas are represented as dots on the maps, and are typically settlement areas such as small towns and hamlets which do not have defined boundaries. Our interpretation of this mapping is that the subject lands are located within the “undelineated built-up area” shown just east of the subject lands as confirmed by Town and Regional staff (**Figure 9 – Built Boundary for the Region of Niagara (2008)**). This designation reinforces the idea that the lands east of Jordan Harbour are not considered specialty crop area.

4.3 *Greenbelt Plan, 2017*

The Greenbelt Plan 2017 came into effect on July 1, 2017 as an amendment to the Greenbelt Plan 2005. During the review of the Provincial Plans in 2015-2016, both the Town and Region requested that the subject lands be removed from the specialty crop area. Despite this request, the approved plan still included the subject lands within the “Niagara Peninsula Tender Fruit and Grape Area” (specialty crop area) designation (**Figure 10 – Greenbelt Plan 2017, Schedule 2**).

The delineation of the Niagara Peninsula Tender Fruit and Grape Area is based on provincial soil and climate analysis of current and potential tender fruit and grape production areas. As discussed, the subject lands are not identified within any provincial soils mapping due to the existing urban uses.

All types, sizes and intensities of agricultural uses and normal farm practices are promoted and protected, and a full range of agricultural uses are permitted in specialty crop areas. According to the policies of the Greenbelt Plan 2017, “*specialty crop area lands shall not be redesignated in official plans for non-agricultural uses*” (Policy 3.1.2.2) and, “*Towns/Villages are not permitted to expand into specialty crop areas*” (Policy 3.1.2.3).

The applicable policies of the specialty crop area require protection of these areas while allowing and promoting agricultural uses and activities. It requires provision of the appropriate flexibility to allow for agricultural, agriculture-related and on-farm diversified uses, normal farm practices and an evolving agricultural and rural economy. As such, development resulting in land uses that are not in line with the above are not permitted.

Unlike the 2005 Plan, the subject lands are now designated “Protected Countryside” and are not identified within a “Hamlet” (**Figure 11 – Greenbelt Plan 2017, Schedule 1**). As noted, it is believed that the removal of the “Hamlet” designation from the subject lands was done erroneously by the Province, as also suggested by the Town and the Region.

5.0 Local Planning Framework

5.1 *Region of Niagara Official Plan*

Prior to the Greenbelt Plan first coming into effect in 2004, it appears the lands were designated Rural on the Agricultural Land Base map of the Region of Niagara Official Plan that was in-effect at that time.

As a result of the specialty crop area designation in the Greenbelt Plan, the subject lands are now designated “Unique Agricultural Area” outside of an urban area in the Agricultural Land Base map of the Region’s Official Plan, a designation which prohibits non-agricultural uses (**Figure 12 – Region of Niagara Official Plan 2014, Schedule B**).

5.2 *Town of Lincoln Official Plan*

Prior to the Greenbelt Plan coming into effect in 2004, the subject lands were designated “Recreational Commercial” in the 2002 Town of Lincoln Official Plan, which permitted a range of uses including motels, hotels, recreation uses, marinas, restaurants, entertainment and accommodation facilities (**Figure 13 – Town of Lincoln Official Plan 2002, Schedule A**). It could be argued that these uses are considered urban in nature.

However, the subject lands are now designated “Specialty Agricultural” in the 2016 Town of Lincoln Official Plan, as a result of the specialty crop designation in the Greenbelt Plan (**Figure 14 – Town of Lincoln Official Plan 2016, Schedule A1**).

5.3 *Town of Lincoln Zoning By-law*

The subject lands are zoned Recreational Commercial (RC & RC-1) and Environmental Conservation (EC) in the Town’s Zoning By-law (**Figures 15 & 16 – Town of Lincoln Zoning By-law 93-14-Z1**). The permitted uses for the Recreational Commercial Zone include, but are not limited to, the following uses:

- Casino
- Eating establishment
- Hotel/motel
- Marina
- Parking lot
- Place of entertainment
- Private clubs accessory to a permitted use
- Recreational use

The specialty crop area designation in the Greenbelt Plan does not reflect the fact that the subject lands are zoned to permit a variety of non-agricultural uses, which are urban in nature. In other words, the Greenbelt Plan is arbitrarily restricting the development potential of the subject lands, which are already developed with as-of-right zoning permissions and do not have the ability to accommodate agricultural uses.

6.0 Prudhommes Secondary Plan

The Prudhommes Secondary Plan was initiated by the Town and Region in 2016 to identify a new urban vision and design guidelines for the lands bounded by Lake Ontario on the north, QEW on the south, Jordan Road on the east and Victoria Avenue on the west. The subject lands are included within the Secondary Plan area.

The Prudhommes Secondary Plan (OPA 3) was adopted by the Town of Lincoln on April 16, 2018. The adopted Plan designated the majority of the subject lands as “High-Rise Residential”, the existing marina lands as “Marina” and the vacant lot as “Mixed-Use” (**Figures 17 & 18 – Prudhommes Secondary Plan, Proposed Land Uses**). The High-Rise Residential designation is intended to accommodate residential buildings that provide a more compact urban form that takes advantage of the waterfront context and surrounding views, where the tallest buildings will be high quality landmarks to frame the views to Lake Ontario and Jordan Harbour. The portion of the subject lands that are designated “High-Rise Residential” have been permitted a maximum height of 18 storeys. The Marina designation is intended to reflect the existing use of the lands, and to provide further enhancement of the existing marina with the addition of shops and restaurants to make the district a destination. The Mixed Use designation is intended to provide for a range of business opportunities as well as residential apartments that can support the associated commercial/retail uses.

In the preparation of the Prudhommes Secondary Plan, population projections were generated based on the proposed land use designations for all lands within the Secondary Plan Area, including the subject lands. In addition, the Region has developed a Master Servicing Plan that includes provisions to undertake servicing improvements based on population and unit forecasts associated with the implementation of the Secondary Plan. As such, it is evident that the intended development of the subject lands through the proposed land use designations as established in the Prudhommes Secondary Plan is for a dense, mixed use community with a variety of housing choices which will assist the Town in providing needed higher density housing options in an area designated for growth.

In their staff report dated April 9, 2018 (**Appendix A – Town of Lincoln Staff Report, April 9, 2018**), Town planning staff noted that the Greenbelt Plan, 2005 inconsistently designated the subject lands, applying both the “Hamlet” designation and the “Tender Fruit and Grape Lands” (specialty crop area) designation to the lands east of the Jordan Harbour, which are not compatible. Further, Region planning staff noted the following considerations in their comments to the Town:

- *The lands on the east side of Jordan Harbour (shown as Special Policy Area A on Schedule E3) have been identified erroneously as Niagara Peninsula Tender Fruit and Grape Area (Specialty Crop Area) lands on Schedule 2 of the Greenbelt Plan, 2017. These lands are currently fully developed with non-agricultural uses and have been for decades. There is no opportunity for these lands to be returned to agricultural production.*
- *The lands are identified as Undelineated Built Up Area on the Built Boundary Mapping (2008) in the Growth Plan, recognizing the cluster of non-agricultural, settlement uses.*
- *The Town and Region recognize these lands as developed and support the redevelopment of already developed lands to accommodate growth so that true specialty crop lands will be protected (pg. 5, Town of Lincoln Staff Report – April 9, 2018).*

The Region states that given the above and as the lands are already serviced and zoned for non-agricultural uses, the land use direction in the Secondary Plan is appropriate. The Region further states that the “Province is encouraged to remove these lands from the Specialty Crop designation to support the Prudhommes Secondary Plan, as identified in the Region’s Municipal Comprehensive Review”.

6.1 *Ministry of Municipal Affairs and Housing Position*

Through the review of the Prudhommes Secondary Plan, the Ministry of Municipal Affairs and Housing raised concerns that the plan was proposing a settlement area boundary expansion of the Prudhommes Urban Area extending on the east side of Jordan Harbour, contrary to the policies of the Greenbelt Plan, 2017. As stated in a letter from Provincial planning staff, it is their opinion that the proposed land use designations identified within the Prudhommes Secondary Plan were not in conformity with that of the Greenbelt Plan, 2017 (**Appendix B – Letter from Ministry of Municipal Affairs, May 7, 2018**). Provincial staff cited the following concerns with the Prudhommes Secondary Plan:

- The lands to the east of the Jordan Harbour are designated “Specialty Crop Area” in the Greenbelt Plan 2017.
- The Prudhommes Secondary Plan proposes a “de facto” urban boundary expansion to the Prudhommes existing Urban Area (Towns/Villages) designation for the eastern portion into the adjacent Specialty Crop Area.
- The Greenbelt Plan 2017 prohibits the expansion of Towns/Villages into Specialty Crop Area, and lands within Specialty Crop Areas shall not be redesignated in Official Plans for non-agricultural uses (Section 3.1.2 of the Greenbelt Plan).

On the basis of the concerns above, Ministry staff recommended that the Region modify OPA 3 by deleting the policy sections which reference the lands east of the Jordan Harbour, and that the Schedules for the Prudhommes Secondary Plan be revised to reflect that the Secondary Plan Area not include the lands east of the Jordan Harbour including the subject lands. In other words, Ministry staff wanted the subject lands removed from the Secondary Plan altogether.

6.2 *Region of Niagara Response and Position*

Regional Planning staff reviewed the Ministry’s comments and recommended that the decision for the lands on the east side of Jordan Harbour be deferred, not deleted. In addition to the justification previously provided by the Town, the Region reinforced that notwithstanding the current Greenbelt designation there are existing, established commercial uses and industrial operations on these lands as confirmed through aerial photography. The Region stated that the Beacon Hotel is shown on 1965 aerial photography of the subject lands (**Figure 19 – Historical Imagery 1965**).

Regional staff provided the following response to the Ministry’s comments, and offered the following opinions to support the approval of the Prudhommes Secondary Plan, including the lands east of Jordan Harbour (**Appendix C – Region of Niagara Staff Report, July 18, 2018**):

- Through the Coordinated (Provincial) Plan Review, the Region supported and encouraged the removal of the land shown east of Jordan Harbour from the specialty crop area designation.
- The Greenbelt Plan designations of the Prudhommes lands have not been accurately ground-truthed and as a result, have been identified as specialty crop area erroneously.
- The lands are currently developed with non-agricultural uses and it is extremely unlikely that these lands will return to agricultural production.
- There is existing zoning that permits non-agricultural uses.
- The Region and the Town recognize these lands as developed and support the redevelopment of already disturbed lands to accommodate growth so that true specialty crop lands in the Town will be protected.

6.3 Region of Niagara Approval of Prudhommes Secondary Plan

On July 26, 2018, the Region as approval authority made the decision to modify and approve Official Plan Amendment No. 3 (Prudhommes Secondary Plan) (**Appendix D – Region of Niagara Planning & Economic Development Committee Minutes (PEDC 10-2018), July 18, 2018**). Planning staff recommended that the designations and policies for the lands east of Jordan Harbour including the subject lands be deferred, not deleted as recommended by Provincial staff, until conformity with the Greenbelt Plan can be achieved. Regional Council agreed and deferred the designations with the following site-specific policy:

“The land use designations for lands on the east side of Jordan Harbour as shown on Schedule ‘B5-3’ shall be deferred until such time as conformity to the Greenbelt Plan is achieved by either a Greenbelt Plan amendment to policy or mapping, or the development and application of guidelines approved by the Province, in order to improve the relevance of the Greenbelt Plan policies. In the interim, the existing uses, and expansions thereto, are permitted as currently recognized in the existing zoning permissions and subject to the Greenbelt Plan.” (pg. 4, PEDC 10-2018 Minutes, July 18, 2018).

The approval of the Prudhommes Secondary Plan including the deferral of the land use designations for the subject lands was not appealed by the Province, despite their request for the complete removal of the lands east of Jordan Harbour from the Secondary Plan. The deferral provides greater flexibility for the future development of the subject lands. If the Province removes the specialty crop designation for the subject lands, then the deferral can be lifted which would allow the underlying residential, mixed-use and marina designations to come into effect and for the lands to be redeveloped and revitalized with substantial housing supply in accordance with Town and Regional planning direction.

Regional Council also passed resolutions requesting that the Minister remove the specialty crop designation from the lands east of Jordan Harbour including the subject lands, and for Region staff to be authorized to initiate a study to develop Specialty Crop Guidelines:

1. *That, for the reasons outlined in Policy 3.1.15.2.11 of the Prudhommes Secondary Plan, Official Plan Amendment 3, the Region of Niagara respectfully **REQUESTS** the Minister of Municipal Affairs and Housing amend the Greenbelt Plan, 2017, to remove the Specialty Crop Area designation on the east side of Jordan Harbour (as seen on Schedule B5-3) in the Town of Lincoln; and,*
2. *That staff **BE AUTHORIZED** to initiate a study in consultation with the Province aimed at developing Specialty Crop Guidelines, in order to provide guidance with respect to land-use designations and development potential for certain lands within the Greenbelt Plan area* (pg. 8, PEDC 10-2018 Minutes, July 18, 2018).

These resolutions clearly demonstrate the position of the Region on the matter of the removal of the specialty crop area designation from the subject lands. Town staff have also stated their support for the removal of the specialty crop designation from the subject lands, and have prepared a letter in support of this request to the Province to remove the lands from the specialty crop area (**Appendix E – Letter of Support from Town of Lincoln, December 20, 2018**). The Town states that if the specialty crop designation is removed, the subject lands would be a part of a complete and sustainable community as envisioned by the secondary plan.

7.0 Conclusion

The Town and the Region recognize the subject lands as “developed” with existing urban services and are supportive of the redevelopment of these lands to accommodate urban uses, including needed high density housing supply, which would contribute to a complete community. This request for the removal of the specialty crop designation is necessary to allow the subject lands to move forward consistent with the municipally supported and approved Prudhommes Secondary Plan.

As outlined in this summary and for the following reasons, the removal of the specialty crop designation is justified:


1. The Town and Region both support the subject lands being removed from the specialty crop designation. Further, they support the redevelopment of the subject lands in accordance with the new Prudhommes Secondary Plan as part of a complete and sustainable community in the Town of Lincoln that provides substantial housing opportunities in a targeted growth area.
2. The existing uses on the subject lands and surrounding context is considered ‘urban’, and the subject lands have been occupied by an ‘urban’ use for more than 50 years. The subject lands are located between the QEW and Lake Ontario with no current or future ability to accommodate agricultural uses.
3. The subject lands have not been assigned a soils classification by the Province as the lands have not been evaluated due to the existing urban uses, as reflected in provincial soils mapping since the 1980s. There is no evidence to suggest that the soils or area are compatible with or warrant the specialty crop designation.
4. The specialty crop designation is inconsistent with the Greenbelt Plan 2005 mapping, which identifies the lands as a “Hamlet”. In addition, the built boundary mapping for the Growth Plan identifies the subject lands within an ‘undelineated built-up area’.

For the reasons described above, we respectfully request that the specialty crop designation be removed from the subject lands, such that the lands can be comprehensively redeveloped according to the policies of the Prudhommes Secondary Plan.



Figure: 1
Aerial Imagery

LEGEND

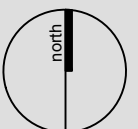
 Subject Lands ± 36,400m² (3.64ha)

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



K:\18324A- RAMADA\RP\TVAERIAL.DWG

2793 Beacon Blvd & 2777 North Service Rd
Pt Lt 17-18 Con Broken Front Louth, Town of
Lincoln

Air Photo Source: First Base Solutions (2018 imagery)



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& LANDSCAPE
ARCHITECTURE**

200-540 BINGEMANS CENTRE DR, KITCHENER, ON, N2B 3X9
P: 519.576.3650 F: 519.576.0121 | WWW.MHBCPLAN.COM

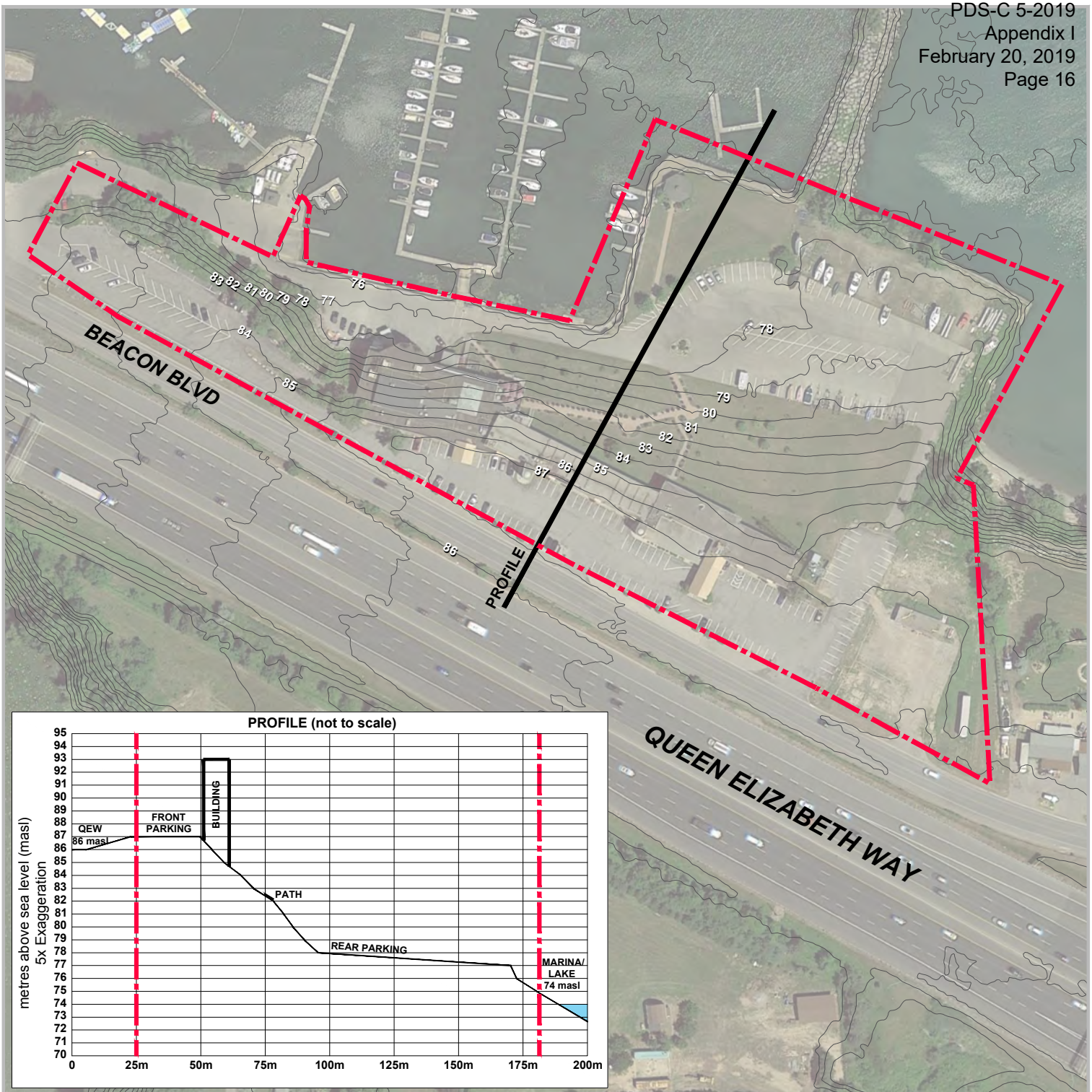


Figure: 2
Elevation Map

LEGEND

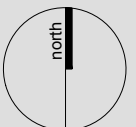
- Subject Lands
- Cross Section Location

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



K:\18324A- RAMADA\RPTELEVATION.DWG

2793 Beacon Blvd & 2777 North Service Rd
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Source: First Base Solutions (2018 imagery) / Contours generated from 2015 SWOOP DTM data




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Figure: 3
Aerial Site Context

LEGEND

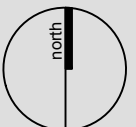
 Subject Lands

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



K:\18324A- RAMADA\RPT\AERIAL CONTEXT ZOOM.DWG

2793 Beacon Blvd & 2777 North Service Rd
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Air Photo Source: Google Satellite Imagery July, 2018




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Figure: 4
Aerial Site Context

LEGEND

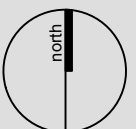
 Subject Lands

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



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2793 Beacon Blvd & 2777 North Service Rd
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Lincoln

Air Photo Source: Google Satellite Image: July, 2018

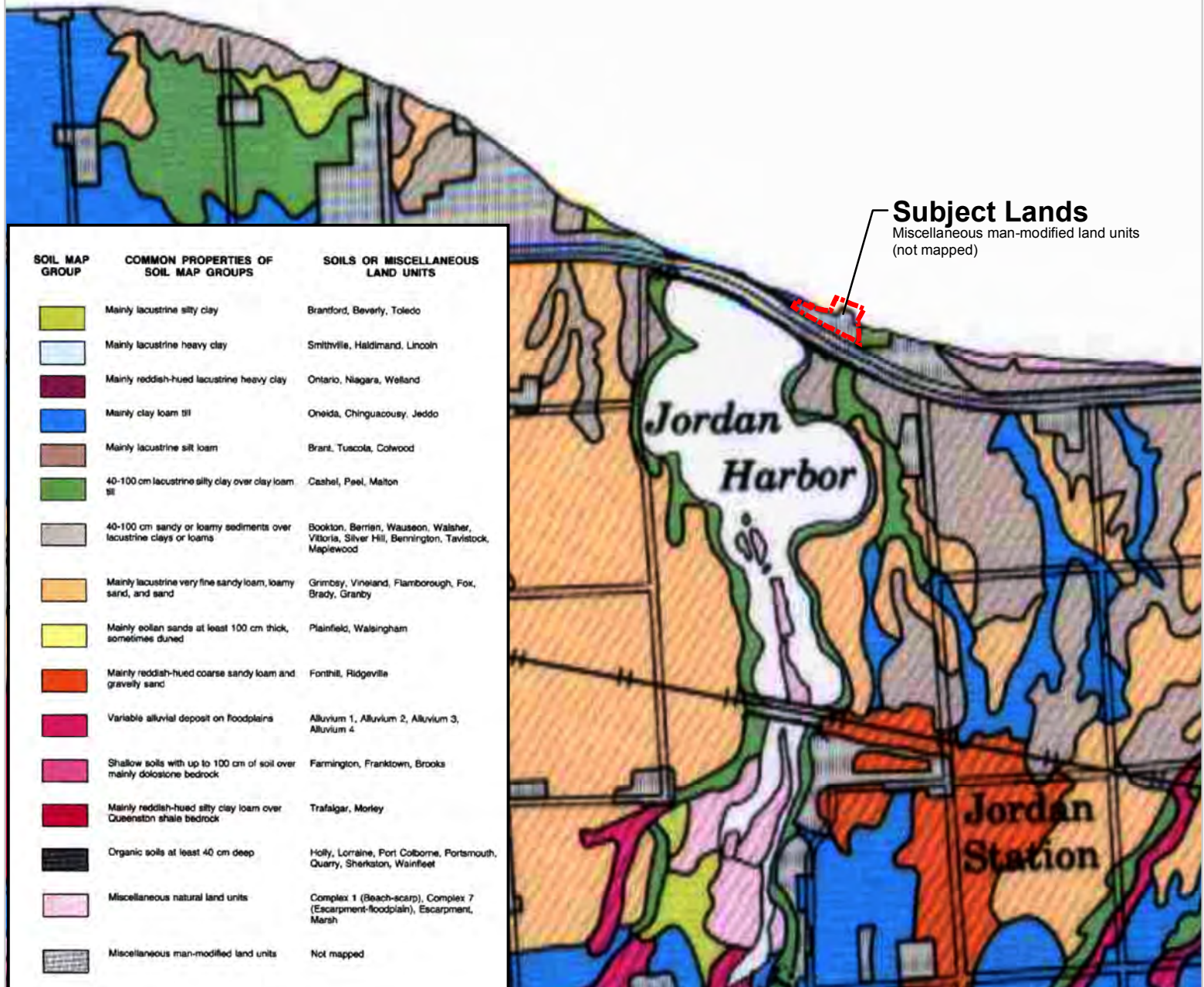


Figure: 5
Region of Niagara
Generalized Soil Map
(1989)

Legend

----- Subject Lands

Date: Jan 11, 2019

Scale: 1:30,000

File: 18324A

Drawn: GC

Document Path: K:\18324A- Ramada\RPT1989_General_Soil_Map.mxd





Figure: 6
Canada Land Inventory
Soils

Legend

----- Subject Lands	Class 5
Other	Class 6
Class 1	Class 7
Class 2	Organic
Class 3	Water
Class 4	

Date: Jan 11, 2019

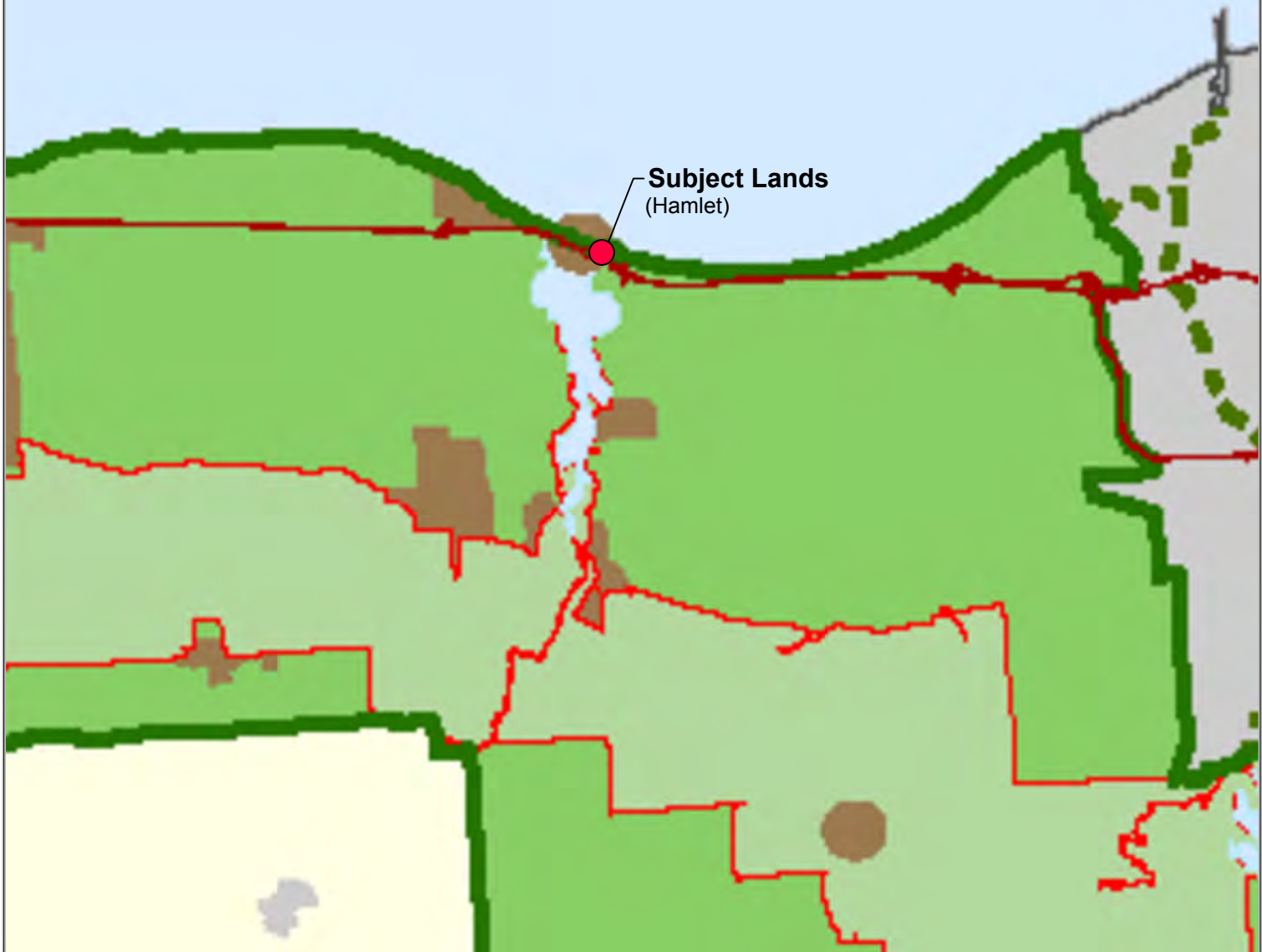
Scale: 1:10,000

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Drawn: GC

Document Path: K:\18324A- Ramada\RPT\CLI_Soil_Map.mxd





DATE: January 11, 2019



2793 Beacon Blvd & 2777 North Service Rd
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Lincoln



Figure: 8
**Greenbelt Plan 2005-
Schedule 2: Niagara
Peninsula Tender Fruit
and Grape Area**

LEGEND

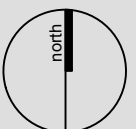
- Subject Lands
- Greenbelt Area*
- Protected Countryside
- Tender Fruit and Grape Lands
- Towns and Villages
- Hamlets
- Niagara Escarpment Plan Area
- Settlement Areas Outside the Greenbelt
- River Valley Connections (outside the Greenbelt)

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



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Figure: 9
**Built Boundary for the
Region of Niagara
(2008)**

LEGEND

● Subject Lands

--- Boundary of Upper- and Single-Tier Municipalities
--- Boundary of Lower-Tier Municipalities

Built Boundary

■ Delineated Built-up Areas ■ Undelineated Built-up Areas

□ Greenbelt Area *

Sources: Ministry of Public Infrastructure Renewal, Ministry of Natural Resources and Ministry of Municipal Affairs and Housing

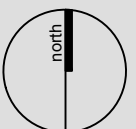
* Ontario Regulation 59/05

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



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Built Boundary for the Growth Plan for the Greater Golden Horseshoe, 2006

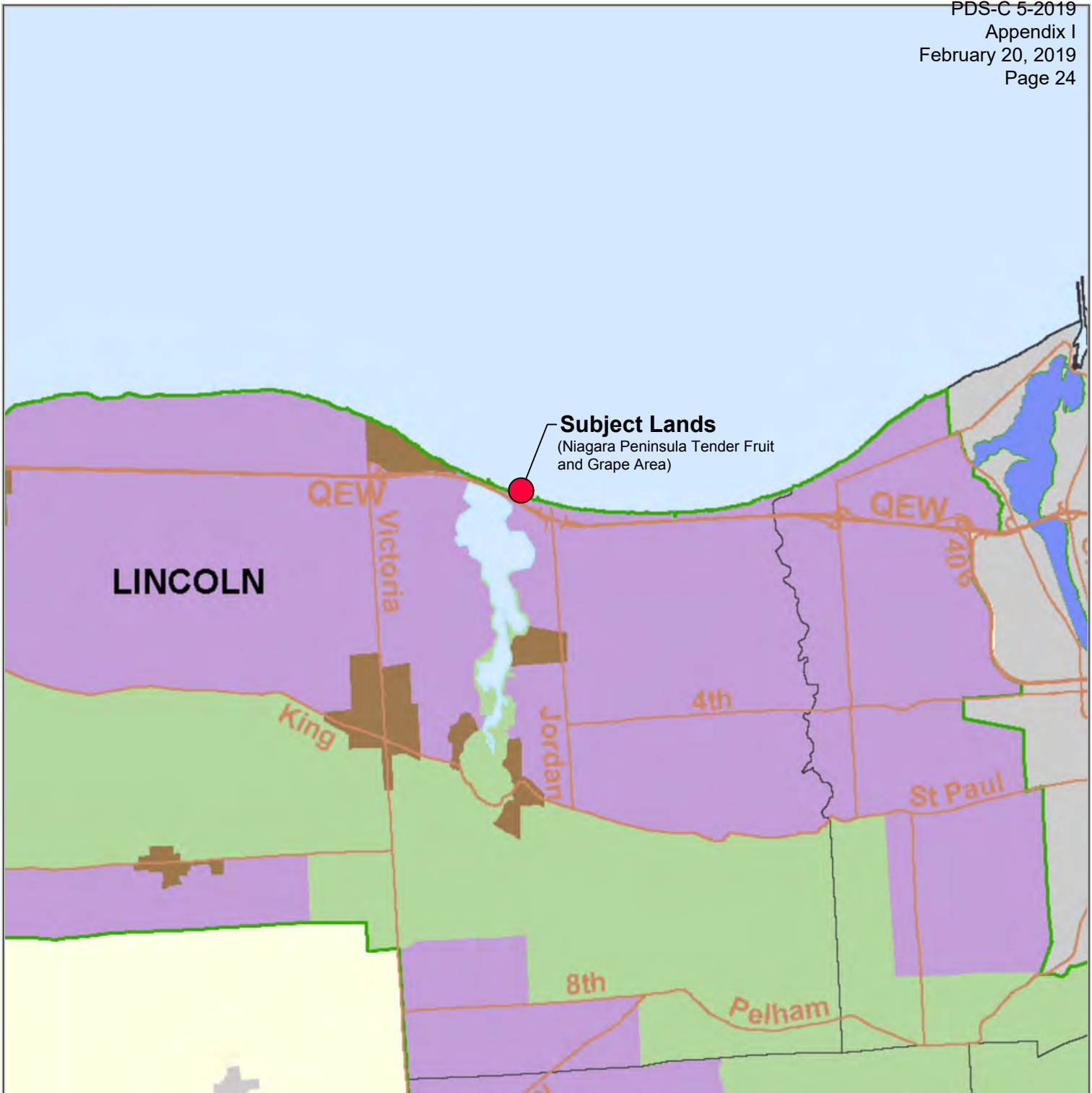
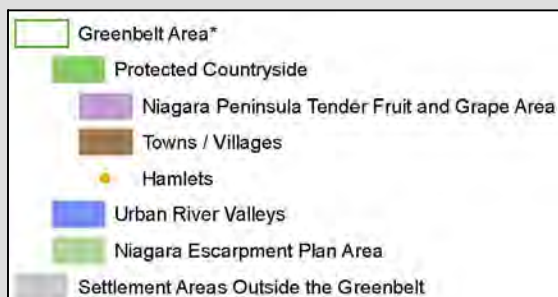


