



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

PEDC 3-2019

Wednesday, March 20, 2019

1:00 p.m.

Council Chamber

Niagara Region Headquarters, Campbell West

1815 Sir Isaac Brock Way, Thorold, ON

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	Pages
1. <u>CALL TO ORDER</u>	
2. <u>DISCLOSURES OF PECUNIARY INTEREST</u>	
3. <u>STATUTORY PUBLIC MEETING UNDER THE PLANNING ACT</u> Regional Official Plan Amendment 15 (ROPA 15) Exemption Policies	
3.1 <u>Presentations</u>	
3.1.1 <i>Overview of the Application - Regional Staff</i>	4 - 11
3.2 <u>Registered Speakers</u>	
3.3 <u>Report &amp; Correspondence (For Information Only)</u>	
3.3.1 PDS 5-2019 Regional Official Plan Amendment 15 Exemption Policies	12 - 19
3.3.2 PDS-C 10-2019 Letter from L. Tulloch, Planner, Community Planning and Development (West), Ministry of Municipal Affairs and Housing, dated February 25, 2019, respecting Regional Official Plan Amendment 15	20 - 21

3.3.3	PDS-C 11-2019 Letter from R. Brady, Director, Planning and Development Services, Town of Fort Erie, dated February 27, 2019, respecting Regional Official Plan Amendment 15	22
3.4	<u>Summary &amp; Next Steps</u>	
3.5	<u>Adjournment of the Statutory Public Meeting Under the Planning Act</u>	
4.	<b><u>PRESENTATIONS</u></b>	
4.1	Modernizing Wine Sales in Ontario Richard Linley, President, and Len Pennachetti, Chair, Ontario Craft Wineries	23 - 31
5.	<b><u>DELEGATIONS</u></b>	
6.	<b><u>ITEMS FOR CONSIDERATION</u></b>	
6.1	<u>PDS 11-2019</u> Recommendation for Regional Official Plan Amendment No. 14 - Brock District Plan  <i>A presentation will precede the consideration of this item.</i>	32 - 63
6.2	<u>PDS 4-2019</u> Memorandum of Understanding for Planning Function and Services between Niagara Region and Local Area Municipalities	64 - 162
6.3	<u>PDS 13-2019</u> Initiation of a Woodland By-law Review	163 - 190
6.4	<u>PDS-C 9-2019</u> Recommendations for Consideration from the Agricultural Policy and Action Committee meeting held February 22, 2019	191 - 202
7.	<b><u>CONSENT ITEMS FOR INFORMATION</u></b>	
7.1	<u>ED 2-2019</u> Economic Development Strategy: 2019 - 2024  <i>A presentation will precede discussion of this item.</i>	203 - 340
7.2	<u>PDS 12-2019</u> Glendale Niagara District Plan – Phase 2 Update  <i>A presentation will precede discussion of this item.</i>	341 - 361

- 7.3 PDS 6-2019 362 - 387  
 Niagara Region 2018 Employment Inventory Results Report (and **BE CIRCULATED** to the Local Area Municipalities, Local Economic Development Offices, Niagara Workforce Planning Board and the Niagara Chambers of Commerce)  
*A presentation will precede discussion of this item.*
- 7.4 ED 3-2019 388 - 390  
 Workforce Development Initiative
- 7.5 PDS 9-2019 391 - 399  
 New Official Plan Consultation Timeline Framework (and **BE CIRCULATED** to the Local Area Municipalities and the Niagara Peninsula Conservation Authority)
8. OTHER BUSINESS
9. CLOSED SESSION
- 9.1 Confidential Report PDS 15-2019 - A Matter Respecting Litigation or Potential Litigation – Appeal to LPAT for Welland CofA Decision on Minor Variance, 37 Niagara Street, Welland
- 9.2 Confidential Report PDS 16-2019 - A Matter Respecting Litigation or Potential Litigation – Appeal to LPAT for Port Colborne CofA Decision on Consent Applications of Westwood Estates, Port Colborne
10. BUSINESS ARISING FROM CLOSED SESSION ITEMS
11. NEXT MEETING  
 The next meeting will be held on Wednesday, April 17, 2019, at 1:00 p.m. in the Council Chamber, Regional Headquarters.
12. 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](mailto:accessibility@niagararegion.ca) (email).



# REGIONAL OFFICIAL PLAN

## Amendment

# Statutory Public Meeting

March 20, 2019

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## ROPA 15: Exemption Policies

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Presented by:

**Kirsten McCauley**, MCIP, RPP  
Senior Planner, Secondary Plans  
[kirsten.mccauley@niagararegion.ca](mailto:kirsten.mccauley@niagararegion.ca)

Associated report:

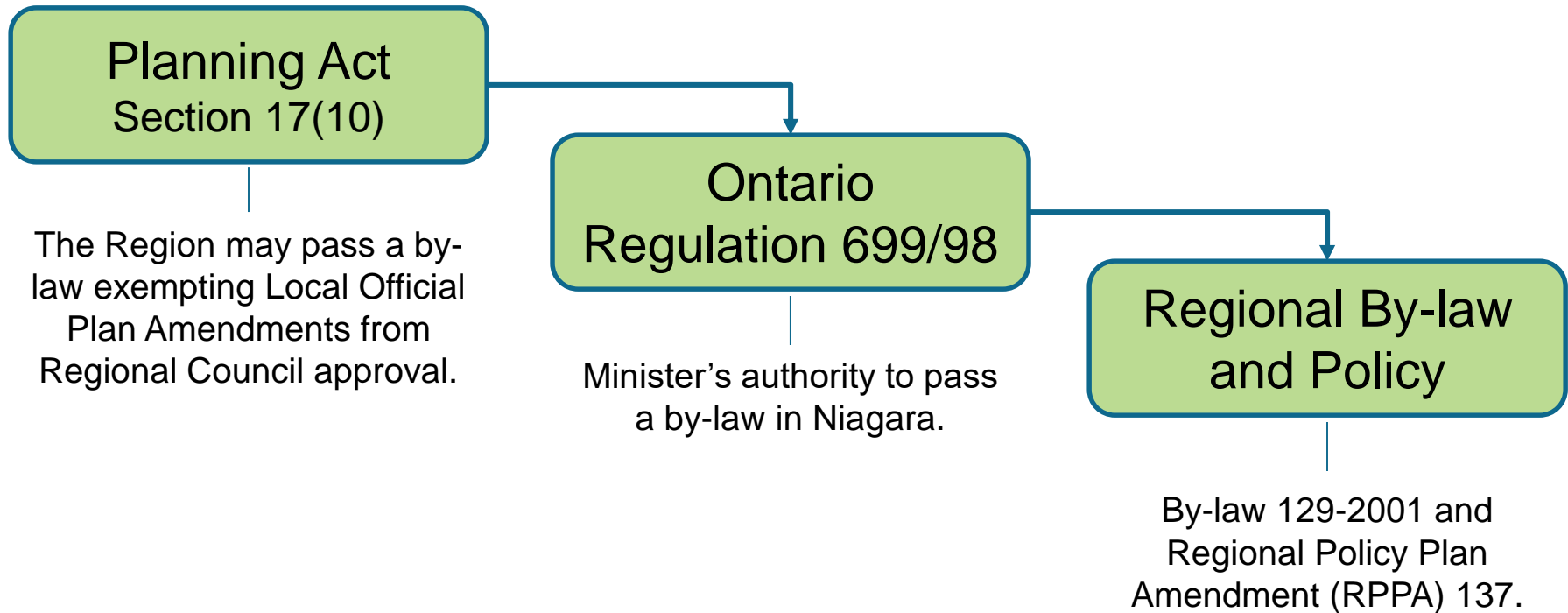
**PDS 5-2019**



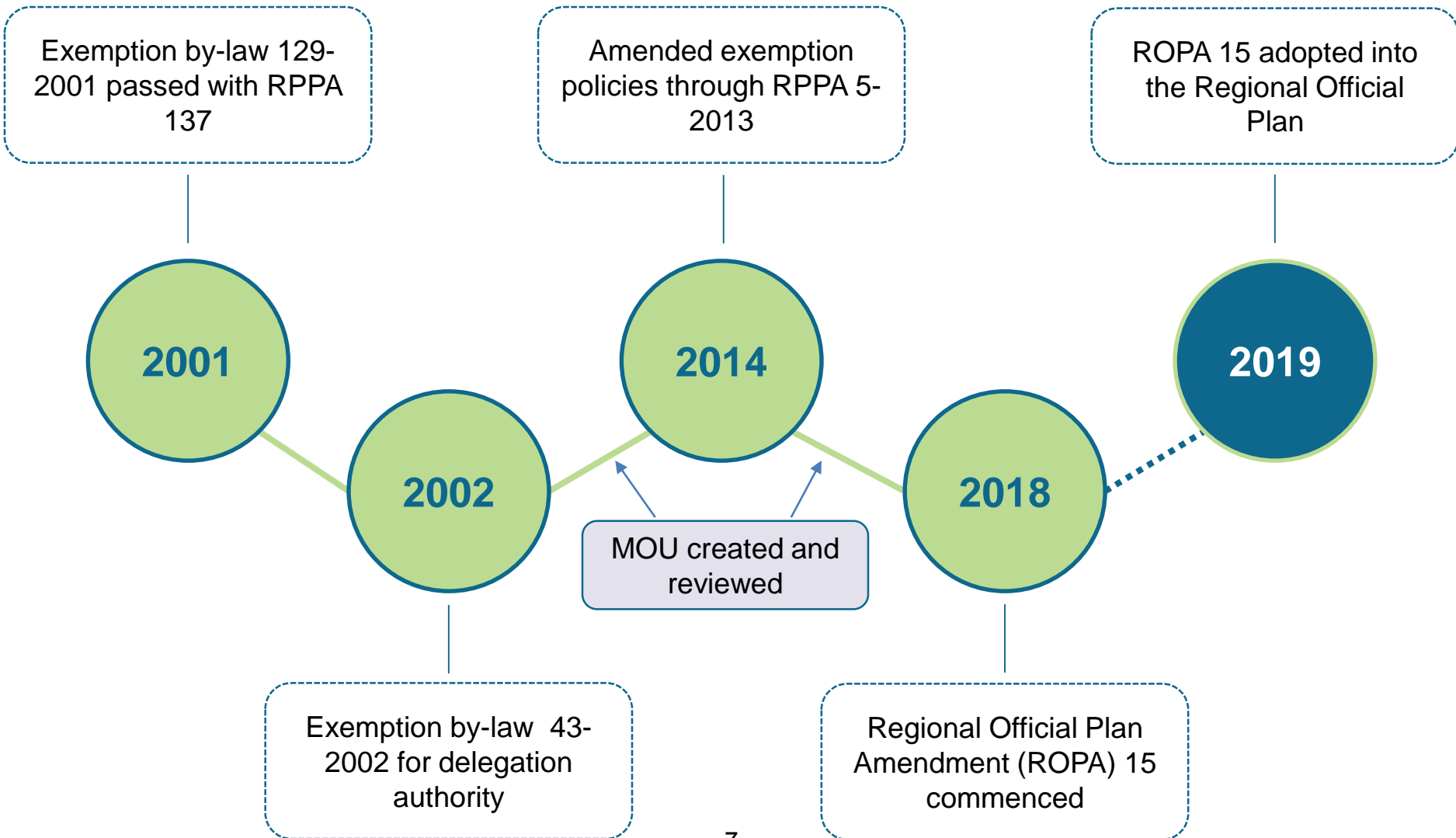
# Purpose of the Amendment

- Review of the existing exemption policies in Section 14.E.6-14.E.9 of the Regional Official Plan.
- Proposed amendment will provide more clarity and certainty to the exemption process.
- Review done in conjunction with an update to the Memorandum of Understanding (MOU) between the Region and the local area municipalities.

# Legislative framework



# Timeline: Niagara's exemption policies



# Existing v. proposed policy

## Existing Policy

- 14.E.6** Decision-making timing in the review of local official plans and amendments.
- 14.E.7** Comprehensive amendment exemptions.
- 14.E.8** Exemptions for amendments of local significance.
- 14.E.9** Conformity with Regional Official Plan.

## Proposed Policy

- Deletes existing policies 14.E.6 & 14.E.9.
- Combines existing policies into a two part policy:
  - Part A:** minor amendments with no concerns to Regional & Provincial interest.
  - Part B:** comprehensive amendments requiring collaboration to identify and address matters of Regional interest.
- Combines and summarizes the list of criteria where an amendment may not be exempt.

# Protecting Regional & Provincial interests

## **New Policy 14.E.7**

Provides a clear and concise Regional mandate:

- Protecting Regional and Provincial planning interest and matters;
- significant impacts to Regional infrastructure/investment; and
- cross-boundary impacts.

Enables collaboration between the Region and the local municipality to address matters.

Region would retain approval authority where resolution is not met.

# Exemption by-law



To align with ROPA 15, the existing exemption by-law will be repealed and replaced.



The new exemption by-law will reflect and implement the updated policy.



The new by-law will be presented to Committee with the recommendation report for ROPA 15.

# Expected outcomes

- ✓ Enhanced efficiency when reviewing local amendments for exemption.
- ✓ Strengthened support and collaboration between the Region and its local municipal partners.
- ✓ Improved clarity enabling consistent interpretation and application of exemption policy.

## Next steps

- Collect comments from Committee, the public, and agencies.
- Evaluate input and make any required changes.
- Recommendation report.
- Approval & appeal period.



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**Subject:** Statutory Public Meeting for Draft Regional Official Plan Amendment 15 – Exemption Policies

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, March 20, 2019

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### **Recommendations**

1. That Report PDS 5-2019 **BE RECEIVED** for information;
2. That a copy of Report PDS 5-2019 **BE CIRCULATED** to the Local Area Municipalities for information;
3. That the necessary update to the exemption by-law **BE PREPARED** and **PRESENTED** to Council for consideration with the recommendation report for Regional Official Plan Amendment No. 15; and
4. That existing By-law 129-2001 and By-law 43-2002 **BE REPEALED** when the new exemption by-law is passed.

### **Key Facts**

- Section 17(10) and Ontario Regulation 699/98 of the *Planning Act, 1990*, allows Niagara Region to pass a by-law exempting local Official Plan Amendments (LOPAs) from Regional approval.
- The Region passed exemption By-law 129-2001 authorizing the Region of Niagara to exempt minor, site specific LOPAs from Regional approval per Regional Policy Plan Amendment 137. By-law 43-2002 delegates the exemption approval to the Commissioner of Planning and Development Services or his/her delegate. By-laws 129-2001 and 43-2002 are no longer consistent with the needs of the Region and local municipalities.
- The Region has undertaken a review of the existing exemption policies in Section 14.E.6-14.E.9 of the Regional Official Plan. The exemption policies identify the process and circumstances where the Region will exempt local Official Plan Amendments from Regional approval.
- The proposed amendment will modernize these policies and provide better clarity and certainty to the exemption process for the Region's local area municipalities.

- The proposed policy was done in conjunction with an update to the Memorandum of Understanding between the Region and the local area municipalities, which included discussions with the local area planners.

## **Financial Considerations**

There are no direct financial implications arising from this report as the cost to process the Amendment can be accommodated within the Planning and Development Services base Operating Budget.

## **Analysis**

### ***Process***

As per the *Planning Act, 1990*, the upper tier municipality is the approval authority for any and all local Official Plan Amendments (LOPAs). However, section 17(10) of the *Act* allows a municipality, with approval from the Minister, to pass a by-law exempting LOPAs from Regional approval. Niagara Region received approval authority from the Minister to pass a by-law to exempt any or all LOPAs per Ontario Regulation 699/98.

Following a process review and consultation with local area partners, the first exemption by-law was passed in 2001 in conjunction with Regional Policy Plan Amendment (RPPA) 137. By-law 129-2001 authorizes the Region of Niagara to exempt minor, site specific LOPAs from Regional approval per RPPA 137 and the exemption approval process in Schedule A to the By-law. The exemption process involves working collaboratively with the local municipality through the process and the review of the LOPA document. This means that the Region has the authority to exemption LOPAs from approval where is deemed to comply with the exemption policy and process. The approval of these amendments would then rest with the local municipal Council.

In 2002, the Region passed By-law 43-2002 to delegate the power to exempt the LOPA to the Commissioner of Planning and Development Services or his/her delegate. This By-law continued to reference the approval process as set out in By-law 129-2001 and the policy of RPPA 137.

Following a process review and consultation with local partners, it was determined that there needed to be differentiation in review and exemption requirements for minor, site specific and comprehensive LOPAs. The Region amended the exemption policies through RPPA 5-2013 to implement this direction. This amendment made minor wording modifications to what was approved through RPPA 137 but largely kept the previously approved wording for minor, site specific amendments. RPPA 5-2013 also added new policy related to exemption of comprehensive LOPAs (i.e. Secondary Plans or where the amendment may have cross boundary impacts). Each policy continued to have criteria outlining where the LOPA would not receive exemption.

### ***Existing Policy and New DRAFT Regional Official Plan Amendment (ROPA)***

Appendix 1 contains the DRAFT proposed Exemption ROPA policy for consideration. Appendix 2 contains the current wording of Regional Official Plan (ROP) policies (s. 14.E.6-4.E.9) that would be replaced by the new wording. Feedback from our local partners indicate that the existing policies are unnecessarily wordy and confusing. Some of the information is out of date and the policy direction of the existing 14.E.7 and 14.E.8 can limit the opportunity for the Region to collaborate with the local area municipality.

Regional staff have condensed and simplified the wording through the draft ROPA. Current Policy 14.E.6 has been removed in its entirety. The guidance and timeframe for the review process of LOPAs will be detailed in the updated Memorandum of Understanding (MOU). Also through recent *Planning Act, 1990*, amendments, the Region's review time increased to 210 days with the ability to request extension. This timeline is detailed in the *Act* and should be removed from the Region Official Plan (ROP). Existing Policy 14.E.9 is inherent in the review process so it has also been removed.

The new proposed ROPA Policy 14.E.6 outlines the exemption authority and provides two part direction as to when the LOPA may be exempt:

- Part A is for amendments that are minor, site specific with no issues/concerns related to Regional and Provincial interest. In this case, the exemption can be determined and issued at the pre-consultation stage.
- Part B is for more comprehensive LOPAs (i.e. Secondary Plans) that require continued collaboration between the Region and the local area municipality (LAM). The Region would work with the LAM to identify and address any matters of Regional and Provincial interest and review the draft LOPA or Secondary Plan document to determine that the matters have been satisfactorily addressed. If the Region is satisfied with the policies (or other steps taken to address the issue), the Region can issue the exemption.

The draft ROPA continues to contain a list of criteria in Policy 14.E.7 to outline where the amendment may not be exempt. It combines, summarizes and condenses the list in the previous 14.E.7 and 14.E.8. The intent of this policy is to provide detailed direction on matters of Regional and Provincial interest where the Regional will retain approval authority if there is disagreement on one or more of the criteria listed. However, where a resolution can be reached which will satisfactorily address the matter through policy or other means (i.e. zoning, conditions of draft plan approval), Part B of Policy 14.E.6 would apply. The listed criteria will continue to be a helpful tool for interested external parties in understanding the Region's exemption process.

### ***Exemption by-law***

In order to properly align this Regional Official Plan Amendment, the existing exemption By-law 129-2001 and 43-2002 will be repealed and replaced by a new exemption by-law that reflects the updated policy and Memorandum of Understanding process. Information on the Memorandum of Understanding is contained in Report PDS 4-2019.

### ***Conclusion***

The exemption policies are being updated to better reflect the working relationship between the Region and the LAMs. It continues to support strong collaboration between the LAMs and the Region and provides more clarity and consistency in reviewing LOPAs.

Following the public meeting, Regional staff will review comments presented at the public meeting, as well as any agency comments received through circulation. A recommendation report will be presented for consideration when finalized.

### ***Alternatives Reviewed***

The *Planning Act, 1990*, requires that a public meeting be held for all amendments to municipal Official Plans. Appropriate notice has been provided for this statutory public meeting.

### ***Relationship to Council Strategic Priorities***

This report support Council's strategic areas for fostering innovation, investment, and entrepreneurship and doing business differently.