Figure: 10
**Greenbelt Plan 2017-
Schedule 2: Niagara
Peninsula Tender Fruit
and Grape Area**

2793 Beacon Blvd & 2777 North Service Rd
Pt Lt 17-18 Con Broken Front Louth, Town of
Lincoln

LEGEND

● Subject Lands



DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC

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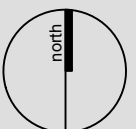




Figure: 11
**Greenbelt Plan 2017-
 Schedule 1: Greenbelt
 Plan Area**

LEGEND

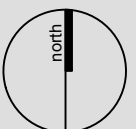
- Subject Lands
- Greenbelt Area*
- Protected Countryside
- Towns / Villages
- Hamlets
- Urban River Valleys
- Niagara Escarpment Plan Area
- Oak Ridges Moraine Area
- External Connections
- Settlement Areas Outside the Greenbelt

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



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Lake Ontario

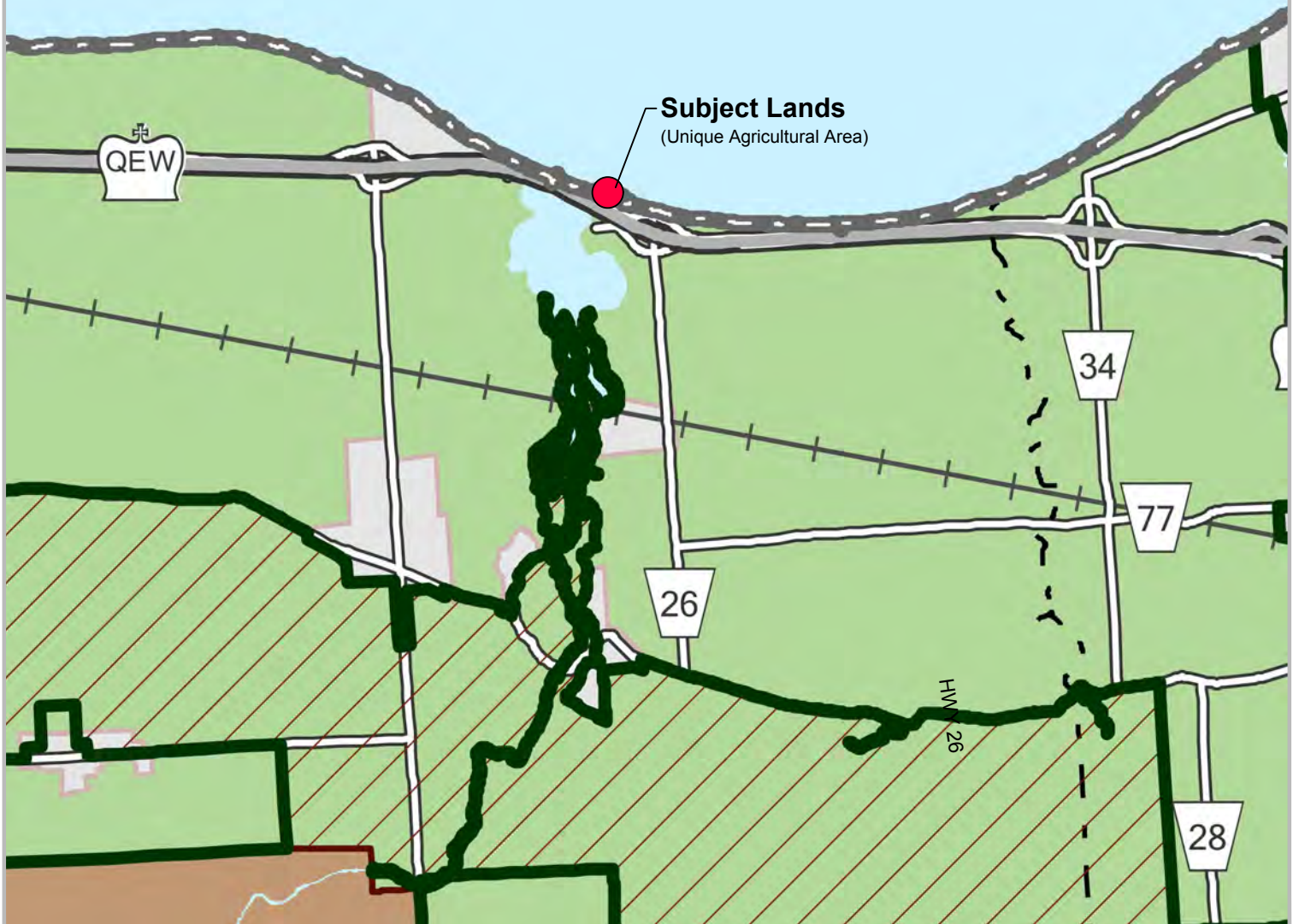


Figure: 12
**Niagara Region Official
Plan (2014)- Schedule
"B" Agricultural Land
Base**

LEGEND

- Subject Lands
- Unique Agricultural Area
- Good General Agricultural Area
- Greenbelt Plan Area
- Niagara Escarpment Plan (NEP) Area
- Urban Area

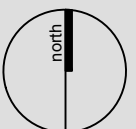
DATE: January 11, 2019

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DRAWN: GC

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Lake Ontario

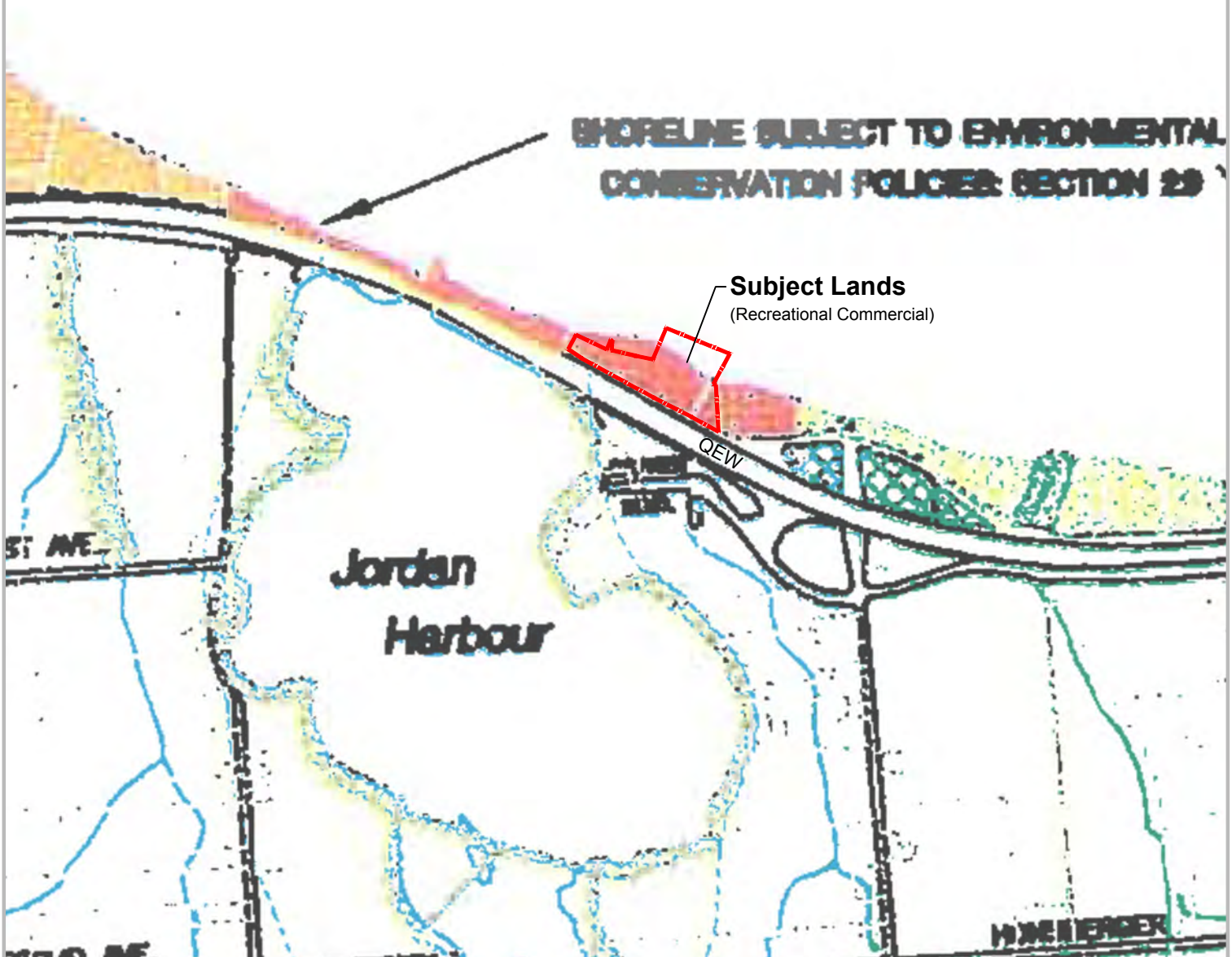


Figure: 13
Town of Lincoln 2002
Official Plan Schedule
"A": Land Use Plan

LEGEND

Subject Lands

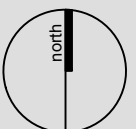
- UNIQUE AGRICULTURAL
- ENVIRONMENTAL CONSERVATION
- RECREATIONAL COMMERCIAL
- ESTATE RESIDENTIAL
- URBAN
- INDUSTRIAL

DATE: January 11, 2019

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FILE: 18324A

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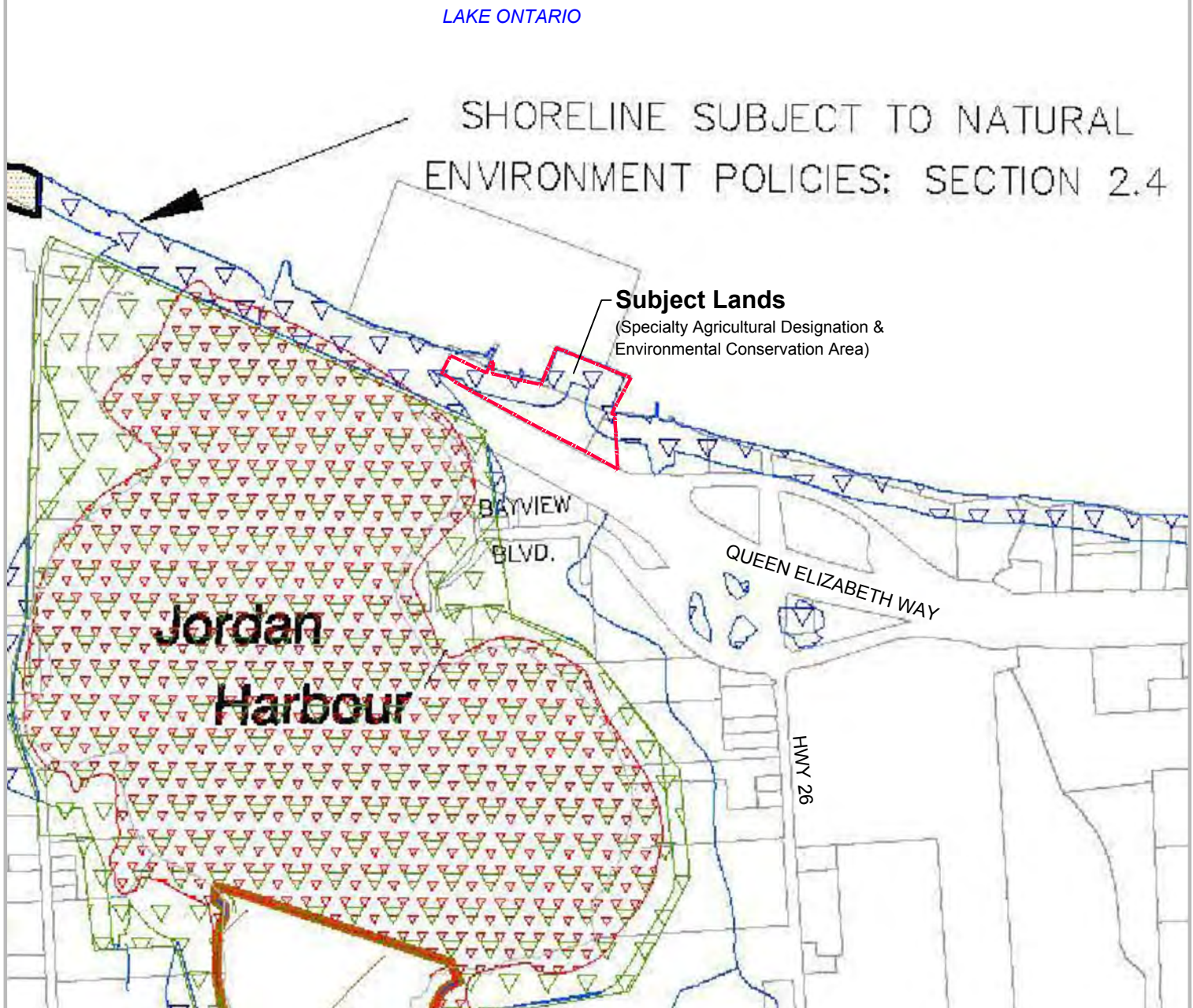


Figure: 14
**Town of Lincoln Official
Plan (2016) Schedule
"A1": Land Use Plan**

LEGEND

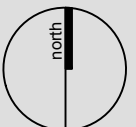
- Subject Lands
- SPECIALTY AGRICULTURAL DESIGNATION
- GREENBELT PROTECTED AREA
- ENVIRONMENTAL PROTECTION AREA
- ENVIRONMENTAL CONSERVATION AREA
- URBAN AREA
- NIAGARA ESCARPMENT PLAN AREA

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



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Pt Lt 17-18 Con Broken Front Louth, Town of
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Lake Ontario

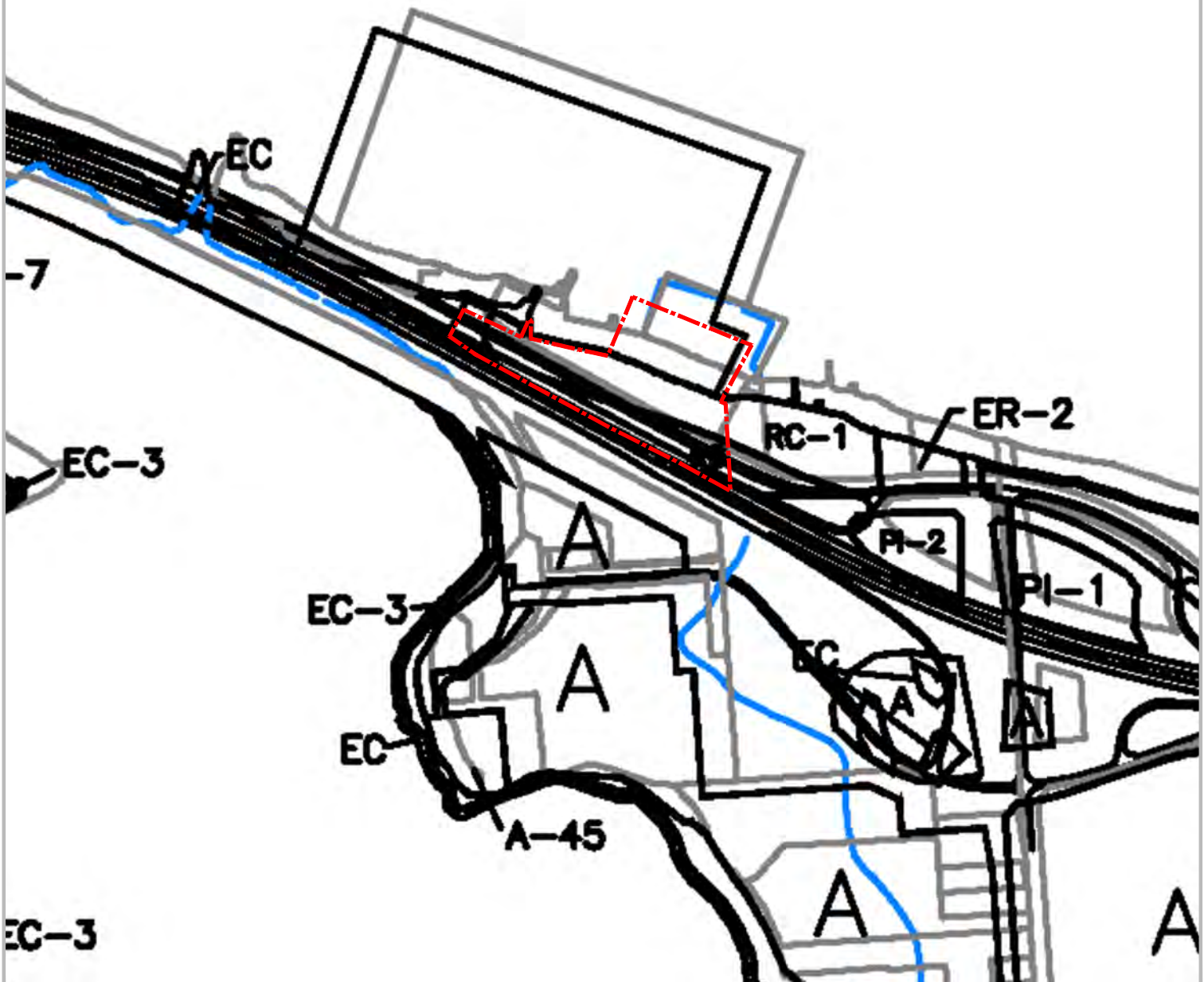


Figure: 15
**Town of Lincoln Zoning
By-Law No. 93-14-Z1
Schedule 'A'**

LEGEND

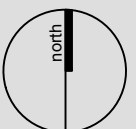
- Subject Lands Zoned as RC, RC-1, & EC
- (A) - Agricultural Zone
- (ER) - Estate Residential Zone
- (RC) - Recreational Commercial Zone
- (P1) - Prestige Industrial Zone
- (EC) - Environmental Conservation Zone

DATE: January 11, 2019

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FILE: 18324A

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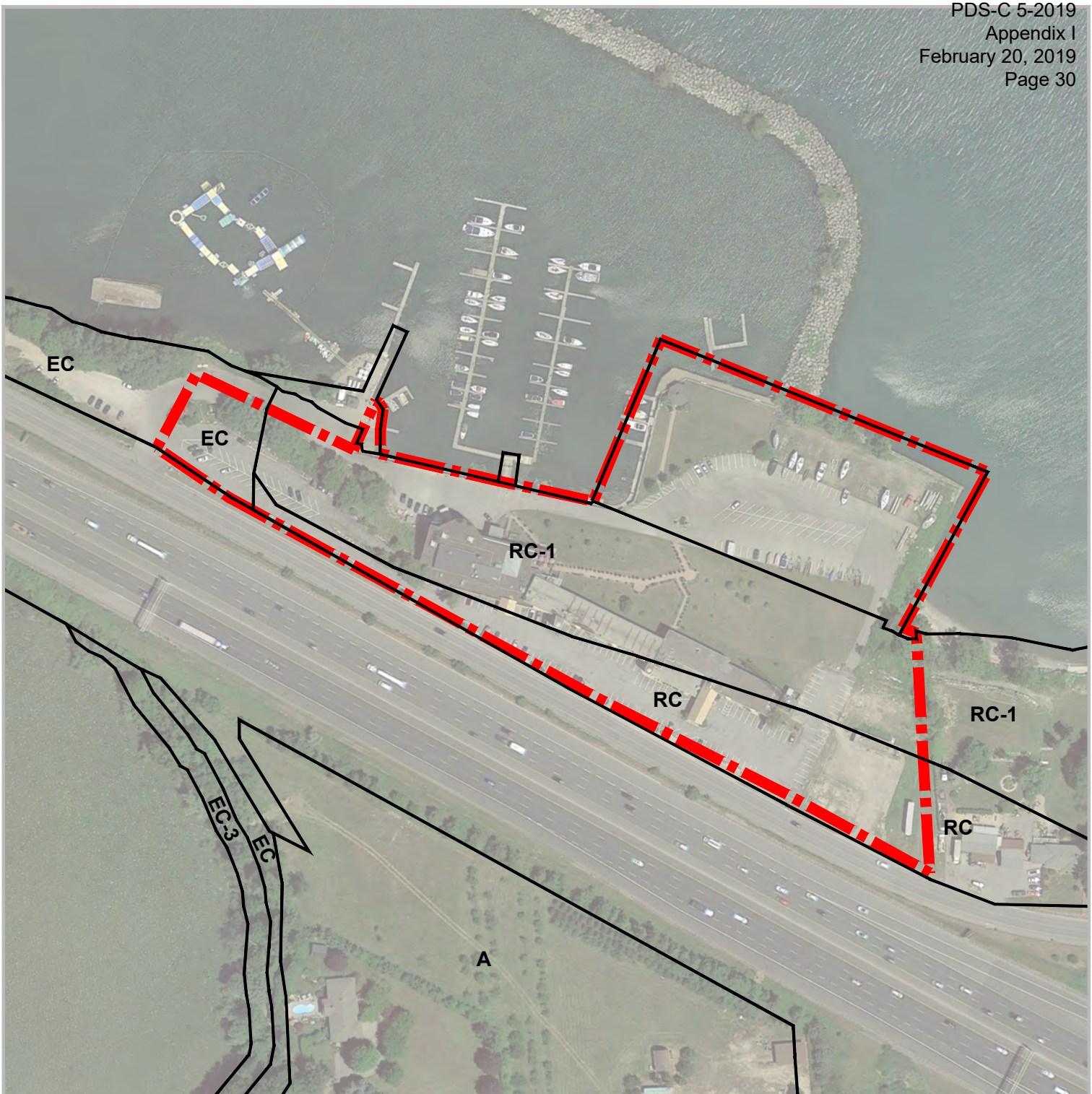


Figure: 16
**Town of Lincoln Zoning
By-Law No. 93-14-Z1**

LEGEND



*Subject Lands

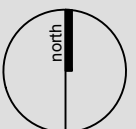
- (A) - Agricultural Zone
- (ER) - Estate Residential Zone
- (RC) - Recreational Commercial Zone
- (P1) - Prestige Industrial Zone
- (EC) - Environmental Conservation Zone

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



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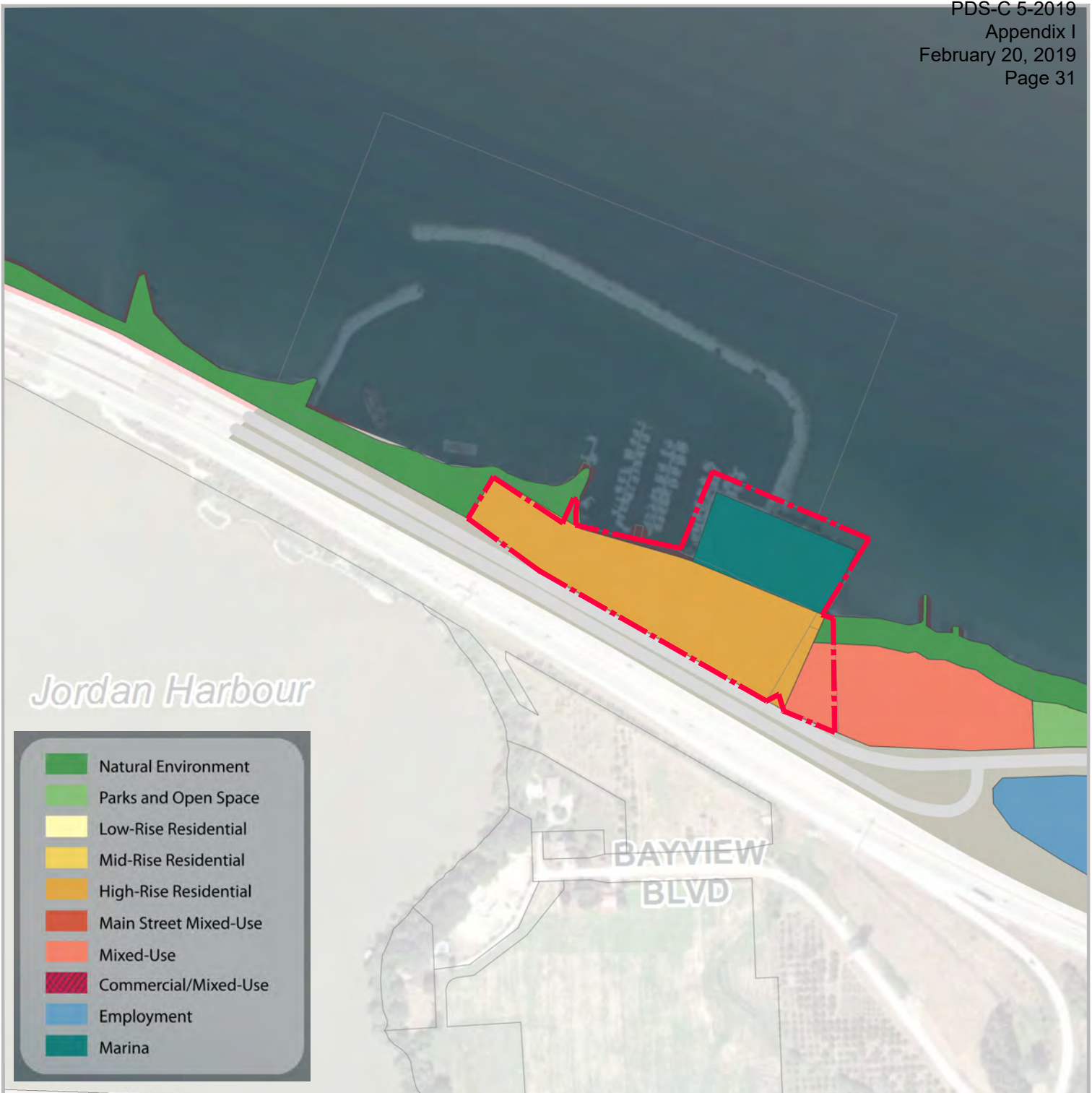



Figure: 17
**Prudhommes
Secondary Plan,
Proposed Land Uses**

LEGEND

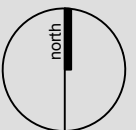
 Subject Lands

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



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Lincoln

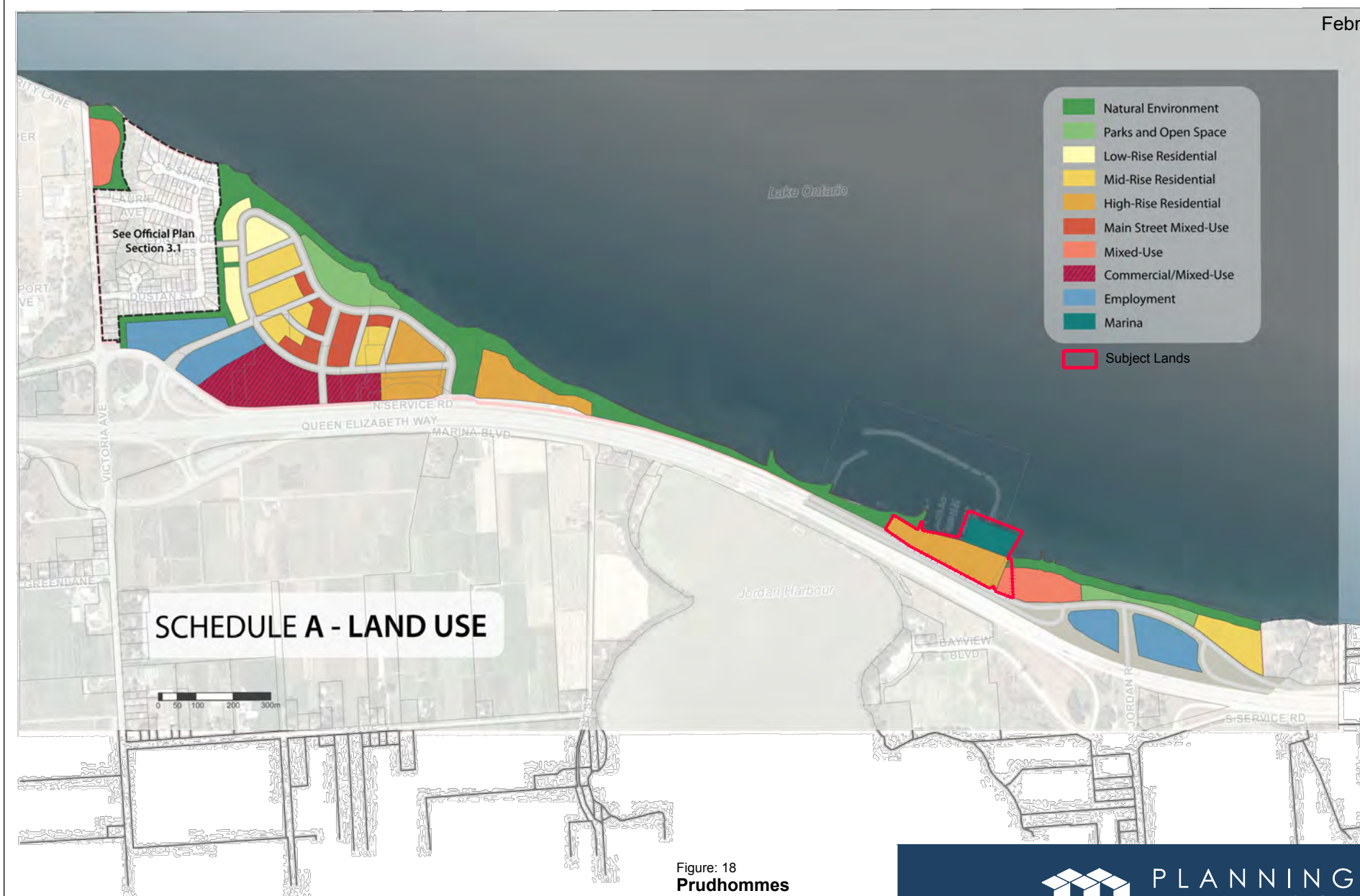


Figure: 18
**Prudhommes
Secondary Plan,
Proposed Land Uses**

2793 Beacon Blvd & 2777 North Service Rd
Pt Lt 17-18 Con Broken Front Louth, Town of
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& LANDSCAPE
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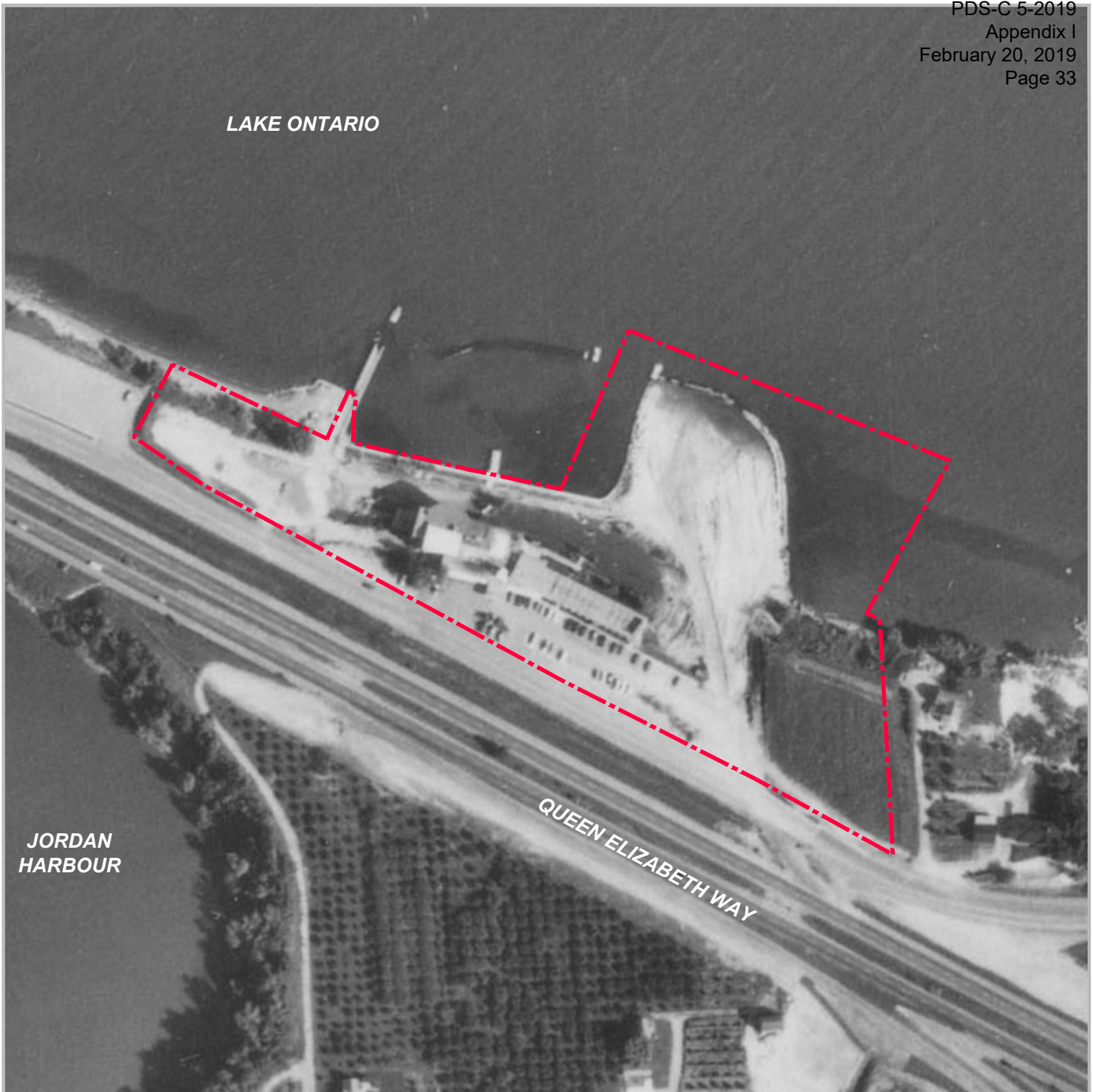



Figure: 19
**Historical Imagery
(1965)**

LEGEND

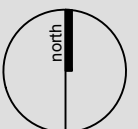
 Subject Lands $\pm 36,400\text{m}^2$ (3.64ha)

DATE: January 11, 2019

SCALE: NTS

FILE: 18324A

DRAWN: GC



K:\18324A- RAMADA\RP11965 HISTORICAL IMAGERY.DWG

2793 Beacon Blvd & 2777 North Service Rd
Pt Lt 17-18 Con Broken Front Louth, Town of
Lincoln

Air Photo Source: Brock University Historical Map Library

APPENDIX A



Planning and Development Department

TO:	Planning Committee
MEETING DATE:	April 9, 2018
SUBJECT / REPORT NO:	Prudhommes Secondary Plan CN: 3-5-02-02 Application: PLOPA20160108 Report - PL 18-19
PREPARED BY:	Matt Bruder, MCIP, RPP Associate Director of Planning and Development
SUBMITTED BY:	Kathleen Dale, MCIP, RPP Director of Planning and Development

RECOMMENDATION:

For the reasons outlined in PL 18-19 it is hereby recommended that:

1. The Official Plan Amendment consisting of the updated Prudhommes Secondary Plan (PLOPA20160108) BE APPROVED and presented to Council.
2. That the approval of the Official Plan Amendment be accompanied by approval of contract planning/development engineering and community engagement resources to address the subsequent increase in incoming development applications. The contract duration is anticipated to be three to five years.

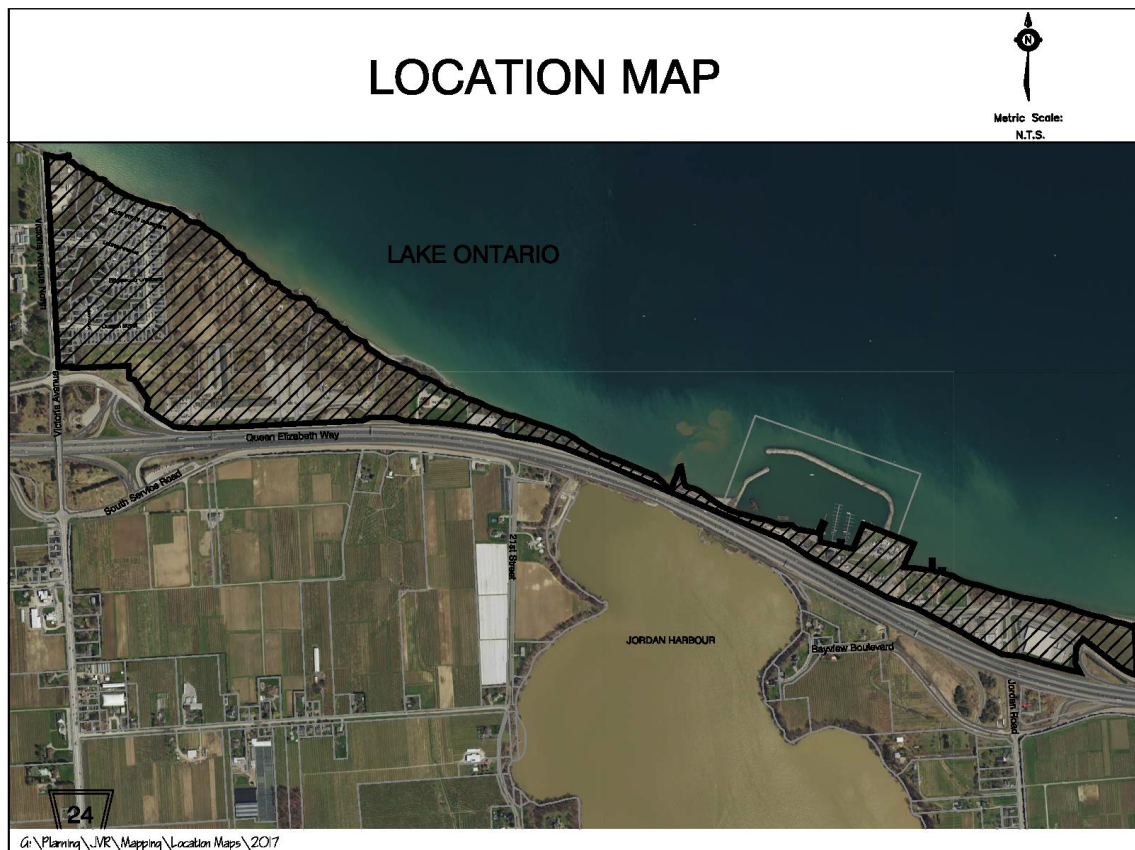
EXECUTIVE SUMMARY:

The purpose of this report is to provide a recommendation to Committee and Council regarding the proposed Official Plan Amendment to adopt the updated Prudhommes Secondary Plan. The new Secondary Plan will encourage and support the creation of a complete, sustainable community that provides a mix and range of employment, commercial, and residential land uses including a diverse range of housing options, local services and community infrastructure, as well as the design of attractive and accessible public spaces that prioritize the pedestrian experience while protecting the natural environment. The new Plan will ensure that development in the area meets the day-to-day needs of residents, integrates existing and new development, accommodates all forms of transportation and accommodates Provincial growth targets through a generally compact built form.

HISTORICAL BACKGROUND:

Location:

The Prudhommes Secondary Plan area is over 50 hectares in size and is bounded by Lake Ontario on the north, the QEW on the south, Jordan Road on the east and Victoria Avenue on the west. A map identifying the location of the lands is included on page 2.



Background:

The original Prudhommes Secondary Plan that is within the current Official Plan was approved in 2006. The Plan provided for a concentration of commercial land uses, supported by the development of medium and high density residential housing. Subsequently, the outlet mall in Niagara on the Lake impacted the Regional market and reduced the desire for the scale of commercial originally proposed in the 2006 Secondary Plan. In addition, it was approved prior to the implementation and subsequent updates of several important planning initiatives that address increasing growth targets and guide corresponding development including the 2014 Provincial Policy Statement (PPS) and the 2017 Provincial Growth Plan for the Greater Golden Horseshoe (Places to Grow).

The PPS speaks to the need to support long-term prosperity and social well-being by planning for strong, sustainable and resilient communities for people of all ages; a clean and healthy environment; and a strong competitive economy. The Growth Plan policies speak to the formation and design of compact and complete communities; prioritizing intensification and efficient use of lands and infrastructure through a more compact built form that supports transit viability and active transportation; a range and mix of housing; the protection of natural heritage; and the integration of climate change into planning and managing growth.

Sustained population growth over the next 30-year planning horizon forecasted and guided by Provincial land use plans requires development to occur in a more compact built form

within identified settlement areas. The Province uses policy tools (i.e., Growth Plan) to accommodate this growth while making efficient use of existing infrastructure, preserving natural areas, protecting drinking water and farmland.

The building industry and the housing market in the GGH are changing in response to land costs, more diverse family types and population growth. The current market trend has resulted in more townhouses, condo towers and mid-rise apartments being built, with a focus on people, amenities and active transportation rather than the circulation and storage of cars.

As a result of the updated Provincial directives, the Town decided to undertake a new Secondary Plan exercise for the Prudhommes area. The new Secondary Plan provides the opportunity to prepare updated policies in the context of the current planning policy framework, urban design practices, and market trends, and provide a form of development which better accommodates the projected population and economic growth for the Town and the Niagara Region. Given the scale, location and impact of the Secondary Plan area, which extends beyond its actual boundaries, there is a Regional and Town interest in ensuring that the site remains a potential employment catalyst for Niagara, tied to other investments in the area, such as the Vineland Research and Innovation Centre.

The Town with the support of the Region, retained WSP to provide consulting services to prepare a new Secondary Plan for the Prudhommes area. This plan has been refined based on input received as further discussed in this report. A copy of the complete Secondary Plan is included as Appendix A to this report.

The new Secondary Plan includes a range of land uses with residential and mixed-use (i.e., commercial/retail/residential combined) being the most predominant. There is also a large area of land set aside for employment uses (i.e., offices, institutional establishments, etc.) and a central waterfront park, along with existing natural environment areas. The vision of this Secondary Plan is to create the following:

- A central Main Street that terminates at a waterfront park, with buildings that front, face and feature the waterfront.
- A well-designed and connected community of residential neighbourhoods that provide for a range of housing types, mix-use developments, retail and service commercial uses, office uses and community facilities.
- A Natural Heritage System, recognizing the constraints of the Lake Ontario Shoreline, while promoting leadership in sustainability and green building technology.
- A height strategy that includes low-rise buildings at the east and west ends of the site, adjacent to Victoria Shores and other existing residential uses, with a distinct transition in height towards the centre of the plan area. The tallest buildings will become landmarks, framing the views to Lake Ontario and Jordan Harbour.
- A public open space network that includes a waterfront park that is connected to the Natural Heritage System and the community. Continuous public access along the waterfront will be provided and will incorporate key connecting links to the planned road system.
- A multi-modal, active transportation network that promotes walking and cycling. The road network will be highly interconnected that promotes ease of access, orientation, and safety for pedestrian, cyclists and motor vehicles. The road network will provide views to Lake Ontario and streetscapes will establish a comfortable pedestrian environment.

FINANCIAL – STAFFING – LEGAL CONSIDERATIONS:

Financial:

The Town's share of the project is being funded through development charges. The Region has also committed funding through their Smarter Niagara Incentive Program (SNIP).

Staffing:

There are no additional staffing requirements anticipated as a result of the consideration of this report. However, Staff expect that subsequent to the approval of the Secondary Plan, that the landowners will be submitting various planning applications. Those subsequent planning applications will impact Staff resources. As such, this report includes a recommendation for contract staff planning/development engineering and community engagement resources to review and process subsequent applications that result from adoption of the Secondary Plan. This would assist in providing additional staff resources to ensure timely processing of the development applications. The required skillset would include planning, management and community engagement. Funding would be obtained through application fees accrued for the multi-year project of the development of Prudhommes.

Legal:

If Council's decision regarding the application is appealed to the Ontario Municipal Board/Local Area Tribunal, legal costs could be incurred if the Town chooses to support its position.

RELEVANT CONSULTATION:

As an initial step in the process, a kick off presentation was held on September 7, 2016 where opportunities for site development were identified during a series of three Public Charettes. A Community Visioning Report was completed which provided a summary of the September presentations. As a result of these public and stakeholder feedback sessions, the three design concepts that were initially presented were revised and presented on October 26, 2016 along with an Emerging Preferred Concept Plan. During this session, the project team requested input to refine the "preferred plan" and prepare draft Urban Design Guidelines that informed the revised Recommended Concept Plan presented at the March 29, 2017 community information session.

During the process to date, consultation was undertaken with the three major landowners of the plan area. Staff from the Town, the Town's consultant and the Region met with each of these to obtain input on draft policies and design guidelines, as well as the overall concept. In addition, Town staff met with Victoria Shores residents to hear their concerns.

The draft Secondary Plan, along with Draft Urban Design Guidelines were presented to Planning Committee on October 17, 2017 and the draft Secondary Plan was presented at statutory public meetings held on January 8 and 9, 2018. Based on agency circulation and public input received at the January public meetings and throughout the process, staff have further refined the Secondary Plan.

In addition to the above, Regional Staff, the Niagara Peninsula Conservation Authority and the Ministry of Transportation were identified as major stakeholders to this Secondary Plan. Consultation was undertaken prior to the consultants preparing the draft Secondary Plan and has continued throughout.

Niagara Region Comments

The Region is committed to working collaboratively with the Town towards the creation of a Secondary Plan that will provide the foundation for a strong, healthy, balanced and prosperous new community. The Secondary Plan contains policies that support and encourage this goal through a range and mix of land uses and built form types, the protection and integration natural heritage resources, opportunities for transit supportive development and active transportation, and the development of complete, well-designed neighbourhoods.

With respect to the Secondary Plan lands on the east side of Jordan Harbour, the Region reviewed the policy framework currently governing these lands. This is also further discussed in the Growth Plan for the Greater Golden Horseshoe and Greenbelt review later in this report. The following considerations were given to these lands:

- The lands on the east side of Jordan Harbour (shown as Special Policy Area A on Schedule E3) have been identified erroneously as Niagara Peninsula Tender Fruit and Grape Area (Specialty Crop Area) lands on Schedule 2 of the Greenbelt Plan, 2017. These lands are currently fully developed with non-agricultural uses and have been for decades. There is no opportunity for these lands to be returned to agricultural production.
- The lands are identified as Undelineated Built Up Area on the Built Boundary Mapping (2008) in the Growth Plan, recognizing the cluster of non-agricultural, settlement uses.
- The Town and Region recognize these lands as developed and support the redevelopment of already developed lands to accommodate growth so that true specialty crop lands will be protected.

Given the above and since the lands are already serviced and zoned for non-agricultural uses, the land use direction in the Secondary Plan is appropriate. The Province is encouraged to remove these lands from the Specialty Crop designation to support the Prudhommes Secondary Plan, as identified in the Region's Municipal Comprehensive Review.

Niagara Peninsula Conservation Authority Comments

- Generally, the Secondary Plan conforms to NPCA policies and those of Chapter 7 of the Regional Official Plan.
- Minor wording changes were recommended to make the plan more consistent with the Conservation Authorities Act.
- NPCA recommends a generic policy that states development and site alteration in habitat of engendered species and threatened species shall be in accordance with provincial and federal requirements.

MTO Input

Town Staff met with MTO on March 9 and March 16, 2018 to discuss the Secondary Plan and the potential for development to impact the Victoria Avenue and Jordan Road interchanges along the QEW. During these meetings MTO stated that they are generally supportive the Secondary Plan and indicated that potential improvements may be required to facilitate traffic movements in the area. These improvements may include:

- addition of turn lanes,
- lengthening of deceleration lanes on the QEW,
- lengthening of existing turn lanes which will likely require widening on the north side of the Service Road and installation of traffic signals.

The specific upgrades required will be identified through more detailed traffic studies that will be required during the subsequent submission of development applications by the landowners. MTO indicated that the need to increase the footprint of the interchanges to facilitate proposed improvements is not anticipated. It was noted that any widenings along the North Service Road required to accommodate the proposed urbanization of the road (i.e., sidewalks, landscaping, curbs, etc.) would need to be along the north side to maintain adequate right-of-way width that may be required to address future QEW improvements. MTO also identified requirements for the western access into Prudhommes from the North Service Road into the designated employment area including the following:

- No road connections/driveways within 200 m of the intersection.
- No left turns coming on to the North Service Road
- Longer shared left turn lane for vehicles coming from the east on the North Service Road to address increased turning movements into the planned development.

STAFF COMMENTS:

It is required that municipal decisions affecting planning matters shall be consistent with the Provincial Policy Statement (PPS 2014), Growth Plan (2017) and Greenbelt Plan (2017). The following policies are particularly relevant to this application.

Provincial Policy Statement:

The lands are located within a settlement area as defined by the PPS.

Policy 1.1.1 promotes healthy, livable and safe communities by promoting efficient development and land use patterns which sustain the financial well-being of municipalities over the long-term and by accommodating an appropriate range of residential and employment (including industrial and commercial uses) to meet long-term needs. Such communities are sustained by:

- Avoiding development and land use patterns which may cause environmental or public health and safety concerns.
- Promoting cost-effective development patterns and standards to minimize land consumption and servicing costs.
- Improving accessibility for persons with disabilities and older persons by identifying, preventing and removing land use barriers which restrict their full participation in society.
- Ensuring that necessary infrastructure, electricity generation facilities and transmission and distribution systems, and public service facilities are or will be available to meet current and projected needs.
- Promoting development and land use patterns that conserve biodiversity and consider the impacts of a changing climate.

Policy 1.1.3.1 states that settlement areas will be the focus of growth and development, and their vitality and regeneration shall be promoted. Policy 1.1.3.2(a) states that land use patterns within settlement areas shall be based on densities and a mix of land uses, which

efficiently use infrastructure and public service facilities, support active transportation and are transit supportive (where transit exists or is planned). Policy 1.1.3.2(b) states that land use patterns within settlement areas shall be based on a range of uses and opportunities for intensification and redevelopment where this can be accommodated considering existing building stock or areas, and the availability of suitable existing or planned infrastructure and public service facilities required to accommodate projected needs.

Policy 1.1.3.4 states that appropriate development standards should be promoted which facilitate intensification and development, and compact form, while avoiding or mitigating risks to public health and safety.

Policy 1.1.3.5 states that planning authorities shall establish and implement minimum growth targets, based on local conditions. However, where provincial targets are established through provincial plans (i.e. the Growth Plan); the provincial target shall represent the minimum target for affected areas.

Policy 1.1.3.6 states that new development taking place in designated growth areas should occur adjacent to the existing built-up area and shall have a compact form, mix of uses and densities that allow for the efficient use of land, infrastructure and public service facilities.

Policy 1.4.1 requires an appropriate range and mix of housing types and densities required to meet projected requirements of current and future residents of the regional market area by:

- Maintaining the ability to accommodate residential growth for a minimum of 10 years through residential intensification and redevelopment and, if necessary, lands which are designated and available for residential development.
- Maintaining land with servicing capacity sufficient to provide at least a three-year supply of residential units available through lands suitably zoned to facilitate residential intensification and redevelopment.

Policy 1.4.3 requires planning authorities to provide for a mix of housing that includes affordable to low and moderate-income households including all forms of housing required to meet the social, health and well-being requirements of current and future residents, including special needs requirements and all forms of residential intensification. This development is to be directed towards locations where appropriate levels of infrastructure and public service facilities are or will be available to support current and projected needs. It further promotes densities for new housing which efficiently use land, resources, infrastructure and public service facilities, and support the use.

The Secondary Plan provides for a variety of housing types all within a more compact built form that also includes commercial, retail, and other employment land uses. This model forms a complete community that allows aging in place while creating an attractive destination to encourage vibrancy and enhance the Town's image. The efficient use of available and planned infrastructure is encouraged by the plan. It also promotes walkability and connectivity through "complete streets" and integrated public space approaches and thus, encourages a more active and healthy lifestyle for its future residents.

Places to Grow – Growth Plan for the Greater Golden Horseshoe:

The lands are predominantly identified as a “settlement area”, as defined by the Growth Plan. The main goals of the latest iteration of this plan (2017) are to accommodate forecasted growth in complete communities. These are communities that are well designed to meet people’s needs for daily living throughout an entire lifetime by providing convenient access to an appropriate mix of jobs, local services, public service facilities, and a full range of housing options to accommodate a range of incomes and household sizes. Building compact and complete communities will help reduce greenhouse gas emissions and ensure communities are more resilient to the impacts of climate change.

Section 1.2.1 contains the following principles, which provide the basis for guiding decisions on how land is developed, resources are managed, and public dollars are invested:

- Support the achievement of complete communities.
- Prioritize compact built form to make efficient use of land and infrastructure and support transit viability.
- Support a range and mix of housing options to serve all sizes, incomes, and ages of households.
- Improve the integration of land use planning with planning and investment in infrastructure and public service facilities, including integrated service delivery through community hubs.
- Integrate climate change considerations into planning and managing growth such as planning for more resilient communities and infrastructure and moving towards low-carbon communities, with the long-term goal of net-zero communities, by incorporating approaches to reduce greenhouse gas emissions.

Particularly relevant to the Secondary Plan, Policy 2.2.2 of the Growth Plan directs municipalities to develop a strategy to achieve intensification throughout delineated built up areas which will:

- Achieve the desired urban structure.
- Identify the appropriate type and scale of development and transition of built form to adjacent areas.
- Identify strategic growth areas to support achievement of the intensification target and recognize them as a key focus for development.
- Ensure lands are zoned and development is designed in a manner that supports the achievement of complete communities.
- Prioritize planning and investment in infrastructure and public service facilities that will support intensification.

Policy 2.2.2 requires that by 2031 and for each year thereafter, a minimum of 60% of all residential development occurring annually within the Region will be within the built-up area. Once a new Regional Plan is approved and in effect, and each year until 2031, a minimum of 50% of all residential development occurring annually within the Region will be within the built-up area. Until the Regional Plan is updated and approved, the existing target of 40% intensification will apply. This is especially important to consider with respect to the limited quantity of vacant urban designated land which is a potential limiting factor for the market potential for such growth within the Town. The Prudhommes Secondary Plan area is

predominately designated as Built Up Area and therefore will be required to contribute to the municipality's intensification target.

Policy 2.2.3 of the Growth Plan provides that all areas of compact built form will be planned and designed to:

- Cumulatively attract a significant portion of population and employment growth.
- Provide a diverse and compatible mix of land uses, including residential and employment uses to support vibrant neighbourhoods.
- Generally, achieve higher densities than surrounding areas.
- Achieve an appropriate transition of built form to adjacent areas.

Policy 2.2.6 specifies that municipal housing strategies are to be developed that support the achievement of the minimum intensification and density targets in the Growth Plan by:

- Identifying a diverse range and mix of housing options and densities to meet projected needs of current and future residents.
- Establishing targets for affordable ownership housing and rental housing.
- Identifying mechanisms, including the use of land use planning and financial tools, to support the implementation of this policy.
- Alignment with applicable housing and homelessness plans required under the Housing Services Act, 2011.

This policy further states that municipalities will maintain at all times where development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units. This supply will include, and may exclusively consist of, lands suitably zoned for intensification and redevelopment.

Section 3.2 of the Growth Plan identifies key policies for infrastructure to support growth. This includes:

- Leveraging infrastructure investment to direct growth and development in accordance with the policies and schedules of the Growth Plan, including the achievement of the minimum intensification and density targets.
- Providing sufficient infrastructure capacity in strategic growth areas.
- Identifying the full life cycle costs of infrastructure and developing options to pay for these costs over the long-term.
- Considering the impacts of a changing climate.
- Prioritizing areas with existing or planned higher residential or employment densities to optimize return on investment and the efficiency and viability of existing and planned transit service levels.

Policy 4.2.10 requires municipalities to develop policies to reduce greenhouse gas emissions and address climate change adaptation goals. These are to support the achievement of complete communities as well as the minimum growth targets in the Growth Plan and reduce dependence on the automobile by supporting existing and planned transit and active transportation.

In accordance with Policy 5.2.5 of the Growth Plan, the minimum growth targets are minimum standards and municipalities are encouraged to go beyond these minimum targets, where appropriate, except where doing so would conflict with any policy of this Plan, the PPS or any other provincial plan.

The Secondary Plan is consistent with the policies that pertain to intensification of settlement areas to accommodate forecasted growth. It encourages a more compact built form than surrounding lands that will include a range of employment and housing opportunities while providing appropriate transition of built form as building heights are purposefully lower where they are adjacent to existing communities. As such it is Staff's opinion that development resulting from its guidelines and policies of the new Prudhommes Secondary Plan will implement direction from the Growth Plan by introducing varying forms of residential land uses supported by commercial/retail/employment land uses that minimizes reliance on the automobile through a more compact, walkable built form, while providing opportunities for further commercial/retail growth and tourism opportunity within the Town.

Greenbelt Plan:

The eastern portion of the subject lands as shown on Schedule E3 of the Plan is as Niagara Peninsula Tender Fruit and Grape Area ('Specialty Crop') on Schedule 2 and as Protected Countryside on Schedule 1 within the Greenbelt Plan, 2017. Notwithstanding this designation, there are existing, longstanding commercial uses and industrial operations on these lands.

In addition to the information above, it should be noted that the previous Greenbelt Plan, 2005, inconsistently designated the lands. Schedule 1 designated the lands as Hamlet and Schedule 2 designated the lands Niagara Peninsula Tender Fruit and Grape Area ('Specialty Crop'). This would further reinforce the Undelineated Built Up Area notation for the Secondary Plan area east of Jordan Harbour in the Growth Plan.

The applicable policies of the Specialty Crop Area require protection of these areas while allowing and promoting agricultural uses and activities. It requires provision of the appropriate flexibility to allow for agricultural, agriculture-related and on-farm diversified uses, normal farm practices and an evolving agricultural and rural economy. As such, development resulting in land uses that are not in line with the above are not permitted. It does permit existing non-agricultural uses to continue and expand subject to the policies of 4.5 of the Greenbelt Plan, 2017.

Discussions between the Town, Region and Province are on-going with respect to the lands on the east side of Jordan Harbour. The Town and the Region recognize these lands as developed and are supportive of the re-development of these lands for continued non-agricultural uses. The Secondary Plan provides applicable policies to guide the future re-development.

The Secondary Plan amends to the Town's Official Plan. Subsequent to adoption of the Secondary Plan, it will be sent to the Region as the approval authority. The Region, Town and Ministry of Municipal Affairs will need to review and discuss the status of Special Policy Area A. In the interim, collaboration between the Ministry and the Region is ongoing.

Regional Policy Plan:

It is required that the municipality ensures that proposed developments conform to the Regional Policy Plan. The responsibility for regulating land uses within the Secondary Plan area rests with the Town through its Official Plan and Zoning By-law.

The lands on the west side of Jordan Harbour are designated as Built Up Area on Schedule A – Regional Structure of the Regional Official Plan. The Town has been assigned an intensification target of 40% per Niagara 2031. Accordingly, a minimum of 40% of all residential development occurring in the Town will be directed to the Built-up Area until the completion of the Municipal Comprehensive Review (MCR) through Niagara 2041. The draft MCR Phase 3 population and employment allocations proposed an intensification rate of 80% for the Town. The redevelopment of the Prudhommes site for a dense, mixed use community with a variety of housing choices will assist the Town in meeting and exceeding this interim and proposed new intensification target.

The Secondary Plan lands on the east side of Jordan Harbour are designated as Protected Countryside on Schedule A - Regional Structure and Unique Agricultural Area on Schedule B - Agricultural Land Base of the Regional Official Plan. As noted, lands within in this designation contain existing, established commercial and industrial operations.

The Regional policies encourage and promote:

- Development of a framework for complete communities all across Niagara, including a diverse mix of land uses, a range of local employment opportunities and housing types, high quality public open spaces, and easy access to local stores and services via automobile, transit and active transportation.
- Sustainable, vibrant, complete communities by encouraging mixed and integrated land uses and promoting development that is compact, transit supportive and provides for active transportation.
- Development of mixed use areas (such as downtowns and commercial areas) to provide an attractive streetscape and public realm.
- The provision of affordable housing.
- Social inclusion for all residents with access to housing, commercial goods and services, job opportunities and social services.
- A range of housing types to serve a variety of people as they age.
- Urban design standards, municipal beautification, streetscape improvements, public art and public gardens to ensure communities remain attractive places, enhance the quality of life and encourage tourism.
- Complementary private realm site design that addresses public safety, active transportation and landscaping.
- Directing growth in a manner that promotes the efficient use of existing municipal sewage and water services.
- Plan Intensification Areas to provide a diverse mix of land uses that complement and support the overall residential intensification objective. These may include, employment, commercial, recreation, institutional and other compatible land uses in relative proportions dependent on area characteristics and the intended critical mass of residential development.
- Plan Intensification Areas to attract a significant portion of population and employment growth, relative, to the shape and character of the community.

It is Staff's opinion that this Secondary Plan is consistent with the policies or direction of the Regional Official Plan. It will provide a highly walkable space that will connect a compact built form with park amenity spaces and naturalized areas of the waterfront. The built form will consist of a range of land-uses in support of a complete community, including high quality public realm space along the roads coupled with attractive urban and architectural design.

Official Plan:

According to the Town Official Plan, the lands on the west side of Jordan Harbour are currently within the existing Prudhommes Secondary and designated for residential and commercial development. These lands are also designated as Built Up Area. The east side of Jordan Harbour is designated under the Greenbelt Plan.

Section 1.2 of the Official Plan notes that a sustainable community is achieved by:

- Providing choices and opportunities for housing, employment, transportation, social, recreational and cultural amenities.
- Making efficient use of infrastructure by focusing on a compact, mixed-use, walkable, bikeable and connected community.
- Promoting urban design guidelines to ensure a high quality of building and site design
- Encouraging design practices that address the accessibility needs of residents with disabilities.
- Identifying opportunities for promoting energy conservation and reducing waste.

Section 1.3 of the Official Plan contains several goals and objectives including:

- Accommodating new and innovative housing types.
- Encouraging local employment so residents can work in close proximity to home.
- Encouraging the development of neighbourhoods which provide a range and mix of housing types and densities.
- Fostering a sense of civic identity through a high standard of urban design in public and private development.
- Facilitating the provision of a full range of goods and services to meet the needs of residents and visitors.
- Providing for housing that is affordable to the community and diverse in an effort to accommodate the broadest range of income levels.
- Encouraging intensification and redevelopment within the urban areas specifically within and in proximity to the CBDs.