### ***Other Pertinent Reports***

N/A

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**Prepared by:**

Kirsten McCauley, MCIP, RPP  
Senior Planner, Secondary Plans  
Planning and Development Services

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**Recommended by:**

Rino Mostacci, MCIP, RPP  
Commissioner  
Planning and Development Services

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**Submitted by:**

Ron Tripp, P. Eng  
Acting Chief Administrative Officer

*This report was prepared in consultation with Isaiah Banach, Manager of Long Range Planning, and reviewed by Doug Giles, Director of Community and Long Range Planning.*

**Appendices**

Appendix 1	DRAFT Regional Official Plan Amendment No. 15	Page 6
Appendix 2	Existing Regional Official Plan Policy	Page 7

## **APPENDIX 1 – DRAFT Regional Official Plan Amendment**

### **DRAFT Amendment XX To The Official Plan for the Niagara Planning Area**

#### **Text Changes**

The Official Plan for the Niagara Planning Area is amended as follows:

#### **Part I – Modifications to Existing Policies**

1. **Policy 14.E.6, 14.E.7, 14.E.8 and 14.E.9** are deleted and replaced with the following:

14.E.6 The Commissioner of Planning and Development Services, or his/her designate, shall determine and issue an exemption from Regional approval for a local Official Plan Amendment (OPA) where:

a) It is determined through pre-consultation that the draft OPA is of local significance, is consistent, conforms to, or does not conflict with Provincial Policy and Plans, and is in conformity with the Regional Official Plan; or,

b) Matters of Regional and Provincial interest are present and, through a collaborative process between the Region and the local municipality, it is determined that the OPA has identified and satisfactorily addressed these matters. In the case of a Secondary Plan, the Region shall review the draft Secondary Plan policy set and mapping prior to determining exemption.

14.E.7 A local OPA shall not be exempt from Regional approval if any of the following cannot be addressed to Region's satisfaction:

- i. conformity with the Regional Official Plan;
- ii. consistency with the Provincial Policy Statement and/or conformity with Provincial Plans;
- iii. significant impacts relating to the Regional Master Servicing Plan and/or Transportation Master Plan;
- iv. directly affects Regional capital forecasts; or
- v. cross-boundary impacts or impacts on any adjacent municipality."

## APPENDIX 2 – Existing Regional Official Plan Exemption Policies 14.E.6 – 14.E.9

### Policy 14.E.6

The following decision-making targets shall be used in the review of local Official Plans and Amendments:

Table 14-1: Decision Making Target Timeframes	
Request	Timeframe
A request for exemption from Regional approval as per this Plan	10 days to respond to request by municipality
A regionally significant local Official Plan or Official Plan Amendment	180 days after submission to the Region to process with decision by Regional Council

### Policy 14.E.7

Policy amendments to local Official Plans that are in conformity with the Regional Official Plan may be exempt from Regional approval where they are of local significance and no Regional interest is adversely affected. Applications for a policy amendment to local Official Plans with Regional interests, where a collaborative process has been undertaken between the Region and the Local Municipality, including policies (i) and (ii) below, have been addressed through pre-consultation and review of the draft Local Amendment may also be exempt. Amendments impacting any one of the following areas are not eligible for exemption:

- i. Applications directly and substantially affecting Regional servicing infrastructure: i.e. streets, water, and wastewater;
- ii. Applications that substantially change Regional capital forecasts;
- iii. Urban boundary expansions;
- iv. Applications to convert employment areas and lands that have the potential for adversely affecting the viability of an employment area;
- v. Major applications that will adversely affect Regional traffic flows;
- vi. Major secondary plans;
- vii. Retail applications of Regional scale which have a market area extending two or more municipalities;
- viii. Applications that are not consistent with the Provincial Policy Statement or the Growth Plan for the Greater Golden Horseshoe;
- ix. Applications with cross-boundary impacts.



Within Designated Greenfield areas a major secondary plan constitutes an area of 25 hectares or more.

Policy 14.E.8

Site specific amendments to local Official Plans shall be subject to the following policy. The *Region* as the approval authority for local Official Plans may exempt some local Official Plan amendments involving land use designation changes from Regional approval. Local Official Plan amendments to be considered for exemption will be of local interest only, not extensive or comprehensive in nature and not involving a change to the municipality's urban area boundaries. Only those amendments which satisfy the following criteria are eligible for exemption:

- i. The amendment must be site specific and/or minor in size and nature,
- ii. The amendment conforms to the Regional Official Plan and is consistent with the Provincial Policy Statement,
- iii. The amendment does not impact on any adjacent municipality or conflict with the Niagara Escarpment Plan, and does not require new Regional financing or servicing,
- iv. The amendment complies with the Region's financial and servicing strategy,
- v. The amendment incorporates any concerns or modifications recommended by the Region to address Regional or Provincial concerns, and
- vi. Any subsequent changes made to the local Official Plan amendment by the local Council in adopting the amendment do not conflict with the Regional Official Plan or previous requirements by the *Region*.

Policy 14.E.9

Decisions of Local Official Plan Amendments must be in conformity with the Regional Official Plan. The policies of the Regional Official Plan continue to apply after adoption and approval of the Local Official Plan."

**Ministry of  
Municipal Affairs  
and Housing**

Municipal Services Office  
Central Ontario  
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Toronto ON M5G 2E5  
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Toll-Free: 1-800-668-0230

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Affaires municipales  
et du Logement**

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Télécopieur: 416-585-6882  
Sans frais: 1-800-668-0230



February 25, 2019

*Sent via 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

Dear Ms. McCauley:

**Subject: Proposed Niagara Region Official Plan Amendment No. 15  
Update to Exemption Policies  
MMAH File #: 26-EOPA-198686**

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Thank you for providing the Ministry of Municipal Affairs and Housing ("Ministry") with the opportunity to review and provide comments on proposed Regional Official Plan Amendment No. 15 ("ROPA 15"). It is understood that the Region is bringing ROPA 15 forward under Section 17 of the *Planning Act* and would be the decision maker.

ROPA 15 would update sections 14.E.6-14.E.8 of the Regional Official Plan which outlines when a local official plan amendment may be exempt from Regional approval. ROPA 15 has been reviewed in the context of the *Planning Act*, the 2014 Provincial Policy Statement, the Growth Plan for the Greater Golden Horseshoe, 2017 ("Growth Plan") and the Greenbelt Plan, 2017.

Pursuant to section 17(10) of the *Planning Act* (the "Act"), Regional Council was authorized to pass By-law 129-2001 which exempts lower-tier official plan amendments brought forward under section 17 of the Act from Regional approval. According to By-law 129-2001, Regional Council may exempt minor, site specific local official plan amendments from Regional approval.

Ministry staff are generally supportive of the Region updating their exemption policies to provide clarity and certainty to their lower-tier municipalities.

The Region may want to consider potential implications of proposed amendment 1 to the Growth Plan to ROPA 15, specifically with regards to decisions on employment area conversions. Currently, the Growth Plan requires that the conversion of lands within employment areas to non-employment uses only be permitted through a municipal comprehensive review ("MCR"), undertaken by an upper-tier municipality and approved by the province under section 26 of the *Planning Act*. In addition, both the current Growth Plan and proposed amendment 1 require that upper-tier municipalities designate employment areas in official plans, in consultation with lower-tier municipalities.

Proposed amendment 1 to the Growth Plan would enable municipalities to undertake employment conversions in advance of the next MCR, subject to criteria. As such, until the Region has completed its Growth Plan conformity exercise and designated employment areas, lower-tier municipalities would be able advance an employment area conversion without triggering the need for a regional official plan amendment.

In conclusion, the Region should consider the potential implications of the Growth Plan and proposed amendment 1 on ROPA 15 which could also inform the appropriate timing for bringing ROPA 15 forward for decision. Thank you again for the opportunity to comment on this proposed amendment. Should you have any questions please do not hesitate to contact me at (416) 585-7323.

Regards,

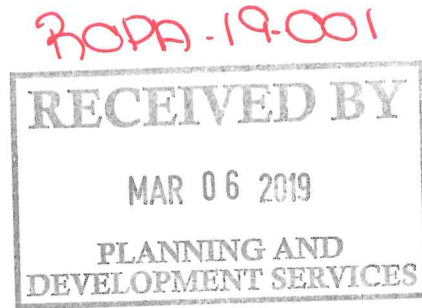


Lorelea Tulloch  
Planner, Community Planning and Development (West)



## Planning and Development Services

Kristen McCauley, MCIP, RPP  
Senior Planner,  
The Regional Municipality of Niagara  
1815 Sir Isaac Brock Way, P.O. Box 1042  
Thorold, ON L2V 4T7



February 27, 2019  
File No. 110701  
Sent Via: Regular Mail

Dear Ms. McCauley:

**Re: Comments on Proposed ROPA 15**

Thank you for providing an opportunity to comment on the proposed ROPA. It would have been preferred if the words "shall determine" were simply "shall issue" in the opening policy. That approach would have been more predictable and would have provided a clear statement on when an exemption would be provided.

The following sections of 14.E.6 are fine as written.

I believe 14.E.7 will be problematic for the Region to interpret and enforce in the future. It is quite unreasonable to expect that a secondary plan will not have impacts on servicing, especially if the secondary plan is used as an instrument to increase residential and/or employment density in a given area. This issue should have been collaboratively addressed in the planning process for the OPA and as such be exempt from Regional approval. This contradictory approach to the wording of the two policies will likely lead to confusion and misinterpretation. All issues in 14.E.7 should be addressed within the policy framework of 14.E.6 therefore it is redundant and misleading.

Again, thank you for requesting comments from the Town of Fort Erie. Please send a copy of the final set of policies when they are available.

Yours very truly,

Richard F. Brady M.A., MCIP, RPP  
Director, Planning & Development Services

[rbrady@forterie.ca](mailto:rbrady@forterie.ca)

RB/hg  
cc:





# Modernizing Wine Sales in Ontario



ONTARIO  
CRAFT  
WINERIES

# About Us

- Ontario Craft Wineries represents over 100 farm wineries across the province with the vast majority being small to medium family-owned businesses.
- Our members are a significant driver of the Ontario rural economy; unlike other beverage alcohol sectors, VQA wines are 100% Ontario grown and produced.
- Ontario's wine industry accounts for over 11,000 direct and indirect jobs – many of which are in rural Ontario (Source: [A Frank, Rimerman + Co., March 2017](#)).
- We drive economic development in the agricultural, manufacturing and tourism sectors. Each bottle of Ontario VQA wine drives \$98.20 in economic impact to the province.
- Local wineries welcome over 2.4 million visitors a year, supporting tourism infrastructure such as restaurants, hotels, tour companies, local events and other businesses.

# OCW Members

## Emerging Regions



## Prince Edward County



## Lake Erie North Shore



## Niagara-On-The-Lake



## Niagara Escarpment & Twenty Valley





# Industry Position

- Support increasing market access for Ontario's VQA wineries through private retail channels. We have long advocated for greater competition in the wine retail sector to improve choice and convenience.
- Concerned about expanding wine to corner stores, box stores and grocery without competitive advantages for the domestic industry.
- Such a move could drive Ontario customers to bigger brands and a retail environment that benefits large non-domestic competitors.

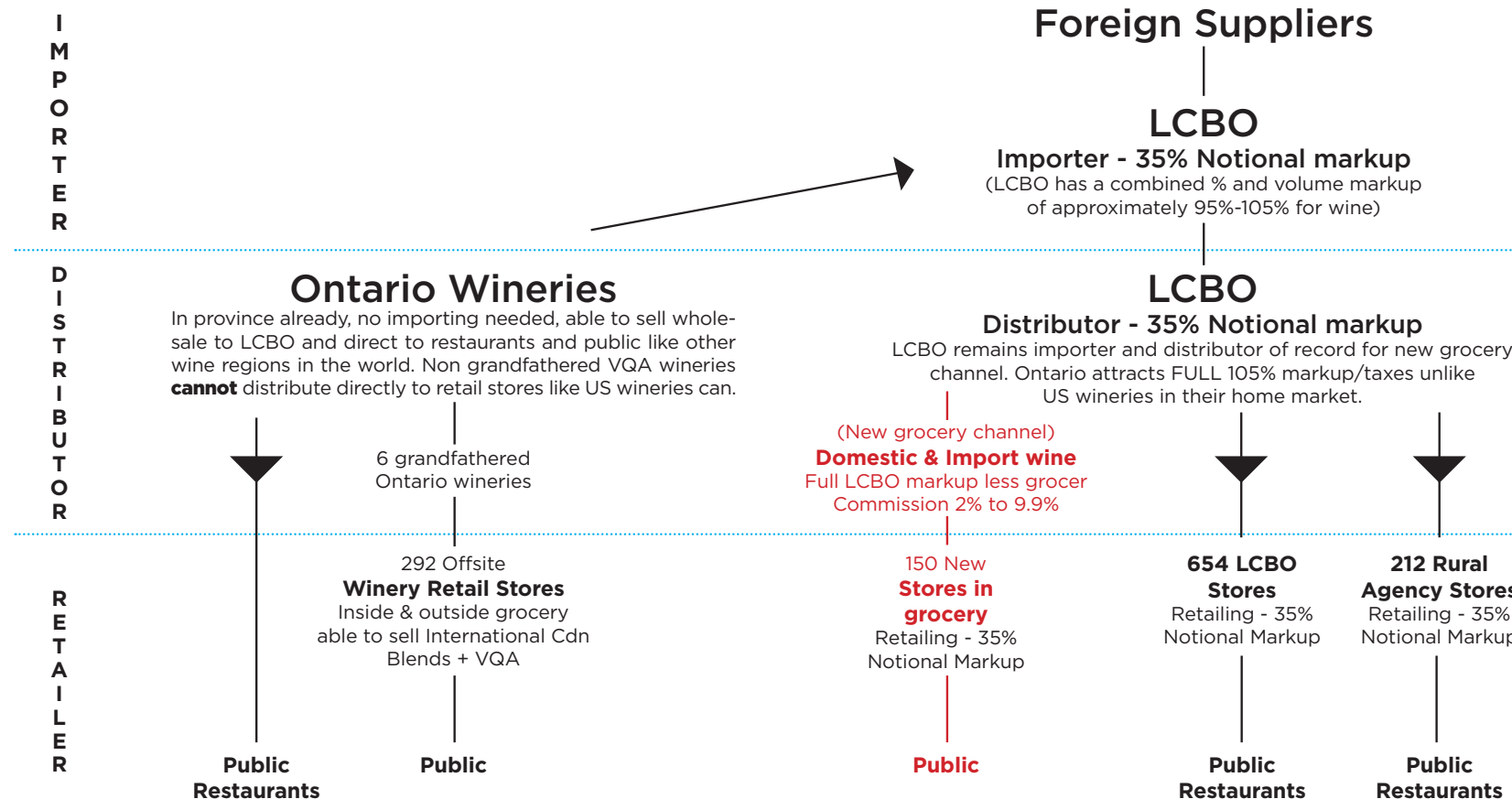
## Objectives:

- Work with the government to develop policy options that will grow our industry to keep us competitive in the new marketplace. This means creating a 21<sup>st</sup> century tax structure and retail environment that will unleash the potential of the local grape and wine industry (100% Ontario/VQA wines).

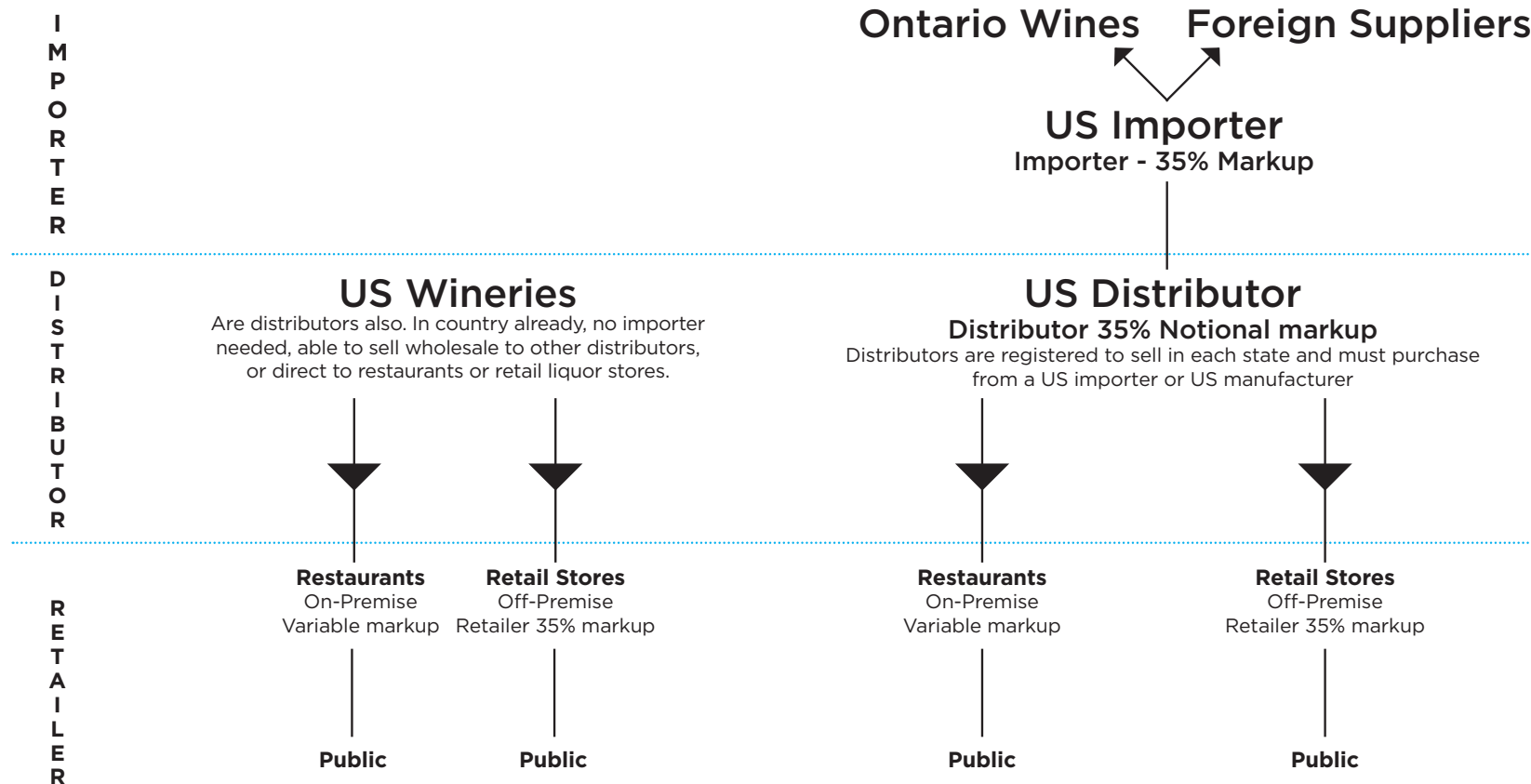
# Our Advice to Government

- **Stop Importing Domestic Wines:** Address the “import tax” levied on 100% Ontario/VQA wine sales through the LCBO markup structure. Ontario wineries are seeking a 35% permanent tax credit that is predictable and addresses how wineries are unfairly taxed in the province.
- **Expand Direct Delivery for 100% Ontario/VQA Wines:** Provide Ontario wineries the ability to deliver directly to any new retail store channel similar to US wineries. It is the best way to ensure a fair and reasonable margin on 100% Ontario/VQA wine sales in new retail channels.
- **Eliminate the VQA Retail Store Tax:** No other Ontario business has a 6.1% tax on top of the other sales taxes the government collects. Eliminate this unfair tax on tax.
- **Allow for Private Wine Shops:** Allow unlimited alcohol licenses and ensure market is accessible to retailers of all sizes, including independent licenses for specialty wine shops i.e. a license enabling independent stores with no chains or ability to consolidate.