Section 1.4 references Regional growth studies and identifies numbers of new residents and corresponding dwelling units and employment opportunities that will need to be accommodated by the Town during the life of the Official Plan. This Prudhommes Secondary Plan area will be a primary location for this growth as it is ideally situated between the appealing Lake Ontario waterfront and the QEW which provides high accessibility.

Section 1.6 provides concepts for guiding future development in urban areas. Section 1.6.4 states that intensification is an appropriate means of accommodating growth since it makes better use of existing serviced land and that the increase in housing units and employment

created by intensification is also considered a good approach to maintaining and improving vibrancy in a community.

Section 3.1.4 requires planning for a higher proportion of medium and high-density development in the Prudhommes area.

Section 3.1.13 of the Official Plan refers to Residential Intensification. It indicates that the Town will consider residential intensification subject to the following criteria:

- The development will be characterized by quality design and landscaping, will implement suitable building setbacks to preserve the existing character of the neighbourhood, shall meet current parking standards and meet or improve traffic movements so as not to negatively impact the surrounding neighbourhood from the perspectives of safety or neighbourhood character

The current Official Plan includes existing Secondary Plan policies for the Prudhommes lands (Section 3.1.15.2) that will be replaced with those of the new Plan.

Section 4.13 supports energy efficiency and improvements to air quality by encouraging the reduction of energy consumption, endorsing the development of compact and mixed-use neighbourhoods and by promoting innovative forms of alternative and renewable energy, in land use and development patterns. Policies are included to reduce energy consumption by encouraging reasonably compact forms of development in conjunction with efficient pedestrian, bicycle and vehicular transportation networks along with efficient or renewable energy systems and energy efficient buildings (i.e., LEED design). Guidelines to encourage developments that are inclusive of these characteristics and initiatives are included in the Secondary Plan.

The policies in Section 5.1.4 guide economic growth and add stability to the local economy by providing for high quality businesses and services along the QEW and protecting and preserving employment areas for current and future use. They also promote walkable, bikeable neighbourhoods with linkages to open spaces which provide a system of parks, trails and nature-based attractions for appreciating the wide variety of natural and cultural amenities.

In the transportation section of the Official Plan (Section 6.1.1), key objectives include the following:

- Develop complete streets which provide the infrastructure support for complete communities where neighbourhoods are well connected to each other, commercial areas, employment areas, and community facilities with a safe and efficient transportation network that accommodates all users on all roads.
- Reduce car dependence, support active transportation and an efficient sustainable transportation system.
- Develop and maintain a suitable road hierarchy within the Town.
- Promote municipal and interregional transit service within and to the Town as well as GO transit service.

With respect to active transportation, walking, hiking and bicycling are all considered valuable means of transportation, and a key component to attract tourism in the Town. Facilities

associated with walking, hiking and cycling are related to the physical environment, and, as such, the following objectives and policies reflect the Town priorities:

- Encourage walking, hiking and bicycling, and work towards a safe, user-friendly environment in the Town that will enhance the overall quality of life and will help to promote tourism.
- Ensure a connected network for pedestrians and cyclists linking destinations such as retail areas and employment area to residential areas.
- Promote trail use safety through education and enforcement initiatives.
- Incorporate walking, hiking and cycling in the Town land use and transportation planning activities.
- Encourage and ensure the integration of the variety of trail facilities within the Town, including the Regional Bicycling Network, the Bruce Trail, the Waterfront Trail, the Twenty Valley Trail and other networks outside of the Town with external funding partners.
- Maximize the annual improvements for trails with the aim of completing major continuous segments of the Trail Network in as timely a manner as possible.
- Promote a land use pattern, density and a mix of uses to minimize the length and number of vehicle trips to support current and future use of transit and active transportation.

The Secondary Plan has been developed with the objective of maximizing walkability and access throughout the subject lands. It will produce a high level of connectivity through integration of the built form with trails and park/natural spaces and road rights-of-way will be developed through a complete streets approach where all potential users (pedestrians, cyclists, vehicles, etc.) will be accommodated. With respect to Section 6.1.1, as previously noted a key objective is to make sure communities are well connected to each other. As such, a connection to the existing Victoria Shores community is included, although the configuration of this connection has been developed with consideration of community concerns regarding traffic increases through their neighborhood, as discussed later in this report.

Sections 7.1.3, 7.1.4 and 7.1.5 includes the following policies for the provision of municipal services in Urban areas:

- The Region will provide and maintain an adequate water supply and sewage treatment system for designated urban areas.
- The Town shall co-operate with the Region to identify and correct deficiencies within the municipal water supply and sewage collection system.
- Planning for sewage services shall direct and accommodate expected growth or development in a manner that promotes the efficient use and optimization of existing municipal sewage services.
- Plan for stormwater management to minimize, or, where possible, prevent increases in contaminant loads and minimize changes in water balance and erosion.
- Maximize the extent and function of vegetative and permeable surfaces.
- Promote stormwater management best practices, including stormwater attenuation and re-use, and low impact development.
- Develop and implement stormwater management plans that will establish storm drainage requirements for ultimate development within the Urban Area. Temporary stormwater management facilities will not be provided.
- The Town shall promote the use of naturalized methods of stormwater management.

- The Town shall encourage the Region to maintain and improve the regular collection of municipal waste in residential and commercial areas.
- The Town encourages new development to provide for collection and storage of recyclable wastes on site.

Development of the Secondary Plan area will require upgrades to the Regional sanitary system. The Region has developed a Master Servicing Plan that includes provisions to undertake these improvements based on population and unit forecasts associated with the implementation of the Secondary Plan. Funding for these improvements will be provided through Regional Development Charges.

Section 8.6 of the Official Plan identifies urban design policies which are frequently referenced in the Secondary Plan. Policies are provided for a wide range of land uses as well as for parks and open spaces and gateway locations and the road network. The objectives are these policies are to:

- To encourage a compact, walkable and well-connected community.
- To encourage mixed use and a range of housing.
- To provide a linked public open space system.
- To encourage quality architecture and to ensure that buildings provide an appropriate edge to the street.
- To encourage increased density in appropriate locations.
- To provide a range of transportation options, including walking and cycling and encourage complete streets for all users.
- Appropriate design of streets and public spaces to enhance and encourage pedestrian and public activity.
- To encourage a strong sense of place and improvements to the public realm.
- New development is to be compatible with established development.
- Protection of the natural environment and cultural heritage landscapes and features.

Considering the above policies, it is staff's opinion that the Secondary Plan is consistent with the Town's Official Plan.

Planning and Development Staff:

The Prudhommes study area has sat relatively vacant for a number of years and the redevelopment of the site will be a major aesthetic improvement; positively contributing to the identity of the Town. It provides waterfront exposure with natural environment characteristics that are vital to the enhancement of the local tourism industry and recreational opportunities. The Town is predominately a Greenbelt community with limited space available for urban settlement. This provides a challenge with respect to the requirements of the Growth Plan and its intensification targets, as well as its mandate to plan for a range and mix of housing options, including more compact housing options that can accommodate a range of household sizes in locations that can provide access to transit and other amenities. This Secondary Plan provides development opportunities to accommodate a significant amount of the growth anticipated within the Town. Building more compact communities reduces the rate at which land is consumed while supporting transit-supportive growth, with walkable street configurations. Compact built form pairs with more effective transit and active transportation networks. They are necessary to ensure the viability of transit; connect people of all ages to their homes, jobs and other aspects of daily living;

and meet climate change mitigation and adaptation objectives. As such, the Secondary Plan includes policies that contribute to a compact built form that makes efficient use of the land, transportation network, and servicing capabilities to accommodate this growth without compromising the wellbeing and integrity of adjacent existing communities. It also considers input received from the general public and landowners to reach a balance with respect to land-uses and their orientation.

The Secondary Plan provides a vision for the area to become a successful, diverse, walkable, mixed-use waterfront neighbourhood. It includes policies relating to growth management, sustainability and safety, urban design, housing, employment and mixed use, protection of the greenlands, mobility and transportation and sustainable servicing. Built in to the policies and land use schedules is consideration of potential impacts to the existing community that is adjacent to the site. A height strategy (Schedule B) is proposed which generally transitions development form from low density residential development and employment uses with limited height allowance, to more compact medium and higher density land uses (mixed-use residential and commercial) towards the centre of the site. The exception is the existing Vineland Manufacturing site on Victoria Avenue North where flexibility to accommodate a higher building is provided in response to comments received from the landowner. As discussed further in the following section, the existing vegetated open space wrapping around the property to the east and partially to the south will provide a buffer to the building. The building design, including a step-back feature so that the highest point is furthest away from existing residences, will also help to mitigate potential shading and visual impacts of the building.

The Secondary Plan includes a comprehensive road network that will incorporate complete streets policies. A complete street is one that accommodates multiple modes of transportation, people of all ages and abilities and supports adjacent land uses. The development of complete streets can create a variety of different benefits and opportunities for communities, such as increased investment into local businesses; improved community health through new opportunities for physical activity; a strong sense of community; increased property values; universally accessibility and more equitable spaces for public participation; and reduction in vehicle traffic and carbon emissions. Schedule D – Active Transportation outlines the proposed road and trail network and connections to surrounding trail systems. In response to concerns raised by the Victoria Shores community regarding the road connection to Prudhommes (at the west end) and the potential for high traffic volumes, staff have reviewed potential mitigation opportunities. While it is necessary for the Town to maintain a form of connection at this location for pedestrians and emergency services, and to avoid isolating the two communities which would be contrary to good planning practice, the option of incorporating “flexible” bollards to physically discourage through traffic (but allowing passage in emergency situations) and landscaping that will visually narrow the streetscape is recommended. These provisions have been included in the Secondary Plan. Staff believe these measures will restrict traffic flow into Victoria Shores and address the concerns brought forward.

There are also concerns with respect to the proposed access to the subject lands that is closest to Victoria Avenue interchange. It is important to note that flexibility is included in the Secondary Plan to make this one-way access or even restrict it to a drive-way access function for the proposed employment lands. These measures will need to be considered while factoring in MTO’s input regarding this entrance, as discussed earlier in the report. The most appropriate option will be confirmed as development applications are received.

Included in the plan are design guidelines for the public realm to provide for vibrant and enlivened public spaces. The public open space network within the Prudhommes site will contain a mix of active and passive/natural park spaces that will provide opportunities. These spaces will be linked with active transportation facilities and will enhance the recreational opportunity in the area, contributing to an elevated quality of living for the residents. The open space network will also help to protect the existing natural environmental features that are present and prohibit development from occurring too close to the lake shore (Schedule E2).

The Secondary Plan incorporates all the identified land uses together with the proposed road and trail network to promote the development of a complete community. Complete communities are an integrated approach to transportation planning, land use planning, and community design to provide a good quality of life and meet the needs of people of all ages, abilities, ethnicities, and income levels. The goal is to increase flexibility for people to choose where they can live, leading to a greater economic and social inclusion of social housing tenants within the Town. The Town's Official Plan outlines that a sustainable community is achieved by:

- Providing choices and opportunities for housing, employment, transportation, social, recreational and cultural amenities.
- Making efficient use of its infrastructure by focusing on a compact, mixed-use, walkable, bikeable and connected community.

The Secondary Plan, if approved will assist in meeting the long-term objectives of Provincial policy that support efficient and compact land use by providing flexibility to adjust the built form based on market conditions and mandated growth targets. It aligns with directing growth towards existing settlement areas, while maintaining outside agricultural land (with the exception of the east side of the Secondary Plan since this land is not suitable for agricultural production). It also celebrates the area as a landmark and key destination in the Town and the Region. Furthermore, it includes refinements based on comments received with respect to traffic, access and land-use, thus working to achieve a balance in considering interests of both landowners within the site, adjacent residents and agencies.

ALTERNATIVES FOR CONSIDERATION:

Council has three options with respect to the proposed application. Council may:

1. Approve the application as per the Staff recommendation;
2. Adjourn the application if further information is required; or
3. Refuse the application.

COMMUNICATION/ENGAGEMENT OVERVIEW:

A design charrette as well as public and stakeholder consultations were undertaken between September 2016 and March 2017. Two formal public meetings were held before the Planning Committee on January 8 and January 9, 2018. The following comments have been received as of the preparation of this report:

Traffic/Road Network/Parking

- Multiple concerns on traffic impacts upon full build-out of the Secondary Plan area, including high volumes along the service road, throughout the subject lands and within the adjacent Victoria Shores community.
- Concern regarding potential interchange improvements at Victoria Ave and/or Jordan Road.
- Concern regarding the adequacy of parking included in the Secondary Plan and the potential for overflow into existing adjacent communities.
- Need to restrict construction traffic from travelling through the Victoria Shores community.

Staff comment: The Town's consultant completed a Traffic Analysis of the Secondary Plan study area to assess the transportation network's ability to handle the resulting development and identify, at a preliminary level, potential modifications required to adequately serve the development. Several locations were identified where volume to capacity ratios could result in the need for improvements including in the vicinity of the Victoria Avenue interchange, the intersections of the North Service Road at Victoria Avenue and the South Service Road at Jordan Road. The extent of improvements required will be confirmed through development applications. Improvements could include addition of traffic signals as well as the addition of left and right turn lanes. In addition, through coordination with MTO, it has been confirmed that there will be required improvements in association with the interchanges to accommodate the potential for longer queue lengths coming off of the QEW and at the intersections at both the North and South Service Roads. The extent of these improvements will be confirmed based on the detailed traffic impact studies that will be required to be submitted for Town, Regional and MTO approval as a component of future development applications. In the interim, it has been confirmed by MTO that an increase in the footprint of the interchange is not anticipated to accommodate the necessary improvements.

With respect to parking, flexibility has been included in the Secondary Plan for above or below ground parking structures. In addition, policies pertaining to formation of "complete streets" indicate that on-street parking will be provided where feasible throughout the Secondary Plan area. The provision of sufficient parking is always reviewed when a development is being considered and the required parking provisions in the Town Zoning By-law, respective of the type of development proposed, will be implemented.

Road Connection between Prudhommes and Victoria Shores

- Need to ensure that all forms of commercial traffic cannot access the existing Victoria Shores community.
- All schedules had previously shown a through road into the Victoria Shores community which increase traffic and impact to the quality of life of the residents.

Staff comment: As noted earlier in this report, while it is necessary for the Town to maintain a form of connection at this location to maintain connectivity for pedestrians and emergency services, and to avoid the total closing off of communities, the incorporation of landscaping and flexible bollards as previously discussed into the Secondary Plan has been completed. In addition, the Secondary Plan has been revised to include wording that commercial traffic cannot access the Victoria Shores community from Prudhommes. With these combined measures, traffic flow into Victoria Shores will be strongly discouraged, while a connection between communities is maintained.

Servicing

- The Victoria Shores community has commented on the current state of the Regional Laurie Avenue sewage pumping station (odours/overflow) and its capacity. Since it will require significant upgrading to address flows from Prudhommes, a recommendation was made for a feasibility review of constructing a new sanitary station to service the proposed development within Prudhommes. Reviewing this option would confirm the best option for the municipality as well as potentially mitigate sever impact on residents during and following construction. This study should tie in the Prudhommes development with the proposed improvements east of the harbor.
- Concerns identified regarding the required upgrading of the Town's gravity-fed pipeline coming from Prudhommes to the station as well as the Regional forcemain and expressed concern regarding disruption caused by construction on road and capacity to service Prudhommes development. Also, confirmation if the footprint will expand when the station is upsized was requested.
- Cost of infrastructure – existing property owners should not bear the cost of improvements associated with the development.

Staff comment: There are servicing upgrades identified within the Regional Master Servicing Plan as a result of the development of this Secondary Plan. As a measure of due diligence and response to comments received regarding required serving upgrades, the Town retained a third party to review the identified upgrade requirements based on the top of the range of the most recent population projections (6,300 people) included in the Secondary Plan. The following improvements were confirmed to be required:

- The existing Town gravity sewer downstream of the proposed development that exists along Dustan Street and Laurie Avenue (i.e. conveying flows from Prudhommes to the Regional pumping station) will require upsizing.
- The Laurie Avenue sewage pumping station will require upsizing beyond calculations of the Master Servicing Plan (i.e. upgrade to 115 L/s is needed)
- The Regional forcemain that conveys flows from the Laurie Street pumping station westerly will require upsizing
- The Victoria Avenue pumping station will require upsizing beyond calculations of the Regional Master Servicing Plan (i.e., upgrade to 300 L/s is needed) to accommodate flows from Prudhommes as well as forecasted development in Vineland and Jordan

These improvements will be coordinated to minimize impacts to the Victoria Shores community. It is also important to note that although the improvements will include upgrades to the associated electrical equipment and standby generator, including expansion of the generator building, the improvements can be accommodated within the existing site of the pumping station (i.e., no land acquisition is required). Since these improvements are development driven, they will be funded by development charges and not tax dollars. The available servicing capacity following these upgrades will need to be further considered and evaluated when planning applications are submitted. Further to the results of the Master Servicing Plan, servicing investigations associated with the development of the Secondary Plan, and the third-party review, it was concluded that the identified upgrades are the preferred plan for the provision of services. As such, a feasibility review for a new sanitary station within the Prudhommes site was not undertaken.

Building Height and Land Use/Character Inconsistency

- There are 2.5 storey homes proposed that will be in proximity to the rear yards of the existing houses on Dustin Street. Residents have noted potential issues regarding visual and privacy impacts due to the close proximity, and since trees in the naturalized buffer area between have been removed.
- Residents expressed concern regarding potential changes to the grade of the proposed homes which could elevate them, further adding to the issue.
- A request was received to permit a 10-storey step-back design on the Vineland Manufacturing site. It was stated that as per section 7.5 of the Official Plan (urban design), mixed use buildings are expected to resemble a mid-rise apartment and as such, the maximum building height 8 to 10 stories would reflect this. The increase in permitted height from the previously recommended 4 stories allows more flexibility to transition and tier heights, providing interesting architectural form that will have a stronger presence within the public realm. The proposed would also work towards Growth Plan targets by promoting a more compact built form that focuses growth in settlement areas.
- Concern regarding the 10 storey height allotment at the Vineland Manufacturing site on Victoria Avenue and its potential to impact views and create shade and shadow effects to the adjacent natural area and nearby residents.
- Lake House restaurant falls within the Prudhommes Secondary Plan and is currently designated as General Commercial which permits the restaurant. This designation is being changed to high density residential which does not specifically list restaurants among the permitted uses. Request that the restaurant use be permitted within the high density residential designation to allow the owner the option of keeping the restaurant under a revised, mixed-use design.

Staff comment: As noted earlier in this report, the recently updated Provincial Policy Statement and Provincial Growth Plan both include objectives to accommodate forecasted growth by promoting intensification through a more compact built form that makes efficient use of existing and planning infrastructure services, promotes active transportation, and provides a mix of housing and employment opportunities.

The primary objectives of Provincial Policy such as the Greenbelt Plan along with the Niagara Escarpment Plan are to preserve the highly valuable and productive agricultural lands that are outside of identified built up areas in the Region. This strongly coincides with the vision of the Town as a tourist destination and a Centre of Agricultural Excellence which is reflected in the Official Plan policies and Zoning By-law. The Town will inevitably experience growth in the coming years and directing it to the designated built-up/settlement areas will result in keeping the overall rural character of the Town intact. As previously mentioned in this report, the Prudhommes Secondary Plan transitions from low density residential development as well as employment land uses with limited height allowance, to more compact medium and higher density land uses (mixed-use residential and commercial) towards the centre of the site. This minimizes impacts of land-use and building height on adjacent existing communities. With respect to the 2.5 storey dwellings proposed adjacent to Victoria Shores community, the Town Zoning By-law typically requires 7.5 metre rear yard setbacks. In addition, there is a minimum 12-metre-wide naturalized corridor proposed between the properties, as well as the rear yard of the existing Victoria Shores residences. As such, there will be significant separation between dwellings and there will be visual screening resulting from vegetation within the naturalized corridor. There have been minor revisions to the

Secondary Plan to more strongly encourage retention of existing and planting of new vegetation/trees, where appropriate, within the naturalized buffer.

The exception to the height transition towards the centre of the Prudhommes site is the Vineland Manufacturing site on Victoria Avenue north. In response to requests by the landowner, flexibility has been included in the plan to accommodate a higher building. The highest point within this site (10 storeys) would occur approximately a minimum of 100 metres away from the closest rear yard to the east, with the majority of this buffer area currently covered with natural vegetation (trees and shrubs) that would be remain. The proposed heights are illustrated on Schedule B – Building Height. In addition, further to comments received from local residents, the landowner has proposed to incorporate a step-back design that would ensure the tallest portion of the building would be located closest to Victoria Avenue and therefore as far as possible from existing dwellings. Further consideration of window placement during future site plan approval along with future landscaping (i.e., tree and shrub plantings) anticipated as part of Regional and Town complete streets/public realm policies will further address privacy concerns. Also, a shadow study is recommended. The proposed height would permit development supporting the goal of a more compact built form within a built-up area, while contributing to a range of housing options and, at the same time, providing potential employment opportunities within a mixed-use design.

Design

Design policies are specific in requiring high quality materials/masonry for low-rise apartments and it would be beneficial to hold all buildings to the same high standard. This would result in reduced maintenance costs, maximizing assessment value, climate resiliency and reduced carbon footprints. All sides of a building should be held to the same high design standard as the front since higher densities mean that homes and backyards become closer together and buildings get higher, causing all sides of buildings to become more visible.

Staff Comment: The Secondary Plan is consistent with the Town Official Plan with respect to urban design guidelines. As such, well designed buildings that incorporate visually attractive and highly functional components will be required. Future site plan approval processes will include the requirement for building elevations and renderings, where appropriate, to be submitted to make sure the urban design policies are adequately addressed.

Natural Environment

- There needs to be added emphasis placed on protection and enhancement of local and regional ecosystems and biological diversity. This will help reduce CO2 emissions, mitigate erosion and flooding and create a healthier community. Achieving these objectives will not be possible if non-native plant species are allowed to be planted since they negatively impact biodiversity and can become invasive. Therefore, the Secondary Plan should only allow planting of native species.
- The Town should develop and/or adopt street tree planting guidelines for both quantity and quality of soil to better facilitate tree growth.
- The areas identified as natural environment in the plan potentially include trails, stormwater management ponds and other drainage features. How much natural environment will truly be protected if this is the case? The proposed width of the trails is too wide, and they generally should not be allowed in the limited Natural Environment areas.

- Concerned about the Town's role in ensuring no further disruption to natural environment will occur.
- Schedule E2 identifies candidate natural environment constraints; however, there is development shown over top of them in other schedules and it does not appear that they are protected.

Staff Comment: The Secondary Plan includes policies that encourage preservation of natural areas and woodlots and maintenance of connectivity between natural features, recognizing their importance to the overall ecological functions of the area. Tree or other plantings throughout the area are required in the Plan to achieve a mature forest cover and to provide shoreline protection, where adjacent to the waterfront. If tree removal is unavoidable, a tree replacement ratio will be followed, and tree plantings will be required in all Town public works projects. The policies do indicate that native species are preferred. Although there may be situations where species not specifically native to the area are permitted to be planted, it will have to be demonstrated that these species are non-invasive and that they will integrate, complement and support the adjacent natural environmental features in a naturalized, self-sustaining manner.

The natural environment protection areas identified in the Land-Use Schedules were identified through consultation with the NPCA. They will be protected and maintained in their present form, except where an Environmental Impact Study (EIS) has been completed to revise their boundaries. This study would be completed during future planning approvals stages. To ensure their consideration, the candidate significant habitat areas are identified on the schedules even though potential development in these areas is also shown. This is to provide flexibility in conjunction with policy wording for these areas to be refined based on EIS without amendment to this plan, while at the same time requiring them to be protected or otherwise that proper reviews are conducted and affected stakeholders are able to comment.

General

- The Secondary Plan should include a pier with a sandy beach created on the leese side
- Consider public restrooms similar to Port Dalhousie and perhaps a public shelter for parties and family gatherings
- Need to make sure grading is adequately addressed so that existing homes on Dustin don't encounter drainage issues as a result of new development
- Dust impacts due to higher traffic during and following construction.

These general comments will be addressed during future development approvals. In addition, comments were received by FBH Group, the largest landowner in the plan area pertaining to minor policy wording changes and revisions which were considered and implemented, as appropriate.

ALIGNMENT TO CORPORATE PLAN:

The Economic Development strategy in the January 2015 Corporate Plan is pertinent preparation of a new Secondary Plan. The Strategy supports the implementation of planning guidelines to develop Prudhommes so that it will be a vibrant part of the community. It also encourages opportunities to support investment and attract new businesses to ensure that Lincoln is a sustainable and prosperous Town. The preparation of a new Secondary Plan is consistent with the Corporate Plan.

APPENDIX B

**Ministry of
Municipal Affairs**

**Ministère des
Affaires municipales**

Ministry of Housing

Ministère du Logement

Municipal Services Office
Central Ontario
777 Bay Street, 13th Floor
Toronto ON M5G 2E5
Phone: 416-585-6226
Facsimile: 416-585-6882
Toll-Free: 1-800-668-0230

Bureau des services aux municipalités
du Centre de l'Ontario
777, rue Bay, 13^e étage
Toronto ON M5G 2E5
Téléphone : 416-585-6226
Télécopieur : 416-585-6882
Sans frais : 1-800-668-0230



May 7, 2018

By email only

Kirsten McCauley, MCIP, RPP
Senior Planner, Secondary Plans
Planning and Development Services
Niagara Region
1815 Sir Isaac Brock Way
Thorold, ON L2V 4T7

**Re: Updated Prudhommes Secondary Plan, April 2018 (OPA 3)
Town of Lincoln, Region of Niagara
MMA File No.: 26-EOPA-188276**

Dear Ms. McCauley,

Thank you for requesting comments from the Ministry of Municipal Affairs ("MMA"), through the One-Window Provincial Planning Service, on Official Plan Amendment No. 3 (OPA 3) to the Official Plan of the Town of Lincoln, which implements the updated Prudhommes Secondary Plan.

We understand that Council of the Town of Lincoln adopted the updated Prudhommes Secondary Plan, as OPA 3 to the Town's Official Plan on April 16, 2018, and that it has been submitted to Niagara Region for review and approval, as the approval authority.

The new Prudhommes Secondary Plan is an update to the existing 2006 Secondary Plan (OPA 37) that is within the current Lincoln Official Plan adopted by Town Council on March 6, 2006 and approved by the Region of Niagara (Region) on August 2, 2006. We understand the new Secondary Plan provides new updated policies in the context of the current planning framework, and supports the creation of a complete, sustainable community that provides a mix and range of employment, commercial, and residential land uses, including a diverse range of housing options, local services and community infrastructure. The new Secondary Plan also accommodates forecast growth through a more compact built form.

MMA circulated the updated Prudhommes Secondary Plan to the Ministry of Agriculture, Food and Rural Affairs (OMAFRA) staff and this letter reflects coordinated provincial

land use planning comments through the One Window Provincial Planning Service. The One Window comments are intended to assist the Region with their decision making process. The updated Secondary Plan has been reviewed in the context of the *Planning Act*, Provincial Policy Statement, 2014 (PPS), Greenbelt Plan, 2017 and the Growth Plan for the Greater Golden Horseshoe, 2017 (Growth Plan).

General Comments

The Town of Lincoln lies within the Greenbelt Area and is subject to the requirements of the Greenbelt Plan, 2017 with an effective date of July 1, 2017. The *Greenbelt Act, 2005* requires that all decisions on planning applications shall conform to the policies in the Greenbelt Plan and that municipalities amend their official plans to conform to the Greenbelt Plan. The Town is also subject to the Growth Plan, 2017 which also took effect on July 1, 2017.

Ministry staff is supportive of the Town preparing a new Prudhommes Secondary Plan as it applies to lands within the current Prudhommes Urban Area boundary to provide updated policies and detailed land uses to support the creation of complete communities through a mix and range of residential, commercial and employment land uses, a range of housing types, community facilities, well designed public spaces and prioritizing active transportation which is aligned with the Growth Plan's vision and policies.

Ministry staff are concerned that the new Prudhommes Secondary Plan proposes a settlement area boundary expansion of the Prudhommes Urban Area extending on the east side of Jordan Harbour contrary to the policies of the Greenbelt Plan.

The following provides more details for the Region's consideration relating to the new Prudhommes Secondary Plan.

Detailed Comments

Proposed settlement area boundary expansion proposed through OPA 3, Prudhommes Secondary Plan (Schedule 'A4' Prudhommes, Schedule 'B1' Land Use, Schedule 'B2' Building Heights, Schedule 'B3' Urban Design Features, Schedule 'B4' Active Transportation, Schedule 'B5-1' Constraints - Shoreline Stabilization Area, Schedule 'B5-2' Constraints - NHS Enhancement Areas, Schedule 'B5-3' Constraints - Greenbelt Special Policy Area and Section 3.1.15.2.11, Special Policy Area).

Greenbelt Plan

As noted above, the Town of Lincoln is located within the Greenbelt Area. The existing Prudhommes Urban Area adjacent to Lake Ontario is identified as a Towns/Villages in the Protected Countryside of the Greenbelt Plan and "Urban Area" in the Regional Official Plan (Schedule A – Regional Structure) and "Urban" in the current Lincoln

Official Plan (Schedule A – Land Use). The lands outside the Prudhommes Urban Area (Towns/Villages) on the east side of Jordan Harbour is designated Protected Countryside by the Greenbelt Plan and identified as Specialty Crop Area - Niagara Peninsula Tender Fruit and Grape Area (Schedule 2 to the Greenbelt Plan). The lands outside the urban area on the east side of Jordan Harbour are designated as Protected Countryside (Schedule A) and 'Unique Agricultural Area' in the Niagara Region Official Plan (Schedule B) and Specialty Agricultural (Schedule A1) in the Town of Lincoln Official Plan.

Notwithstanding the current designation as Protected Countryside and identification of the lands as Specialty Crop Area in the Greenbelt Plan, and the Region and Town Official Plan designations, the new Prudhommes Secondary Plan is proposing a “de facto” urban boundary expansion to the Prudhommes existing Urban Area (Towns/Villages) designation for the eastern portion into the adjacent Specialty Crop Area. The proposed urban expansion lands on the east side of Jordan Harbour within the Greenbelt Specialty Crop Area shown on Schedules B1, B2, B3, B4 and B5-3, Special Policy Area to OPA 3 include new and intensified urban land use designations and permissions (e.g. Employment, High-Rise and Mid-Rise Residential, Mixed Use and Parks and Open Space land use designations).

Section 3.1.15.2.11, Special Policy Area includes policies that these lands shall be permitted to continue their existing uses **or redevelop in accordance with the uses permitted in the Secondary Plan** (*emphasis added in bold*).

The Greenbelt Plan prohibits the expansion of Towns/Villages into Specialty Crop Areas, and lands within Specialty Crop Areas shall not be redesignated in official plans for non-agricultural uses (Section 3.1.2 of the Greenbelt Plan).

Growth Plan

Towns/Villages in the Protected Countryside are also subject to the policies of the Growth Plan. Policy 2.2.8 of the Growth Plan requires that a settlement area boundary expansion may only occur through a *municipal comprehensive review* that is initiated by an upper-tier or single-tier municipality that is approved by the Province. The Growth Plan does not support the use of “Special Policy Areas” as precursors to settlement area boundary expansions.

However, as noted above, Towns/Villages are not permitted to expand into Specialty Crop Areas, therefore a proposed settlement area boundary expansion is not possible for the Prudhommes Urban Area under the in-effect Growth Plan and Greenbelt Plan.

Recommendation

As noted above, the new Prudhommes Secondary Plan is proposing a settlement area boundary expansion outside of a *municipal comprehensive review* as required by the Growth Plan and the expansion of a Towns/Villages (Prudhommes Urban Area) into

Specialty Crop Areas and the redesignation of Specialty Crop Areas for non-agricultural uses which is prohibited by the Greenbelt Plan.

The Region needs to ensure that its decisions under the *Planning Act* conform with the policies of the Greenbelt Plan in accordance with the *Greenbelt Act, 2005*.