# Ontario Wine Distribution Model



# U.S.A. Wine Distribution Model



# General Retail Guardrails (All Channels)

- Revise the definition of “Made” and allow wineries to open additional retail locations
- No private retailer can own more than 7.5% of licenses
- Shelf space guidelines to match LCBO: 30% for 100% Ontario/VQA, of which 5% is for small wineries
- Wholesale pricing that incents VQA over imports and ICB
- Maintain a socially responsible floor price of \$10.95 outside the LCBO
- Retailers to abide by LCBO price minimum. Retailers can charge more if they wish
- No retailer specific SKUs including private label, control label or exclusives
- No retailer inducements e.g. listing fees, third-party payments
- Lift LCBO moratorium and expand Bag-in-Box to other VQA and ICB producers

# If Done Right, It Could Be Said!

- “The Ford government’s expansion of alcohol retailing will double the production of 100% Ontario VQA grapes and wines” - Len Pennachetti, Chair, Ontario Craft Wineries
- “Doug Ford’s promise to the people to expand beer and wine sales in Ontario is the biggest boon to the 100% Ontario VQA grape and wine industry since the inception of VQA 30 years ago” - Allan Schmidt, President, Wine Marketing Association of Ontario
- “Thanks to the Ford Government’s planned retail expansion in the province, Ontario’s Greenbelt is a brighter shade of green now for 100% Ontario VQA grape growers and winemakers” - Richard Linley, President, Ontario Craft Wineries

# Regional Official Plan Amendment (ROPA) 14

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## Brock District Plan

Planning & Economic  
Development Committee

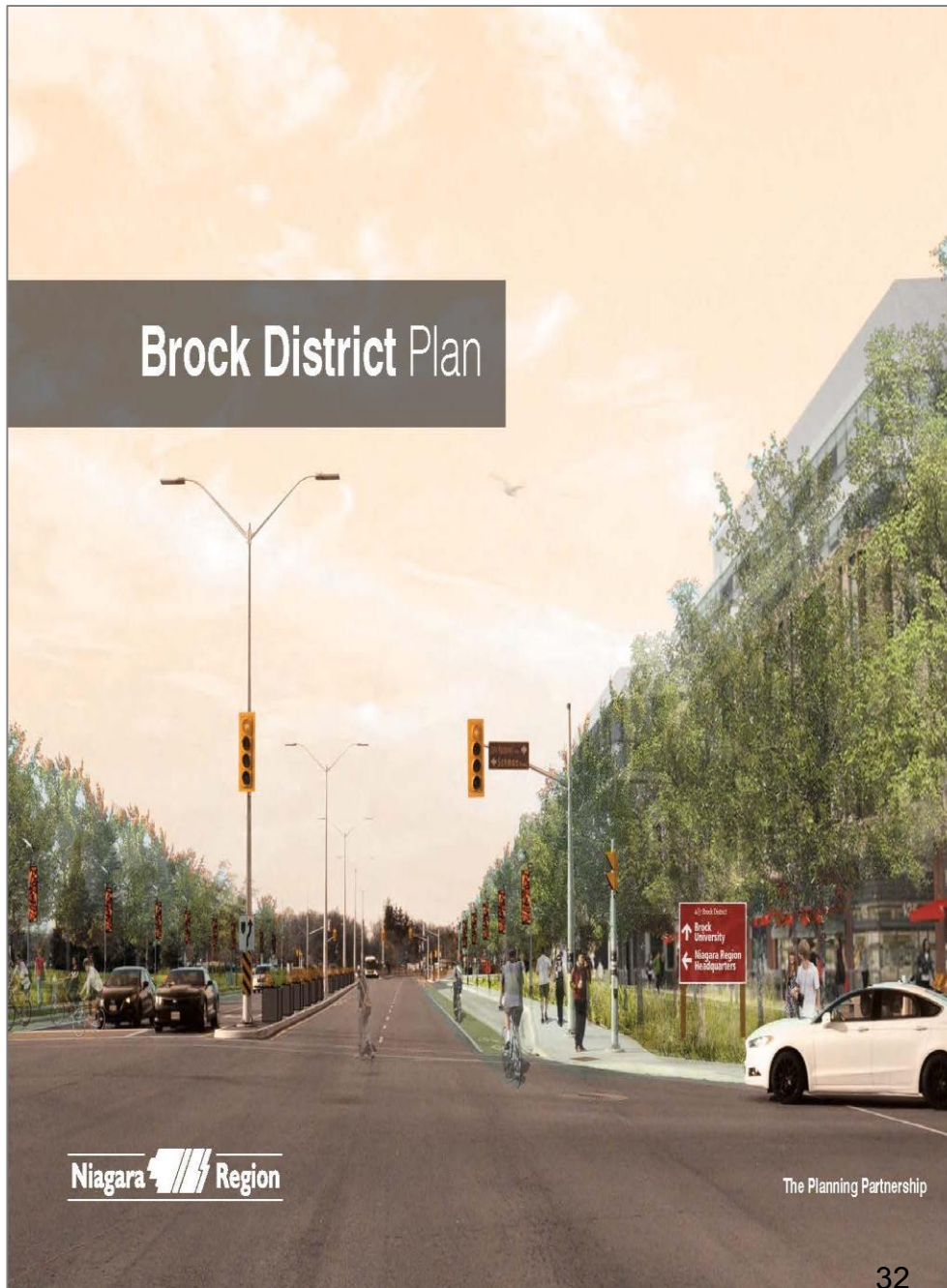
March 20, 2019

**Presented by**

**Kirsten McCauley, MCIP, RPP**  
Senior Planner, Secondary Plans

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**Associated Report**  
PDS 11-2019

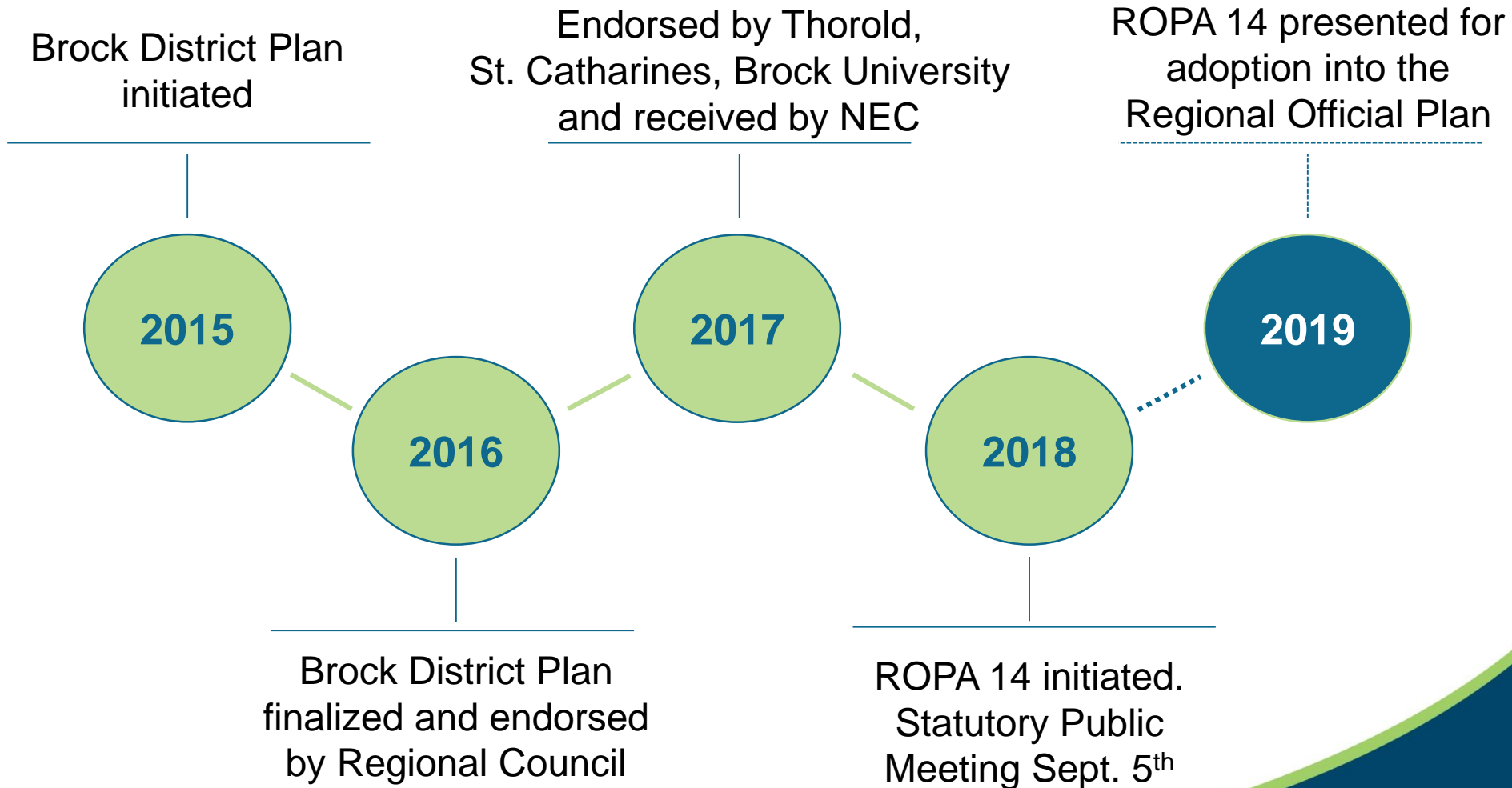




# What is a District Plan?

- Proactive planning strategy to drive growth and economic prosperity.
- Sets Regional vision and framework for planning, design and development of a complete community
- Serves as a guide for multiple stakeholders to coordinate development and investment efforts.
- Direction for additional study/planning updates to benefit the area.

# Timeline: Brock District Plan





St. Catharines

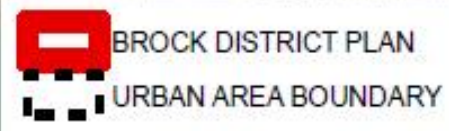
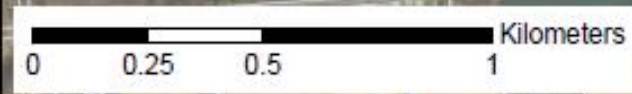
Niagara Escarpment

Brock  
University

Regional  
HQ

Lake Moodie

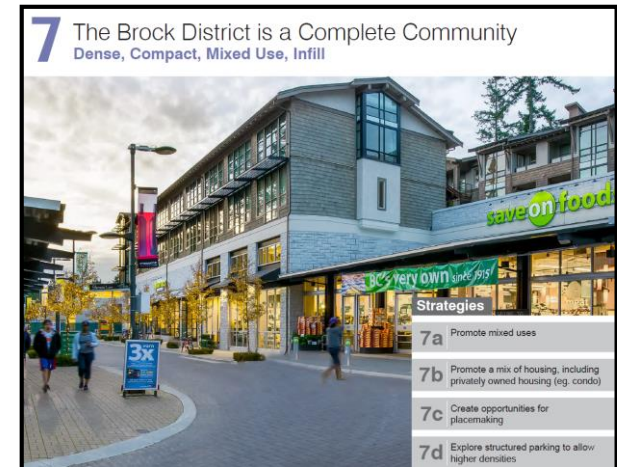
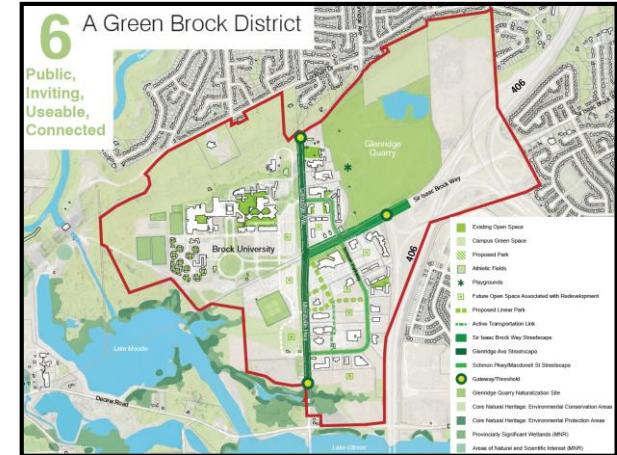
Thorold





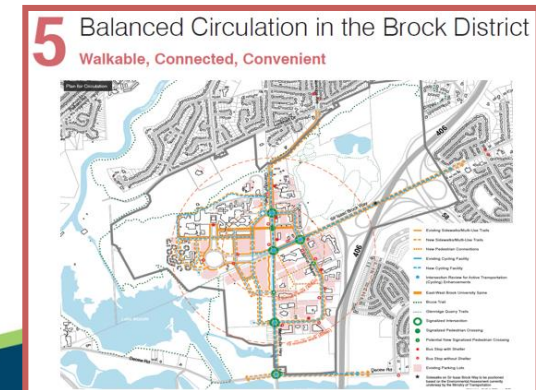
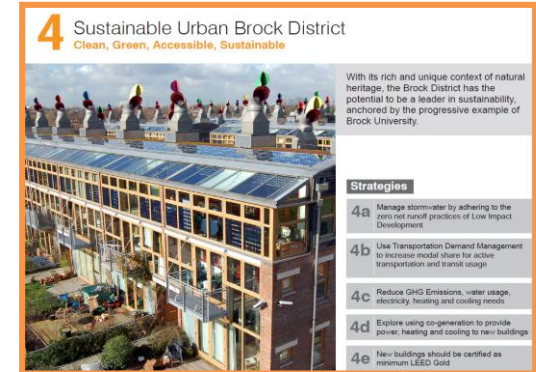
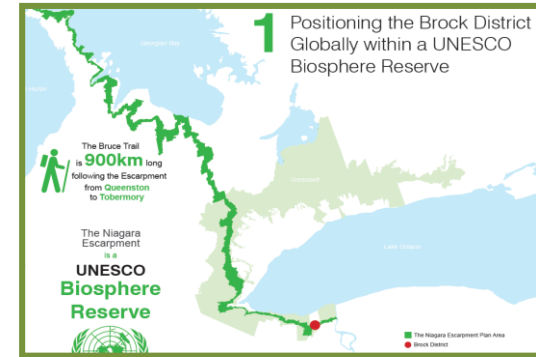
# Brock District Plan Vision:

To leverage the unique economic driver of Brock University and to transition the area from a lower density employment area to a higher density mixed use centre that is comprehensively and sustainably planned for social and economic success, and environmental sustainability.



# Frameworks:

1. Positioning the Brock District globally within a UNESCO Biosphere Reserve
2. Setting the Brock District in the Niagara Escarpment
3. Gateways to the Brock District
4. Sustainable Urban Brock District
5. Balanced Circulation in the Brock District
6. A Green Brock District
7. The Brock District is a Complete Community



# ROPA 14

A policy framework for the Brock District Plan area that guides future growth to support the creation of a complete, sustainable community.

## The Policy Framework

General Objectives ( Policy 4.G.14.A )	Specific Objectives ( Policy 4.G.14.B )	Policies ( Policy 4.G.14.C )
<ul style="list-style-type: none"><li>✓ Provides general direction for the area.</li><li>✓ Establishes the importance of the District Plan.</li></ul>	<ul style="list-style-type: none"><li>✓ Each specific objective relates to a key framework of the District Plan.</li></ul>	<ul style="list-style-type: none"><li>✓ Guidance for: gateways, urban design &amp; active transportation elements.</li><li>✓ Directs for additional work and continued collaboration to implement the Brock District Plan.</li></ul>

# Brock Technical Advisory Committee

TAC is responsible to implement recommendations and actions of the District Plan, including project and policy coordination.

## TAC Membership





# Regional Headquarters International Plaza



## Gateways





# Recommendation

- ✓ Conforms and does not conflict with the Provincial and Regional policy.
- ✓ Implements the Council-endorsed Brock District Plan and promotes ongoing collaboration.
- ✓ Supports the transformation of the area to a complete, sustainable community.
- ✓ Supports area as a Regional economic driver.

## Next steps

- Council to approve ROPA 14.
- Appeal period.
- Technical Advisory Committee continues to implement.

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**Subject:** Recommendation for Regional Official Plan Amendment No. 14 – Brock District Plan

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, March 20, 2019

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## Recommendations

1. That Regional Official Plan Amendment No. 14 – Brock District Plan, attached as Appendix 1 to Report PDS 11-2019, **BE APPROVED**;
2. That all parties **BE NOTIFIED** of Regional Council's decision in accordance with *Planning Act, 1990* requirements; and
3. That staff **ISSUE** 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 filed against the decision.

## Key Facts

- The purpose of this report is to present Regional Official Plan Amendment No. 14 – Brock District Plan – for approval.
- A District Plan is a pro-active strategy intended to support the Region's focus on growth and economic prosperity by bringing together land-use strategies, urban design guidelines, and recommendations for improving sustainability and quality of life in identified areas.
- The Brock District is a unique urban centre that straddles the City of St. Catharines and the City of Thorold with about half of the area comprised by Brock University. The District includes the four quadrants of Sir Isaac Brock Way and Merrittville Highway/Glenridge Avenue and extends from Highway 406 west to the westerly edge of Lake Moodie and from Decew Road and Lake Gibson north to the wooded slope of the Niagara Escarpment.
- The Brock District Plan itself was received and endorsed by Regional Council in 2016. A statutory public meeting for the draft Regional Official Plan Amendment was held on September 5, 2018 in accordance with *Planning Act, 1990* requirements.
- All comments received via circulation and the public meeting have been reviewed and considered in Regional Official Plan Amendment No. 14.

- Regional Official Plan Amendment No. 14 is considered good planning.

## **Financial Considerations**

There are no direct financial implications arising from this report. The costs to process and circulate this amendment are included within the council approved 2019 Operating Budget.

## **Analysis**

### ***District Plans Overview:***

A District Plan is a pro-active strategy intended to support the Region's focus on growth and economic prosperity, in large part through the promotion of excellence in development and urban design. A District Plan will bring together land-use strategies, urban design guidelines, and recommendations for improving sustainability and quality of life in identified areas. It is a high-level document identifying key opportunities and, through a collaborative process with a variety of stakeholders and interested parties, makes recommendations for studies and actions that will promote these opportunities.

A District Plan exercise brings together many stakeholders that may not otherwise communicate, plays an important role in coordinating regional interests, and ensures that the District Plan represents the interests of the broader region as well as the local municipality. The District Plan is an intermediate step between Regional growth planning and the local planning documents. It will support the achievement of complete communities, a thriving economy, a clean and healthy environment, and social equity.

### ***Brock District Plan Study Area:***

The Brock District Plan study area was identified as an area of strategic investment and employment with overlapping jurisdictional interests. It is a unique urban centre that straddles the City of St. Catharines and the City of Thorold with about half of the area comprised by Brock University. The District includes the four quadrants of Sir Isaac Brock Way and Merrittville Highway/Glenridge Avenue and extends from Highway 406 west to the westerly edge of Lake Moodie and from Decew Road and Lake Gibson north to the wooded slope of the Niagara Escarpment. A portion of the area is guided by the Provincial policies of the Greenbelt Plan and the Niagara Escarpment Plan. Most of the study area is contained within the urban area boundaries with the exception of the Lake Moodie lands. The Lake Moodie lands were added by Regional Council when the District Plan was endorsed, with the intent to further study these lands for passive recreational purposes.

The District Plan was prepared in collaboration with many stakeholders, including the City of Thorold, the City of St. Catharines and Brock University.

***Brock District Plan Chronology:***

- Late Spring 2015: Brock District Plan initiated
- Summer 2015: The Planning Partnership was selected to coordinate and guide the District Plan process and ultimately prepare the District Plan.
- November 25, 2015: Brock District Plan Update report and presentation to Council (PDS-46-2015)
- Throughout 2015 and 2016: A working group representing the Region, the City of Thorold, the City of St. Catharines, and Brock University met regularly.
- October 6, 2016: Endorsement by Regional Council (PDS 34-2016)
- January 30, 2017: Endorsement by City of St. Catharines Council
- February 21, 2017: Endorsement by City of Thorold Council
- March 9, 2017: Endorsement by Brock University Board of Trustees
- April 20, 2017: Received by the Niagara Escarpment Commission
- March 7, 2018: Initiation of the Regional Official Plan Amendment (ROPA) No. 14 (PDS-C 10-2018)
- September 5, 2018: Statutory Public Meeting for ROPA No. 14 (PDS 35-2018)

The Region is now recommending the ROPA for this District Plan to add the policy direction into the Regional Official Plan. Accordingly, an amendment to the Regional Official Plan (ROP) has been prepared under Section 17 of the *Planning Act, 1990*.