To ensure conformity with the Greenbelt Plan, ministry staff recommends that the Region modify OPA 3 as follows:

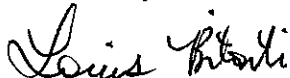
- Schedule 'B5-3' Constraints, Greenbelt Special Policy Area and Section 3.1.15.2.11 Special Policy Area be deleted, and
- Schedules 'B1', 'B2', 'B3', 'B4', 'B5-1', 'B5-2', be amended to reflect the existing boundary of the Prudhommes Urban Area in the Lincoln Official Plan for the purposes of the new Secondary Plan to conform with the Greenbelt Plan, Growth Plan, and in accordance with the current Niagara Regional Official Plan and Lincoln Official Plan.

Ministry and OMAFRA staff would be pleased to meet with Regional and Town staff to discuss the above-noted concerns in the hopes of achieving a satisfactory resolution prior to the Region's decision.

By this letter, we also request to receive notice of decision of the Region of Niagara on OPA 3 and that notice be sent to the undersigned.

Should you have any questions, please do not hesitate to contact me at (416) 585-6910 or by email at Louis.Bitonti@ontario.ca.

Sincerely,



Louis Bitonti, RPP
Senior Planner, Community Planning and Development (West)

Cc. Jackie Van de Valk, OMAFRA

Subject: Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln

Report to: Planning and Economic Development Committee

Report date: Wednesday, July 18, 2018

Recommendations

1. That Official Plan Amendment No. 3 to the Town of Lincoln Official Plan **BE APPROVED** as modified (Attached as Appendix 1 to Report PDS 11-2018) with policy and mapping deferrals as identified in Appendix 2 of this report;
2. That all parties **BE NOTIFIED** of Regional Council's decision in accordance with *Planning Act* requirements; and,
3. That staff **ISSUES** a declaration of final approval of the Official Plan Amendment 20 days after notice of Council's decision has been given, provided that no appeals have been lodged against the decision.

Key Facts

- This report seeks Regional Council's approval of the Prudhommes Secondary Plan (OPA 3), as modified.
- OPA 3 was adopted by the Town of Lincoln Council on April 16th, 2018 and was forwarded to the Region for approval.
- OPA 3 comprises approximately 50 hectares (124 acres) of land along 3 kilometres of Lake Ontario shoreline.
- The Prudhommes Secondary Plan, as modified, provides for a complete and sustainable new community that will offer a range of residential options, commercial opportunities, attractive and accessible open space with a street network that encourages active transportation.
- The Prudhommes Secondary Plan, as modified, is consistent with the Provincial Policy Statement, 2014, and in conformity with Provincial plans and the Regional Official Plan.
- There was extensive public consultation undertaken through the Secondary Plan process including 2 statutory public meetings in accordance with the *Planning Act*.

Financial Considerations

There are no direct financial implications arising from the approval of OPA 3. An appeal of Council's decision would result in the need for resources to support an LPAT hearing. Should there be appeals of Regional Council's decision, a further report on financial implications will be provided.

Analysis

Background:

The Prudhommes Secondary Plan study area is located along Lake Ontario, north of the QEW between Victoria Ave and Jordan Road in the Town of Lincoln. Historically, the area was a tourism recreation destination featuring the Wet'n'Wild Waterpark and other entertainment uses. In more recent years, the Prudhommes study area has sat relatively vacant. The redevelopment of the site will be a significant aesthetic improvement and would positively contribute to the identity of the Town. Its location provides waterfront exposure with natural environment characteristics that will enhance the local tourism industry and recreational opportunities of the area.

In 2006, the Town of Lincoln prepared a Secondary Plan for the Prudhommes area. The Plan provided for a concentration of commercial land uses, supported by a mix of residential housing. Subsequently, the introduction of the new outlet mall in Niagara-on-the-Lake impacted the Regional market and reduced the desire for the scale of commercial development originally proposed in the 2006 Secondary Plan. In addition, the implementation and subsequent updates of Provincial plans had to be considered for this area to address intensification targets and guide corresponding development. As a result, the Town decided to undertake a new Secondary Plan for the Prudhommes area. The Town also expanded the Secondary Plan area from the 2006 plan to include the lands on the east side of Jordan Harbour. The new Prudhommes Secondary Plan comprises approximately 50 hectares of land along 3 kilometres of Lake Ontario shoreline.

Vision and Objectives:

The vision for Prudhommes is to be a successful, diverse, walkable, mixed-use waterfront neighbourhood – adding an exciting and evolving destination within the broader Niagara Region. The Vision is further articulated through policy direction to create:

- i. A central Main Street that terminates at a waterfront park with buildings that front, face, and feature the main street, the waterfront; and views to Lake Ontario;
- ii. A well-designed and connected community of residential neighbourhoods that provide for a range of housing types, mixed-use developments, retail and service commercial uses, office uses, and community facilities;

- iii. A connected system of natural features recognizing the constraints of the Lake Ontario Shoreline, while promoting leadership in sustainability and green building technology;
- iv. A height strategy that includes low-rise buildings at the east and west ends of the site, adjacent to Victoria Shores and other existing residential uses, with a distinct transition in height, getting taller toward the middle of the Secondary Plan Area. The tallest buildings will become landmarks, framing the views to Lake Ontario and Jordan Harbour;
- v. A public open space network that includes a waterfront park that is connected to the existing natural features and the community. Continuous public access along the waterfront shall be provided and will incorporate key connecting links to the planned street network;
- vi. A multi-modal, active transportation network that promotes walking and cycling. The street network will be a highly interconnected network that could include public and private roads that promotes ease of access, orientation, and safety for pedestrian, cyclists, and motor vehicles. Streetscape design will establish a comfortable pedestrian environment; and,
- vii. A transit-ready community where development incorporates opportunities for any future GO Transit, intra-municipal, or other transit system investments. Any transit introduced into the area will be supported by the high quality public realm and appropriate built form.

The Secondary Plan will create a complete, sustainable new community where residents can have the opportunity to live and work in the same place with offerings that will draw visitors to the area to support the local economy. The policies of the Prudhommes Secondary Plan will ensure that development meets the day-to-day needs of residents, offers a range of residential options, appropriately integrates new development with existing development, and accommodates all forms of transportation. The Secondary Plan provides appropriate land use direction to celebrate the Prudhommes area as a landmark and key destination in the Town and Region.

Planning Review

The Prudhommes Secondary Plan has been reviewed against the Provincial and local planning policy framework. This review has been broken into 2 parts (west of Jordan Harbour and east of Jordan Harbour) because planning policy direction differs.

West of Jordan Harbour:

The following policy analysis relates to the consistency and conformity of the lands on the west side of Jordan Harbour in the existing Prudhommes settlement area.

Provincial Policy Statement (PPS), 2014:

The Provincial Policy Statement (PPS) provides direction on matters of Provincial interest related to land use planning and development in Ontario. The PPS recognizes that healthy, liveable and safe communities will achieve long term prosperity, environmental health and social well-being through wisely and efficiently managing land use and development (1.1.1). Settlement areas shall be the focus of growth and development and their vitality and regeneration shall be promoted (1.1.3.1). Policy 1.1.3.2 requires land use patterns within settlement areas to be based on densities and a mix of land uses that efficiently uses land, resources, infrastructure while promoting active transportation and minimizing negative impacts to the environment. The Prudhommes Secondary Plan is consistent with the PPS.

Growth Plan for the Greater Golden Horseshoe, 2017

The Growth Plan provides high level policy direction for municipalities to build healthy, complete communities through appropriate growth management and intensification. The Growth Plan requires municipalities to provide a diverse and compatible mix of land uses, including residential and employment uses to support vibrant neighbourhoods, active transportation goals and enhanced transit opportunities. The components of the Secondary Plan support the Growth Plan policies, through the efficient use of land and infrastructure, provision of a street network that supports active transportation and the provision of high quality, attractive public spaces.

The Secondary Plan is consistent with the policies that pertain to intensification of settlement areas to accommodate forecasted growth. It encourages a more compact built form that will include a range of employment and housing opportunities while providing an appropriate height transition adjacent to existing development. The guidelines and policies of the Prudhommes Secondary Plan will implement direction from the Growth Plan by introducing varying forms of residential land uses supported by commercial/retail/employment land uses that minimizes reliance on the automobile and supports opportunities for active transportation.

The Growth Plan designates the lands as Greenbelt on Schedule 2: Places to Grow Concept. Through the Regional and local conformity exercise, the lands on the west side of Jordan Harbour are within the Prudhommes settlement area and have been delineated as Built Up Area in both the Region and Town of Lincoln Official Plan.

Regional Planning staff support the Prudhommes Secondary Plan as it generally conforms with the Growth Plan for the Greater Golden Horseshoe, 2017.

Greenbelt Plan, 2017

The Greenbelt Plan informs decision-making to permanently protect against loss and fragmentation of the agricultural land base and the ecological and hydrological features, areas and functions with the plan area. The Prudhommes urban area lands are designated as Towns/Villages on Schedule 1 of the Greenbelt Plan. Towns/Villages have the largest concentrations of population, employment and development. The Prudhommes Secondary Plan, as modified, conforms with the Greenbelt Plan.

Regional Official Plan, 2015

The Niagara Region Official Plan (ROP) includes growth management policies which direct a significant portion of future growth and development to the Built-up Area through intensification. In particular objective 4.A.1.6 of the ROP states “Build compact, mixed use, transit supportive, active transportation friendly communities in the Built-up Area and in Designated Greenfield Areas.”

The Regional Official Plan policies encourage and promote the development of a framework for complete communities all across Niagara, including a diverse mix of land uses, a range of local employment opportunities and housing types, high quality public open spaces, and easy access to local stores and services via automobile, transit and active transportation. The Secondary Plan policies support and direct the area to develop as a sustainable, vibrant, complete community by encouraging mixed and integrated land uses and promoting development that is compact, transit supportive and provides for active transportation. Therefore Secondary Plan is consistent with the intent of the Regional Official Plan.

The lands on the west side of Jordan Harbour are designated as Built Up Area on Schedule A – Regional Structure of the Regional Official Plan. The Town has been assigned an intensification target of 40% per Niagara 2031. Accordingly, a minimum of 40% of all residential development occurring in the Town will be directed to the Built-up Area until the land needs assessment is completed for 2041 and the new Regional Official Plan has been approved. The draft Niagara 2041 Phase 3 population and employment allocations propose an intensification rate of 80% for the Town of Lincoln. The redevelopment of the Prudhommes Secondary Plan area for a dense, mixed use community with a variety of housing choices will assist the Town in meeting and exceeding this interim and proposed new intensification target.

Town of Lincoln Official Plan

The lands on the west side of Jordan Harbour are currently within the existing Prudhommes Urban Area and designated as Built Up Area. The Secondary Plan provides appropriate policy direction to implement a complete, compact and sustainable new community. The policies support a variety of land uses and housing types, the

efficient use of land for mixed-use development, a provision for active and passive recreation space, walkable streets and high quality urban design. The Secondary Plan is consistent with the Town's Official Plan.

East of Jordan Harbour:

The following policy analysis relates to the consistency and conformity of the lands on the east side of Jordan Harbour in the existing Prudhommes settlement area. The Region has reviewed the Greenbelt Plan, the Growth Plan for the Greater Golden Horseshoe and the local planning framework as it relates to the Secondary Plan lands on the east side of Jordan Harbour.

Lands east of Jordan Harbour (as shown on Schedule B5-3 of the Secondary Plan) are designated as Niagara Peninsula Tender Fruit and Grape Area ('Specialty Crop') on Schedule 2 and as Protected Countryside on Schedule 1 within the Greenbelt Plan, 2017. The applicable policies of the Specialty Crop Area require protection of these areas while allowing and promoting agricultural uses and activities. It requires provision of the appropriate flexibility to allow for agricultural, agriculture-related and on-farm diversified uses, normal farm practices and an evolving agricultural and rural economy. As such, development resulting in land uses that are not in line with the above are not permitted. The Specialty Crop designation permits existing non-agricultural uses to continue and expand subject to the policies of 4.5 of the Greenbelt Plan, 2017.

In addition to the information above, it should be noted that the previous Greenbelt Plan, 2005, inconsistently designated the lands. Schedule 1 designated the lands as Hamlet and Schedule 2 designated the lands Niagara Peninsula Tender Fruit and Grape Area ('Specialty Crop').

The Growth Secretariat issued Built Boundary Mapping in 2008 to accompany the Growth Plan, 2006. The accompanying Built Boundary mapping delineated built up areas in accordance with the policies of the Growth Plan. The lands on both the east and west sides of the Jordan Harbour were identified on the Niagara Built Boundary Map as "Undelineated Built Up Area." Undelineated built-up areas are defined as smaller, unserviced or partially-serviced settlement areas, which have limited capacity to accommodate significant future growth, and are represented with dots rather than with a defined area and edge. These settlement areas are typically small towns and hamlets. This notation would reinforce the recognition that the east of Jordan Harbour is not considered Speciality Crop Area.

In regard to the Regional Official Plan, the lands on the east side of Jordan Harbour are currently designated as Protected Countryside on Schedule A - Regional Structure and Unique Agricultural Area on Schedule B - Agricultural Land Base of the Regional Official Plan. As noted, lands within in this designation contain existing, long established commercial and industrial operations.

The Town of Lincoln Official Plan designates the lands as Agricultural Area on Schedule A – Land Use Plan and Specialty Agricultural Designation on Schedule A1 – Land Use Plan. The east side of Jordan Harbour is considered to be outside the urban boundary of Prudhommes.

Following the adoption of the Prudhommes Secondary Plan by Lincoln's Town Council, the Secondary Plan was forwarded to the Ministry of Municipal Affairs for review and comment. The Ministry of Municipal Affairs (MMA), in consultation with the Ministry of Agriculture, Food and Rural Affairs, reviewed the Secondary Plan and provided comments in light of the Provincial planning documents. This letter is included as Appendix 3. MMA is supportive of the Town preparing the new Secondary Plan as it applies to lands within the current urban boundary. However, the majority of their comments focus on the lands east side of Jordan Harbour as they are within the Specialty Crop Area of the Greenbelt Plan. The comments recommend that the land on the east side of Jordan Harbour be deleted from the Secondary Plan.

Regional Planning staff have reviewed these comments and recommend that the decision for the east side of Jordan Harbour be deferred, not deleted. Notwithstanding the current Greenbelt designation, there are existing, established commercial uses and industrial operations on these lands as confirmed through aerial photography (Beacon Hotel is shown on 1965 aerial photography). In addition, through the Coordinated (Provincial) Plan Review, the Regional Planning staff supported and encouraged the removal of the land shown east of Jordan Harbour from a Specialty Crop Area designation. It is the Region's position that the Prudhommes lands have not been accurately ground-truthed and as a result, have been identified as Specialty Crop Area erroneously. These lands are currently developed with non-agricultural uses and it is extremely unlikely that these lands will return to agricultural production. Further to this point, there is existing zoning that permits non-agricultural uses. The Region and the Town recognize these lands as developed and support the redevelopment of already disturbed lands to accommodate growth so that true specialty crop lands in the Town will be protected.

Therefore, the Region is recommending the following deferral wording:

"The land-use designations for lands on the east side of Jordan Harbour as shown on Schedule 'B5-3', shall be deferred until such time as:

- Specialty Crop Guidelines (per the definition of Specialty Crop Areas in the Greenbelt Plan, Growth Plan for the Greater Golden Horseshoe and Provincial Policy Statement) are approved;*
- The lands subject to this deferral are evaluated against the Specialty Crop Guidelines; and*
- In the interim, the existing uses and expansions thereto are permitted as currently recognized in the existing zoning permissions."*

The above deferral provides direction for additional detailed review of the Specialty Crop Area designation in the Prudhommes study area to determine the capability of these lands to support agriculture. Regional Planning Staff support and recommend this deferral approach as a reasonable solution.

Consultation

The Town undertook an extensive consultation program undertaken throughout the Secondary Plan process that informed the creation of the vision, objections, policies and land use plan. A design charrette, public information centres and stakeholder consultations were undertaken between September 2016 and March 2017. Two formal statutory public meetings were held before the Town's Planning Committee on January 8 and January 9, 2018. A summary of concerns are identified and addressed in the Town's Planning Report PL-18-19 (Appendix 5 to this Report).

Throughout the Secondary Plan process, two major issues were raised by the neighbouring residents. The first issue was the road access from the Prudhommes area to the Victoria Shores neighbourhood (located immediately west of the plan area). This issue was addressed by Town staff through policy that permitted pedestrian, cyclist and emergency access only and prohibits vehicular traffic via road design. The second issue was building heights. The Secondary Plan permits low rise residential development immediately adjacent to the existing Victoria Shores residents with a transitional height strategy moving toward taller buildings closer to the harbour. The 2.5 storey height limitation coupled with the building setbacks and open space channel running between the plan area and the existing development adequately addresses the height concern.

Following the adoption of the Secondary Plan by the Town of Lincoln, Regional staff received three pieces of correspondence. This correspondence has been included as Appendix 4 to this report.

Correspondence 1:

A resident of Victoria Shores, provided comments regarding the building height for the Vineland Manufacturing property and the impact it will have on views, traffic and the environment. Regional Planning staff recommend Modification 50 to the Secondary Plan to address this concern. The suggested wording provides direction for additional sun/shadow study and urban design direction to mitigate any negative impacts to surrounding properties. The applicant would be required to submit these specific studies to demonstration compatibility as well as any other requested studies as part of a complete application for a development proposal.

Correspondence 2:

Losani Homes also submitted a letter indicating their concerns regarding the approval of the Secondary Plan and the impact it may have on Regional Development Charges (DC). Losani Homes requests consideration for a Special Area component for the DC By-law for the Prudhommes area. The infrastructure requirements to fund the development of the Secondary Plan area were identified through the Master Servicing Plan that was recently approved by Regional Council as well as the Regional DC By-law. Through the Development Charges Background Study that was undertaken in 2017, the Region reviewed its ability to include area rated charges for recovery of costs in specific areas. For a number of reasons, including services that are serving a broader public and the equitable division of costs associated with growth, the study recommended that DCs continue to be calculated on a uniform Region wide basis for all services except water and wastewater which would continue to be calculated on an urban-wide basis. Therefore Region does not have area specific charges and is not considering implementing them for this project.

Correspondence 3:

IBI Group, on behalf of a landowner, provided correspondence requesting consideration of a building height increase for his property on the very eastern limit of the Secondary Plan, north of the North Service Road. A proposed concept and planning justification for the increased height was provided by IBI Group. The Secondary Plan, as adopted, permits a building height for this property of 2.5 storeys; however, the mid-rise residential land use designation permits various forms of townhouses and apartments. The building height permission and the land use designation appear to be inconsistent. The request can be supported as it provides a more efficient use of the land and the new building height would be more consistent with the permitted uses in the land use designation. It is important to note that although Regional staff are supporting this modification, these lands are within the area that is recommended for deferral.

Modifications

The Region is proposing 97 modifications to the Prudhommes Secondary Plan (OPA 3). The recommended modifications are referenced throughout the Secondary Plan attached as Appendix 1. The majority of these modifications are text adjustments or technical in nature.

Modification 42 adds a policy to direct enhanced design features and building materials for development along the North Service Road which can be viewed from the QEW.

As noted previously in the report, Modification 50 was added to address comments received and reinforce the study requirements for compatible development of the Vineland Manufacturing site.

Modifications 71, 81, 82, 88, 91 and 93 are related to the deferral of the east side of Jordan Harbour as referenced previously in the report. This deferral is also outlined in Appendix 2.

Regional staff provided the list of modifications to Town staff for review. Town staff provided their input and support for the modifications and deferral wording.

Conclusion

The Region has worked collaboratively with the Town to create a Secondary Plan that will provide the foundation for a strong, healthy, balanced and prosperous new community. The Prudhommes Secondary Plan contains policies that support and encourage this goal through a range and mix of land uses and built form types, the protection and integration natural heritage resources, opportunities for transit supportive development and active transportation, and the development of complete, well-designed neighbourhoods.

Alternatives Reviewed

Council may choose not to approve OPA 3. This approach is not recommended as Regional staff have worked collaboratively with the Town in the creation of the Secondary Plan. The Secondary Plan reflects input from public agencies, stakeholders, the public and Regional staff.

Council may choose to approve without modifications and deferrals. This approach is not recommended as a portion of the Secondary Plan is not in conformity with current Provincial policy.

Relationship to Council Strategic Priorities

Approval of OPA 3 supports Regional Council's strategic priorities of moving people and goods; building a labour ready workforce; fostering innovation, investment, and entrepreneurship; positioning Niagara globally; and, doing business differently. The Amendment supports the performance indicators for growth; employment investment; and, efficient use of infrastructure.

Other Pertinent Reports

The Town of Lincoln Planning Report (PL-18-19) has been attached for information (Appendix 5).

Prepared by:

Kirsten McCauley, MCIP, RPP
Senior Planner, Secondary Plans
Planning and Development Services

Recommended by:

Rino Mostacci, MCIP, RPP
Commissioner
Planning and Development Services

Submitted by:

Carmen D'Angelo, BSc, MPA
Chief Administrative Officer

This report was prepared in consultation with Tom Villella, Manager of Special Projects, and reviewed by Doug Giles, Director of Community and Long Range Planning.

Appendices

- Appendix 1 Prudhommes Secondary Plan Official Plan Amendment No. 3 to the Town of Lincoln Official Plan (with proposed modifications)
- Appendix 2 Modifications and Deferral
- Appendix 3 Letter from the Ministry of Municipal Affairs
- Appendix 4 Correspondence
- Appendix 5 Town of Lincoln Planning Report PL-18-19

APPENDIX D

THE REGIONAL MUNICIPALITY OF NIAGARA PLANNING & ECONOMIC DEVELOPMENT COMMITTEE MINUTES

PEDC 10-2018

Wednesday, July 18, 2018

Council Chamber

Niagara Region Headquarters, Campbell West
1815 Sir Isaac Brock Way, Thorold, ON

Committee: Annunziata, Augustyn, Baty, Caslin, Easton, Heit, Hodgson, Luciani, Maloney, Marshall, Maves, Timms, Volpatti (Committee Chair)

Absent/Regrets: Campion, Darte (Committee Vice Chair), Edgar, Joyner, Petrowski, Quirk

Staff: C. Carter, General Manager, B. Dick, Acting Manager, Community Planning, J. Gilston, Legislative Coordinator, D. Heyworth, Official Plan Policy Consultant, V. Kuhns, Acting Director, Economic Development, P. Lambert, Associate Director, Infrastructure Planning & Development Engineering, K. McCauley, Senior Planner, Secondary Plans, T. McKinnon, Deputy Regional Clerk, R. Mostacci, Commissioner, Planning & Development Services, S. Norman, Senior Planner, A.-M. Norio, Acting Regional Clerk, L. Savage, Planner, R. Tripp, Acting Chief Administrative Officer/Commissioner, Public Works, T. Villella, Manager, Special Projects

1. **CALL TO ORDER**

Committee Chair Volpatti called the meeting to order at 1:15 p.m.

Rino Mostacci, Commissioner, Planning and Development Services, introduced new staff members John Whyte, Development Industry Consultant, Alex Pasquini, Development Planner, and Adele Labbe, Senior Environmental Planner to the Committee.

Moved by Councillor Easton
Seconded by Councillor Baty

That the order of the agenda **BE AMENDED** to consider Correspondence Item PDS-C 33-2018 (Agenda Item 6.4) prior to the consideration of Report PDS 11-2018 (Agenda Item 5.1).

Carried

2. DISCLOSURES OF PECUNIARY INTEREST

There were no disclosures of pecuniary interest.

3. PRESENTATIONS

3.1. Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln

Kirsten McCauley, Senior Planner, Secondary Plans, appeared before the Committee to provide information respecting Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln. Topics of the presentation included:

- Details of the Plan area
- The objectives of the Secondary Plan
- The constraints to the Plan

A copy of the presentation has been attached to these minutes.

4. DELEGATIONS

4.1 PDS 11-2018 Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln (Agenda Item 5.1)

4.1.1 John Ariens, IBI Group

John Ariens, IBI Group, appeared before the Committee on behalf of FBH Group in support of the Prudhommes Secondary Plan, and provided a presentation with concept drawings of the plan area.

4.1.2 Ted Gillespie, President, Victoria Shores Homeowners Association

Ted Gillespie, President, Victoria Shores Homeowners Association, appeared before the Committee in support of the Prudhommes Secondary Plan, but expressed his concerns respecting the expansion of the Laurie Pumping Station, the rezoning on the Court Industries site to a 10 storey multi-use facility, the construction of townhomes in an environmentally sensitive area, and the traffic flow on Victoria Avenue from the QEW interchange.

6. **CONSENT ITEMS FOR INFORMATION**

6.4 **PDS-C 33-2018**

Addendum to Report PDS 11-2018 - Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln

Moved by Councillor Marshall
Seconded by Councillor Luciani

That Correspondence Item PDS-C 33-2018, being a memorandum from R. Mostacci, Commissioner, Planning and Development Services, dated July 18, 2018, respecting Addendum to Report PDS 11-2018, Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln, **BE RECEIVED** for information.

Carried

5. **ITEMS FOR CONSIDERATION**

5.1 **PDS 11-2018**

Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln

Moved by Councillor Easton
Seconded by Councillor Hodgson

That Report PDS 11-2018, dated July 18, 2018, respecting Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That Official Plan Amendment No. 3 to the Town of Lincoln Official Plan **BE APPROVED** as modified (Attached as Appendix 1 to Report PDS 11-2018) with policy and mapping deferrals as identified in Appendix 2 of this report;
2. That all parties **BE NOTIFIED** of Regional Council's decision in accordance with Planning Act requirements;
3. That staff **ISSUES** a declaration of final approval of the Official Plan Amendment 20 days after notice of Council's decision has been given, provided that no appeals have been lodged against the decision;

4. That the deferral wording related to Modification 71, 81 and 82, as outlined in Report PDS 11-2018, **BE REPLACED** with the following:

“The land use designations for lands on the east side of Jordan Harbour as shown on Schedule ‘B5-3’ shall be deferred until such time as conformity to the Greenbelt Plan is achieved by either a Greenbelt Plan amendment to policy or mapping, or the development and application of guidelines approved by the Province, in order to improve the relevance of the Greenbelt Plan policies.

In the interim, the existing uses, and expansions thereto, are permitted as currently recognized in the existing zoning permissions and subject to the Greenbelt Plan.”; and,

5. That staff **BE AUTHORIZED** to initiate a study in consultation with the Province aimed at developing Specialty Crop Guidelines, in order to provide guidance with respect to land-use designations and development potential for certain lands within the Greenbelt Plan area.

The following friendly **amendment** was accepted by the Committee Chair, and the mover and seconder of the motion, to remove Clause 5 of the motion as follows:

5. ~~That staff **BE AUTHORIZED** to initiate a study in consultation with the Province aimed at developing Specialty Crop Guidelines, in order to provide guidance with respect to land-use designations and development potential for certain lands within the Greenbelt Plan area.~~

The Committee Chair called the vote on the motion, as amended, as follows:

That Report PDS 11-2018, dated July 18, 2018, respecting Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That Official Plan Amendment No. 3 to the Town of Lincoln Official Plan **BE APPROVED** as modified (Attached as Appendix 1 to Report PDS 11-2018) with policy and mapping deferrals as identified in Appendix 2 of this report;
2. That all parties **BE NOTIFIED** of Regional Council’s decision in accordance with Planning Act requirements;

3. That staff **ISSUES** a declaration of final approval of the Official Plan Amendment 20 days after notice of Council's decision has been given, provided that no appeals have been lodged against the decision; and,
4. That the deferral wording related to Modification 71, 81 and 82, as outlined in Report PDS 11-2018, **BE REPLACED** with the following:

"The land use designations for lands on the east side of Jordan Harbour as shown on Schedule 'B5-3' shall be deferred until such time as conformity to the Greenbelt Plan is achieved by either a Greenbelt Plan amendment to policy or mapping, or the development and application of guidelines approved by the Province, in order to improve the relevance of the Greenbelt Plan policies.

In the interim, the existing uses, and expansions thereto, are permitted as currently recognized in the existing zoning permissions and subject to the Greenbelt Plan."

Recorded Vote:

Yes (13): Annunziata, Augustyn, Baty, Caslin, Easton, Heit, Hodgson, Luciani, Maloney, Marshall, Maves, Timms, Volpatti.

No (0).

Carried

5.2 PDS 30-2018

Official Plan Amendment No. 4 (OPA 4) - Beamsville GO Transit Station Secondary Plan – Town of Lincoln

Patrick Kennedy, Dillon Consulting, and Alex Morrison, Planner, provided information respecting Official Plan Amendment No. 4 (OPA 4) - Beamsville GO Transit Station Secondary Plan – Town of Lincoln. Topics of the presentation included:

- The purpose of the secondary plan
- The Beamsville GO Transit Station Secondary Plan Amendment process
- Highlights of the public engagement
- Overview of the Region's modifications to the amendment
- Next steps

Moved by Councillor Easton
Seconded by Councillor Baty

That Report PDS 30-2018, dated July 18, 2018, respecting Official Plan Amendment No. 4 (OPA 4) - Beamsville GO Transit Station Secondary Plan – Town of Lincoln, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That Official Plan Amendment No. 4 (OPA 4) to the Town of Lincoln Official Plan **BE APPROVED** as modified in Appendix 1 of Report PDS 30-2018;
2. That all parties **BE NOTIFIED** of Regional Council's decision on this application in accordance with Planning Act requirements; and,
3. That staff **ISSUES** a declaration of final approval of the Amendment 20 days after notice of Council's decision has been given provided that no appeals have been lodged against the decision.

Carried

5.3 ED 7-2018

Q2 Economic Development Quarterly Report

Moved by Councillor Maves
Seconded by Councillor Timms

That Report ED 7-2018, dated July 18, 2018, respecting Q2 Economic Development Quarterly Update, **BE RECEIVED** for information.

Carried

5.4 ED 8-2018

Premier Industrial-Commercial Development Inventory and Premier Site Program Report

This item was removed from the agenda and will be brought to the Regional Council meeting being held on July 26, 2018.

6. CONSENT ITEMS FOR INFORMATION

6.1 PDS-C 25-2018

Civic Park (International Plaza) Final Design

Vanessa Aykroyd, Landscape Architect, provided information respecting Civic Park (International Plaza) Final Design. Topics of the presentation included:

- Details of the Regional Headquarters Campus Master Plan
- Concept drawings for Civic Park, Orchard Plaza, International Plaza, the Courtyard, and gardens
- Details of the SITES Certification system

Moved by Councillor Maves

Seconded by Councillor Marshall

That the following items **BE RECEIVED** for information:

PDS-C 25-2018

Civic Park (International Plaza) Final Design

PDS-C 31-2018

Glendale Niagara District Plan Visioning Update

PDS-C 32-2018

Differences Between Secondary Plans, Community Plans and Private Initiated Official Plan Amendments

PDS-C 34-2018

A letter from P. Brown, Partner, CB Land Management Inc., dated July 12, 2018, respecting Official Plan Amendment No. 3, Prudhommes Secondary Plan, Town of Lincoln

PDS-C 35-2018

A letter from P. Brown, Partner, CB Land Management Inc., dated June 11, 2018, respecting Town of Lincoln Development Charges Background Study - May 17, 2018

Carried

Councillor Information Request(s):

Review the potential for recognizing members of the public in the Civic Park's gardens. Councillor Annunziata.

7. OTHER BUSINESS

7.1 Marijuana Grow Operations

Rino Mostacci, Commissioner, Planning and Development Services, addressed the concerns raised at the Public Health and Social Services Committee on July 18, 2018 respecting marijuana crops in greenhouses within the Region. Mr. Mostacci advised that as it was a local planning matter, he would address it at the upcoming area planners meeting and provide an update at the Planning and Economic Development Committee meeting being held on September 5, 2018.

7.2 Prudhommes Secondary Plan

Moved by Councillor Annunziata
Seconded by Councillor Maves

1. That, for the reasons outlined in Policy 3.1.15.2.11 of the Prudhommes Secondary Plan, Official Plan Amendment 3, the Region of Niagara respectfully **REQUESTS** the Minister of Municipal Affairs and Housing amend the *Greenbelt Plan, 2017*, to remove the Specialty Crop Area designation on the east side of Jordan Harbour (as seen on Schedule B5-3) in the Town of Lincoln; and,
2. That staff **BE AUTHORIZED** to initiate a study in consultation with the Province aimed at developing Specialty Crop Guidelines, in order to provide guidance with respect to land-use designations and development potential for certain lands within the Greenbelt Plan area.

Carried

7.3 Employment Lands

Councillor Timms requested information respecting the process and timelines for assessing employment lands in the Region, and who has the final authority to determine employment land areas. Rino Mostacci, Commissioner, Planning and Development Services, advised that in accordance with the Employment Land Strategy, local area municipal employment lands must align with the Region's plans. He noted that the Region was currently reviewing employment lands with local area municipalities for the Official Plan.

7.4 Greater Niagara Circle Route Committee and Waterfront Trails

Councillor Baty requested the status of the Greater Niagara Circle Route Committee, details of the trails that utilized funding from the Public Realm Investment and Waterfront Investment Programs, and information pertaining to the status of the infrastructure program that funds waterfront trails. Rino Mostacci, Commissioner, Planning and Development Services, advised that he would provide a response to these matters at the Planning and Economic Development Committee meeting being held on September 5, 2018.

7.5 Release of Greater Niagara Circle Route Reserve Funds

Councillor Timms requested an update respecting the motion passed at the Regional Council meeting held on June 14, 2018 respecting the release of funds from the Greater Niagara Circle Route reserve fund. Rino Mostacci, Commissioner, Planning and Development Services, advised that staff have met to discuss the matter and will provide a response to the Public Works Committee on September 4, 2018.

8. **CLOSED SESSION**

There were no closed session items.

9. **NEXT MEETING**

The next meeting will be held on Wednesday, September 5, 2018, at 1:00 p.m. in the Council Chamber, Regional Headquarters.

10. **ADJOURNMENT**

There being no further business, the meeting adjourned at 3:49 p.m.

Councillor Volpatti
Committee Chair

Jonathan Gilston
Legislative Coordinator

Ann-Marie Norio
Acting Regional Clerk



APPENDIX E

4800 SOUTH SERVICE RD
BEAMSVILLE, ON L0R 1B1
905-563-8205

December 20, 2018

Neal DeRuyter
MHBC Planning, Urban Design & Landscape Architecture
540 Bingemans Centre, Suite 200
Kitchener ON N2B 3X9

Dear Mr. DeRuyter:

**Re: Removal of Specialty Crop Area Mapping
Ramada Beacon Hotel, 2777 & 2793 North Service Rd. (Beacon Boulevard)**

The above noted properties are zoned Recreational Commercial (RC), (RC-1) and Environmental Conservation (EC) according to Town of Lincoln Zoning By-law No. 93-14-Z1, as amended. The Town of Lincoln Council adopted Zoning By-law No. 93-14-Z1, as amended on February 15, 1993. The uses on the lands have been in existence prior to the Town's 1993 Zoning By-law. The permitted uses include restaurants, hotels and retail uses.

The lands are also designated as High Rise Residential, Mixed Use, Marina and Natural Environment in the Prudhommes Secondary Plan. The Secondary Plan was approved by Town Council on April 16, 2018 and approved by Regional Council on July 26, 2018. The lands are also identified as a Special Policy Area in the Secondary Plan. The Special Policy Area contains the policies outlined below. The Special Policy Area is currently deferred pending the removal of the Specialty Crop designation in the Greenbelt Plan.

“3.1.15.2.11 SPECIAL POLICY AREA

- a) Notwithstanding the current designation in the Greenbelt Plan the lands identified on Schedule 'B5-3' – Constraints are shown as a Special Policy Area on Schedule A Land use to the Prudhommes Secondary Plan. These lands shall be permitted to continue their existing uses or redevelop in accordance with the uses permitted in the Secondary Plan for the following reasons:
 - i. The lands are currently fully developed with non-agricultural uses and have been for decades and there is no opportunity for these lands to be returned to agricultural purposes.
 - ii. The lands are identified as an Undelineated Built Up Area in the Growth Plan for the Greater Golden Horseshoe. Therefore, through this

December 20, 2018

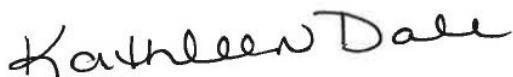
identification, these lands are recognized as a cluster of non-agricultural settlement uses.

- iii. The Region and the Town recognize these lands as developed and support the redevelopment of already developed lands to accommodate growth so that true specialty crop lands in the Town will be protected.
 - iv. The lands are already serviced with municipal services and are adjacent to a serviced urban area.
 - v. The lands are already zoned for non-agricultural uses.
 - vi. The entirety of the Secondary Plan area supports the development of a complete community and celebrates the area as a landmarked and key destination in the Region and the Town.
- b) Therefore, the land use direction set out in the Secondary Plan establishes appropriate redevelopment opportunities and efficient use of serviced land with no potential to return to agricultural uses. Applicable land use policies of the Secondary Plan shall apply.
- c) The Town encourages the Province in their next review of the Greenbelt Plan to remove these lands from the Specialty Crop – Niagara Tender Fruit and Grape Area designation to support the expansion of the Prudhommes Urban Boundary as identified in the Regional Official Plan.”

The new Secondary Plan encourages and support the creation of a complete, sustainable community that provides a mix and range of employment, commercial, and residential land uses including a diverse range of housing options, local services and community infrastructure, as well as the design of attractive and accessible public spaces that prioritize the pedestrian experience while protecting the natural environment. The new Plan will ensure that development in the area meets the day-to-day needs of residents, integrates exiting and new development, accommodates all forms of transportation and accommodates Provincial growth targets through a generally compact build form.

The lands are not used for agricultural purpose and have historically been used as a hotel and marina. Therefore, Town Staff are in support of the request to the Province by the landowners to remove the lands from the specialty crop area. As such, the lands if removed, would be a part of a complete and sustainable community as envisioned by the secondary plan.

Regards,



Kathleen Dale MCIP, RPP
Director of Planning & Development

December 20, 2018

Email and Letter

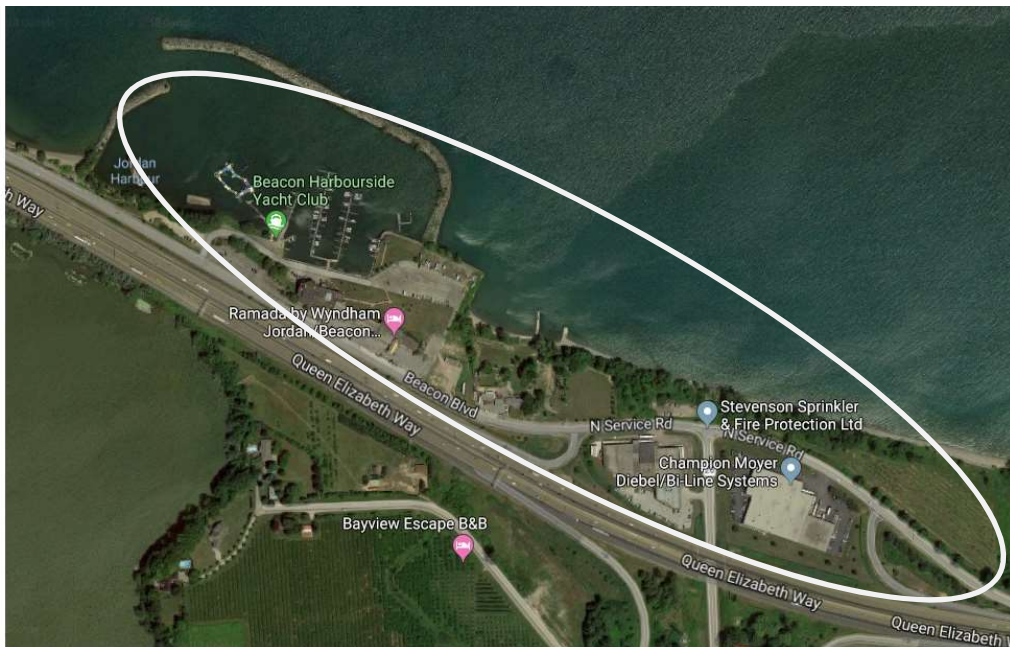
The Honourable Minister Steve Clark
College Park
17th Flr, 777 Bay St
Toronto, ON M5G 2E5
minister.mah@ontario.ca

Dear Minister Clark,

**RE: Greenbelt Plan Specialty Crop Designation – East Side of Jordan Harbour,
Town of Lincoln, Regional Municipality of Niagara**

Niagara Region Council passed a motion on July 26, 2018, respectfully requesting that the Minister of Municipal Affairs and Housing amend the Greenbelt Plan, 2017, to remove the Specialty Crop Area designation on the east side of Jordan Harbour in the Town of Lincoln (per the Prudhommes Secondary Plan).

The Town of Lincoln, in collaboration with Niagara Region, approved a Secondary Plan for the Prudhommes area in July, 2018. This area is seen as an important node for growth and economic prosperity both for the Town and the Region. The Prudhommes area is featured prominently along the Queen Elizabeth Way on both sides of Jordan Harbour. This Secondary Plan provides an exciting opportunity to redevelop and transform this area of the Region and act as a gateway into Niagara from the GTA.



Unfortunately the Secondary Plan cannot be fully realized as the narrow strip of developed lands on the east side of Jordan Harbour, north of the Queen Elizabeth Way was erroneously designated as part of the Niagara Peninsula Tender Fruit and Grape Area (Specialty Crop) system of the Greenbelt Plan. Niagara Region Council therefore deferred the land uses on the east side of Jordan Harbour due to this conformity issue. As you are likely aware, this area is already almost completely developed with a range of commercial uses including a hotel complex, a marina and warehouses.

The Secondary Plan presents the following rationale for these lands to be permitted to continue their existing urban uses or redevelop in accordance with the urban uses permitted in the Secondary Plan:

- i. The lands are currently fully developed with non-agricultural uses and have been for decades (hotel, restaurant and conference centre), and there is no opportunity for these lands to be returned to agricultural purposes.
- ii. The lands are identified as an “*Undelineated Built Up Area*” in the Growth Plan for the Greater Golden Horseshoe. Therefore, through this identification, these lands are recognized as a cluster of non-agricultural settlement uses.
- iii. The Region and the Town recognize these lands as developed and support the redevelopment of already developed lands to accommodate growth so that true specialty crop lands will be protected.
- iv. The lands are already serviced with municipal services and are adjacent to a serviced urban area.
- v. The lands are already zoned for non-agricultural uses.
- vi. The entirety of the Secondary Plan area supports the development of a complete community and celebrates the area as a landmark and key destination in the Region and the Town.

The land use direction set out in the Secondary Plan establishes appropriate urban redevelopment opportunities and the efficient use of serviced land that has no potential to return to agricultural uses.

For reference, this is not the first request to remove these lands from the Greenbelt Specialty Crop Designation. The Region and the Town made the request formally, through the most recent Coordinated Plan Review (CPR), citing the existing, long established serviced commercial uses and industrial operations on these lands (confirmed through aerial photography as early as 1965). The Coordinated Plan Review process did not address this request and no response or rationale has been provided.

It is the Region’s position that location of the lands between the lake and the Queen Elizabeth Way, the developed nature of the lands and the fact that the lands are not

capable of returning to agricultural production demonstrate that they are not Special Crop Lands and should be removed from this designation. Niagara Region once again respectfully requests that this error be corrected so that the Prudhommes Secondary Plan area can achieve its full potential.

If you have any questions or wish to discuss this matter further, please contact myself or Kirsten McCauley, Senior Planner – Secondary Plans, at 905-980-6000 ext 3532 or Kirsten.mccauley@niagararegion.ca.

Respectfully,

Rino Mostacci, MCIP, RPP
Commissioner of Planning and Development Services

CC: Honourable Minister Ernie Hardeman (email only)
Kathleen Dale, Director of Planning, Town of Lincoln (email only)
Aly Alibhai, Regional Director, Municipal Affairs and Housing (email only)
Mayor Easton, Town of Lincoln (email only)
Regional Chair Jim Bradley, Niagara Region (email only)

Appendix 1: Schedule B1 – Land Use Plan for the Prudhommes Secondary Plan
Appendix 2: Memorandum of background information to support the request



Memorandum

Date: December 3, 2018

The Region has undertaken a review of the Greenbelt Plan, the Growth Plan for the Greater Golden Horseshoe and the local planning framework as it relates to the Secondary Plan lands on the east side of Jordan Harbour.

Greenbelt Plan, 2005:

The original Greenbelt Plan (2005) Schedule 1: Greenbelt Plan Area designated the lands on the west side of Jordan Harbour as Towns and Villages. The Greenbelt Plan, 2005, also provided a Hamlet dot representing the east side of Jordan Harbour. This is further reflected on Greenbelt Plan, 2005, Appendix 2 Schematic showing settlements within the Greenbelt Area.

Schedule 1: Greenbelt Plan Area, 2005



Appendix 2: Schematic showing settlements within the Greenbelt Area, 2005



However, Greenbelt Plan, 2005, Schedule 2 Niagara Peninsula Tender Fruit and Grape Area (Specialty Crop) inconsistently designated this area as Tender Fruit and Grape Lands.



Greenbelt Plan, 2017:

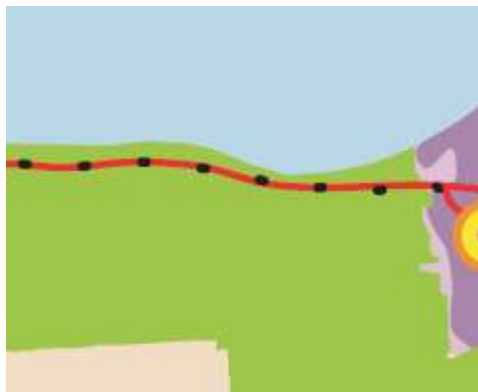
Without any explanation, the updated Greenbelt Plan (2017) has removed the Hamlet designation and shown the lands on the east side of the harbour as Protected Countryside on Schedule 1, and Niagara Peninsula Tender Fruit and Grape Area (Specialty Crop) on Schedule 2. The specialty crop area designation recognizes existing uses that were established prior to December 16, 2004.

The Greenbelt Plan, 2017, contains Policy 3.1.2.2 which permits non-agricultural use subject to the policies of sections 4.2 to 4.6. These non-agricultural uses are generally discouraged in specialty crop areas and may only be permitted after the completion of an agricultural impact assessment. Further Policy 4.5.4 states that expansions to existing buildings and structures, accessory structures and uses and/or conversions of legally existing uses which bring the use more into conformity with this Plan are permitted subject to a demonstration of the following:

- a) Notwithstanding section 4.2.2.2, new municipal services are not required; and
- b) The use does not expand into key natural heritage features or key hydrologic features or their associated vegetation protection zones, unless there is no other alternative, in which case any expansion shall be limited in scope and kept within close geographical proximity to the existing structure.

Growth Plan, 2006 and 2017:

The Growth Plan for the Greater Golden Horseshoe, 2006 and 2017, designates the lands as Greenbelt on Schedule 2: Places to Grow Concept.



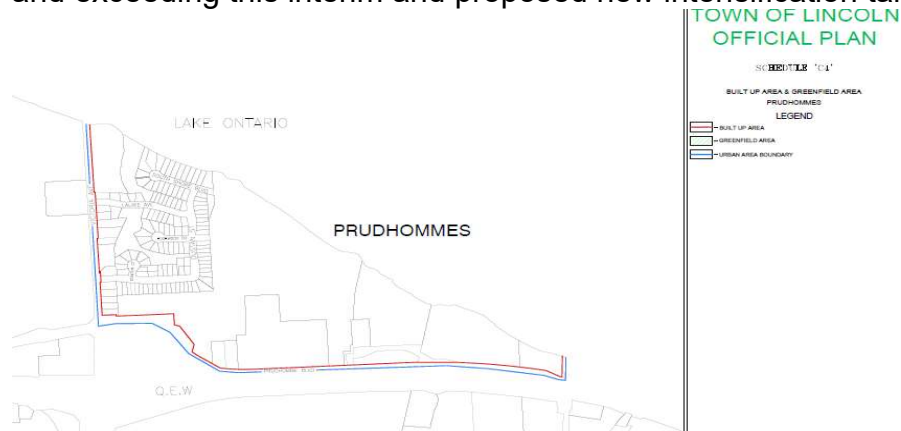
Further to the Growth Plan, 2006, the Province released Built Boundary Maps in 2008 demonstrating delineated and undelineated Built-Up Areas. On the Niagara Built Boundary Map, 2008, the Prudhommes area on each side of the Jordan Harbour is shown as undelineated Built-Up Area. To date, the Province has not updated the 2008 built boundary mapping. The inclusion of an undelineated built-up area would indicate that the Province recognizes there are non-agricultural uses on the east side of Jordan Harbour.



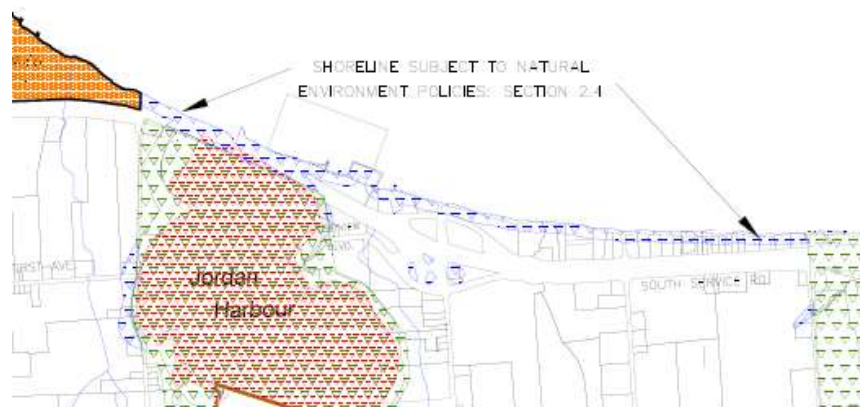
Town of Lincoln Official Plan:

The Town of Lincoln recently approved a new Official Plan and designated the entire Prudhommes Urban Area (west of Jordan Harbour) as Built Up Area in Schedule C-4 of the Official Plan (see below). This designation was accepted by Provincial staff and recently approved by Regional Council in 2016. The Town of Lincoln in the Niagara 2031 growth management work (implemented through RPPA 2-2009) was assigned an intensification target of 40%. The Growth Plan's policy 2.2.2.3 for delineated Built-up Areas states that "until the next municipal comprehensive review is approved and in effect, the annual minimum intensification target contained within each upper- and single-tier official plan that is approved and in effect as of July 1, 2017 will continue to apply." Until the next MCR and new Regional Official Plan are complete a minimum of 40% of all residential development occurring in the Town of Lincoln will need to be located in the built boundary. The draft MCR Phase 3 population and employment allocations

(not endorsed by Regional Council) had a proposed intensification rate of 80% for the Town of Lincoln. The redevelopment of the Prudhommes site for a dense, mixed use community with a variety of housing choices will assist the Town of Lincoln in meeting and exceeding this interim and proposed new intensification target.



The lands on the east side of the harbour are outside the urban boundary and are designated Specialty Agricultural (white) and Environmental Conservation Area (blue).



The existing uses on the east side of Jordan Harbour were established prior to 2004 (as early as 1965). This has been confirmed through aerial photography.

Current Zoning Provisions:

The Zoning By-law provides urban land use direction for properties within the study area. The Beacon Harbourside Resort is zoned Recreation Commercial (RC) and RC-1 (the exception to recognize the erosion limit). The RC zone permits a number of non-farm uses including hotel/motel, place of entertainment and casino. The RC zone permits building heights of approximately 10 storeys (35m) for hotel/motel and casino uses.

The existing employment uses of Moyer Diebel and Avondale are zoned Prestige Industrial PI-1 and PI-2. Both zoning exceptions restrict manufacturing uses that require water in its operation while the PI-1 also has a specific minimum yard setback and parking

location. The Prestige Industrial zone range of uses and allows for building heights of 4-6 storeys (17-22m) depending on use.

The remainder of the land within the Secondary Plan study area east of Jordan Harbour is zoned Estate Residential ER-2 with the exception of a minimum lot area and erosion limit (NPCA will determine required setback).

Servicing:

Based on the Niagara Atlas Mapping, there appears to be a sanitary servicing line (green) to the Beacon property which is connected to a local or private pumping station. There is also a water line (blue). Confirmation of servicing was reviewed by Regional staff and it was determined that the servicing is the local municipality's jurisdiction.



Region's position through the Coordinated Plan Review:

Through the Provincial Plan review, the Regional Planning staff supported and encouraged the removal of the land shown east of Jordan Harbour from a Specialty Crop designation. It is the Region's position that the Prudhommes lands have not been accurately ground-truthed and as a result, have been identified as Specialty Crop erroneously. These lands are currently developed with non-agricultural uses and have been for decades, therefore it is extremely unlikely for these lands to be returned to agricultural production. The Secondary Plan proposed urban land uses to more efficiently make use of serviced land.

The following Special Policy Area (SPA) was included in the Prudhommes Secondary Plan to demonstrate the inconsistency in Provincial direction and support the redevelopment of the land. This SPA was deferred per Council's decision below.

3.1.15.2.11 SPECIAL POLICY AREA

- a) Notwithstanding the current designation in the Greenbelt Plan the lands identified on Schedule 'B5-3' – Constraints are shown as a Special Policy Area on Schedule

A Land use to the Prudhommes Secondary Plan. These lands shall be permitted to continue their existing uses or redevelop in accordance with the uses permitted in the Secondary Plan for the following reasons:

- i. The lands are currently fully developed with non-agricultural uses and have been for decades and there is no opportunity for these lands to be returned to agricultural purposes.
 - ii. The lands are identified as an Undelineated Built Up Area in the Growth Plan for the Greater Golden Horseshoe. Therefore, through this identification, these lands are recognized as a cluster of non-agricultural settlement uses.
 - iii. The Region and the Town recognize these lands as developed and support the redevelopment of already developed lands to accommodate growth so that true specialty crop lands in the Town will be protected.
 - iv. The lands are already serviced with municipal services and are adjacent to a serviced urban area.
 - v. The lands are already zoned for non-agricultural uses.
 - vi. The entirety of the Secondary Plan area supports the development of a complete community and celebrates the area as a landmarked and key destination in the Region and the Town.
- b) Therefore, the land use direction set out in the Secondary Plan establishes appropriate redevelopment opportunities and efficient use of serviced land with no potential to return to agricultural uses. Applicable land use policies of the Secondary Plan shall apply.
- c) The Town encourages the Province in their next review of the Greenbelt Plan to remove these lands from the Specialty Crop – Niagara Tender Fruit and Grape Area designation to support the expansion of the Prudhommes Urban Boundary as identified in the Regional Official Plan.

Council Resolution:

Minute Item No. 5.1

PDS 11-2018 - Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln

That Report PDS 11-2018, dated July 18, 2018, respecting Official Plan Amendment (OPA) 3 - Prudhommes Secondary Plan, Town of Lincoln, **BE RECEIVED** and the following recommendations **BE APPROVED**:

1. That Official Plan Amendment No. 3 to the Town of Lincoln Official Plan **BE APPROVED** as modified (Attached as Appendix 1 to Report PDS 11-2018) with policy and mapping deferrals as identified in Appendix 2 of this report;
2. That all parties **BE NOTIFIED** of Regional Council's decision in accordance with Planning Act requirements;
3. That staff **ISSUES** a declaration of final approval of the Official Plan Amendment 20 days after notice of Council's decision has been given, provided that no appeals have been lodged against the decision; and,
4. That the deferral wording related to Modification 71, 81 and 82, as outlined in Report PDS 11-2018, **BE REPLACED** with the following:
"The land use designations for lands on the east side of Jordan Harbour as shown on Schedule 'B5-3' shall be deferred until such time as conformity to the Greenbelt Plan is achieved by either a Greenbelt Plan amendment to policy or mapping, or the development and application of guidelines approved by the Province, in order to improve the relevance of the Greenbelt Plan policies. In the interim, the existing uses, and expansions thereto, are permitted as currently recognized in the existing zoning permissions and subject to the Greenbelt Plan."

Minute Item No. 7.2

Prudhommes Secondary Plan

1. That, for the reasons outlined in Policy 3.1.15.2.11 of the Prudhommes Secondary Plan, Official Plan Amendment 3, the Region of Niagara respectfully **REQUESTS** the Minister of Municipal Affairs and Housing amend the *Greenbelt Plan, 2017*, to remove the Specialty Crop Area designation on the east side of Jordan Harbour (as seen on Schedule B5-3) in the Town of Lincoln; and,
2. That staff **BE AUTHORIZED** to initiate a study in consultation with the Province aimed at developing Specialty Crop Guidelines, in order to provide guidance with respect to land-use designations and development potential for certain lands within the Greenbelt Plan area.

Soils Classification

When Greenbelt mapping was created (2004) Specialty Crop lands were designated by the Province using a LEAR based criteria. That criteria was built on the following inputs and weighting:

- Land Evaluation:
 - Soil Type (40%) (Class 7 worth 0 points – no mention of no score)
 - Climate (60%)
- Area Review:
 - Parcel Size (25%) (0-24acres worth 2 points)
 - Fragmentation (25%)

- Tile Drainage (25%) (0 points for no tile drainage)
- Farm Receipts (25%) (0 points for no farm receipts)

Soils for Lincoln County were initially mapped in 1963 at a 1:63,360 scale. Soils were re-mapped in 1980 at a more detailed scale of 1:25,000 by OMAF & Agriculture Canada. Page 40, Volume 1 of *“The Soils of the Regional Municipality of Niagara”* (1989) states: *Areas that were not mapped include the following: built up areas of towns and cities; areas adjacent to built up areas where construction was occurring; four-lane divided highways and interchanges; airports; golf courses; gravel pits; quarries; and areas of intensive strip development along roads.”* The Beacon hotel pre-dates the 1963 mapping and also meets the criteria for “no score” in the subsequent 1980 review, which explains why it has no soil score. With no soil score for this lot, a small parcel size, no tile drainage, and no farm receipts, it is unlikely a LEAR score for this property could be calculated.



MEMORANDUM

PDS-C 7-2019

**Subject: Niagara Region's draft comments: Amendment 1 to the Growth Plan
(ERO 013-4504, 013-4505, 013-4506, 013-4507)**

Date: February 20, 2019

To: Planning and Economic Development Committee

From: Isaiah Banach, Manager, Long Range Planning

On January 15, 2019, the Ministry of Municipal Affairs and Housing (MMAH) released a proposed amendment to the Growth Plan for the Greater Golden Horseshoe, 2017 (the "Growth Plan").

The Growth Plan plays a significant role in Regional planning; it directs where and how municipalities grow. The *Planning Act, 1990* requires all municipal planning decisions to conform with the Growth Plan.

The deadline to provide comments to the Province on the proposed amendment is February 28, 2019. The Region is preparing a submission, with input from local planning Directors and Managers.

Attached to this memo is Regional staff's preliminary comments. At the time of writing, these comments are draft; they were developed to share with local staff, which was done on February 8, 2019. On February 14, 2019, a roundtable meeting was held with planning Directors and Managers.

The following are some of the key comments arising from the Region's initial review of the amended Growth Plan:

- The amendment proposes new Natural Heritage System policies and applies the Region's mapping to those policies. If implemented, this would lead to conflicts, mainly in the Region's rural areas. We will suggest ways to resolve the conflict until the new Regional Official Plan is adopted at which time the problem will be resolved permanently.
- New provincially significant employment zones are proposed in the GTA, although none are proposed in Niagara. Staff suggest that Niagara be granted the authority to designate provincially significant employment zones in the Gateway Economic Zone, without amending the Growth Plan.
- Prioritizing transit-supportive land use permissions for parcels adjacent to or near higher order transit facilities.

- Clarifying number of jobs and scale of employment uses where terms 'similar' and 'significant' are referenced.
- Improving economic competitiveness by enabling uses ancillary to the principle use of major goods movement facilities on adjacent or nearby lands.

Prior to February 28, 2019, the Region, with input from local planning staff, will update the draft material for submission. In addition to comments on the draft Growth Plan, the submission will include a copy of the Region's Coordinated Plan Review comments, initially submitted to the Province in 2016. The Province requested that comments provided to the previous parliament be resubmitted for their consideration.

Further details on the proposed amendment to the Growth Plan can be viewed on the MMAH website and the Environmental Registry of Ontario:

- <http://www.mah.gov.on.ca/Page20926.aspx>.
- <https://ero.ontario.ca/notice/013-4504>;
- <https://ero.ontario.ca/notice/013-4505>;
- <https://ero.ontario.ca/notice/013-4506>;
- <https://ero.ontario.ca/notice/013-4507>.