***Brock District Plan Regional Official Plan Amendment:***

The vision of the Brock District Plan is to leverage the unique economic driver of Brock University to transition the area from a lower density employment area to a higher density mixed use centre that is comprehensively and sustainably planned for social and economic success, and environmental sustainability.

The proposed amendment will include the seven focus areas of the Brock District Plan:

1. Positioning the Brock District globally within a UNESCO Biosphere Reserve
2. Setting the Brock District in the Niagara Escarpment
3. Gateways to the Brock District
4. Sustainable Urban Brock District
5. Balanced Circulation in the Brock District
6. A Green Brock District
7. The Brock District is a Complete Community

Each of the above frameworks were carefully considered when crafting the general and more specific objectives to implement the District Plan goals.

The ROPA policies reflect the vision and intent of the District Plan frameworks and provides guidance and direction via policy for how to achieve this vision. ROPA 14 promotes continued collaboration, sustainable development and building practices, better circulation for all modes of travel, high quality design in the public and private realm, and direction to prepare additional guidance material to implement the frameworks. Other implementation efforts include ongoing Technical Advisory Committee participation and conformity review and updating of relevant local plans, policies and zoning by-laws.

***Planning Policy Review:***

The proposed Regional Official Plan Amendment has been reviewed for alignment with the applicable policies set out in the Provincial Policy Statement, the Provincial Growth Plan, Greenbelt Plan, Niagara Escarpment Plan and Regional Official Plan, as well as a general review of St. Catharines and Thorold local Official Plans.

Provincial Policy Statement, 2014

The majority of the District Plan area is located within a *settlement area* defined by the Provincial Policy Statement (PPS). Settlement areas are where efficient land use and development patterns are encouraged to support strong, healthy communities, long-term prosperity, environmental health and social well-being. The policy framework directs that planning authorities identify appropriate locations and opportunities for intensification and redevelopment in the urban areas, while balancing protection of the natural environment and resources. A portion of the plan area (Lake Moodie and surrounding lands) is outside the settlement area. The intent for this area is to protect the natural environment and enhance and recognize linkages. The ROPA is consistent with the PPS.

Growth Plan for the Greater Golden Horseshoe, 2017

The Growth Plan supports the development of complete communities and efficient use of land and infrastructure. The ROPA recognizes the importance of the area for economic investment, the direction for a mix of land uses to accommodate more intensified development, and supports transportation solutions which encourage transit and active transportation. The amendment conforms with the Growth Plan.

Greenbelt Plan, 2017

The Greenbelt Plan predominantly designates the lands as 'Settlement Areas Outside the Greenbelt' with a portion of the study area within the Niagara Escarpment Plan

Area. Settlement areas outside of the Greenbelt are meant to be the focus of growth and development. Information on the Niagara Escarpment Plan is provided under the heading below.

Lands around Lake Moodie are designated as Protected Countryside and Natural Heritage System. These lands were added to the District Plan by Regional Council at the time of endorsement with the intent to study this area for passive recreation uses and trail connectivity. There is no urban use proposed for these lands. The ROPA conforms with the Greenbelt Plan.

### Niagara Escarpment Plan

The Niagara Escarpment Plan (NEP) Area passes through the north half of the Brock District. The lands subject to the NEP are designated as Urban Area and Escarpment Natural Area. The Urban Area designation is the least restrictive designation of the NEP and identifies urban areas which surround the escarpment, providing direction for compatible development. The Escarpment Natural Area designates areas that are relatively natural in state and to recognize, protect and, where possible, enhance natural environment.

The ROPA generally respects and is not in conflict with the Niagara Escarpment Plan. There is unresolved litigation between Brock University and the Niagara Escarpment Commission on the Lockhart Drive lands that relates to, amongst other things, the exact location of the boundary between the Urban Area and the Escarpment Natural Area. When the litigation has been resolved, the Council-endorsed District Plan can be updated without a formal amendment process.

### Regional Official Plan

The Regional Official Plan (ROP) designates the subject lands primarily within the Urban Area Boundary (including both Built-up Area and Designated Greenfield Area). The ROP provides clear direction for encouraging a mix of integrated land uses, making efficient use of land, resources and infrastructure, promoting compact development, active transportation, and supporting a diverse economy that capitalizes on market opportunities. The land south of Sir Isaac Brock Way and east of Merrittville Highway is also included in the Niagara Economic Gateway Zone. This designation provides specific policy direction to address challenges and promote the area for investment. The ROPA implements the key objectives and policy direction of the Regional Official Plan.

### City of St. Catharines

The City of St. Catharines identifies the area as part of the South District with land uses that generally align with the vision of the ROPA. The subject lands are designated within the urban area boundary, with the exception of the Lake Moodie area. The lands

at the north east corner of Sir Isaac Brock Way and Glenridge Ave are also identified as an 'Intensification Area' on the Municipal Structure, Schedule D.

## City of Thorold

The City of Thorold Official Plan designates the lands within the urban area boundary, with the exception of the Lake Moodie area. The City undertook The Brock Business Park Secondary Plan process at the same time as the creation of the Brock District Plan. Generally the District Plan and Secondary Plan align. The Secondary Plan's intent is to revitalize the business park to support and enhance employment uses and encourage, where appropriate, mixed use development.

### ***Input on the ROPA:***

#### *Statutory Public Meeting*

The *Planning Act, 1990*, requires that a statutory public meeting be held for all amendments to municipal Official Plans. A public meeting was held on September 5, 2018 to present a draft of ROPA 14 to Planning and Economic Development Committee and receive comments from the public. The Notice of Public Meeting was advertised on August 16, 2018 in Niagara This Week newspapers having general circulation in the study area. The Notice of Public Meeting was also sent to the list of prescribed bodies and agencies having interest on August 15, 2018.

The draft ROPA presented at the Public Meeting included three reference maps: the Plan for Circulation Map, the Demonstration Plan Map and the Integrated Plan of Future Land Use Map. These maps were for illustration purposes only and did not constitute an operative part of the Regional Official Plan. However, the maps caused confusion. Therefore, they have been removed from the ROPA. They are still contained within the previously approved District Plan.

At the Public Meeting, one resident, a former NEC Commissioner and Regional Councillor, presented his concern regarding the northern most lands along Lockhart Drive shown as "Peripheral Development Lands" on one of the District Plan maps. In response to this concern, staff clarify that the ROPA and the District Plan do not provide specific land use direction for these lands.

#### *Niagara Escarpment Commission*

The Niagara Escarpment Commission (NEC) staff presented a report to their Commission in June, 2018 based on the previous draft ROPA regarding their concern with the "Peripheral Development Lands" along Lockhart Drive. The NEC report provided interpretation of the extent of the boundary between the Escarpment Urban Area and Escarpment Natural Area designations along Lockhart Drive based on their

position in February, 2017. Staff reviewed the Niagara Escarpment Plan (as approved in 2017) and there has been no change to the Urban Area designation between the NEP of 2005 and 2017.

In response to the comments regarding Lockhart Drive, the Brock District ROPA provides policy direction that supports Natural Heritage and the NEP. Specifically, any future land use changes shall be reviewed in the context of the Brock District Plan, as well as the Natural Heritage policies of Section 7B of the Regional Official Plan and the policies of the NEP (per ROPA Policy 4.G.14.C.8).

Regional staff have also been made aware that there is outstanding litigation between Brock University and the Niagara Escarpment Commission related to the Lockhart Drive lands and the determination of the boundary between Escarpment Urban Area and Escarpment Natural Area.

The ROPA can proceed regardless of the litigation as its outcome does not have any bearing on the policy, objectives or intent of the amendment. The District Plan map may be updated without amendment when the Region has been advised that the litigation has been resolved and a final boundary has been determined.

#### *Agency Comments*

There were several minor comments regarding wording provided by Brock University, the City of St. Catharines and the City of Thorold. These comments were reviewed and incorporated into the final version for the Regional Official Plan Amendment, as appropriate. A table of comments and how they were considered is included as Appendix 3 to this report. Generally, the ROPA has been well received.

#### *Technical Advisory Committee*

Staff were directed to establish a Technical Advisory Committee (TAC) to review the recommendations and establish an implementation strategy for the seven frameworks and 25 actions/priorities of the Brock District Plan. Three TAC meetings have been held with representatives from Thorold, St. Catharines, Brock University, Niagara Escarpment Commission, Regional staff from various departments and others. The TAC will provide input and feedback for new ideas to enhance the Brock District Plan area.

The draft ROPA was circulated to the TAC and discussed at the first meeting. The TAC was generally supportive of the amendment.



## **Conclusion**

The ROPA conforms and does not conflict with the PPS, Provincial Plans and the Regional Official Plan. It builds on the foundation laid by the Official Plan, as well as Council's strategic direction.

The ROPA as presented represents the visionary work of the Brock District Plan. The policies implement the vision and objectives of the District Plan and supports the transformation of the district from a low density, single use area to a higher density, mixed-use area. Further the ROPA promotes the achievement of a district that will evolve into a sustainable, complete community with a positive urban experience.

In conclusion, staff recommends that Regional Council approve Regional Official Plan Amendment No. 14 as it represents good planning.

## **Alternatives Reviewed**

Alternative 1 – Council could choose to deny the Regional Official Plan Amendment. This course of action is not favourable as the ROPA is implementing a Council-endorsed District Plan that promotes investment and prosperity in a strategic location in the Region.

Alternative 2 – Council could choose to modify and approve the Regional Official Plan Amendment. The modification would need to demonstrate consistency and conformity with the Regional and Provincial policy.

## **Relationship to Council Strategic Priorities**

This report supports Council's strategic areas for 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**

PDS 34-2016 – Brock District Plan (endorsement)

PDS-C 10-2018 – Memorandum for Regional Official Plan Amendment No. 14 initiation

PDS 35-2018 - Statutory Public Meeting for Regional Official Plan Amendment 14  
Brock District Plan

The Brock District Plan can be found here:

<https://www.niagararegion.ca/projects/district-plans/pdf/brock-district-plan.pdf>

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**Prepared by:**

Kirsten McCauley, MCIP, RPP  
Senior Planner, Secondary Plans  
Planning and Development Services

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**Recommended by:**

Rino Mostacci, MCIP, RPP  
Commissioner  
Planning and Development Services

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**Submitted by:**

Ron Tripp, P. Eng  
Acting Chief Administrative Officer

*This report was reviewed by Isaiah Banach, Manager of Long Range Planning and Doug Giles, Director of Community and Long Range Planning.*

**Appendices**

Appendix 1	Regional Official Plan Amendment No. 14	Page 10
Appendix 2	Location Map	Page 19
Appendix 3	Private/Public Agency Comment Table on ROPA 14	Page 20

**Amendment No. 14  
To The Official Plan  
for the Niagara Planning Area**

**PART “A” – THE PREAMBLE**

The preamble provides an explanation of the Amendment including the purpose, location, background, and basis of the policies and implementation, but does not form part of this Amendment.

- Title and Components
- Purpose of the Amendment
- Location of the Amendment
- Background
- Basis for the Amendment
- Implementation

**PART “B” – THE AMENDMENT**

The Amendment describes the additions and/or modifications to the Official Plan for the Niagara Planning Area, which constitute Official Plan Amendment No. 14.

- Map Change
- Text Change

**PART “C” – THE APPENDICES**

The Appendices provide information regarding public participation and agency comments relevant to the Amendment, but do not form part of this Amendment.

## **PART “A” – THE PREAMBLE**

### **TITLE AND COMPONENTS:**

This document, when approved in accordance with Section 17 of the *Planning Act, 1990*, shall be known as Amendment 14 to the Official Plan of the Niagara Planning Area. Part “A” – The Preamble, contains background information and does not constitute part of this Amendment. Part “B” – The Amendment, consisting of map changes, constitutes Amendment 14 to the Official Plan of the Niagara Planning Area. Part “C” – The Appendices, does not constitute part of the Amendment. These Appendices contain information related to public involvement and agency comments associated with the Amendment.

### **PURPOSE OF THE AMENDMENT:**

The purpose of this Amendment is to add policy to the Niagara Region Official Plan that reflects and supports the implementation of the key frameworks of the Council-endorsed Brock District Plan. The amendment also includes the addition of an asterisk identifier and corresponding legend update on Schedule A to the Regional Official Plan.

### **LOCATION OF THE AMENDMENT:**

The amendment area straddles the City of St. Catharines and the City of Thorold with about half of the area comprised by Brock University. The District includes the four quadrants of Sir Isaac Brock Way and Merrittville Highway/Glenridge Avenue and extends from Highway 406 west to the westerly edge of Lake Moodie and from Decew Road and Lake Gibson north to the wooded slope of the Niagara Escarpment.

### **BACKGROUND**

A District Plan is a pro-active strategy intended to support the Region’s focus on growth and economic prosperity by bringing together land-use strategies, urban design guidelines, and recommendations for improving sustainability and quality of life in identified areas. The Brock District Plan was prepared in 2015/2016 and Council endorsed in October of 2016. The Region is implementing this District Plan through a Regional Official Plan Amendment to add policy direction into to the Regional Official Plan to support the vision, objectives and key directions of the District Plan.

### **BASIS FOR THE AMENDMENT:**

- a) The Amendment was the subject of a Public Meeting held under the *Planning Act, 1990* on September 5, 2018. Public and agency comments were addressed as part of the preparation of this Amendment.

- b) The Amendment will support continued collaboration between stakeholders to advance the key frameworks of the District Plan and transition the area from a lower density employment area to a higher density mixed use centre that is comprehensively and sustainably planned.
- c) Based on the Region's review of the *Planning Act, 1990*, the Provincial Policy Statement (2014), the Provincial plans (2017), the Regional Official Plan, and public and agency consultation, Regional staff is of the opinion that the Amendment is consistent, or does not conflict, with Provincial and Regional policies and plans and, therefore, represents good planning.

#### IMPLEMENTATION:

Section 14, Implementation of the Official Plan for the Niagara Planning Area, shall apply where applicable.

## **PART “B” – THE AMENDMENT**

### **Amendment 14 To the Official Plan for the Niagara Planning Area**

The Official Plan for the Niagara Planning area is amended as follows:

#### **Map Changes (attached)**

1. “Schedule A – Regional Structure” is amended to add an asterisk to the map denoting the Brock District Plan area and the corresponding notation with “District Plan” to the Legend.

#### **Text Changes**

The Official Plan for the Niagara Planning Area is amended as follows:

#### **Part I – Modifications to Existing Policies**

None

#### **Part II – New Policies**

1. Add Policy “4.G.14 District Plans” to Chapter 4.

##### **“4.G.14 Brock District Plan**

The Brock District is a unique urban centre that straddles the City of St. Catharines and the City of Thorold with about half of the area comprised by Brock University. The District includes the four quadrants of Sir Isaac Brock Way and Merrittville Highway/Glenridge Avenue and extends from Highway 406 west to the westerly edge of Lake Moodie and from Decew Road and Lake Gibson north to the wooded slope of the Niagara Escarpment. A portion of the district is also subject to the provincial policies of the Greenbelt Plan and the Niagara Escarpment Plan.

The vision of the Brock District Plan is to leverage the unique economic driver of Brock University to transition the area from a lower density employment area to a higher

density mixed use centre that is comprehensively and sustainably planned for social and economic success, and environmental sustainability.

The Brock District Plan sets a framework for the planning, design and development of an iconic strategic employment and residential growth area consisting of a vibrant complete university community set within a UNESCO World Biosphere Reserve. The vision focuses on higher education as a catalyst for economic prosperity. Brock University is the centre around which areas for new mixed use, higher density housing and employment are stitched together with an enhanced public realm including a network of tree lined streets, urban open spaces and natural features, demonstrating sustainable design, green infrastructure and a walkable positive experience.

#### **4.G.14.A General Objectives**

##### **Objective 4.G.14.A.1**

The Brock District Plan shall capitalize on the research, innovation and other activities at Brock University, build on the intellectual capital of the area and leverage the assets of Niagara Region to have a global impact in terms of opportunities to attract new students, new residents, new businesses, and new employees to the Brock District.

##### **Objective 4.G.14.A.2**

The Brock District Plan shall build on the partnerships with local municipalities, Brock University and the Niagara Escarpment Commission to collaboratively implement the objectives and policies of the plan.

##### **Objective 4.G.14.A.3**

The Brock District Plan is recognized as an area of major activity and an important catalyst for investment. The Brock District Plan shall capitalize on the opportunities and transform the concepts into reality.

#### **4.G.14.B Specific Objectives**

- a) To ensure that the Brock District becomes a complete community by integrating current and new uses and spaces, with a revitalized public realm and dense, compact mixed use development supporting a blend of residential, retail, institutional, recreational and employment activities.
- b) To position the Brock District globally within a UNESCO World Biosphere Reserve and Region's Gateway Economic Zone to promote interdisciplinary solutions through research and innovation for the conservation of biodiversity; sustainable use; and managing changes and interactions between social and ecological systems.



- c) To ensure the protection and possible enhancement of existing natural features and systems within and outside the Niagara Escarpment.
- d) To ensure Gateways emphasize the prominence and boundaries to the Brock District.
- e) To ensure that the Brock District Plan is a leader in sustainability, low impact development, green building standards, transit oriented development and new technologies. The Brock District shall aspire to be a carbon neutral district by reducing and/or offsetting greenhouse gas emissions.
- f) To ensure that the Brock District is served by a safe, beautiful, comfortable, and connected active transportation network.
- g) To ensure that the Brock District strives to create beautiful and sustainable streetscapes with a network of publicly accessible open spaces. The Civic Park shall be a four season landscape that will be appealing and available to all.

#### **4.G.14.C Policies**

##### **4.G.14.C.1**

A Regional Technical Advisory Committee shall be formed by the Region to develop an implementation framework as part of the ongoing commitment to the District Plan particularly with respect to the implementation tools in Policy **4.G.14.C.2.** and Objectives of **4.G.14.B.**

##### **4.G.14.C.2**

The following guidance material will be developed to transition the area to the District envisioned in the District Plan:

- a) Brock District Placemaking Manual
- b) Brock District Green Energy Infrastructure Plan
- c) Brock District Green Building Standards
- d) Regional Headquarters Master Plan
- e) Conformity review and updating of relevant local plans, policies and zoning by-laws

##### **4.G.14.C.3**

The following locations shall be emphasized as Gateways to the District using design features such as natural landscaping, including native species, and

other urban design components identified in the District Plan or through further study of the Technical Advisory Committee:

- a) The Niagara Escarpment gateway via Glenridge Ave;
- b) The lake gateway via Merrittville Hwy; and
- c) The 406 gateway via Sir Isaac Brock Way

**4.G.14.C.4**

The Brock District Plan contains design guidelines for development in both the public and private sector. These guidelines reinforce the seven specific objectives in Section **4.G.14.B**. The guidelines provide clarity with respect to built form, streets, parks, open space and parking for development in the Brock District. Development proposals shall consider these guidelines.

**4.G.14.C.5**

An active transportation network shall be created, as illustrated on the Plan for Circulation Map in the Brock District Plan by ensuring local Plans incorporate a sidewalk on both sides of the streets, improved cycling infrastructure, safe marked crossings, a network of pathways and trails, improved transit and signage that is clear and informative.

**4.G.14.C.6**

The Demonstration Plan Map as shown in the Brock District Plan shall be used as a guide only for the layout and design of permitted development within the District Plan Area.

**4.G.14.C.7**

Local municipal Official Plans, Secondary Plans, and Zoning By-laws shall be updated to implement the vision, objectives, and policy direction of Brock District Plan, as required. Brock University shall have regard for the vision and objectives of the Brock District Plan through future review of their Campus Master Plan.

**4.G.14.C.8**

Land use designations in local Official Plans shall be reviewed in the context of the Brock District Plan, as well as the Natural Heritage policies of Section 7B and the Niagara Escarpment Plan.

**4.G.14.C.9**

The Brock District Plan shall be reviewed and updated every 10 years in consultation with stakeholders.

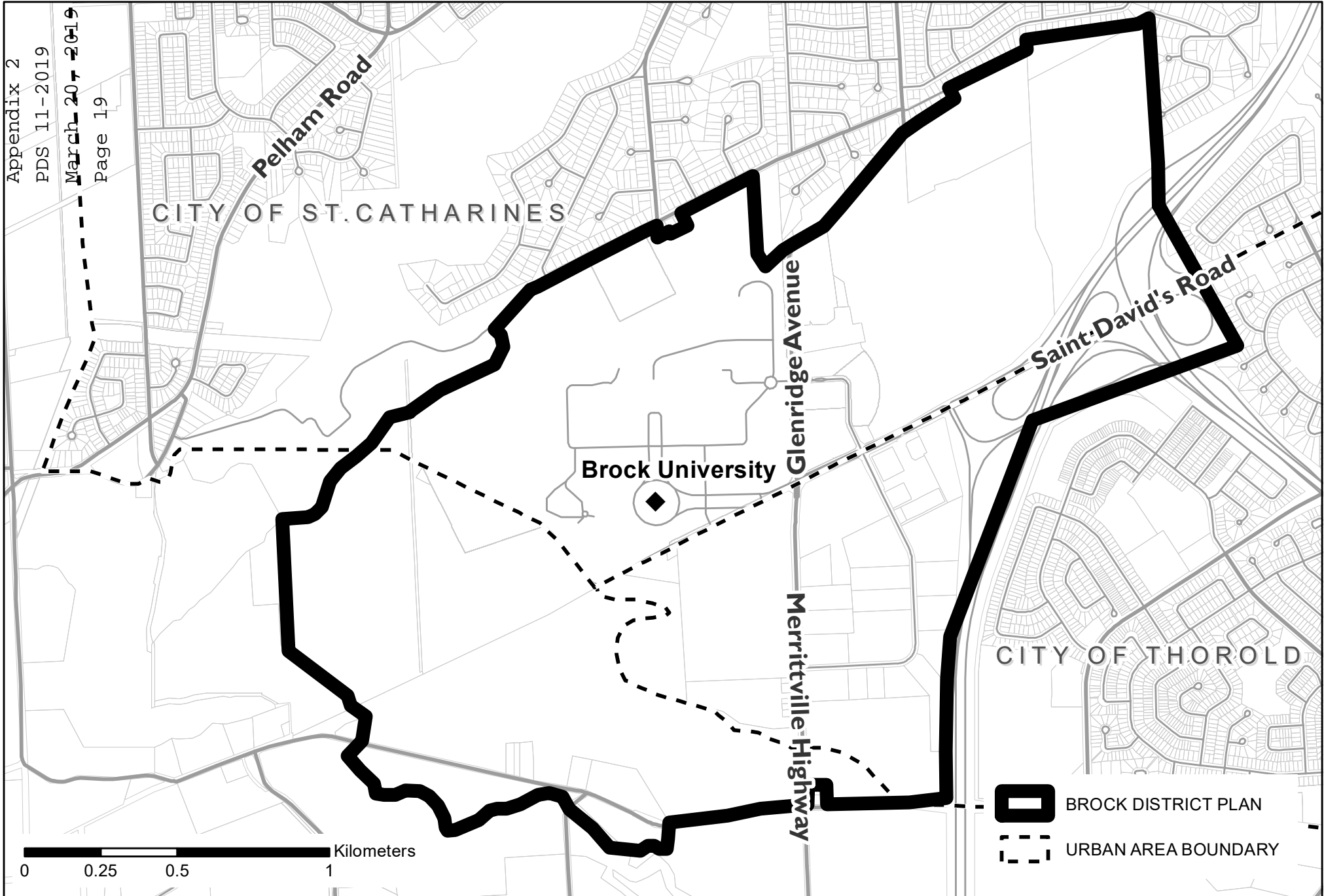
**4.G.14.C.10**

Minor changes to the Brock District Plan may be permitted as a result of future planning study or technical review provided it is consistent with the overall vision and framework of the Brock District Plan.

**4.G.14.C.11**

The Brock Master Plan Servicing Study (City of Thorold, 2014) and/or any other servicing strategy shall be reviewed to determine the servicing requirements and, if required, any upgrades as part of any future (re)development application within the Brock District Plan area.





Origin of comment	Comment	Response
Khaldoon Ahmad, Urban Design, Niagara Region	Do we need policy related to the Linear Park to capture this as a structuring element within the district?	Wording for trails and connectivity captured in Policy 4.G.14.C.5
Jack Thompson, Transportation, Niagara Region	Comments related to minor policy clarification	Changes made as required and appropriate.
Denise Landry, Senior Planner, City of Thorold	<p>Staff is supportive of the review time of 10 years but suggests the addition of "in consultation with stakeholders"</p> <p>Gateways and the consistency with the Brock Business Park Secondary Plan</p> <p>Urban Design Guidelines wording</p> <p>Servicing - BluePlan memo re: capacity upgrades and the change from Institutional to Mixed Use</p>	<p>Change made - Policy 4.G.14.C.9</p> <p>Discussed and clarified the locations of the gateways to the District vs. the Brock Business Park.</p> <p>Change made to Policy 4.G.14.C.4 - Policy provides flexibility for the City to use as appropriate.</p> <p>Policy added</p>
Ken Scholtens, Economic Development, Niagara Region	Comments indicate support and encouragement for additional economic development efforts within the District Plan area and suggests review of incentives to encourage investment in the Niagara Gateway Economic Centre.	Comments captured and supported through various policies.
Brian Hutchings, Vice President, Brock University	<p>Slight wording changes requested.</p> <p>Brock University provided a letter of support for the ROPA as well as the District Plan and the continued collaboration. The university advised that the District Plan aligns well with several of their long term objectives.</p>	Changes made

Regional Development Engineering	Requested acknowledgement of the servicing study in the area and the need for review for future applications.	Added Policy 4.G.14.C.11 The Brock Master Plan Servicing Study (City of Thorold, 2014) and/or any other servicing strategy shall be reviewed to determine the servicing requirements and, if required, any upgrades as part of any future (re)development application within the Brock District Plan area.
Niagara Escarpment Commission (NEC)	NEC staff presented a report to their Commission related to the Lockhart Dr lands. They advised they were concerned with how the lands were shown on a map that was previously included for reference. Staff presented their position on the location of the boundary between the Escarpment Urban Area designation and the Escarpment Natural Area designation.	The map has been removed.  In response to the comments regarding Lockhart Drive, the Brock District ROPA provides policy direction that supports Natural Heritage and the NEP. Specifically, any future land use changes shall be reviewed in the context of the Brock District Plan, as well as the Natural Heritage policies of Section 7B of the Regional Official Plan and the policies of the NEP (per ROPA Policy 4.G.14.C.8).
CN	No comments.	Noted.
Bruce Bellows, Planner, City of St. Catharines	Requested minor revision to Specific Objective c) in Section 14.G.14B which I think should read “within <u>and outside</u> the Niagara Escarpment Plan Area.”  Comments provided relate to the Lockhart Dr lands and the representation of Niagara Escarpment Plan designation on the map that was removed.	Policy amended to include proposed wording and remove “Plan Area.”  See response to NEC comments.
Ministry of Municipal Affairs	No comments provided.	Noted.
Don Alexander, public	Concerns presented regarding the northern most lands along Lockhart Drive shown as “Peripheral Development Lands” on one of the District Plan maps.	The map has been removed.  The ROPA and the District Plan do not provide specific land use direction for these lands. Any

		future land use changes shall be reviewed in the context of the Brock District Plan, as well as the Natural Heritage policies of Section 7B of the Regional Official Plan and the policies of the NEP (per ROPA Policy 4.G.14.C.8).
Enbridge Pipelines Inc.	No concerns.	Noted.



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**Subject:** Memorandum of Understanding for Planning Function and Services between Niagara Region and Local Area Municipalities

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, March 20, 2019

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## Recommendations

1. That the updated Memorandum of Understanding (MOU) for Planning Function and Services between the Regional Municipality of Niagara and the Local Area Municipalities dated March 2019, attached to this report as Appendix I, **BE CIRCULATED** to the Local Area Municipalities for review and approval; and
2. That subsequent to the approvals by the Local Area Municipalities that the MOU **BE BROUGHT FORWARD** to Regional Council for approval with direction that the Regional Chief Administrative Officer (CAO) **BE AUTHORIZED** to sign the MOU.

## Key Facts

- The purpose of this report is to provide information to Committee and Council regarding the proposed updated MOU, and to recommend circulation of the MOU to the local area municipalities for review and approval prior to Regional Council approval.
- This MOU is between the Region and the Local Area Municipalities. However, the Niagara Peninsula Conservation Authority (NPCA) participated in the Working Group that updated the document.
- In September 2017, staff informed Regional Council of the immediate need to update two important and related documents dealing with planning function and services (roles and responsibilities) in Niagara:
  1. The 2007 Memorandum of Understanding (as amended) between the Local Area Municipalities, the Niagara Peninsula Conservation Authority and Niagara Region (MOU); and
  2. The 2008 Protocol for Plan Review and Technical Clearance between the Niagara Peninsula Conservation Authority and Niagara Region.
- The revised Protocol was approved by Regional Council and the NPCA in January 2018 (attached to the MOU as Appendix III).

- Subsequent to the Protocol approval, work commenced to update the 2007 MOU to:
  - clarify the respective roles and responsibilities of the Region and the Local Area Municipalities,
  - be an instrument of continuously improving service and relationship management
  - incorporate directions on: new legislation, growth, process changes, and planning resources.
- The MOU Working Group, a sub-group of the Niagara Area Planners, met on several occasions to determine the direction and content of the MOU. The MOU Working Group determined that the MOU required a major update rather than the fine-tuning that occurred in 2010 and 2014.
- A working session with development industry stakeholders was held on October 24, 2018, to discuss the MOU and opportunities to improve the development approvals process. Parts 3 and 5 of the MOU address many of those comments (see Appendix II).
- The MOU was also circulated for discussion to the CAOs, Niagara Area Planners, Building Officials and Public Works groups during January and February 2019.
- This revised MOU sets the foundation for undertaking transformational changes into the future and confirms the framework within which the Region and local area municipalities will function and provide planning services in Niagara.

## **Financial Considerations**

There are no financial impacts to the Region as a result of the updated MOU.

## **Analysis**

### **Background**

In 2007, the Niagara Region, local area municipalities and NPCA signed a MOU for improving the planning function in Niagara. The primary function of the MOU was to be a relationship management tool with a focus on the respective roles and responsibilities of the signing parties for policy planning and the review of development applications.

In 2008, the Protocol for Plan Review and Technical Clearance between the Niagara Peninsula Conservation Authority and Niagara Region was approved. This document

detailed the transfer of responsibilities to the NPCA related to environmental matters identified in the MOU.

The MOU was updated in 2011, and again, in 2014.

The MOU and Protocol have succeeded as tools, and are relied upon to manage relationships, reduce duplication and effect continuous improvements. However, significant changes have occurred in Niagara over the past few years in terms of legislation, process changes, relationships, resources and growth that needed to be incorporated into these documents to ensure continued success.

In September 2017, staff informed Regional Council that the MOU and Protocol required updating. Work commenced to update the MOU to:

- confirm the framework (roles and responsibilities) within which the Region and local area municipalities will function and provide planning services,
- be a leading instrument of continuously improving service and relationship management,
- integrate the recommendations of the Protocol with respect to new Regional responsibilities,
- include directions on fairly new matters, such as: pre-consultation meetings, review exemptions, complete applications, commenting timelines, urban design, and
- recognize new legislation, process changes, relationships, resources and growth.

#### Key Changes and Actions in the MOU

The following are the key changes and actions found in the MOU:

1. **Parties to the MOU** - The NPCA is no longer a party to the MOU. The integration of the approved 2018 Protocol into the MOU permits the MOU to be focused on the regional and local area municipal roles and responsibilities.
2. **New Goals and Objectives** – The goal of the 2007 MOU did not address all of the principles of the ideal planning system. To assist the Region and local area municipalities in managing growth and change, the goal of this MOU is having: A Niagara region planning system that is:
  - Integrated
  - Efficient
  - Collaborative
  - Proactive
  - Solution focused
  - Consistent

- Predictable
- Easily understood
- Transparent, and
- Responsive.

The new objectives identify what needs to be done to achieve the new goal, and include new directions, such as:

- to develop a model that demonstrates how planning services are appropriately resourced and structured
- to deliver timely, accurate, effective and customer-focused planning services;
- to pursue improvements to the planning application processes that achieve good planning, streamlining, predictability and consistency;
- to eliminate unnecessary duplication to maximize the utilization of existing resources and technical expertise and, where possible, coordinate efforts; and
- to monitor the performance of this MOU and service delivery.

3. **Regional and Local Area Municipality Interests** – The MOU now identifies specific Regional interests in planning matters through the provincial transfer of responsibilities with respect to growth management, water and wastewater services and urban design (Section 1.5).

All Parties agree to provide planning comments based on:

- legislative, regulatory or delegated authority,
- council approved policies and by-laws,
- interests that have been identified through pre-consultation, terms of reference, complete application requirements, and/or requisite studies.

4. **Roles and Responsibilities** – Roles and responsibilities are provided in table format for ease of reference and clarity. Table 1 identifies responsibilities by application type, report and submission, and Table 2 identifies responsibilities on the complex matter of stormwater management review by area of interest.
5. **Development Application Review Process** – To address comments regarding consistency, timing and fairness from the Development Industry stakeholders, as well as issues identified by the MOU Working Group, a major new section, Part 3 – Development Application Review Process, has been added to the MOU.

The MOU now recognizes the need for timely and prescribed information to be provided to staff, prior to the pre-consultation meeting, thus ensuring staff has sufficient time and basic facts about the proposal to research, complete a site

visit and provide comprehensive comments (see Section 3.3 Pre-consultation and Table 2 - Non-Statutory Development Application Review Timelines).

Table 2 also includes timing targets for review comments after circulation of a complete application.

Importantly, the MOU now permits applications that have been deemed to have no regional interest during pre-consultation to be exempt from further regional review (Section 3.3.4).

The MOU also recognizes the importance of incentives and the need to identify eligibility at the pre-consultation stage (Section 3.3.6).

6. **Continuous Improvement Efforts** - Similar to the 2007 MOU, this MOU commits to undertaking continuous improvement, and agrees that the Niagara Area Planners will establish a working team or teams to determine and implement, as feasible, best practices in policy planning and development application review. Part 9 – Continuous Improvement Efforts, and Appendix I – Niagara Area Planners’ Work Program 2019-2022 identify new actions to address many of the improvements suggested at the Development Industry Round Table meeting, MOU Group discussions and other consultations.

### MOU Consultation

On October 24, 2018, a working session was held with Development Industry stakeholders, facilitated by Performance Concepts and Dillon Consulting, to discuss the MOU and opportunities to improve the development approvals process. A summary report was prepared on the results entitled “Improving Niagara’s MOU & Development Approvals Process”, (attached as Appendix II). Parts 3 and 5 of the MOU address many of the findings.

In addition to presenting the MOU to Area Planners for comment, the MOU was also circulated for discussion to the CAOs, Building Officials and Public Works groups during meetings in January and February 2019.

### **Alternatives Reviewed**

A review of comparable-purposed MOUs from across the Province has been undertaken to understand the practices of other two-tier municipalities. No common standard was determined.

## **Relationship to Council Strategic Priorities**

Doing Business Differently is a strategic priority of Regional Council. Revising the MOU will improve the delivery of planning services across the region and provided more certainty and clarity for current and future property owners and investors.

## **Other Pertinent Reports**

- Report PDS 2-2018 - Protocol for Planning Services Between the Regional Municipality of Niagara and the Niagara Peninsula Conservation Authority – January 10, 2018
- Report PDS-49-2017 – MOU Planning Services in Niagara – November 8, 2017
- Report PDS-43-2017 – Review and Update of the 2007 Memorandum of Understanding (MOU) between the Local Area Municipalities, Niagara Peninsula Conservation Authority and Niagara Region, and the 2008 Protocol for Plan Review and Technical Clearance between the Niagara Peninsula Conservation Authority (NPCA) and Niagara Region – September 15, 2017
- Memorandum PDS-C 4-2014 – Local Area Municipal Response to the 2014 Update to the Memorandum of Understanding for improving the Planning Function in Niagara – May 14, 2014
- Report PW 1-2014 Building Relationships, 2014 Update to the Memorandum of Understanding for Improving the Planning Function in Niagara – January 7, 2014
- Report PPW 10-2007 Memorandum of Understanding – Planning System in Niagara

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**Prepared by:**

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Planning and Development Services

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**Recommended by:**

Rino Mostacci, MCIP, RPP  
Commissioner  
Planning and Development Services

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**Submitted by:**

Ron Tripp, P.Eng.  
Acting Chief Administrative Officer

*This report was reviewed by Doug Giles, Director of Community and Long Range Planning.*

## **Appendices**

- Appendix I** Memorandum of Understanding for Planning Function and Services between Niagara Region and Local Area Municipalities, dated March 2019.
- Appendix II** Improving Niagara's MOU & Development Approvals Process, dated November 2, 2018.
- Appendix III** Protocol for Planning Services between the Regional Municipality of Niagara and the Niagara Peninsula Conservation Authority.

# **MEMORANDUM OF UNDERSTANDING**

between

The Regional Municipality of Niagara

The Town of Fort Erie

The Town of Grimsby

The Town of Lincoln

The City of Niagara Falls

The Town of Niagara-on-the-Lake

The Town of Pelham

The City of Port Colborne

The City of St. Catharines

The City of Thorold

The Township of Wainfleet

The City of Welland

The Township of West Lincoln

***Planning Function and Services in Niagara***

***March 2019***



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- Appendix III      Protocol for Planning Services Between the Regional Municipality of Niagara and the Niagara Peninsula Conservation Authority

# **Part 1**

## **Preamble**

### **Part 1 – Preamble**

#### **1.1 Introduction**

The Memorandum of Understanding (MOU) has been prepared for the following thirteen government planning authorities (hereafter referred to as Parties), which operate within a two-tier system in the Niagara Region planning area:

- a) The Council for the Regional Municipality of Niagara (Region); and
- b) The Councils of the Town of Fort Erie, the Town of Grimsby, the Town of Lincoln, the City of Niagara Falls, The Town of Niagara-on-the-Lake, the Town of Pelham, the City of Port Colborne, the City of St. Catharines, the City of Thorold, the Township of Wainfleet, the City of Welland and the Township of West Lincoln (collectively referred to as the “area municipalities”);

The purpose of this MOU is to update and clarify the respective roles and responsibilities of the Parties, as well as to be an instrument of continuously improving service and relationship management. This revised MOU sets the foundation for undertaking transformational changes into the future and confirms the framework within which the Parties will function and provide planning services.

The MOU has been collaboratively developed by the MOU Working Group, a sub-group of the Niagara Area Planners. The MOU has been reviewed, refined and endorsed by the Niagara Area Planners. The MOU was also presented for discussion to the CAOs, Building Officials and Public Works group meetings during January/February 2019.

#### **1.2 Background**

In 2007, the Region, area municipalities and NPCA signed a Memorandum of Understanding (2007 MOU) for improving the planning function in Niagara. The primary function was to be a relationship management tool with a focus on the respective roles and responsibilities of the signing parties for policy planning and the review of development applications. The 2007 MOU was reviewed and revised in 2011 and again in 2014.

The 2007 MOU (as amended) succeeded in managing relationships, reducing duplication and effecting continuous improvements. However, significant changes have more recently occurred in Niagara, in terms of legislation, relationships, resources, and growth that have impacted the established roles and responsibilities.

Following discussions at Niagara Area Planners, in September 2017, reports were presented to Regional Council and the NPCA (PDS-43-2017 and CR-92-17 respectively) outlining the need to update the 2007 MOU, as amended, as well as the 2008 Protocol for Plan Review and Technical Clearance between the Niagara Peninsula Conservation Authority and Niagara Region (2008 Protocol).<sup>1</sup>

A priority was established for updating the 2008 Protocol due to new directions within the NPCA that required the NPCA and Regional roles to be realigned. This work was undertaken in Fall 2017. The revised Protocol was approved by Regional Council and the NPCA in January 2018 and came into effect upon these approvals.