Respectfully submitted and signed by

Isaiah Banach

Manager, Long Range Planning
Planning & Development Services
Niagara Region

Attachment:

- Niagara Region's preliminary draft comments: Amendment 1 to the Growth Plan

Table 1: Comments on proposed amendment policy

Amendment Policy #	Growth Plan text as modified through Amendment Text = removed ; <u>Text</u> = added ; Text = retained	Draft: Niagara Region’s comments to Province Text = removed; <u>Text</u> = added; Text = retained; Text = Region revision	Comments provided by local municipal partners
2.2.1 MANAGING GROWTH			
2.2.1.2	<p>2. Forecasted growth to the horizon of this Plan will be allocated based on the following:</p> <p>a. the vast majority of growth will be directed to settlement areas that:</p> <ul style="list-style-type: none">i. have a delineated built boundary;ii. have existing or planned municipal water and wastewater systems; andiii. can support the achievement of complete communities; <p>b. growth will be limited in settlement areas that:</p> <ul style="list-style-type: none">i. are undelineated built-up areas; <u>rural settlements</u>;ii. are not serviced by existing or planned <i>municipal water and wastewater systems</i>; oriii. are in the <i>Greenbelt Area</i>; <p>c. within <i>settlement areas</i>, growth will be focused in:</p> <ul style="list-style-type: none">i. <i>delineated built-up areas</i>;ii. <i>strategic growth areas</i>;iii. locations with existing or planned transit, with a priority on <i>higher order transit</i> where it exists or is planned; andiv. areas with existing or planned <i>public service facilities</i>; <p>d. development will be directed to <i>settlement areas</i>, except where the policies of this Plan permit otherwise;</p> <p>e. development will be generally directed away from <i>hazardous lands</i>; and</p> <p>f. the establishment of new <i>settlement areas</i> is prohibited.</p>	<p>Regional staff support the proposed change.</p>	
2.2.1.4	<p>4. Applying the policies of this Plan will support the achievement of complete communities that:</p> <p>a. feature a diverse mix of land uses, including residential and employment uses, and convenient access to local stores, services, and public service facilities;</p> <p>b. improve social equity and overall quality of life, including human health, for people of all ages, abilities, and incomes;</p> <p>c. provide a diverse range and mix of housing options, including second units and affordable housing, to accommodate people at all stages of life, and to accommodate the needs of all household sizes and incomes;</p> <p>d. expand convenient access to:</p> <ul style="list-style-type: none">i. a range of transportation options, including options for the safe, comfortable and convenient use of active transportation;ii. public service facilities, co-located and integrated in community hubs;	<p>The Region has two of comments on these changes:</p> <p>First, replacing terms “low-carbon communities” and “net-zero communities” with “environmentally sustainable communities” will lead to misalignment between the Growth Plan, Greenbelt Plan, and Niagara Escarpment Plan (NEP), as the Greenbelt Plan and NEP still reference “low-carbon communities” and “net-zero communities”. References in the Greenbelt Plan and NEP should be consistent.</p> <p>Second, in our view, the Growth Plan should retain the language in Policy 2.2.1.4.e relating to site design and urban design standards.</p> <p>The application of urban design standards are essential to the realisation of vibrant, livable, and healthy communities in the Growth Plan area. Urban design guidelines attract investment, and demonstrate how forms of development can work within the varied contexts found in Niagara, and raise investors’ confidence.</p>	

Amendment Policy #	Growth Plan text as modified through Amendment Text = removed ; <u>Text</u> = added ; Text = retained	Draft: Niagara Region's comments to Province Text = removed; <u>Text</u> = added; Text = retained; Text = Region revision	Comments provided by local municipal partners
	<p>iii. an appropriate supply of safe, publicly-accessible open spaces, parks, trails, and other recreational facilities; and</p> <p>iv. healthy, local, and affordable food options, including through urban agriculture;</p> <p>e. ensure the development of high-quality<u>provide for a more</u> compact builtform, an attractive and <u>a</u> vibrant public realm, including public open spaces, through site design and urban design standards;</p> <p>f. mitigate and adapt to climate change impacts, build<u>improve</u> resilience, <u>and</u> reduce greenhouse gas emissions, and contribute towards the achievement of low-carbon communities to environmental sustainability; and</p> <p>g. integrate green infrastructure and <u>appropriate</u> low impact development.</p>	<p>In our view, these terms should be specifically itemized as a method for achieving complete communities in the Growth Plan.</p>	
2.2.1.6	<p>6. Based on a land needs assessment undertaken in accordance with policy 2.2.1.5, some upper- and single-tier municipalities in the <i>outer ring</i> will determine that they have <i>excess lands</i>. These municipalities will:</p> <p>a. determine which lands will be identified as <i>excess lands</i> based on the hierarchy of <i>settlement areas</i> established in accordance with policy 2.2.1.3; and</p> <p>b. prohibit <i>development</i> on all <i>excess lands</i> to the horizon of this Plan; <u>and</u></p> <p>c. <u>where appropriate, use additional tools to reduce the land that is available for development, such as those set out in policies 5.2.8.3 and 5.2.8.4.</u></p>	<p>Regional staff request clarification on the proposed phrase “use additional tools” in Policy 2.2.1.6.c.</p> <p>The Region prefers that it be able to identify the tools – rather than the Province – in order to address site-specific conditions. Regional staff would support the inclusion of language to clarify that intent.</p>	
2.2.2 DELINEATED BUILT-UP AREAS			
2.2.2.1	<p>1. By the year 2031, and for each year thereafter, a minimum of 60 per cent of all residential development occurring annually within each upper- or single-tier municipality will be within the delineated built-up area.</p> <p><u>1. 2.</u> By the time the next <i>municipal comprehensive review</i> is approved and in effect, and each year until 2031, a<u>for each year thereafter, the applicable minimum intensification target is as follows:</u></p> <p>a. <u>A minimum of 60 per cent of all residential development occurring annually within each of the City of Hamilton and the Regions of Peel, Waterloo and York will be within the delineated built-up area;</u></p> <p>b. <u>A</u> minimum of 50 per cent of all residential development occurring annually within each upper- or single-tier municipality<u>of the Cities of Barrie, Brantford, Guelph, Orillia</u></p>	<p>Regional staff support this change. Since the target are minimums, it allows the Region to identify a higher number if determined to be appropriate.</p>	

Amendment Policy #	Growth Plan text as modified through Amendment Text = removed ; <u>Text</u> = added ; Text = retained	Draft: Niagara Region's comments to Province Text = removed; <u>Text</u> = added; Text = retained; Text = Region revision	Comments provided by local municipal partners
	<u>and Peterborough and the Regions of Durham, Halton and Niagara</u> will be within the <i>delineated built-up area</i> ; <u>and</u> c. <u>The City of Kawartha Lakes and the Counties of Brant, Dufferin, Haldimand, Northumberland, Peterborough, Simcoe and Wellington will, through the next municipal comprehensive review, each establish the minimum percentage of all residential development occurring annually that will be directed within the delineated built-up area, based on maintaining or improving upon the minimum intensification target contained in the applicable upper- or single-tier official plan.</u>		
2.2.2.3	<u>3. 4.</u> All municipalities will develop a strategy to achieve the minimum intensification target and <i>intensification</i> throughout <i>delineated built-up areas</i> , which will: a. encourage intensification generally to achieve the desired urban structure; b. identify the appropriate type and scale of development and transition of built form to adjacent areas; a. e. identify <i>strategic growth</i> areas to support achievement of the intensification target and recognize them as a key focus for development; b. <u>identify the appropriate type and scale of development in strategic growth areas and transition of built form to adjacent areas;</u> c. <u>encourage intensification generally throughout the delineated built-up area;</u> d. ensure lands are zoned and development is designed in a manner that supports the achievement of <i>complete communities</i> ; e. prioritize planning and investment in <i>infrastructure</i> and <i>public service facilities</i> that will support <i>intensification</i> ; and f. be implemented through official plan policies and designations, updated zoning and other supporting documents.		
2.2.2.4	<u>4. 5.</u> For <u>Councils of</u> upper- and single-tier municipalities, council may request an alternative to the target established in policy 2.2.2.2 through the next municipal comprehensive review <u>1</u> where it is demonstrated that this target cannot be achieved and that the alternative target will: a. maintain or improve on the minimum intensification target in the official plan that is approved and in effect; b. be appropriate given the size of the delineated built-up area; <u>location and capacity of the delineated built-up area.</u> c. account for existing infrastructure, public service facilities, and capital planning; d. account for existing planning approvals and other related planning studies;		

Amendment Policy #	Growth Plan text as modified through Amendment Text = removed ; <u>Text</u> = added ; Text = retained	Draft: Niagara Region's comments to Province Text = removed; <u>Text</u> = added; Text = retained; Text = Region revision	Comments provided by local municipal partners
	<p>e. consider the actual rate of intensification being achieved annually across the upper or single-tier municipality;</p> <p>f. support diversification of the total range and mix of housing options in delineated built-up areas to the horizon of this Plan, while considering anticipated demand;</p> <p>g. account for lands where development is prohibited or severely restricted; and</p> <p>h. h. support the achievement of complete communities.</p> <p>6. For upper and single-tier municipalities in the outer ring, council may request an alternative to the target established in policy 2.2.2.1 through a municipal comprehensive review where it is demonstrated that target cannot be achieved and that the alternative target is appropriate given the criteria in policy 2.2.2.5.</p>		
2.2.2.5	<p>5. 7. The Minister may permit an alternative to the target established in policies 2.2.2.1 and 2.2.2.2. If council does not make a request or the Minister does not permit an alternative target, the targets established in policies 2.2.2.1 and 2.2.2.2 will apply accordingly.</p>		
2.2.4 TRANSIT CORRIDORS AND STATION AREAS			
2.2.4.4	<p>4. For upper and single-tier municipalities, council may request an alternative to a particular major transit station area, the Minister may approve a target that is lower than the applicable target established in policy 2.2.4.3 through a municipal comprehensive review, where it is has been demonstrated that: a. this target cannot be achieved because:</p> <p>a. i. development is prohibited by provincial policy or severely restricted on a significant portion of the lands within the delineated area; or</p> <p>ii. planning for the relevant minimum density target established in policy 2.2.4.3 would be premature given the potential for redevelopment of the existing built form within the horizon of this Plan;</p> <p>b. the alternative target would: there are a limited number of residents and jobs associated with the built form, but a major trip generator or feeder service will sustain high ridership at the station or stop.</p> <p>i. support the achievement of a more compact built form, where appropriate;</p> <p>ii. maximize the number of potential transit users within walking distance of the station;</p> <p>iii. increase the existing density of the area;</p> <p>iv. be appropriate given the existing design of streets and open spaces, levels of feeder service and the range of densities across the transit network; and</p>		

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	v. —not preclude planning for the minimum density targets established in policy 2.2.4.3 in the future; and		
2.2.4.5	5. c. where there are four or more <u>Notwithstanding policies 5.2.3.2 b) and 5.2.5.3 c), upper- and single-tier municipalities may delineate the boundaries of major transit station areas within the upper- or single-tier municipality along the same priority transit corridor or subway line, the average of the targets established and identify minimum density targets for those major transit station areas will meet or exceed the applicable minimum density target established in policy 2.2.4.3. For the purposes of this policy, Union Station will be excluded in advance of the next municipal comprehensive review, provided it is done in accordance with subsections 16(15) or (16) of the Planning Act, as the case may be.</u> 5. The Minister may permit an alternative to the targets established in policy 2.2.4.3. If council does not make a request or the Minister does not permit an alternative target, the targets established in policy 2.2.4.3 will apply.		
2.2.4.10	10. Lands adjacent to or near to existing and planned <i>frequent transit</i> should be planned to be <i>transit-supportive</i> and supportive of <i>active transportation</i> and a range and mix of uses and activities.	<p>Regional staff requests the inclusion of additional provisions to Section 2.2.4.10 to accommodate site-specific conditions when implementing <i>transit-supportive</i> uses for lands adjacent to or near <i>higher order transit</i> facilities.</p> <p>In order to truly fulfill this vision, the Growth Plan must include and grant priority to <i>transit-supportive</i> land use permissions for parcels adjacent to or near <i>higher order transit</i> facilities.</p> <p>In 2018, Metrolinx announced its new 'Transit Oriented Development (TOD) Market Driven Strategy' approach for the design and construction of transit stations. This strategy is intended to implement transit infrastructure through leveraging Metrolinx's network and real estate assets to attract municipal and private investment for improved station function.</p> <p>The Region recognizes the appetite for Metrolinx's new TOD approach for existing and future potential GO Station sites in Niagara. However, not all <i>higher order transit</i> facility sites are conducive to accommodating this TOD approach. Reasons include:</p> <ul style="list-style-type: none">• an absence of Metrolinx or municipally-owned assets on/or near the facility site;• incompatible land use permissions on parcels adjacent to facility sites; and,• inability to accommodate TOD element and/or uses due to limitations caused by site size and/or restrictions. <p>The Region supports the Province's vision to expand the role of <i>higher order transit</i> to help attain <i>complete communities</i> and encourage a</p>	

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		<p>more evenly distributed <i>modal share</i> through improved <i>multimodal</i> connections and <i>transit service integration</i>. To enable transit-supportive development, it is recommended that Policy 2.2.4.10 be revised as highlighted below:</p> <p>Recommended Policy Revision (Policy 2.2.4.10) <u>To support the optimization of transit investment across the GGH, lands adjacent to or near existing and planned frequent transit or higher order transit facilities, including those within the Greenbelt Plan area, where such lands have been approved through a municipal class environmental assessment,</u> should be planned to be transit-supportive and supportive of active transportation:</p> <ul style="list-style-type: none">a) <u>provide transit-supportive uses that enable opportunities for improved transit service integration;</u>b) <u>facilitate multimodal connections that encourage a more evenly distributed modal share;</u>c) <u>support active transportation; and</u>d) offer a range and mix of uses and activities. <p>It is the Region's opinion that these additional provisions for implementing <i>transit-supportive</i> uses around <i>higher order transit</i> facilities will improve the viability of public private partnership opportunities in Niagara sought through Metrolinx's TOD Market Driven Strategy. Further, it will improve the ability for municipalities to achieve the guiding principles of the Growth Plan through creating integrated and more complete communities.</p> <p>If the Region's proposed revision to Policy 2.2.4.10 is implemented within the amended Growth Plan, the Region requests that a complimentary policy revision be made within the Greenbelt Plan should it be amended.</p>	
2.2.5 EMPLOYMENT			
2.2.5.5	<p>5. Upper- and single-tier municipalities, in consultation with lower-tier municipalities, the Province, and other appropriate stakeholders, will each develop an employment strategy that:<u>Municipalities should designate and preserve lands within settlement areas located adjacent to or near major goods movement facilities and corridors, including major highway interchanges, as areas for manufacturing, warehousing and logistics, and appropriate associated uses and ancillary facilities.</u></p> <p>a. establishes a minimum density target for all employment areas, measured in jobs per hectare, that reflects the current and anticipated type and scale of employment that characterizes the employment areas and aligns with policy 2.2.5.1;</p>		

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	b. identifies opportunities for the intensification of employment areas on sites that support active transportation and are served by existing or planned transit; and c. will be implemented through a municipal comprehensive review, including official plan policies and designations and zoning by laws.		
2.2.5.6	6. Upper- and single-tier municipalities, in consultation with lower-tier municipalities, will designate all <i>employment areas</i> , including any prime employment areas , in official plans and protect them for appropriate employment uses over the long-term. <u>For greater certainty, employment area designations may be incorporated into upper- and single-tier official plans by amendment at any time in advance of the next municipal comprehensive review.</u>	Regional staff support this change.	
2.2.5.7	7. Municipalities will plan for all <i>employment areas</i> within <i>settlement areas</i> , with the exception of any prime employment areas , by: a. prohibiting residential uses and ; <u>b. limiting other sensitive land uses</u> that are not ancillary to the primary employment use; <u>c. prohibiting major retail uses or establishing a size or scale threshold for any major retail uses that are permitted and prohibiting any major retail uses that would exceed that threshold; and</u> <u>d. integrating providing an appropriate interface between employment areas with and adjacent non-employment areas and developing vibrant, mixed-use areas and innovation hubs, where appropriate to maintain land use compatibility.</u>	Regional staff support this change, as the term 'prime employment' was confusing and difficult to implement. Regional staff requests that proposed phrase "appropriate interface" in Policy 2.2.5.7.d be reconsidered. As an example, if an area were to be identified by a municipality as Class 4 under the MOE's NPC-300 Guideline, thus allowing higher sound level limits, that may not be considered an "interface" between employment areas and adjacent areas. Regional staff suggest adding the phrase "or mitigation" after "appropriate interface" to address this concern.	
2.2.5.8	8. Municipalities may identify employment areas located adjacent to or near major goods movement facilities and corridors, including major highway interchanges, as prime employment areas and plan for their protection for appropriate employment uses over the long-term by: The development of sensitive land uses, major retail uses or major office uses will avoid, or where avoidance is not possible, minimize and mitigate adverse impacts on industrial, manufacturing or other uses that are particularly vulnerable to encroachment. a. prohibiting residential, institutional, and other sensitive land uses; b. prohibiting retail and office uses that are not associated with or ancillary to the primary employment use; and c. planning for freight supportive land use patterns.	Regional staff support this change.	
2.2.5.9	9. The conversion of lands within <i>employment areas</i> or prime employment areas to non-employment uses may be permitted		

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	only through a <i>municipal comprehensive review</i> where it is demonstrated that: a. there is a need for the conversion; b. the lands are not required over the horizon of this Plan for the employment purposes for which they are designated; c. the municipality will maintain sufficient employment lands to accommodate forecasted employment growth to the horizon of this Plan; d. the proposed uses would not adversely affect the overall viability of the <i>employment area</i> or prime employment area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan; and e. there are existing or planned <i>infrastructure</i> and <i>public service facilities</i> to accommodate the proposed uses.		
2.2.5.10	10. For greater certainty, the redesignation of an <u>Notwithstanding policy 2.2.5.9, until the next municipal comprehensive review, lands within existing employment</u> area <u>areas may be converted</u> to a designation that permits non-employment uses is considered a conversion and may occur only through a municipal comprehensive review undertaken in accordance with <u>provided the conversion would:</u> <u>a. satisfy the requirements of policy 2.2.5.9 a), d) and e); and</u> <u>b. maintain a significant number of jobs on those lands.</u>	Regional staff generally support this change; however, requests clarification from the Province in relation to the phrase “significant number of jobs” in Policy 2.2.5.10.b. Regional staff request that the Region – rather than the Province – be able to identify what it considered a significant number of jobs. What may be considered “significant” in all or part of the Niagara may be different than other municipalities in the GTAH, thus a universal application of this phrase would not be appropriate. Additionally, Regional staff request the Province to clarify that an amendment to an upper-tier official plan is not required during instances where employment areas are not yet identified in the official plan.	
2.2.5.11	11. Any change to an official plan to permit new or expanded opportunities for <i>major retail</i> in an <i>employment area</i> may <u>only</u> occur only through a municipal comprehensive review undertaken in accordance with policy 2.2.5.9 <u>or 2.2.5.10</u> .		
2.2.5.12	<u>12. The Minister may identify provincially significant employment zones to support co-ordination of planning for jobs and economic development at a regional scale and will require their protection through appropriate official plan policies and designations. Policy 2.2.5.10 will not apply to any part of an employment area within a provincially significant employment zone.</u>	Regional staff note that the proposed amendment does not identify any parts of Niagara as “provincially significant employment zones”. At a future time, the Region may desire to identify all or part of the areas with the Gateway Economic Zone and Gateway Economic Centre as provincially significant employment zones. These areas exist only in Niagara, and currently are subject to policy 2.2.4.15: <i>In recognition of the importance of cross-border trade with the United States, this Plan recognizes a Gateway Economic Zone and Gateway Economic Centre near the Niagara-United States border. Planning and economic development in these areas will support economic diversity</i>	

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		<p>and promote increased opportunities for cross-border trade, movement of goods, and tourism.</p> <p>Regional staff request the Province to grant the Region the ability to identify all or some of the Gateway Economic Zone and Gateway Economic Centre as provincially significant employment zones without amendment to the Growth Plan. Niagara's expanding role in the Greater Golden Horseshoe is driving the need for the Region to continuously identify and protect existing and emerging employment areas along <i>major goods movement facilities and corridors</i>. Granting the Region this ability enables the opportunity to advance responsiveness to market demands, as well as improve efficiency through reducing the costs and time associated to a provincial plan amendment process. Staff recommend that proposed Policy 2.2.5.12 be revised as highlighted below:</p> <p><u>12. "The Minister may identify provincially significant employment zones to support co-ordination of planning for jobs and economic development at a regional scale and will require their protection through appropriate official plan policies and designations. Lands in the Gateway Economic Zone and Gateway Economic Centre may be identified as provincially significant employment zones without amendment to this Plan, at the request of the Region of Niagara. Policy 2.2.5.10 will not apply to any part of an employment area within a provincially significant employment zone."</u></p>	
2.2.5.13	<p><u>13. Upper- and single-tier municipalities, in consultation with lower-tier municipalities, will establish minimum density targets for all employment areas within settlement areas that:</u></p> <ul style="list-style-type: none"><u>a. are measured in jobs per hectare;</u><u>b. reflect the current and anticipated type and scale of employment that characterizes the employment area to which the target applies;</u><u>c. reflects opportunities for the intensification of employment areas on sites that support active transportation and are served by existing or planned transit; and</u><u>d. will be implemented through official plan policies and designations and zoning by-laws.</u>		
2.2.5.14	<p><u>14. Outside of employment areas, the redevelopment of any employment lands should retain space for a similar number of jobs to remain accommodated on site.</u></p>	<p>Similar to the comments provided for Policy 2.2.5.10 above, Regional staff request that the Region – rather than the Province – be able to identify what it considered a similar number of jobs. What may be considered “similar” in all or part of the Region may be different than other municipalities in the GTAH, thus a universal application would not be appropriate.</p>	
2.2.5.16	<p><u>16.</u> 13. Existing office parks will be supported by:</p>		

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	<ul style="list-style-type: none">a. improving connectivity with transit and <i>active transportation</i> networks;b. providing for an appropriate mix of amenities and open space to serve the workforce;c. planning for <i>intensification</i> of employment uses;d. <u>ensuring that the introduction of any non-employment uses, if appropriate, would be limited and would not negatively impact the primary function of the area;</u> ande. approaches to <i>transportation demand management</i> that reduce reliance on single-occupancy vehicle use.		
2.2.6 HOUSING			
2.2.6.1	<p>1. Upper- and single-tier municipalities, in consultation with lower-tier municipalities, the Province, and other appropriate stakeholders, will each develop a:</p> <ul style="list-style-type: none">a. <u>support</u> housing strategy that a supports choice through the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan by:<ul style="list-style-type: none">i. identifying a diverse range and mix of housing options and densities, including second units and <i>affordable</i> housing to meet projected needs of current and future residents; andii. establishing targets for <i>affordable</i> ownership housing and rental housing;b. <u>identifies</u> mechanisms, including the use of land use planning and financial tools, to support the implementation of policy 2.2.6.1 a);c. aligns<u>align land use planning</u> with applicable housing and homelessness plans required under the Housing Services Act, 2011; andd. will be implemented<u>implement policy 2.2.6.1 a), b) and c)</u> through official plan policies and designations and zoning by-laws.		
2.2.6.2	<p>2. Notwithstanding policy 1.4.1 of the PPS, 2014, in preparing a housing strategy in accordance with<u>implementing</u> policy 2.2.6.1, municipalities will support the achievement of <i>complete communities</i> by:</p> <ul style="list-style-type: none">a. planning to accommodate forecasted growth to the horizon of this Plan;b. planning to achieve the minimum intensification and density targets in this Plan;c. considering the range and mix of housing options and densities of the existing housing stock; andd. planning to diversify their overall housing stock across the municipality.		

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2.2.6.5	5. When a <i>settlement area</i> boundary has been expanded through a municipal comprehensive review in accordance with the policies in subsection 2.2.8, the new <i>designated greenfield area</i> will be planned based on the housing strategy developed in accordance with policies 2.2.6.1 and 2.2.6.2.		
2.2.7 DESIGNATED GREENFIELD AREAS			
2.2.7.2	<p>The <u>minimum density target applicable to the</u> <i>designated greenfield area</i> of each upper- or<u>and</u> single-tier municipality will be planned<u>is as follows:</u></p> <p>a. <u>The City of Hamilton and the Regions of Peel, Waterloo and York will plan</u> to achieve within the horizon of this Plan a minimum density target that is not less than 8<u>60 residents and jobs combined per hectare;</u></p> <p>b. <u>The Cities of Barrie, Brantford, Guelph, Orillia and Peterborough and the Regions of Durham, Halton and Niagara will plan to achieve within the horizon of this Plan a minimum density target that is not less than 50 residents and jobs combined per hectare; and</u></p> <p>c. <u>The City of Kawartha Lakes and the Counties of Brant, Dufferin, Haldimand, Northumberland, Peterborough, Simcoe and Wellington will plan to achieve within the horizon of this Plan a minimum density target that is not less than 40 residents and jobs combined per hectare.</u></p>	Regional staff support this change. Since the target are minimums, it allows the Region to identify a higher number if determined to be appropriate.	
2.2.7.4	<p>4. For Councils of upper- and single-tier municipalities in the inner ring, policy 2.2.7.2 does not apply to<u>may request an alternative to the target established in policy 2.2.7.2 where it is demonstrated that the target cannot be achieved and that the alternative target will support the diversification of the total range and mix of housing options and the achievement of a more compact built form in designated greenfield areas identified in official plans that are approved and in effect as of July 1, 2017. Where policy 2.2.7.2 does not apply: to the horizon of this Plan in a manner that is appropriate given the characteristics of the municipality and adjacent communities.</u></p> <p>a. the minimum density target contained in the applicable upper- or single-tier official plan that is approved and in effect as of that date will continue to apply to these lands until the next municipal comprehensive review is approved and in effect. Until that time:</p> <p>i. the density target will continue to be measured across all lands that were subject to the original target that is approved and in effect; and</p>		

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	<p>ii. the municipality will document actions taken to increase the planned density of these lands, where appropriate;</p> <p>b. through the next <i>municipal comprehensive review</i>, these lands will be planned to achieve within the horizon of this Plan, a minimum density target that will:</p> <p>i. be measured in accordance with policy 2.2.7.3;</p> <p>ii. constitute an increase in the planned density of the lands over which it is measured; and</p> <p>iii. not be less than 60 residents and jobs combined per hectare;</p> <p>c. council may request an alternative to the target established in policy 2.2.7.4 b) iii) through the next <i>municipal comprehensive review</i>, where it is demonstrated that the alternative target will:</p> <p>i. not be less than the minimum density target in the official plan that is approved and in effect;</p> <p>ii. reflect documented actions taken to increase planned densities in accordance with policy 2.2.7.4 a) ii);</p> <p>iii. achieve a more <i>compact built form</i> that supports existing or planned transit and <i>active transportation</i> to the horizon of this Plan;</p> <p>iv. account for existing and planned <i>infrastructure, public service facilities</i>, and capital planning;</p> <p>v. account for lands built and planning matters that are approved and in effect;</p> <p>vi. support the diversification of the total range and mix of housing options in <i>designated greenfield areas</i> to the horizon of this Plan, while considering the community character; and</p> <p>vii. support the achievement of <i>complete communities</i>; and</p> <p>d. the Minister may permit an alternative to the target established in policy 2.2.7.4 b). If council does not make a request or if the Minister does not permit an alternative target, the target established in policy 2.2.7.4 b) applies to these lands.</p> <p>5. For upper- and single-tier municipalities in the <i>outer ring</i>, the minimum density target for <i>designated greenfield areas</i> contained in the applicable official plan that is approved and in effect as of July 1, 2017 will continue to apply until the next <i>municipal comprehensive review</i> is approved and in effect.</p> <p>6. For upper- and single-tier municipalities in the <i>outer ring</i>, council may request an alternative to the target established in policy 2.2.7.2 through a <i>municipal comprehensive review</i> where it is demonstrated that the target cannot be achieved and that the alternative target:</p> <p>a. will maintain or improve on the minimum density target in the official plan that is approved and in effect as of July 1, 2017;</p>		

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	b. will achieve a more compact built form to the horizon of this Plan that is appropriate given the characteristics of the municipality and adjacent communities; and c. is appropriate given the criteria identified in policy 2.2.7.4 c), with the exception of policies 2.2.7.4 c) i and vii.		
2.2.7.5	5. 7. The Minister may permit an alternative to the target established in policy 2. 2.7.6 <u>7.2</u> . If council does not make a request or the Minister does not permit an alternative target, the target established in policy 2.2.7.2 will apply.		
2.2.8 SETTLEMENT AREA BOUNDARY EXPANSIONS			
2.2.8.3	<p>3. Where the need for a <i>settlement area</i> boundary expansion has been justified in accordance with policy 2.2.8.2, the feasibility of the proposed expansion will be determined and the most appropriate location for the proposed expansion will be identified based on the <u>comprehensive application of all of the policies in this Plan, including the</u> following:</p> <p><u>a.</u> there are<u>is sufficient capacity in</u> existing or planned <i>infrastructure and public service facilities</i> to support the achievement of complete communities;</p> <p><u>b.</u> the <i>infrastructure and public service facilities</i> needed would be financially viable over the full life cycle of these assets, based on mechanisms such as asset management planning and revenue generation analyses;</p> <p><u>c.</u> <u>the proposed expansion would be informed by applicable water and wastewater master plans or equivalent and stormwater master plans or equivalent, as appropriate;</u></p> <p>c. the proposed expansion would align with a water and wastewater master plan or equivalent that has been completed in accordance with the policies in subsection 3.2.6;</p> <p>d. the proposed expansion would align with a stormwater master plan or equivalent that has been completed in accordance with the policies in subsection 3.2.7;</p> <p><u>d.</u> e. watershed planning or equivalent has demonstrated that the proposed expansion, including the associated <u>water, wastewater and stormwater</u> servicing, would not negatively impact<u>be planned and demonstrated to avoid, or if avoidance is not possible, minimize and mitigate any potential negative impacts on watershed conditions and</u> the <i>water resource system</i>, including the <i>quality and quantity of water</i>;</p> <p><u>e.</u> f. key hydrologic areas and the Natural Heritage System <u>for the Growth Plan</u> should be avoided where possible;</p> <p>g. for settlement areas that receive their water from or discharge their sewage to inland lakes, rivers, or groundwater, a completed environmental assessment for new or expanded services has identified how expanded water and wastewater</p>	<p>Regional staff request the Province be consistent with proposed amendment Policy 4.2.1.3 and the application of undertaking 'watershed planning or equivalent'.</p> <p>Regional staff support the inclusion of water and wastewater master plans or equivalent and stormwater plans or equivalent, in proposed Policy 2.2.8.3.c. In the Region's view, this policy should also specify Transportation Master Plans, as they are an essential component of growth planning. Staff suggest the following text be included to Policy 2.2.8.3.c as highlighted below:</p> <p><u>c.</u> <u>"the proposed expansion would be informed by applicable water and wastewater master plans or equivalent, and stormwater master plans or equivalent, and Transportation Master Plans or equivalent, as appropriate."</u></p>	

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	<p>treatment capacity would be addressed in a manner that is fiscally and environmentally sustainable;</p> <p><u>f.</u> h. <i>prime agricultural areas</i> should be avoided where possible. An agricultural impact assessment will be used to determine the location of the expansion<u>To support the <i>Agricultural System</i>, alternative locations across the upper- or single-tier municipality will be evaluated, prioritized and determined</u> based on avoiding, minimizing and mitigating the impact on the <i>Agricultural System</i> and evaluating and prioritizing alternative locations across the upper- or single-tier municipality in accordance with the following:</p> <p>i. expansion into <i>specialty crop areas</i> is prohibited;</p> <p>ii. reasonable alternatives that avoid <i>prime agricultural areas</i> are evaluated; and</p> <p>iii. where <i>prime agricultural areas</i> cannot be avoided, lower priority agricultural lands are used;</p> <p><u>g.</u> i. the <i>settlement area</i> to be expanded is in compliance with the <i>minimum distance separation formulae</i>;</p> <p><u>h.</u> j. any adverse impacts on agricultural operations and on the <i>agri-food network</i> from expanding <i>settlement areas</i> would be avoided or, if avoidance is not possible, minimized and mitigated as determined through an agricultural impact assessment;</p> <p><u>i.</u> k. the policies of Sections 2 (Wise Use and Management of Resources) and 3 (Protecting Public Health and Safety) of the PPS are applied;</p> <p><u>j.</u> l. the proposed expansion would meet any applicable requirements of the Greenbelt, Oak Ridges Moraine Conservation, Niagara Escarpment, and Lake Simcoe Protection Plans and any applicable source protection plan; and</p> <p><u>k.</u> m. within the Protected Countryside in the <i>Greenbelt Area</i>:</p> <p>i. the <i>settlement area</i> to be expanded is identified in the Greenbelt Plan as a Town/Village;</p> <p>ii. the proposed expansion would be modest in size, representing no more than a 5 per cent increase in the geographic size of the <i>settlement area</i> based on the <i>settlement area</i> boundary delineated in the applicable official plan as of July 1, 2017, up to a maximum size of 10 hectares, and residential <i>development</i> would not be permitted on more than 50 per cent of the lands that would be added to the <i>settlement area</i>;</p> <p>iii. the proposed expansion would support the achievement of <i>complete communities</i> or the local agricultural economy;</p> <p>iv. the proposed uses cannot be reasonably accommodated within the existing <i>settlement area</i> boundary;</p>		

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	<p>v. the proposed expansion would be serviced by existing <i>municipal water and wastewater systems</i> without impacting future <i>intensification</i> opportunities in the existing <i>settlement area</i>; and</p> <p>vi. expansion into the Natural Heritage System that has been identified in the Greenbelt Plan is prohibited.</p>		
2.2.8.4	<p>4. Upper- and single-tier<u>Notwithstanding policy 2.2.8.2,</u> municipalities in the outer ring that have identified excess lands in accordance with policy 2.2.1.6, may undertake a<u>may adjust settlement area boundary expansion only through boundaries outside of a municipal comprehensive review where it is demonstrated that, provided:</u></p> <p><u>a. there would be no net increase in land within settlement areas;</u></p> <p><u>b. the adjustment would support the municipality's ability to meet the intensification and density targets established pursuant to this Plan;</u></p> <p><u>c. the location of any lands added to a settlement area will satisfy the applicable requirements of policy 2.2.8.3;</u></p> <p><u>d. the affected settlement areas are not rural settlements or in the Greenbelt Area; and</u></p> <p><u>e. a. the settlement area to be expanded has been identified as a focus for growth in the hierarchy established in accordance with policy 2.2.1.3 and the expansion will:</u><u>which lands would be added is serviced by municipal water and wastewater systems and there is sufficient reserve infrastructure capacity to service the lands.</u></p> <p><u>i. —be contiguous to the existing</u></p>	<p>The Region has several comments on this section:</p> <p>First and most importantly, Policy 2.2.8.4.d creates unintended consequences in Niagara. The use of “Greenbelt Area”, by definition, includes lands in the Niagara Escarpment Plan area (NEP). Niagara has several settlement areas within the NEP that would be prohibited from adjusting its boundaries even when doing so would otherwise be permitted by the Niagara Escarpment Commission, which has the authority to designation lands Escarpment Urban Area for this purpose.</p> <p>It is important to the Region that it be able to approve adjustments consistent with the Commission's decision.</p> <p>The Region suggests the following change to Policy 2.2.8.4.d as highlighted below:</p> <p><u>d. “the affected settlement areas are not rural settlements or in the Greenbelt Plan Area, except for those lands within the Niagara Escarpment Plan designated as Niagara Escarpment Plan Urban Area; and”</u></p> <p>Second, proposed Policy 2.2.8.4 is unclear whether boundary adjustments can be made that relate to multiple settlement areas within the Region. The Region has 27 settlement areas. It may be appropriate to limit settlement adjustments to the same settlement areas to restrict the ability to adjust lands that have different geographies and land needs.</p> <p>Third, in proposed Policy 2.2.8.4.e., the Region suggests the proposed phrase “<u>which lands would be added is serviced...</u>” be revised as highlighted “<u>which lands would be added is serviced, or is planned for services...</u>” to address instances where services are planned but not yet provided.</p> <p>Fourth, Regional staff requests clarification on whether “no net increase in land” means developable land.</p>	
2.2.8.5	<p><u>a. Notwithstanding policy 2.2.8.2, and 5.2.4.3, a settlement area boundary;</u>and</p>	<p>Similar to the Region's comments to Policy 2.2.8.4 above, the Region suggests the proposed phrase “<u>which lands would be added is serviced...</u>” be revised as highlighted “<u>which lands would be added is</u></p>	