The 2018 Protocol shifted responsibility for reviewing policy and development applications and providing technical clearance services ensuring compliance with the Regional Official Plan and Provincial legislation to the Region. In addition, the Region also took on responsibility for stormwater management review. A full description of the Region and NPCA's roles and responsibilities are detailed in the 2018 Protocol, which is attached to this MOU as Appendix III, and is to be read in conjunction with the MOU. Following the approval and implementation of the 2018 Protocol, work commenced to update the MOU.

### **1.3 Goal**

The MOU established a 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.” This goal continues to have relevance; however, it does not address all of the principles of the ideal planning system. To assist the Parties in managing growth and change while protecting the natural environment, agricultural land base and cultural heritage, the goal of this MOU is having:

A Niagara region planning system that is:

- Integrated
- Efficient
- Collaborative

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<sup>1</sup> The 2008 Protocol consolidated planning services with respect to the natural environment.

- Proactive
- Solution focused
- Consistent
- Predictable
- Easily understood
- Transparent, and
- Responsive.

## 1.4 Objectives

This MOU seeks to achieve the following objectives:

- To clarify respective roles and responsibilities with respect to the provision of planning services;
- To deliver timely, accurate, effective and customer-focused planning services;
- To eliminate unnecessary duplication to maximize the utilization of existing resources and technical expertise and, where possible, coordinate efforts;
- To develop transparent, effective, efficient and collaborative processes for policy development;
- To pursue improvements to the planning application processes that achieve good planning, streamlining, predictability and consistency;
- To improve on communications between regional, NPCA and area planners to work together more effectively and efficiently;
- To identify an approach/process to interpret policy thereby ensuring consistency both now and in the future;
- To develop a model that demonstrates how planning services are appropriately resourced and structured;
- To hear and understand the needs and desires of the public;
- To ensure that public aspirations are considered and communicated in the planning process;
- To develop transparent, easily understood processes for community engagement;
- To monitor the performance of this MOU and service delivery;
- To encourage public participation in policy development and development review; and
- To ensure the MOU is embraced and easily understood by Councils, the public, applicants and staff.

## 1.5 Authority

There are several land use policy planning approvals that rightly are addressed at the Regional Municipality level – these will be retained as expressed in the MOU. However, the Council of the Regional Municipality is empowered by The Planning Act to delegate all or parts of its approval authorities to its Area Municipalities subject to such conditions as the Regional Council deems appropriate. In 1997 and 1999, Regional Council adopted by-laws delegating authority for the approval of subdivisions and consents (respectively) to the local municipal Councils.

In 1996, the Province of Ontario transferred the responsibility to review planning applications for Provincial interests to the Regional Municipality of Niagara on behalf of the Ministry of Municipal Affairs and Housing, Ministry of the Environment, Conservation and Parks, Ministry of Natural Resources and Forestry, Ministry of Tourism, Culture and Sport, and Ministry of Agriculture, Food and Rural Affairs. Matters of provincial interest are identified in the Planning Act S.2 and further defined in Provincial legislation, such as the Growth Plan for the Greater Golden Horseshoe. There is a need to clarify the roles and responsibilities of the Region and area municipalities with respect to some provincial interests, as follows:

- Growth Management: The Region allocates population and employment growth to the area municipalities. The area municipalities distribute population and employment growth within their communities.
- Water and Wastewater Services: The Region is responsible for all connections to the Region's trunks and pipes.
- Urban Design: The Region has an interest in urban design along Regional Roads.
- Natural Heritage and Water Resources: The Region has an interest in Natural Heritage and Water Resources (see Protocol).

While not a party to this MOU, the Region and area municipalities work collaboratively with the NPCA and recognize its authority. The NPCA is an autonomous corporate body established under the Conservation Authorities Act with a mandate, as set out in Section 20 of the Conservation Authorities Act, to establish and undertake programs designed to further the conservation, restoration, development and management of natural resources. NPCA comments are limited to natural environment interests as set out in legislation, regulation and/or delegated authority (as detailed in the 2018 Protocol).

## **1.6 Jurisdiction**

This MOU applies to those lands within the Regional Municipality of Niagara. It is noted that a portion of Grimsby is under the Hamilton Conservation Authority's jurisdiction.

## 1.7 Definitions:

### Complete Application means:

Submission of prescribed requirements under the Planning Act including all application fees, application form and application requirements determined in consultation with the Lead Agency and commenting/review Parties. In addition to the compulsory requirements, supplementary information may also be required. The requirements of a Complete Application will be determined through pre-consultation.

### Interests means:

The interests of the Party as defined by its approved plans, policies, programs and delegated authorities, and as further defined within this MOU.

### Lead Agency means:

The organization responsible for coordinating the processing of a development application, policy project or environmental assessments;

### Lead Agency for Technical Study means:

The organization responsible for the principal review of a technical study(s) ensuring compliance and conformity with related applicable legislation.

### Niagara Area Planners means:

A group representing the Parties that collaborate on matters of common interest. This group is comprised of planning and development directors or their designate.

### Planning Application Review means:

The review of planning applications (including formal pre-consultation) under the *Planning Act*, the *Niagara Escarpment Planning and Development Act* and the *Environmental Assessment Act*, which may include:

1. The identification of the need for and review of related technical reports (including scoping); and/or
2. The identification of conditions of approval.

### Policy Review means:

1. The review of existing or new policy documents, such as stormwater management guidelines, watershed studies, secondary plans and background studies; and/or
2. The identification of the need for and review of related technical reports.



Technical Clearance Review means:

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

## **Part 2 - Roles and Responsibilities of the Parties**

### **2.1 Policy and Implementation Planning**

The Parties agree that successfully meeting the objectives for this MOU will require a collaborative approach to policy and implementation planning. The signatories are committed to developing Niagara and building good communities.

The parties agree to provide comments based on:

- Legislative, regulatory or delegated authority,
- Council approved policies and by-laws,
- Interests that have been identified through this MOU, pre-consultation, terms of reference, complete application requirements, and/or requisite studies.

Specific provisions related to roles and responsibilities are provided in this MOU and Table 1 - Responsibilities by Application Type, Report, Submission.

The Parties agree that a high degree of policy alignment is important in advancing an integrated and consistent planning system. In order to achieve policy alignment, the Parties agree to collaborate and include the following measures for each policy planning project and implementation of projects:

- Pre-consultation with relevant partners, prior to project start-up, identifying areas of common interest,
- Placement of appropriate representation on project steering committees;
- Agreed-to milestone meetings, consultations, and document review;
- Mutually satisfactory review protocols with shared commitment to timeliness; and
- Work collaboratively toward sharing GIS files and data.

### **Policy Planning**

The following are the means by which Policy Planning will be conducted by the Parties for specific types of policy planning projects.

### **2.1.1 Regional Official Plan and Amendments (ROPAs)**

Approval of the Regional Official Plan rests with the Province of Ontario. The Adoption of ROPAs rests with Regional Council. Area Municipalities provide comments based on circulation by the Region. The Niagara Peninsula Conservation Authority (NPCA) comments to Region during circulation.

### **2.1.2 Area Municipal Comprehensive Official Plans and Non Site-Specific LOPAs**

Approval rests with Regional Council. The Area Municipality prepares the Comprehensive Official Plan, collaboratively with direct involvement of Regional Planning and NPCA *prior* to releasing a draft Official Plan for public comment. The NPCA provides comments during circulation.

### **2.1.3 Area Municipal Site Specific and Policy Specific Official Plan Amendments**

For the purposes of this Section, 'site specific' means that the proposal:

- is single application on a single property or multiple contiguous properties under single ownership or control; and
- does not require a Regional Official Plan Amendment or Secondary Plan.

Area Municipality approves and Region provides comments during circulation stage and reviews draft Official Plan Amendment prior to adoption. The NPCA provides comments during circulation stage.

### **2.1.4 Secondary Plans**

Approval rests with the Region, except where deemed exempt as per the Regional Official Plan. The Region will determine whether the Secondary Plan is exempt from Regional approval within the timeframe outlined in Table 2.<sup>2</sup>

The Area Municipality prepares the Secondary Plan, collaboratively with direct involvement of Regional Planning and NPCA:

- in the development of the Terms of Reference, Scope of Work or Initiation Report
- the review of the draft Secondary Plan policies and mapping/schedules prior to release for public comment

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<sup>2</sup> The MOU Group has identified a need to review and update Regional Official Plan policies with respect to local Official Plan Amendment exemptions, specifically related to Secondary Plans. This item has been included in the Niagara Area Planners' Work Program for Improvements 2019-2022 (attached as Appendix I).

The Region provides comments on the Secondary Plan within the timeframe outlined in Table 2. The NPCA provides comments during circulation.

#### **2.1.5 Community Improvement Plans**

Proponent, either Region or Area Municipality, approves the CIP. If Regional funding is provided (subject to Regional budget approvals), proponent municipality prepares the Community Improvement Plan, collaboratively with direct involvement of the Area Municipality, Regional Planning and NPCA:

- in the development of the Terms of Reference, Scope of Work or Initiation Report
- in the development committees pertaining to CIP creation

The Region will review the draft Community Improvement Plan policies and mapping/schedules prior to release for public comment. Non-proponent, Region or Area Municipality comments during circulation. Conversely, the Area Municipality will review draft Regional Community Improvement Plan policies and mapping/schedules prior to release for public comment. The NPCA provides comments during circulation.

#### **2.1.6 Niagara Escarpment Plan Amendments**

Approval rests with Province. The Region comments during circulation. The Area Municipality comments during circulation. The NPCA comments during circulation.

#### **2.1.7 Regional Environmental Assessments**

Approval rests with Province. The Region adopts. The Area Municipality comments during circulation. The NPCA comments during circulation.

#### **2.1.8 Local Environmental Assessments**

Approval rests with Province. The Area Municipality adopts. The Region comments during circulation. The NPCA comments during circulation..

#### **2.1.9 Special Studies**

The principal or lead proponent of any special study is the agency that is responsible for adopting. In the event of joint studies, all proponent agencies

adopt. The relevant partners participate in the process via a collaborative framework that is established at the beginning of the study process.

## **Implementation Planning**

The Parties agree that successfully meeting the objectives for this MOU will involve placing responsibility for implementation planning primarily with the Area Municipalities as the legislated/delegated approval authority for such activity.

The following are the means by which Implementation Planning will be conducted by the Parties for specific types of Implementation Planning activities.

### **2.1.10 Comprehensive Zoning By-laws**

Area Municipality approves. The Area municipality prepares the Comprehensive Zoning By-law, collaboratively with direct involvement of Regional Planning and NPCA *prior* to releasing a draft Comprehensive Zoning By-law for public comment. The NPCA comments during circulation.

### **2.1.11 Zoning By-law Amendments**

Area Municipality approves. Based on Schedule C, Region may comment during circulation. The NPCA provides comments upon request by Area Municipality.

### **2.1.12 Draft Plans of Subdivision**

Area Municipality approves. Based on Schedule C, Region comments during circulation of new Draft Plans. The NPCA provides comments upon request by Area Municipality.

### **2.1.13 Plans of Condominium**

Area Municipality approves. The Region comments during circulation, for vacant land condominiums and for conversions of rental housing to condominiums, based on Schedule C. The NPCA provides comments upon request by Area Municipality.

### **2.1.14 Consents**

Area Municipality approves. Based on Schedule C, Region may comment during circulation. The NPCA provides comments upon request by Area Municipality.

**2.1.15 Minor Variances**

Area Municipality approves. Based on Schedule C, Region may comment during circulation. The NPCA provides comments upon request by Area Municipality.

**2.1.16 Site Plan Control**

Area Municipality approves. Based on Schedule C, Region may comment during circulation. The NPCA provides comments upon request by Area Municipality.

**2.1.17 Niagara Escarpment Development**

Region provides comments, upon circulation. The Area Municipality provides comments, upon circulation. The NPCA provides comments, upon circulation.

## **2.2 Roles and Responsibilities with Respect to Environmental Features**

**2.2.1** This MOU gives overall direction for the coordinated review of development applications, policy planning and environmental assessments. For purposes of clarity with respect to environmental features, the NPCA reviews development applications, policy and environmental assessments, in accordance with the Conservation Ontario MOU with the Province to ensure consistency with Conservation Authority 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. Through the approved 2018 Protocol the NPCA agreed to copy the Region and area municipality on all correspondence.

**2.2.2** The approved 2018 Protocol identifies the roles and responsibilities of the Region and NPCA in Ontario's Land Use Planning System with respect to environmental matters. The 2018 Protocol (as may be amended) is to be read concurrent with this MOU.

**2.2.3** The Region agrees to prepare and maintain, with the assistance of the NPCA and Area Municipalities, a Natural Environment Information Map for the lands within its jurisdiction.<sup>3</sup> This map shall define the Region, Area Municipalities and NPCA geographic areas of interest in the Natural Environment including the following features and required buffers:

- All streams and watercourses;
- Environmental designations and Policies in the Regional Official Plan
- Lake Ontario and Lake Erie Shoreline;
- Regulated Areas under Section 28 of the Conservation Authorities Act; and
- Mapping of Natural Heritage Features and Areas as defined by the Provincial Policy Statement, Greenbelt Plan, and any other Provincial Policy Document.

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<sup>3</sup> This statement recognizes that a portion of Grimsby is under Hamilton Conservation Authority jurisdiction with respect to natural hazards.

## Part 3 – Development Application Review Processes

### 3.1 General

The Parties agree that the timely, efficient and predictable review of development applications is paramount to encouraging well planned, affordable development in the region. Part 3 – Development Application Review Processes identifies segments of the development review process that benefit from clarification and agreement.

### 3.2 Preliminary Review

A preliminary review occurs prior to Pre-consultation. Its purpose is to gather information and is typically part of a developer's due diligence. Preliminary discussions about a potential development application benefit the applicant by supplying early information about the land, process and possible issues. An important part of a preliminary review is providing direction on the Pre-Consultation Process. In particular, the applicant needs to understand what information is required by the parties prior to pre-consultation and any fees.

### 3.3 Pre-Consultation

Pre-consultation is a requirement for most Planning Act Applications. It requires specific actions by the applicant and each of the Parties with an *interest* in the development. After pre-consultation the applicant should have a clear understanding of the documentation required to submit a Complete Application (Section 3.4) as well as preliminary comments regarding whether the proposal will be supported by the Region and the Area Municipalities

#### 3.3.1 Required Information<sup>4</sup>

Prior to scheduling a pre-consultation meeting, the Lead Agency will determine which Parties should attend the meeting and require specific information from the applicant to provide to the attending Parties in order that the Parties may complete an initial review. The required information will vary depending on the type of application, but generally includes:

- A completed Pre-consultation Request Form, including permission to enter property,
- The required fee (if applicable),
- Preliminary Plans showing the following:
  - Location of existing and proposed land uses, buildings and structures;

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<sup>4</sup> The MOU Group has identified an issue with respect to the consistency in the information circulated for preparation of a pre-consultation meeting. The lack of information diminishes the benefits of pre-consultation. Standardization of forms and required information would help in this regard. This item has been included in the Niagara Area Planners' Work Program for Improvements 2019-2022 (attached as Appendix I).

- Location of significant features on the site and adjacent to the site (i.e. wetlands, hazard lands, watercourses, woodlands, wells, septic tanks, etc.);
- Existing and proposed lot fabric (as appropriate); and
- Proposed development concept, including setbacks from lot lines and significant features.

### **3.3.2 Circulation/Timelines**

Refer to Table 2 for circulation/timelines. If the circulated information is incomplete and/or the timeline is not met, the commenting agencies may request in writing the rescheduling of the pre-consultation meeting to offer better service and outline of study requirements.

Commenting agencies may conduct site visits prior to the date of the pre-consultation meeting, where time permits, to inform discussion at the meeting regarding the scoping of required studies.

### **3.3.3 Required Studies and Scoping of Studies<sup>5</sup>**

The Terms of Reference, or the minimum requirements for each of the required studies will be discussed during the pre-consultation process. The objectives and parameters of the studies will be agreed to prior to them being undertaken in accordance with the Local and Regional Official Plans as well as accompanying guidelines.

The following is agreed to with respect to requesting and scoping studies:

- When determining the need for a study or plan, the Party requiring the study shall scope the study by identifying the specific necessary information. In addition, the Party requesting the study may offer to review the Terms of Reference.
- When more than one Party requests the same study, it is essential that a collaborative approach for scoping and Terms of Reference review occurs to ensure that all matters are addressed, and the applicant understands the requirements.
- For clarity, the NPCA has a role in scoping Environment Impact Studies (EIS) and reviewing the Terms of Reference for EIS and similar reports where natural hazards (as defined in the 2018 Protocol) and NPCA Regulation/Policy are required to be addressed.

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<sup>5</sup> The MOU Group has identified the need for standardized Terms of Reference for required studies. Standardization would help in scoping studies as well as ensure consistency. This need has been included on the Niagara Area Planners' Work Program for Improvements 2019-2022 (see Appendix I).



- In the event that one or more studies have been undertaken prior to pre-consultation, the Parties retain the right to require revisions to ensure that the studies are completed in accordance with requirements.
- All required studies shall be prepared and signed by a qualified professional.
- The Province has downloaded the responsibility to determine the need for an Archeological Study to the Region. Where an approved Archeological Master Plan has been incorporated into a Local Official Plan, this responsibility, as well as any related clearance of condition(s), will fall to the Lead Agency.

### **3.3.4 Exemption from Application Review by the Region<sup>6</sup>**

All development applications are circulated to the Region for review, except where the Region has determined through pre-consultation that the development proposal is exempt from further circulation and review. Examples include, but are not limited to:

1. Zoning By-law Amendment applications for “Agricultural Purposes Only” required as a condition of consent
2. Zoning By-law Amendment, Consent, Minor Variance and Site Plan applications where:
  - The application is not situated on a Regional road, easement or facility, or as determined at the pre-consultation meeting,
  - The Region has indicated during the pre-consultation process that there are no Provincial or Regional interests, and
  - The application received by the area municipality is the same as reviewed at pre-consultation.
3. Zoning By-law Amendment applications as a condition of consent, where Provincial and Regional interests have been dealt with through the consent application.
4. Draft Plans of Condominium, Site Plan and Part Lot Control applications where:
  - Provincial and Regional interests have been dealt with through a previous or concurrent development review process, provided no changes have been made to the application which effects Provincial or Regional interests

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<sup>6</sup> The MOU Group has identified the need for a standardized letter to be provided at a pre-consultation meeting that acknowledges the potential for exemption from further review on the part of a Party. This need has been included on the Niagara Area Planners’ Work Program for Improvements 2019-2022 (see Appendix I).

### **3.3.5 Fees**

Each of the parties to the pre-consultation shall identify the fees required for application review, including the identification of additional costs should a peer review of a technical study be required.

The Parties agree not to charge each other fees for applications processed under the Planning Act.

### **3.3.6 Incentives**

Each of the Parties to the pre-Consultation will endeavor to identify financial incentive programs, if any, that the project may be eligible for. Incentives available from either the Region or Area Municipality are subject to both program changes and budget approvals. As such, incentives identified at pre-Consultation may not be available at time of construction.

## **3.4 Complete Applications**

### **3.4.1 Submission Requirements<sup>7</sup>**

The requirements of a Complete Application are determined during pre-consultation and provided in writing to the applicant by the Lead Agency in consultation with the commenting agencies.

The Lead Agency will review the application submission to ensure all required materials (forms, fees, plans, studies, etc.), as requested by all commenting agencies, are provided, and deem the application complete or not.

### **3.4.2 Circulation and Development Application Review Timelines**

The Planning Act and related Regulations identify statutory timelines for the review of Complete Applications by the Lead Agency. In order to ensure the statutory timelines are met, the Parties agree that the commenting agencies, as identified in Table 1 – Responsibilities by Application Type, Report, Submission, shall use best efforts to complete the review of all

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<sup>7</sup> In addition to the information prescribed in *Planning Act Regulations*, the *Planning Act* also provides that the applicant may also be required to provide additional information provided the Municipality's Official Plan contains a provision related to the requirements. All of these requirements are identified during the pre-consultation process.

applications in accordance with the timelines identified in Table 2 – Non-statutory Development Application Review Timelines.