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	<p>ii. not contain any lands that will be identified as excess lands expansion may occur in advance of a municipal comprehensive review, provided:</p> <p><u>a. the lands that are added will be planned to achieve at least the minimum density target in policy 2.2.7.2 or policy 2.2.5.13, as appropriate;</u></p> <p><u>b. development is prohibited on all excess lands to the horizon of this Plan in accordance with the location of any lands added to a settlement area will satisfy the applicable requirements of policy 2.2.48.63;</u></p> <p><u>c. an area of land that has been identified as excess lands and is greater in size than the proposed expansion is removed from settlement areas by redesignation and settlement area boundaries are amended accordingly, such that the overall quantum of excess lands is reduced; the affected settlement area is not a rural settlement or in the Greenbelt Area;</u></p> <p><u>d. where appropriate, the municipality has used additional tools to reduce the land that is available for development, such as those set out in policies 5.2.8.3 and 5.2.8.4; and the settlement area is serviced by municipal water and wastewater systems and there is sufficient reserve infrastructure capacity to service the lands; and</u></p> <p><u>e. all requirements of policies 2.2.8.2 and 2.2.8.3 have been satisfied. For the purposes of policy 2.2.8.2 a), excess lands will be considered to be not available; the additional lands and associated forecasted growth will be fully accounted for in the land needs assessment associated with the next municipal comprehensive review.</u></p>	<p><u>serviced, or is planned for services...</u> to address instances where services are planned but not yet provided.</p>	
2.2.8.6	<p><u>6. For a settlement area boundary expansion undertaken in accordance with policy 2.2.8.5, the amount of land to be added to the settlement area will be no larger than 40 hectares.</u></p>	<p>Regional staff requests the Province to clarify Policy 2.2.8.6 to specify whether the 40 hectare limit is applicable to <i>each</i> of Niagara's 27 settlement areas, or rather a cumulative total of across all settlement areas.</p> <p>Additionally, Regional staff requests the Province to clarify whether the phrase "amount of land" means developable land.</p>	
2.2.9 RURAL AREAS			
2.2.9.7	<p><u>7. Notwithstanding policy 2.2.8.2, minor adjustments may be made to the boundaries of rural settlements outside of a municipal comprehensive review, subject to the following:</u></p> <p><u>a. the affected settlement area is not in the Greenbelt Area;</u></p> <p><u>b. the change would constitute minor rounding out of existing development, in keeping with the rural character of the area;</u></p> <p><u>c. confirmation that water and wastewater servicing can be provided in an appropriate manner that is suitable for long-term; and</u></p>	<p>Regional staff support these changes to improve the ability to make boundary adjustments outside of the MCR process. This is consistent with the Region's submission shared with the Province during the 2015-2017 Coordinated Plan Review.</p> <p>However, similar to the Region's comment to Policy 2.2.8.4 above, the Region is concerned with the use of the term "Greenbelt Area". By definition this includes lands in the NEP, and several of Niagara's NEP rural areas have had recent or deferred designation changes. The</p>	

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	<u>d. Sections 2 (Wise Use and Management of Resources) and 3 (Protecting Public Health and Safety) of the PPS are applied.</u>	<p>Region requires the ability to update regional mapping to reflect the Commission's direction.</p> <p>Regional staff suggest the following change to Policy 2.2.9.7.e as highlighted below:</p> <p>a. <u>"the affected settlement area is not in the Greenbelt Area, except for those lands within the Niagara Escarpment Plan designated as Niagara Escarpment Plan Urban Area."</u></p> <p>Further, Regional staff suggest that Policy 2.2.9.7.c should be expanded to clarify that water and wastewater services includes private on-site and/or municipal services. Staff recommend proposed Policy 2.2.9.7.c be revised as highlighted below:</p> <p>c. <u>"confirmation that private on-site and/or municipal water and wastewater servicing can be provided in an appropriate manner that is suitable for long-term; and"</u></p>	
INFRASTRUCTURE			
3.2.1 INTEGRATED PLANNING			
3.2.1.2	<p>2. Planning for new or expanded <i>infrastructure</i> will occur in an integrated manner, including evaluations of long-range scenario-based land use planning, <u>environmental planning</u> and financial planning, and will be supported by infrastructure master plans, asset management plans, community energy plans, watershed planning, environmental assessments, and other relevant studies where appropriate, and should involve:</p> <p>a. leveraging <i>infrastructure</i> investment to direct growth and development in accordance with the policies and schedules of this Plan, including the achievement of the minimum intensification and density targets in this Plan;</p> <p>b. providing sufficient <i>infrastructure</i> capacity in <i>strategic growth areas</i>;</p> <p>c. identifying the full life cycle costs of <i>infrastructure</i> and developing options to pay for these costs over the long-term; and</p> <p>d. considering the impacts of a changing climate.</p>		
3.2.4.3	<p>3. Municipalities will provide for the establishment of priority routes for goods movement, where feasible, to facilitate the movement of goods into and out of <i>employment areas</i>, including prime employment areas, and other areas of significant commercial activity and to provide alternate routes connecting to the provincial network.</p>		
3.2.6 WATER AND WASTEWATER SYSTEMS			

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3.2.6.2	2. <i>Municipal water and wastewater systems and private communal water and wastewater systems</i> will be planned, designed, constructed, or expanded in accordance with the following: a. opportunities for optimization and improved efficiency within existing systems will be prioritized and supported by strategies for energy and water conservation and water demand management; b. the system will serve growth in a manner that supports achievement of the minimum intensification and density targets in this Plan; c. a comprehensive water or wastewater master plan or equivalent, informed by <i>watershed planning</i> <u>or equivalent</u> has been prepared to: i. demonstrate that the effluent discharges and water takings associated with the system will not negatively impact the <i>quality and quantity of water</i> ; ii. identify the preferred option for servicing growth and development, subject to the hierarchy of services provided in policies 1.6.6.2, 1.6.6.3, 1.6.6.4 and 1.6.6.5 of the PPS, 2014, which must not exceed the assimilative capacity of the effluent receivers and sustainable water supply for servicing, ecological, and other needs; and iii. identify the full life cycle costs of the system and develop options to pay for these costs over the long-term. d. in the case of <i>large subsurface sewage disposal systems</i> , the proponent has demonstrated attenuation capacity; and e. plans have been considered in the context of applicable inter-provincial, national, bi-national, or state-provincial Great Lakes Basin agreements or provincial legislation or strategies.		
3.2.6.4	4. Municipalities that share an inland water source or receiving water body will co-ordinate their planning for potable water, stormwater, and wastewater systems based on <i>watershed planning</i> <u>or equivalent</u> to ensure that the <i>quality and quantity of water</i> is protected, improved, or restored.	Regional staff requests the Province to clarify what constitutes as an "equivalent" to watershed planning, and whether there will be any additional guidance provided through future documents.	
3.2.7.1	1. Municipalities will develop <i>stormwater master plans</i> or equivalent for serviced <i>settlement areas</i> that: a. are informed by <i>watershed planning</i> <u>or equivalent</u> ; b. protect the <i>quality and quantity of water</i> by assessing existing stormwater facilities and systems; c. characterize existing environmental conditions; d. examine the cumulative environmental impacts of stormwater from existing and planned development, including an assessment of how extreme weather events will exacerbate these impacts and the identification of appropriate adaptation strategies;		

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	<ul style="list-style-type: none">e. incorporate appropriate <i>low impact development</i> and <i>green infrastructure</i>;f. identify the need for stormwater retrofits, where appropriate;g. identify the full life cycle costs of the stormwater <i>infrastructure</i>, including maintenance costs, and develop options to pay for these costs over the long-term; andh. include an implementation and maintenance plan.		
3.2.7.2	<p>2. Proposals for large-scale <i>development</i> proceeding by way of a secondary plan, plan of subdivision and, vacant land plan of condominium or site plan will be supported by a <i>stormwater management plan</i> or equivalent, that:</p> <ul style="list-style-type: none">a. is informed by a <i>subwatershed plan</i> or equivalent;b. incorporates an integrated treatment approach to minimize stormwater flows and reliance on stormwater ponds, which includes appropriate <i>low impact development</i> and <i>green infrastructure</i>;c. establishes planning, design, and construction practices to minimize vegetation removal, grading and soil compaction, sediment erosion, and impervious surfaces; andd. aligns with the <i>stormwater master plan</i> <u>or equivalent</u> for the <i>settlement area</i>, where applicable.		
PROTECTING WHAT IS VALUABLE			
4.2.1 WATER RESOURCE SYSTEMS			
4.2.1.1	<p>1. Municipalities<u>Upper- and single-tier municipalities</u>, partnering with <u>lower-tier municipalities and</u> conservation authorities as appropriate, will ensure that <i>watershed planning</i> is undertaken to support a comprehensive, integrated, and long-term approach to the protection, enhancement, or restoration of the <i>quality and quantity of water</i> within a <i>watershed</i>.</p>		
4.2.1.2	<p>2. Water resource systems will be identified, informed by watershed planning and other available information, and the appropriate designations and policies will be applied in official plans to provide for the long-term protection of <i>key hydrologic features, key hydrologic areas</i>, and their functions.</p>	Regional staff observe that water resource systems would no longer need to be identified in official plans with appropriate policies. Regional staff request that clarification be provided to indicate that water resource systems mapping will be identified and associated policy be applied within official plans.	
4.2.1.3	<p><u>3. Watershed planning or equivalent will inform:</u></p> <ul style="list-style-type: none"><u>a. the identification of water resource systems;</u><u>b. the protection, enhancement, or restoration of the quality and quantity of water,</u>c. 3. Decisions<u>decisions</u> on allocation of growth and;<u>d. planning for water, wastewater, and stormwater infrastructure will be informed by applicable watershed planning.</u>	Regional staff support this change.	
4.2.1.4	<p><u>4. Planning for large-scale development in designated greenfield areas, including secondary plans,</u> will be informed by a <i>subwatershed plan</i> or equivalent.</p>	Regional staff support this change.	

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4.2.1.5	<u>5. 4.</u> Municipalities will consider the Great Lakes Strategy, the targets and goals of the Great Lakes Protection Act, 2015, and any applicable Great Lakes agreements as part of <i>watershed planning</i> and coastal or waterfront planning initiatives.		
4.2.2 NATURAL HERITAGE SYSTEM			
4.2.2.1	1. The Province will map a <u>A</u> <i>Natural Heritage System for the GGH</i> <u>Growth Plan has been mapped by the Province</u> to support a comprehensive, integrated, and long-term approach to planning for the protection of the region's natural heritage and biodiversity. The <i>Natural Heritage System</i> mapping will exclude <u>for the Growth Plan excludes</u> lands within <i>settlement area</i> boundaries that were approved and in effect as of July 1, 2017.		
4.2.2.4	4. The <u>Provincial mapping of the</u> <i>Natural Heritage System for the Growth Plan does not apply until it has been implemented in the applicable upper- or single-tier official plan. Until that time, the policies in this Plan that refer to the Natural Heritage System for the Growth Plan will apply outside settlement areas to the</i> <i>natural heritage systems</i> identified in official plans that are <u>were</u> approved and in effect as of July 1, 2017 will continue to be protected in accordance with the relevant official plan until .	<p>The Region has serious concerns with this policy. In our view, NHS mapping <i>and policies</i> should not apply until they have been implemented through the applicable upper- or single-tier Official Plan. Proposed amendments to S. 4.2.2.4 will have the unintended and effect of rendering most of rural Niagara undevelopable.</p> <p>Regional staff <u>fully support</u> of the <i>first</i> part the proposed change to policy 4.2.2.4, which delays implementation of the Growth Plan Natural Heritage System (NHS) mapping until completion of the Municipal Comprehensive Review (MCR) process and new Regional Official Plan.</p> <p>However, Regional staff <u>do not support</u> the <i>second</i> part of the proposed change to policy 4.2.2.4, which applies Growth Plan NHS policies to the previously identified Regional NHS outside of settlement areas - until such time as the new Regional Official Plan is completed. As proposed, this change would present significant implementation issues across the Region.</p> <p>Regional staff note that proposed Policy 4.2.2.4 would adversely impact Niagara. Other GTA municipalities may have mapping that is more closely aligned to provincial plan provisions. In Niagara's case, implementing provincial NHS policy with its own mapping would unreasonably hamper growth.</p> <p>Specifically, when designing NHS mapping, policies are created in conjunction with mapping to complement each other. It is not appropriate to apply policies to a mapped system they were not designed for. Further, the primary tool used by most municipalities to implement the policies of their NHS is an Environmental Impact Study (EIS) or similar. EIS guidelines are created with specific consideration of the policies of that municipalities' Official Plan. By overriding the well established EIS process, municipalities would be left without a way to</p>	

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		<p>effectively implement NHS policies. Additionally, it would be likely that for areas outside of the mapped Growth Plan NHS, after the MCR process is complete, the policies for natural systems and features could change again. This creates unnecessary uncertainty and confusion in the planning process.</p> <p><u>If</u> the Provincial NHS <i>policies</i> <u>must</u> apply now, a transition regulation must be developed to permit certain exemptions. Alternatively, should the policies apply now, exemptions should be made for minor variances, consents and site plan applications submitted within a defined period of time.</p> <p><u>Additionally</u>, given that the proposed changes to the Growth Plan are similar to the Greenbelt Plan, particularly as it relates to natural heritage, it is recommended that a section similar to Section 5.2.1 of the Greenbelt Plan be included within the Growth Plan. This would have the effect of recognizing existing development approvals and allow for them to be implemented. It is also recommended that Sections 4.5.1 and 4.5.2 of the Greenbelt Plan be incorporated in some manner in the Growth Plan to recognize existing uses and existing lots of record.</p> <p>These additions would have the effect of allowing for the Region to plan for the future in developing a new comprehensive NHS instead of being mired in multiple discussions on the impacts of mapping on current approvals and lots of record, which will become a major issue and require significant resources to resolve.</p>	
4.2.2.5	<p><u>5. Upper- and single-tier municipalities, may refine provincial mapping of the Natural Heritage System for the Growth Plan at the time of initial implementation in their official plans. For upper-tier municipalities, the initial implementation of provincial mapping may be done separately for each lower-tier municipality. After the Natural Heritage System has been issued.5. In implementing the Natural Heritage System, upper- and single-tier municipalities may, for the Growth Plan has been implemented in official plans, further refinements may only occur</u> through a municipal comprehensive review, refine provincial mapping with greater precision in a manner that is consistent with this Plan.</p>	<p>Regional staff support changes to proposed Policy 4.2.2.5, specifically in regards to the removal of the phrase 'in a manner that is consistent with this plan'. It is staff's interpretation that this allows for greater flexibility in refinements to the Growth Plan NHS mapping through the MCR process. Previously, it had been suggested that the Province may provide guidelines for the refinement of Provincial NHS mapping. Regional staff request that the Province re-confirm its intent to prepare this type of guideline, and when it should be expected. Many municipalities are currently undertaking natural environment work as part of the MCR process and require this certainty to continue to move forward with their work programs.</p>	
4.2.2.6	<p>6. Beyond the <i>Natural Heritage System</i> <u>for the Growth Plan</u>, including within <i>settlement areas</i>, the municipality:</p> <p>a. will continue to protect any other <i>natural heritage features</i> <u>and areas</u> in a manner that is consistent with the PPS; and</p> <p>b. may continue to protect any other <i>natural heritage system</i> or identify new systems in a manner that is consistent with the PPS.</p>		

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4.2.2.7	7. If a <i>settlement area</i> is expanded into <u>to include</u> the <i>Natural Heritage System</i> <u>for the Growth Plan</u> in accordance with the policies in subsection 2.2.8, the portion that is within the revised <i>settlement area</i> boundary will: a. be designated in official plans; b. no longer be subject to policy 4.2.2.3; and c. continue to be protected in a manner that ensures that the connectivity between, and diversity and functions of, the <i>natural heritage features and areas</i> will be maintained, restored, or enhanced.	Regional staff requests the Province to clarify in Policy 4.2.2.7 that the Region has the ability to refine the NHS during instances of settlement area expansions. This clarification would align with the intent of proposed amendment Policy 4.2.2.5.	
4.2.6 AGRICULTURAL SYSTEM			
4.2.6.1	1. The Province will identify an <u>An</u> <i>Agricultural System</i> for the GGH. 2. Prime agricultural areas; <u>has been identified by the Province.</u>		
4.2.6.2	<u>2. Prime agricultural areas,</u> including <i>specialty crop areas</i> , will be designated in accordance with mapping identified by the Province and these areas will be protected for long-term use for agriculture.		
4.2.6.3	3. Where <i>agricultural uses</i> and non-agricultural uses interface outside of <i>settlement areas</i> , land use compatibility will be achieved by avoiding or where avoidance is not possible, minimizing and mitigating adverse impacts on the <i>Agricultural System</i> . Where mitigation is required, measures should be incorporated as part of the non-agricultural uses, as appropriate, within the area being developed. <u>Where appropriate, this should be based on an agricultural impact assessment.</u>		
4.2.6.8	8. The <u>Provincial mapping of the agricultural land base does not apply until it has been implemented in the applicable upper- or single-tier official plan. Until that time,</u> <i>prime agricultural areas</i> identified in <u>upper- and single-tier</u> official plans that are <u>were</u> approved and in effect as of July 1, 2017 will continue to be protected in accordance with the official plan until provincial mapping of the Agricultural System has been issued <u>be considered the agricultural land base for the purposes of this Plan.</u>	Regional staff support this change. However, the change would contradict Section 3.1 of Publication 856 "Implementation Procedures for the Agricultural System in Ontario's Greater Golden Horseshoe". Significant components of Publication 856 assist municipalities with implementing the Agricultural System into official plans. Regional staff requests that Publication 856 be updated to reflect proposed changes to Policy 4.2.8.6.	
	9. In implementing the Agricultural System, upper <u>Upper-</u> and single-tier municipalities, may, through a municipal comprehensive review; refine or augment provincial mapping <u>of the agricultural land base at the time of initial implementation</u> in a manner that is consistent with this Plan and any <u>their official plans, based on</u> implementation procedures issued by the Province. <u>For upper-tier municipalities, the initial implementation of provincial mapping may</u>		

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	<u>be done separately for each lower-tier municipality. After provincial mapping of the agricultural land base has been implemented in official plans, further refinements may only occur through a municipal comprehensive review.</u>		
4.2.10 CLIMATE CHANGE			
4.2.10.1	<p>1. Upper- and single-tier municipalities will develop policies in their official plans to identify actions that will reduce greenhouse gas emissions and address climate change adaptation goals, aligned with the Ontario Climate Change Strategy, 2015 and the Climate Change Action Plan, 2016<u>other provincial plans and policies for environmental protection,</u> that will include:</p> <ul style="list-style-type: none">a. supporting the achievement of <i>complete communities</i> as well as the minimum intensification and density targets in this Plan;b. reducing dependence on the automobile and supporting existing and planned transit and <i>active transportation</i>;c. assessing <i>infrastructure</i> risks and vulnerabilities and identifying actions and investments to address these challenges;d. undertaking stormwater management planning in a manner that assesses the impacts of extreme weather events and incorporates appropriate <i>green infrastructure</i> and <i>low impact development</i>;e. recognizing the importance of <i>watershed planning</i> for the protection of the <i>quality and quantity of water</i> and the identification and protection of hydrologic features and areas;f. protecting the <i>Natural Heritage System</i> <u>for the Growth Plan</u> and <i>water resource systems</i>;g. promoting local food, food security, and soil health, and protecting the agricultural land base;h. providing direction that supports a culture of conservation in accordance with the policies in subsection 4.2.9; andi. any additional policies to reduce greenhouse gas emissions and build resilience, as appropriate, provided they do not conflict with this Plan.		
4.2.10.2	<p>2. In planning to reduce greenhouse gas emissions and address the impacts of climate change, municipalities are encouraged to:</p> <ul style="list-style-type: none">a. develop strategies to reduce greenhouse gas emissions and improve resilience through the identification of vulnerabilities to climate change, land use planning, planning for <i>infrastructure</i>, including transit and energy, <i>green infrastructure</i>, and <i>low impact development</i>, and the conservation objectives in policy 4.2.9.1;b. develop greenhouse gas inventories for transportation, buildings, waste management and municipal operations; andc. establish municipal interim and long-term greenhouse gas emission reduction targets that support provincial targets and	<p>Regional staff observe that references to working toward “low-carbon communities” and “net-zero communities” in the proposed amendment are replaced with the term “environmentally sustainable communities”. An exception is the reference to low-carbon communities in Policy 4.2.10.2.c. It's unclear whether this is intentional or not. If not, the intention of that policy where the terms have been deleted elsewhere.</p>	

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	reflect consideration of the goal of low-carbon communities and monitor and report on progress made towards the achievement of these targets.		
5.2.2 SUPPLEMENTARY DIRECTION			
5.2.2.1	1. To implement this Plan, the Minister will, in collaboration with other Ministers of the Crown where appropriate, identify, establish, or update the following: a. the <i>delineated built boundary</i> and undelineated built-up areas ; b. the size and location of the <i>urban growth centres</i> ; and c. a standard methodology for land needs assessment; <u>and</u> <u>d. provincially significant employment zones.</u>		
5.2.2.3	<u>3. The Province may review and update provincially significant employment zones, the agricultural land base mapping or the Natural Heritage System for the Growth Plan in response to a municipal request.</u>	<p>Regional staff requests that proposed Policy 5.2.2.3 be amended to clarify that the request can come from upper- and single-tier municipalities, since they are the authority that typically addresses/ administers the review and update of such items. Regional staff suggest the following changes to Policy 5.2.2.3 as highlighted below:</p> <p><u>3. The Province may review and update provincially significant employment zones, the agricultural land base mapping or the Natural Heritage System for the Growth Plan in response to a municipal request from an upper- or single-tier municipality.</u></p> <p>As commented earlier in proposed Policy 2.2.5.12 Regional staff request that the Region be granted the ability to identify all or some of the Gateway Economic Zone and Gateway Economic Centre as provincially significant employment zones without amendment to the Growth Plan.</p>	
5.2.5 TARGETS			
5.2.5.2	2. The minimum intensification and density targets in this Plan or established pursuant to this Plan will be identified in upper- and single-tier official plans. Any changes to the targets established pursuant to this Plan may only occur <u>be implemented</u> through a <i>municipal comprehensive review</i> .		
5.2.5.3	3. For the purposes of implementing the minimum intensification and density targets in this Plan, upper- and single-tier municipalities will, through a <i>municipal comprehensive review</i> , delineate the following in their official plans, where applicable: a. delineated built-up areas; b. urban growth centres; c. major transit station areas; d. other <i>strategic growth areas</i> for which a minimum density target will be established; e. each portion of the designated greenfield area that is subject to a specific density target ; and	Regional staff support this change.	

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	<u>e.</u> f. excess lands.		
DEFINITIONS			
Designated Greenfield Area	Lands within <i>settlement areas</i> (<u>not including rural settlements</u>) but outside of <i>delineated built-up areas</i> that have been designated in an official plan for development and are required to accommodate forecasted growth to the horizon of this Plan. <i>Designated greenfield areas</i> do not include <i>excess lands</i> .	Regional staff support this change.	
Excess Lands	Lands <u>Vacant, unbuilt but developable lands</u> within <i>settlement areas</i> but outside of <i>delineated built-up areas</i> that have been designated in an official plan for development but are in excess of what is needed to accommodate forecasted growth to the horizon of this Plan.		
Innovation Hub	Innovation Hub Locations that support collaboration and interaction between the private, public and academic sectors across many different economic sectors to promote innovation.		
Low Impact Development	An approach to stormwater management that seeks to manage rain and other precipitation as close as possible to where it falls to mitigate the impacts of increased runoff and stormwater pollution. It <u>typically</u> includes a set of site design strategies and distributed, small-scale structural practices to mimic the natural hydrology to the greatest extent possible through infiltration, evapotranspiration, harvesting, filtration, and detention of stormwater. <i>Low impact development</i> can include, <u>for example</u> : bio-swales, <u>vegetated areas at the edge of paved surfaces</u> , permeable pavement, rain gardens, green roofs, and exfiltration systems. <i>Low impact development</i> often employs vegetation and soil in its design, however, that does not always have to be the case <u>and the specific form may vary considering local conditions and community character.</u>		
Major Trip Generators	Origins and destinations with high population densities or concentrated activities which generate many trips (e.g., <i>urban growth centres</i> and other downtowns, <i>major office and office parks</i> , <i>major retail</i> , <i>employment areas</i> , community hubs, <u>large parks and recreational destinations</u> , <u>post-secondary institutions</u> and other <i>public service facilities</i> , and other mixed-use areas).		
Major Transit Station Area	The area including and around any existing or planned <i>higher order transit</i> station or stop within a <i>settlement area</i> ; or the area including and around a major bus depot in an urban core. <i>Major transit station areas</i> generally are defined as the area within an approximate <u>500 to 800</u> metre radius of a transit station, representing about a 10-minute walk.		
Natural Heritage System	The system mapped and issued by the Province in accordance with this Plan, comprised <u>A system made up</u> of <i>natural heritage features and areas</i> , and linkages intended to provide connectivity (at the regional or site level) and support natural processes which		

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	are necessary to maintain biological and geological diversity, natural functions, viable populations of indigenous species, and ecosystems. The system can include <i>key natural heritage features, key hydrologic features</i> , federal and provincial parks and conservation reserves, other <i>natural heritage features and areas</i> , lands that have been restored or have the potential to be restored to a natural state, associated areas that support <i>hydrologic functions</i> , and working landscapes that enable <i>ecological functions</i> to continue. (Based on PPS, 2014 and modified for this Plan)		
Natural Heritage System for the Growth Plan	<u>Natural Heritage System for the Growth Plan</u> <u>The <i>natural heritage</i> system mapped and issued by the Province in accordance with this Plan.</u>		
Office Parks	Employment areas designated in an official plan <u>Areas</u> where there are significant concentrations of offices with high employment densities.		
Prime Employment Area	Prime Employment Area Areas of employment within settlement areas that are designated in an official plan and protected over the long-term for uses that are land extensive or have low employment densities and require locations that are adjacent to or near major goods movement facilities and corridors. These uses include manufacturing, warehousing, and logistics, and appropriate associated uses and ancillary facilities.	Regional staff support this change.	
Rural Settlements	<u>Rural Settlements</u> <u>Existing hamlets or similar existing small settlement areas that are long-established and identified in official plans. These communities are serviced by individual private on-site water and wastewater systems contain a limited amount of undeveloped lands that are designated for development. All settlement areas that are identified as hamlets in the Greenbelt Plan, as rural settlements in the Oak Ridges Moraine Conservation Plan, or as minor urban centres in the Niagara Escarpment Plan are considered rural settlements for the purposes of this Plan, including those that would not otherwise meet this definition.</u>	<p>Regional staff note that the inclusion of the term “Rural Settlements” improves overall policy interpretation; however, some of what the Region considers “rural settlements” were historically serviced or partially serviced by municipal infrastructure. Development in rural settlement areas should not be excluded from connecting to municipal services if they are present.</p> <p>Additionally, Regional staff request the phrase “that are long-established and” be removed, as it is vague and could lead to interpretation issues. Regional staff suggests that the definition for “Rural Settlements” be revised as highlighted below:</p> <p><u>“Existing hamlets or similar existing small settlement areas that are long-established and identified in official plans. These communities are generally serviced by individual private on-site water and wastewater systems contain a limited amount of undeveloped lands that are designated for development. All settlement areas that are identified as hamlets in the Greenbelt Plan, as rural settlements in the Oak Ridges Moraine Conservation Plan, or as minor urban centres in the Niagara Escarpment Plan are considered rural settlements for the purposes of this Plan, including those that would not otherwise meet this definition.”</u></p>	

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Settlement Areas	Urban areas and rural settlement areas <u>settlements</u> within municipalities (such as cities, towns, villages and hamlets) that are: a. built up areas where development is concentrated and which have a mix of land uses; and b. lands which have been designated in an official plan for development in accordance with the policies of this Plan. Where there are no lands that have been designated for development, the <i>settlement area</i> may be no larger than the area where development is concentrated. (Based on PPS, 2014 and modified for this Plan)		
Strategic Settlement Employment Areas	Areas that have been identified by the Minister that are to be planned and protected for employment uses that require large lots of land and depend upon efficient movement of goods and access to Highway 400. These are not <i>settlement areas</i> or prime employment areas . Major retail and residential uses are not permitted.		
Subwatershed Plan	A plan that reflects and refines the goals, objectives, targets, and assessments of <i>watershed planning</i> , <u>as available at the time a subwatershed plan is completed</u> for smaller drainage areas, is tailored to subwatershed needs and addresses local issues. <i>A subwatershed plan</i> should: consider existing development and evaluate impacts of any potential or proposed land uses and development; identify hydrologic features, areas, linkages, and functions; identify natural features, areas, and related <i>hydrologic functions</i> ; and provide for protecting, improving, or restoring the <i>quality and quantity of water</i> within a subwatershed. <i>A subwatershed plan</i> is based on pre-development monitoring and evaluation; is integrated with natural heritage protection; and identifies specific criteria, objectives, actions, thresholds, targets, and best management practices for development, for water and wastewater servicing, for stormwater management, for managing and minimizing impacts related to severe weather events, and to support ecological needs. (Greenbelt Plan)		
Undelineated Built-up Areas	Undelineated Built-up Areas Settlement areas for which the Minister has not delineated a built boundary pursuant to this Plan.	Regional staff support this change.	

Table 2: Proposed new policy for the amendment

Topic / Theme	Proposed new policy	Rationale	Comments provided by local municipal partners
Employment uses for lands adjacent to Airports	[to be drafted]	<p>Regional staff seek the Province to include policy that permits employment uses on lands adjacent to or near Airports. To ensure land use compatibility, these lands would have to be related to or secondary to the primary use of the Airport.</p> <p>Regional staff have identified that policy provisions for this ask may best fit within Growth Plan <u>Section 3: Infrastructure to Support Growth</u>.</p> <p>If the Region’s proposed policy is implemented within the amended Growth Plan, the Region requests that a complimentary policy revision be made within the Greenbelt Plan should it be amended.</p>	
Updates to built boundary mapping	[to be drafted]	<p>Regional staff requests the Province to update all built boundary mapping to recognize Niagara’s 27 settlement areas.</p> <p>Regional staff suggest inclusion of a new policy in Growth Plan <u>Section 5.2.7: Schedules and Appendices</u> that grants upper- and single-tier municipalities the ability to update built boundary mapping without amendment to the Growth Plan.</p>	
Coordination between Growth Secretariat and Ministry of Municipal Affairs	[to be drafted]	<p>Regional staff has identified a need for improved coordination between the Growth Secretariat and Ministry of Municipal Affairs when interpreting and implementing provincial policy.</p> <p>The Region recommends including a policy in Growth Plan that provides direction and a clear process when provincial policy interpretation and implementation challenges are encountered.</p>	