### **3.5 Application Review and Commenting**

**3.5.1** The Parties agree, where possible, to streamline commenting methods by using standardized wording in emails, forms, letters, conditions of approval etc.

**3.5.2** When a concern and/or condition of approval is not supported by the Lead Agency, the Lead Agency shall inform the commenting agency and initiate discussions to resolve the issue.

In the case of multiple applications for the same land, the Lead Agency shall use the greater of the timelines.

Revisions to applications during the review process may result in the review period being extended depending on the complexity of the revisions and the need for revised studies.

When new issues arise from the analysis of studies during application review which results in the need for additional information or study, addendums to the study may be required and additional review time may be required to review any addendums.

### **3.6 Other**

#### **3.6.1 Extensions of Draft Plan Approval**

The Parties agree that the request for an extension to a draft approved Plan of Subdivision or Condominium be received, with the required review fee, and circulated for comment by the Area Municipality, not the applicant.<sup>8</sup>

#### **3.6.2 Modifications to Conditions of Draft Plan Approval**

The Parties agree that the request for a modification to a draft approved Plan of Subdivision or Condominium be received, with the required review fee, and circulated for comment by the Area Municipality, not the applicant.

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<sup>8</sup> The MOU Group has identified the possibility of exemption for a request for extension to a draft approved Plan of Subdivision or Condominium by the Region and NPCA. This idea has been included on the Niagara Area Planners' Work Program for Improvements 2019-2022 (see Appendix I).

### **3.6.3 Clearance of Conditions of Draft Plan Approval**

The Parties agree that the request for formal clearance of conditions of Draft Plan of Subdivision or Condominium be received and circulated by the Area Municipality, not the applicant. The Area Municipality is also responsible for circulating a copy of the draft agreement. The applicant's submissions shall include the following:

- the required review fee
- a letter from the applicant which outlines how each Regional condition has been met, accompanied by the necessary supporting documents<sup>9</sup>

### **3.6.4 Support Services**

The Region may offer support services to the Area Municipalities on a fee for service basis. These services are identified in Appendix II – Support Services - Niagara Region, and may be modified on the advisement of the Region without amendment to this MOU.

### **3.6.5 Applications for New or Expanded Mineral Aggregate Operations**

For applications for new or expanded mineral aggregate operations a Joint Agency Review Team (JART) process will be considered. The JART is a streamlined process that allows for the coordination of applications and sharing of resources and expertise, while maintaining independent decision-making authority.

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<sup>9</sup> The Region will continue to review submissions related to individual conditions prior to receiving the formal request for clearance



## Part 4 - Managing Relationships with Other Governments on Planning Matters

### 4.1 Provincial Interest

When a planning matter arises in terms of Provincial interest and the administration of same, area municipalities will channel their concerns through the Regional Municipality with the expectation that the Regional Municipality will facilitate/coordinate an understanding between Provincial authorities and local interests.

### 4.2 Federal Interest

When a planning matter arises in terms of Federal interest and the administration of same, area municipalities will channel their concerns through the Regional Municipality with the expectation that the Regional Municipality will facilitate/coordinate an understanding between Federal authorities and local interests.

### 4.3 Other Governments

When significant planning matters arise from the efforts and activities of neighbouring municipalities, such as the City of Hamilton and the County of Haldimand in Ontario and Erie and Niagara Counties in Western New York, the signatories will present a unified and singular position with coordination being provided by the Region.

## Part 5 - Continuous Improvement Efforts

### 5.1 Working Groups

As part of this MOU, the Parties have committed to undertaking continuous improvement efforts and agree that the Niagara Area Planners establish a working team or teams to determine and implement, as feasible, best practices in policy planning and development application review.

### 5.2 Work Program for Improvements

As a result of the Development Industry Round Table meeting, MOU Group discussions and other consultations, several areas for improvement were identified. The MOU has been revised to address many of those improvements. Suggested improvements which require research, analysis or amendments to policy prior to implementation have been included in Appendix I - Niagara Area Planners' Work Program for Improvements 2019-2022.

### 5.3 Training Opportunities

The Parties agree to assess opportunities to jointly/collaboratively train staff on matters pertaining to improving service efficiencies. The Parties agree to assess opportunities to jointly/collaboratively educate staff on related and pertinent topics, such as changing legislation. Where feasible, education/training will be offered to members of the development industry and consultants to develop common understandings planning matters.

Interested parties may explore opportunities related to cross-training Staff through secondment and job-shadowing, in addition to sharing of resources.

## Part 6 - MOU Terms and Implementation

### 6.1 Duration and Review

This MOU shall remain in effect until such time as replaced by an updated MOU (if any). A mandatory review shall occur a minimum of every 5 years 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.

The mandatory review shall be coordinated by the Region, undertaken by the MOU technical review team and overseen by the Niagara Area Planners.

The MOU may be reviewed at any time before the mandatory review if there are matters that need to be addressed. Based on a review by the MOU technical review team, changes considered minor in nature may not require Regional or local Council approvals. This MOU will be reviewed and amended concurrent with the new Regional Official Plan.

The Appendices are intended to be independent of the MOU and may be reviewed and amended, as necessary.

### 6.2 Overlapping Mandate

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

### 6.3 Conflict

Where there is conflict between new (changing) legislation and this MOU, new legislation will take precedence.



Where there is a conflict between an Official Plan, the NPCA Regulation and/or Board adopted policies, the Regulation shall take precedence.

Where there are conflicts, Regional, NPCA and local municipal staff 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 1.

## 6.4 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.

## 6.5 Fees

Fees for pre-consultation, planning review and technical clearance services will be set independently by the Parties.

All development application fees will be collected by the Area municipalities and remitted to the Region and NPCA upon circulation of a complete application, except for Regional Official Plan amendment applications.

The Region and Municipality 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.

The NPCA will be responsible for collecting any further processing, approvals and/or Final Clearance Fees, if required.

The NPCA and Region will provide the area municipalities with an approved schedule of fees and updates.

## 6.6 Effective Date

This MOU will take effect on the last date signed by the Parties to this MOU.

## Part 7 - Tables

**Table 1 - Responsibilities by Application Type, Report, Submission**

Application Type	Lead Agency	Commenting Agencies	Responsibility for Final Approval	Mandated Approval Authority
Application Type				
Regional Official Plan and updating Amendments (under Sect. 26 Planning Act)	Region	Local NPCA Province	MMAH	Planning Act S. 17 and s. 26
Regional Official Plan Amendments (other than above)	Region	Local NPCA Province	Region	Planning Act S.22
Local Official Plan, updating Amendments to Local Official Plans, Secondary Plans and other non-exempt Local Official Plan Amendments <sup>10</sup>	Local	Region NPCA	Region	Planning Act, Regional Official Plan
Exempt Local Official Plan Amendments and Secondary Plans <sup>11</sup>	Local	Region NPCA	Local	O.Reg 699/98, Planning Act, Regional Official Plan
Zoning By-Law/Amendments	Local	Region NPCA	Local	Planning Act S. 34
Minor Variance/Permissions	Local	Region NPCA	Local	Planning Act S. 45
Draft Plans of Subdivision	Local	Region NPCA	Local	Planning Act S.51 and Regional By-laws <sup>12</sup>
Draft Plan of Condominium	Local	Region NPCA	Local	Planning Act S. 51 and Regional By-laws <sup>13</sup>
Consent/Boundary Adjustments	Local	Region NPCA	Local	Planning Act S. 53 and Regional By-laws <sup>14</sup>

<sup>10</sup> Regional Official Plan Policies 14.E.7 and 14.E.8 identify criteria under which approval of Local Official Plan Amendments may be delegated to the local Council for approval.

<sup>11</sup> Regional Official Plan Policies 14.E.7 and 14.E.8 identify criteria under which approval of Local Official Plan Amendments may be delegated to the local Council for approval. Ontario Regulation 699/98 and Regional By-laws 129-2001 and 43-2001.

<sup>12</sup> Delegation Authority By-laws 8620-97, 8763-97, 8760-97, 8819-97, 8764-97, 8793-97, 8792-97, 8807-97, 8761-97, 8884-97, 8619-97, 8762-97.

<sup>13</sup> Delegation Authority By-laws 8620-97, 8763-97, 8760-97, 8819-97, 8764-97, 8793-97, 8792-97, 8807-97, 8761-97, 8884-97, 8619-97, 8762-97

<sup>14</sup> Delegation Authority By-laws 179-1999, 180-1999, 181-199, 182-1999, 183-1999, 184-1999, 185-1999, 186-1999, 187-1999, 188-1999, 124-1999.

<b>Application Type</b>	<b>Lead Agency</b>	<b>Commenting Agencies</b>	<b>Responsibility for Final Approval</b>	<b>Mandated Approval Authority</b>
Part Lot Control	Local	Region NPCA	Local	Planning Act S. 50 and Reg. By-laws <sup>15</sup>
Site Plan	Local	Region, NPCA	Local	Planning Act S. 41
NEC Applications: Amendments and Permits <sup>16</sup>	NEC	Local, Region NPCA	NEC	Niagara Escarpment and Development Act
Aggregate License	MNRF Region	Local, Region NPCA	MNRF	Aggregate Resources Act S.11
Environmental Assessments	Local/Region /Province	Local, Region NPCA	Local/ Region/ Province	Environmental Assessment Act
<b>Reports / Submissions</b>		<b>Commenting Agencies</b>	<b>Prepared to the Satisfaction of:</b>	<b>Mandated Approval Authority</b>
<i>EIS in a NPCA Regulated Area</i>		Region Local	NPCA	O. Reg. 155/06, PPS, Regional Official Plan
<i>EIS outside Settlement Area<sup>17</sup></i>		NPCA Local	Region	Regional Official Plan
<i>EIS inside Settlement Area<sup>18,19</sup></i>		NPCA Region	Local	Regional Official Plan
Watershed Studies		Region	Local NPCA	Region
Sub-Watershed Studies		Local	Region NPCA	Local
Technical Reports for Natural Hazard Identification		Local Region	NPCA	PPS, Conservation Act S. 28
Regional Master Servicing Plans		Local NPCA	Region	Regional Official Plan
Regional Stormwater Master Plan/Guidelines		Local NPCA	Region	Regional Official Plan
Regional Transportation Plans		Local NPCA	Region	Regional Official Plan
Local Master Servicing Plans		Region NPCA	Local	Planning Act, Local Official Plan

<sup>15</sup> Delegation Authority By-laws 8620-97, 8763-97, 8760-97, 8819-97, 8764-97, 8793-97, 8792-97, 8807-97, 8761-97, 8884-97, 8619-97, 8762-97.

<sup>16</sup> The Niagara Escarpment Commission is not a party to this MOU.

<sup>17</sup> 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.

<sup>18</sup> 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.

<sup>19</sup> Where an area municipality does not have in-house expertise to review an EIS, the area municipality may require a peer review.

<b>Application Type</b>	<b>Lead Agency</b>	<b>Commenting Agencies</b>	<b>Responsibility for Final Approval</b>	<b>Mandated Approval Authority</b>
Local Stormwater Master Plan/Guidelines		Region NPCA	Local	Planning Act, Local Official Plan
Local Transportation Plans		Region NPCA	Local	Planning Act, Local Official Plan

**Table 2 - Non-Statutory Development Application Review Timelines**

<b>Application Type</b>	<b>Pre-Consultation</b>	<b>Target for Comments After Circulation of a Complete Application</b>
<b>Site specific Regional Official Plan Amendment</b>	Commenting agencies to receive required information/plans a min. of 7 calendar days prior to pre-consultation.	Parties to provide comments within 20 calendar days
<b>Secondary Plan (Local Official Plan Amendment)</b>	Same as above	For draft Secondary Plans policies and mapping/schedules, within 30 - 45 calendar days the Region shall: a) indicate whether or not the Secondary Plan is exempt from Regional approval; and b) provide comments
<b>Other Comprehensive Local Official Plan Amendment</b>	Same as above	As determined in consultation with the area municipality
<b>Site specific Local Official Plan Amendment</b>	Same as above	Parties to provide comments within 20 calendar days
<b>Comprehensive zoning by-law</b>	Same as above	Parties to provide comments within 30 - 45 calendar days
<b>Site specific zoning by-law amendment (including Holding Provision)</b>	Same as above	Parties to provide comments within 20 calendar days
<b>Draft plans of subdivision or condominium</b>	Same as above	Parties to provide comments within 30 - 45 calendar days
<b>Modifications to Draft Approved Subdivision and Condominium</b>	Same as above	Parties to provide comments within 30 - 45 calendar days
<b>Consent</b>	Same as above	Parties to provide comments within 10 calendar days in urban areas and within 14 calendar days in rural areas (on private services).

<b>Application Type</b>	<b>Pre-Consultation</b>	<b>Target for Comments After Circulation of a Complete Application</b>
<b>Minor Variance</b>	Same as above	Parties to provide comments within 10 calendar days.
<b>Site Plan</b>	Same as above	Parties to provide comments within 20 calendar days
<b>Extension of draft Approval</b>	N/A	Parties to provide comments within 10 calendar days
<b>Clearance of Conditions</b>	N/A	Parties to provide comments within 15 calendar days
<b>Niagara Escarpment Development Permit</b>	N/A	Parties to provide comments within 30 calendar days
<b>Niagara Escarpment Plan Amendment</b>	N/A	Parties to provide comments within 60 calendar days

#### **Notes for Table 2**

1. To convene a pre-consultation meeting, the lead agency must have enough information from the applicant for the parties to complete an initial analysis and provide advice, including but not limited to advice on requirements for a Complete Application.
2. All due dates are from the time of receipt by the commenting parties and are for applications deemed complete as determined by the parties as part of pre-consultation.
3. Studies that require peer review may require an additional 30-60 day review period.
4. Revisions to Plans of Subdivision or Condominium during the review process may result in the review period being extended depending on the complexity of the revisions and the need for revised studies.
5. When new issues arise from the analysis of studies or required consultation during application review which results in the need for additional information or study, additional review time may be required.

## Part 8 - Endorsement and Signature Pages

### Regional Municipality of Niagara

Date of Regional Council endorsement: \_\_\_\_\_

CAO Signature: \_\_\_\_\_

### Town of Fort Erie

Date of Town Council endorsement: \_\_\_\_\_

CAO Signature: \_\_\_\_\_

### Town of Grimsby

Date of Town Council endorsement: \_\_\_\_\_

CAO Signature: \_\_\_\_\_

### Town of Lincoln

Date of Town Council endorsement: \_\_\_\_\_

CAO Signature: \_\_\_\_\_

### City of Niagara Falls

Date of City Council endorsement: \_\_\_\_\_

CAO Signature: \_\_\_\_\_

### Town of Niagara-on-the-Lake

Date of Town Council endorsement: \_\_\_\_\_

CAO Signature: \_\_\_\_\_

### Town of Pelham

Date of Town Council endorsement: \_\_\_\_\_

CAO Signature: \_\_\_\_\_

### City of Port Colborne

Date of City Council endorsement: \_\_\_\_\_

CAO Signature: \_\_\_\_\_

**City of St. Catharines**

Date of City Council endorsement:

CAO Signature:

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**City of Thorold**

Date of City Council endorsement:

CAO Signature:

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**Township of Wainfleet**

Date of Township Council endorsement:

CAO Signature:

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**City of Welland**

Date of City Council endorsement:

CAO Signature:

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**Township of West Lincoln**

Date of Township Council endorsement:

CAO Signature:

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## Part 9 – Appendices

### Appendix I - Niagara Area Planners' Work Program 2019-2022

1. Review the issues related to the package of information circulated for preparation of a pre-consultation meeting, as this impacts the ability to prepare and provide comprehensive information to the applicant and others. It is expected that an update to the standard forms (e.g. Pre-consultation Request Form) and required information would help in this regard.
2. Prepare standardized terms of reference for studies (for example: planning justification, noise, air quality, etc.). Standardization would aid in the scoping of studies, as well as, ensure consistency.
3. In addition to the standardized checklist, prepare a standardized letter to be provided at a pre-consultation meeting that acknowledges the potential for exemption from further regional review.
4. Review the possibility of regional exemption for an extension request for a draft approved Plan of Subdivision or Condominium.
5. Prepare standardized guidelines or terms of reference for the preparation of Secondary Plans to ensure Secondary Plans across the region are comprehensive, consistent and timely.
6. Investigate the implementation of a portal where an application can be tracked in order that a developer/consultant can understand the rate of movement.
7. Hold education programs, in consultation with the development industry, on topics including, but not limited to:
  - “The Business of Development – Understanding Development Performa”,
  - Customer Service related to Development (“Race to Register”).
8. Review the issues identified by the Development Industry related to securities, including but not limited to standardization and release of securities.
9. Formulate a collaborative multiyear policy planning program for Niagara that addresses:
  - Conformity of the Regional Official Plan to Provincial plans and policies;
  - Conformity of Local Official Plans to the Regional Official Plan;



- Timely update of Comprehensive Zoning By-laws to conform to Local Official Plans;
  - Harmonization of Regional and Local Official Plan policies and Conservation Authority regulations and policies, where possible; and
  - Alignment of guidelines and protocol between the Parties, such as guidelines that set out requirements for preparation of a Secondary Plan; and
10. Continued efforts to streamline the development review process, as it relates to Provincial, NPCA and regional/local interests.
11. Modifications to Regional Official Plan policies 14.E.6, 14.E.7, 14.E.8, 14.E.9 with respect to exemption policies (e.g., Secondary Plans).

## **Appendix II**

### **Support Services - Niagara Region**

**From time to time, the area municipalities may require support. The Region may provide support services to the MOU parties on a fee for service basis in the following areas:**

**Urban Design**

**EIS Review**

**Noise Study Review**

### **Appendix III**

#### **Protocol for Planning Services Between the Regional Municipality of Niagara and the Niagara Peninsula conservation Authority, approved January 2018**





## Engaging Niagara's Development Industry: Improving the MOU & Development Approvals Process (DAP)

November 19<sup>th</sup>, 2018



## Table of Contents

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## INTRODUCTION & METHODOLOGY

## Introduction: Engaging the Development industry as Partners to Improve the MOU/DAP

In October, 2018, the Region of Niagara engaged Performance Concepts Consulting and Dillon Consulting to execute a facilitated consultation program with members of Niagara's development community. The focus of the consultation program was twofold:

- To identify improvement issues/opportunities concerning the “who does what” Memorandum of Understanding (the MOU) that informs and shapes the execution of Niagara's two-tier municipal development approvals process (DAP);
- To identify specific technical/operational improvement opportunities across DAP that do not fit within the broader parameters of the MOU.


The Performance Concepts/Dillon team worked closely with the Region's new Development Industry Consultant; a staff position created in 2018 with the express purpose of liaising with the development industry, the 12 local municipalities and the NPCA to improve DAP execution and manage the relationship between the industry and local government regulators. The Development Industry Consultant position is imbedded within the Region's Planning & Development Services business unit. The position is occupied by Jon Whyte, a former leader in the Niagara development industry with high credibility among industry and local government DAP participants.

This report sets out the consultation program undertaken by Performance Concepts/Dillon. The report also documents the development industry feedback concerning improvements to the MOU and the overall DAP model in Niagara. Finally, the report sets out specific recommendations and a prioritized action plan to improve the MOU and re-engineer a more effective, predictable and timely DAP service delivery model.




## Methodology Components of Development Industry Consultation:

1. Performance Concepts/Dillon review of Niagara MOU evolution/history and substantive issues informing the improvement dialogue.



2. Discussions with Region staff to gain their perspective on the issues associated with the MOU & the overall DAP model in Niagara.



3. Structured interviews/discussions with a small sample of development industry leaders & their professional consultants; with interviews designed to set the scene for an October 24th industry-wide workshop.



4. Preparation & execution of the October 24th half-day industry-wide workshop; featuring 30+ participants in 3 breakout sessions organized around a restructured MOU and DAP improvement areas.



5. A briefing session/roundtable discussion with senior Planning staff from the Region and the 12 local municipalities. The briefing/roundtable was focussed on industry observations/ideas offered at the October 24th workshop, as well as go-forward improvement opportunities that could feature Region/local municipal/industry collaboration.

## Evidence Based Input to Achieve MOU/DAP Improvements

Development industry interviews to identify culture, process and IT toolkit issues/opportunities



Performance Concepts/Dillon team's expert input to inform consultation model & substantive recommendations



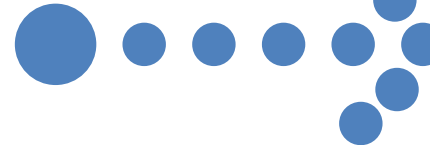
Mentimeter interactive polling evidence to establish "short list" of industry MOU/DAP improvement priorities



Region/local municipal expertise to inform go-forward improvement action plan re. MOU and DAP process pinch points



**Evidence-Informed Findings Re. MOU + DAP Improvement Opportunities**



**Recommendations to Achieve MOU/DAP Improvements**

## **DEVELOPMENT INDUSTRY OBSERVATIONS/FINDINGS RE. MOU & DAP PERFORMANCE IMPROVEMENT**

## Development Industry Observations/Findings Emerging from October 24<sup>th</sup> Workshop:

The half-day October 24<sup>th</sup> workshop provided significant insights around the current performance of the Niagara development approvals model.

The agenda for the workshops was structured as follows:

### Workshop Agenda

	<b>Welcome and Introductions</b>
10:00 to 10:30	<b>Brief Overview of The MOU</b> <i>A brief presentation to provide context on the MOU history and current status</i>
10:30 to 12:30	<b>Discussion on Improvement Opportunities (Break Out Session)</b> In small groups we will discuss the following 3 questions: <i>A. What suggestions to do you have to help signatories continue to meet MOU objectives?</i> <i>B. Where are the opportunities to improve consistency and predictability in the DAP?</i> <i>C. Where are the process/resourcing pinch points in the DAP that need to be addressed?</i>
12:30 to 1:15	Lunch will be provided
1:15 to 1:45	Towards a DAP Change Work Plan <i>We will discuss what improvements should be priority</i>
1:45 to 2:00	Next Steps and Closing

The agenda breakout sessions created a two-track discussion; a first track focused on the MOU and a second track focused on the overall performance of DAP in terms of consistency/predictability and process execution pinch points. The appendix to this report includes the workbook for the October 24<sup>th</sup> workshop; a tool designed to structure and inform the breakout session discussions.

As part of the development industry workshop's afternoon priority setting exercise, the online polling tool, Mentimeter was used to gauge participant opinion in an objective way. Using their smart phones, participants were able to provide their input anonymously to questions asked and see the results unfold on-screen. Three polling formats were used:

- Word cloud – Participants were asked to provide their thoughts on what is going well. One-2 word responses formed a word cloud participants could observe as it developed.
- Scaling – The key ideas raised by participants in break-out sessions was entered into the Mentimeter tool and participants were asked to rank what was most important on a 1-5 scale of agree to disagree:
  - What is most important from the perspective of culture?
  - What is most important from the perspective of consistency?
  - What is most important from the perspective of removing road blocks?
- Open ended responses – To conclude the session, participants were asked “What are the top 2 things you think need to be fixed?” The purpose of this question was to establish improvement priorities.

The Mentimeter participant feedback has been utilized by the Performance Concepts/Dillon team to inform our go-forward improvement recommendations around the MOU and the broader DAP model in Niagara. The complete Mentimeter results are presented in the Appendix to this report.

## **MOU Update & Restructuring: Industry Observations/Performance Improvement Ideas**

The Niagara MOU was drafted in July 2006 and updated in 2014 following meetings with planners and the development industry to identify areas for improvement. Signed by the Region, twelve local municipalities and the Niagara Peninsula Conservation Authority, the MOU includes the following sections:

- Part 1: Preamble – This section introduces the MOU and sets the context related to its goal and objectives.
- Part 2: Roles and Responsibilities of Signatories for Policy Planning and Implementation Planning – This section goes through each policy and implementation planning activity and sets out specific roles.
- Part 3: Consolidation of the Review of Planning Applications as they Relate to the Natural Environment – This section speaks specifically to the role of the NPCA in leading a streamlined one-window natural environment review.
- Part 4: Managing Relationships with Other Governments – This section speaks to the role of the Region in liaising with other levels of government and sets out topics for continuous improvement.
- Part 5: MOU Duration and Formal Review – This section sets up the formal review and dispute resolution process.

Industry representatives brought forward the following observations/advice concerning MOU improvement for consideration by the Region and the local municipalities:

- MOU should address the value of the “pre pre-consultation talk” between the applicant and the Region/local municipality re. the vision of the proposed project. From the point of vision-consensus moving forward, there should be a shared commitment to move the project through DAP in a timely/predictable fashion. It is not clear if/when (during the DAP process) “the talk” is actually happening. It is problematic when the genuine municipal senior staff “deciders” are not in the room for “the talk”, as opposed to junior planning staff

not in a position to commit to navigating the project through DAP. The need for a transparent shared commitment to high quality projects is especially relevant during public meeting processes.

- The MOU could speak to a “best practice” approach to pre-consultation; premised on successful pre-consultation case studies recommended by the industry.
- The MOU should mandate Region/local municipality processing time targets for each core DAP application category. An MOU commitment to target timeframe should endorse a “timeframe range” for the major component steps in the overall DAP process for each core application category. The MOU could include a municipal “best efforts” commitment to meet an overall timeframe “target range” 9 times out of 10 within each core application category.
- The MOU could endorse a one-window DAP processing model in each Niagara municipality. This organization design preference would see all Planning/Engineering staff regularly involved in DAP positioned within a single business unit whose leadership is committed to timely and high-quality execution of application review and approvals. **One Window reduces internal silos...**
- The MOU could recognize the value of delegated approvals to staff by Council for appropriate DAP categories such as Site Plan approval.
- The MOU could recognize the potential value of the Region delegating carefully scoped approval functions to local municipalities in order to streamline approvals.

## Streamlining DAP Beyond the MOU: Industry Observations/Performance Improvement Ideas

### High Level Observation: Significant Degree of 2-tier Complexity in Niagara Without DAP Standardization

DAP execution in Niagara involves the Region, 12 local municipalities, the NPCA and occasionally the Niagara Escarpment Commission. The Niagara DAP “conveyor belt” that moves any given development application forward through a regulatory review process to a final approval is in reality an assortment of 12 distinct local municipal conveyor belts. According to industry participants in the workshop, Niagara’s 12 DAP conveyor belts represent a daunting logistics challenge to applicants and their consultants. The 12 conveyor belts are not standardized, processing timeframes vary widely, and staff cultures are not necessarily as client-focused as the industry would expect given the economic benefits/employment value-added associated with their projects. In comparison, Halton Region’s DAP consists of 4 local municipal conveyor belts, Peel Region’s DAP features 3 local municipal conveyor belts, and the single-tier City of Hamilton has a single DAP process conveyor belt for each category of development application. The Niagara development industry emphasized the need to improve predictability, process standardization and overall timeliness of Niagara’s 12 DAP conveyor belts in order to remain competitive with the logistically less challenging DAP processes in Hamilton and the west GTA Regions.



**High Level Observation: DAP Cultural Divide Between “Client-Driven Partnership” versus “Impartial Regulatory Process”**

The existence of a cultural divide between the development industry and the Niagara municipalities was evident during the workshop. The industry considers itself to be the client of the municipalities; bringing significant economic and employment benefits to Niagara. The industry feels that municipal DAP officials often consider themselves to be representing the public interest by opposing or restricting valuable development projects.

The Performance Concepts/Dillon team notes there need not be a zero-sum game around municipal culture when executing DAP. Applicants can receive timely, consistently executed review feedback from municipal officials - who can balance the economic benefits of new development with a responsible due diligence review of projects that protects the public interest in balanced community building. The industry is factually correct in noting that DAP regulators need to produce timely approvals that support an affordable and diverse housing stock for Niagara; a key source of competitive advantage vis-à-vis the rest of the Golden Horseshoe municipalities. Win-win relationships between industry applicants and municipal regulators are possible and indeed necessary.

The cultural divide can be reduced/eliminated by the industry and municipal staff across Niagara participating together in process improvement projects; especially when these projects build trust and a professional appreciation of the business and regulatory priorities/pressures faced by each side of the DAP partnership.

**Towards Optimal Pre-consultation & Timely Designation of a “Complete Application”**

Development industry participants in all 3 breakout groups at the October 24<sup>th</sup> workshop noted that pre-consultation was not delivering the full range of expected benefits envisioned by municipalities – guidance and certainty around technical submission requirements for a complete application. The industry notes that municipal staff are coming to pre-consultation meetings without being technically prepared, nor having undertaken a site visit. The absence of “decider” senior Planning staff at pre-consultation is a concern. Industry representatives contend Staff do not always provide specific terms of reference for required studies, and fail to scope or waive studies as appropriate for non-contentious projects. A timely pre-consultation checklist of requirements is preferred to a delayed formal pre-consultation letter. Industry representatives cited numerous examples of technical requirements being added to the “complete application” checklist well after the pre-consultation meeting. A couple of Niagara local municipalities that commit a definitive schedule for application review (at the pre-consultation stage) were acknowledged with approval by the industry. The industry strongly supports pre-consultation in principle, and is interested in working with Niagara municipalities to refine pre-consultation in order to generate the full range of expected benefits.

Designation of a “complete application” by the municipality processing the application is a critical DAP process step. The question of whether technical studies should be provided/reviewed by staff before or after a “complete application” designation is a matter of interpretation and debate among planners and development industry stakeholders across the province. This issue is important because the “complete application” designation turns on the legislated timeframe clock for “no decision” appeals to the new LPAT, that has replaced the OMB. Workshop participants indicated that a Niagara-wide consistent approach to deeming an application is appropriate for local municipalities and the Region.

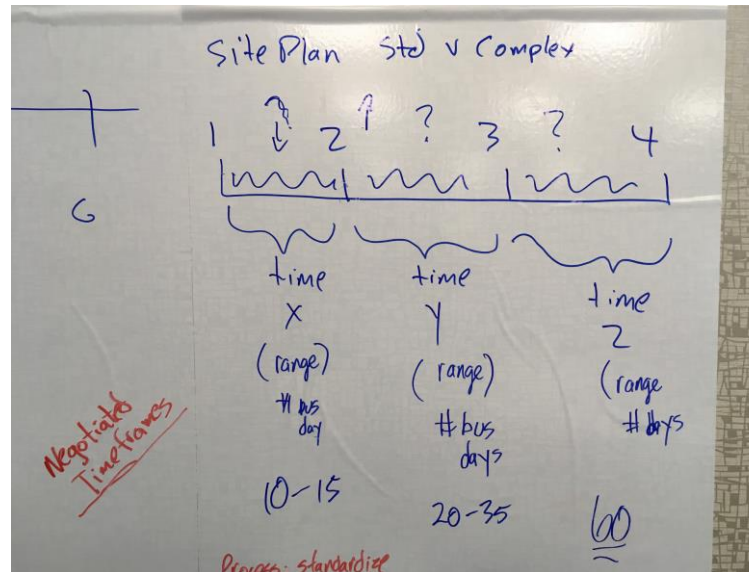
### **DAP Timeframe Targets & Importance of a Predictable Application Processing Schedule**

Consistency and predictability of application processing is an over-riding concern of the industry. Development project financing by banks/lenders is contingent on the application progressing in a timely fashion through a number of DAP milestones on the way to building permit issuance. DAP “conveyor belt” processing delays can, and do, cause genuine cash flow hardship for development firms with finite financial resources. The industry supports the design/development of timeframe targets for core DAP application categories. The figure below (a Site Plan example) captures the essential design requirements for targets. Targets should address the # of processing business days when the municipality is in control of the file. Targets should address each core processing milestones (numbered 1-4 in the figure below). When the file is returned to the applicant for submission corrections/refinements the timeframe clock turns off. The clock turns back on when the applicant re-submits the necessary information. Currently there are no commonly agreed to timeframe targets across Niagara for processing core DAP application categories such as Site Plan. This reality means there are either no municipal timeframe targets or as many as 12 different local municipal timeframe targets. The industry believes this absence of consistency/predictability is a central problem in a Region with 12 local municipal DAP conveyor belts. Like the local municipalities, the Region does not have transparent processing timeframe targets for its roles in DAP application review.

The industry is supportive of transparent DAP timeframe reporting via an online public portal. This portal would report on the progress of active applications in each local municipality (versus timeframe targets). The portal would categorize application processing status as “green light” for on-time, “yellow light” for minor delays versus targets, or “red light” for major delays. The comparative status of any/all applications’ DAP milestone progress (across the 12 Niagara local municipalities) would be available, as would the process pinch point agency for “yellow light” or “red light” delayed applications.

## Need for DAP Timeframe Targets

Rough workshop sketch diagram covers the basics...# business days to actually move through each processing milestone (1-4) should be monitored against a range-defined targets (x/y/z). Currently there are no common commitments across Niagara re. processing timeframe targets.



Beyond the design/implementation of timeframe targets for each core DAP application category, the industry is strongly supportive of processing timeframe schedules for each individual application. These application-specific schedules should include a predictable/standard number of public consultation check-in points across; with the same number of check-in points across all the applications in a given DAP category. In this scheduling approach, no application will face unpredictable/non-standard delays due to political/public resistance associated with additional meetings.

**Critical Importance of Improving the Back-end of DAP (Engineering Review to Registration)**

Draft plan approval of a sub-division application may encompass a relatively large number of future lots. A number of economic factors will determine an applicant's decision on when/how many lots to bring forward for the "back-end DAP" detailed engineering review/development agreement production/registration process. The timeliness of the "back-end DAP" process is critical for applicants, who have made the business decision to proceed as quickly as possible to obtain a building permit and initiate construction. For the Region and local municipalities, the workload associated with the post-draft plan back-end of DAP is challenging. A 200-unit draft plan of sub-division approval may well generate 4 repeat cycles (e.g. 50 units each) of the back-end DAP process. The race-to-registration is in fact the most critical DAP process component for applicants, since lots/houses can be pre-sold with committed closing dates after draft plan approval. Process deficiencies or resourcing shortages in the post-draft plan race-to-registration can cause serious disruptions to the applicant's business model; including legal risks if closing dates are unduly delayed. Predictable municipal timeframes are critical, especially since the Region and the local municipality are both involved in detailed engineering drawings review.

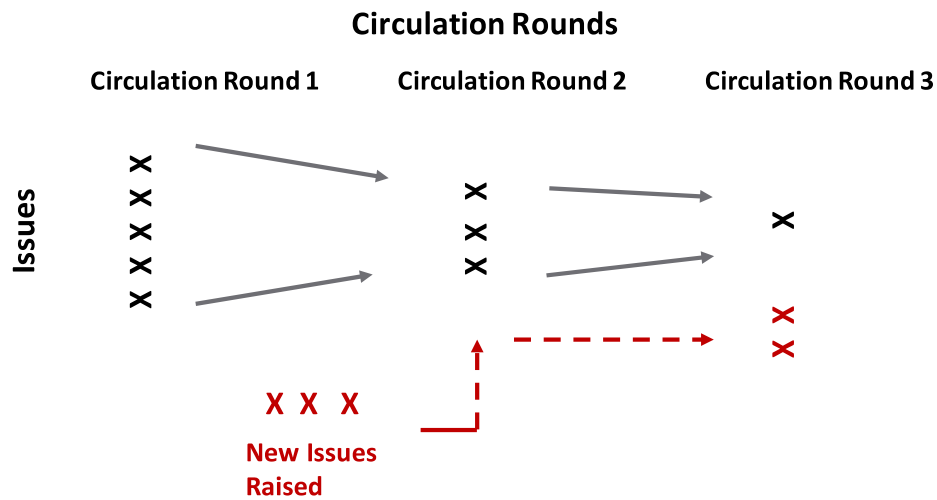
Workshop participants have noted that the higher performing local municipalities in Niagara place the "back end of DAP" processing responsibility with engineering staff as opposed to planning staff. Engineering staff are seen to possess strong logistics skills and the substantive technical expertise needed to move the file forward through engineering drawings reviews, financial securities calculations, and final registration detail. In some cases, these engineering staff operate within a one window organization structure devoted to timely application processing. Development participants have noted these staff are often in short supply and face workload capacity challenges given the volume of back-end DAP review cycles per draft plan approval. Development industry workshop participants strongly support a consistent/predictable engineering-led "back-end DAP" process; consistently executed across all Niagara municipalities.

### **Improving Efficiency of DAP Technical Circulations to Achieve Technical Approvals**

The ideal technical circulation process identifies any/all technical deficiencies in the initial review of the submitted application package. Technical comments are consolidated by the file planner, reviewed for internal consistency, and then provided to the applicant for action/re-submission. Subsequent rounds of technical review ensure the original technical issues are resolved prior to application approval being granted. However, industry representatives report that new technical issues are often raised after the original round of review has already been completed. According to the industry, the net result is a “dribs and drabs” ad-hoc introduction of technical concerns during subsequent review cycles, and an unfairly stretched timeline for completing the overall series of reviews.

Performance Concepts notes that this “dribs and drabs” problem is cited by development industry representatives across the Golden Horseshoe and Ottawa as a near-universal DAP process execution problem. A possible remedy is the production of a consolidated memo of technical issues requiring remedy at the end of the initial circulation. This memo would require municipal staff to ensure any cross-disciplinary discrepancies among staff are resolved prior to the applicant receiving comments. This would free up applicants from the onerous task they now face of trying to resolve these technical discrepancies themselves amongst agencies or internal municipal business units.

## Technical Circulation “Drips & Drabs” Problem



### Eliminating DAP Process/Resourcing Pinch Points

Workshop participants noted that the most serious DAP pinch points occur during the post-draft plan race-to-registration. Examples of back-end Dap pinch points include the following:

- The number of required engineering drawing review cycles are a concern.
- The MOE approvals were also noted as a significant process delay. Having MOE approvals delegated to a Regional and/or a local municipal PEng. could reduce the MOE delay. This delegation occurs in numerous municipalities across the Golden Horseshoe and Ottawa.
- Relatively minor technical issues that delay construction across the winter season; creating major timeframe pinch points and significant cash flow burdens. Later-in-the-season technical issues must be resolved more quickly. A municipal cultural problem at its root.
- The real-estate final steps around registration are often slow/delayed because planning staff are not always knowledgeable about the detailed requirements.
- Development agreement design/production features an excessive number of conditions that are often redundant or unnecessary. Condition standardization/consolidation is desirable.
- Resourcing shortages versus workload causes slowdowns. Engineering fees should be used to fund the necessary staff to deal with the “volumes multiplier” challenge of multiples bundles of a single draft plan’s approved units proceeding through registration.

Pinch points are also caused by culture issues. Phone calls/e-mails should receive a response within a 24-hour customer service standard timeframe. Technical processing issues can often be resolved/negotiated verbally, without rigid written “must do” correspondence. This type of “correspondence first” rules driven culture reduces flexibility to resolve problems and causes undue delays. Talk-first as opposed to write-first problem-solving is the preferred path of development participants in the workshop.



### **The Role of the Regional & Local Municipality File Planners as System Navigators**

DAP is a complex horizontal service delivery channel involving multiple agencies, Region business units and local municipal business units. The complexity requires a system navigator or “Sherpa” to work with the applicant to achieve timely approvals versus transparent target timeframes. The DAP “Sherpa” is typically the file planner at the Region and/or the local municipality. The file planner must be more than a paper pusher. The file planner must resolve process pinch points, and secure consensus around any contentious technical issues. File planners must also ensure conformity with policy requirements, and manage the public consultation process in a fair/balanced fashion. Development industry workshop participants note that planners do not receive logistics training in file/project management as part of their academic preparations (which is devoted to policy/theory and technical land use matters). Workshop participants contend that file planners in Niagara are not executing the necessary project management discipline to delivery timely DAP processing. This discipline would require them to “crack the whip” with internal colleagues and other agencies when file processing timelines are lagging. Municipal DAP workflow software solutions are often not implemented at the required level of detail to support the file planner is meeting mandated timeframes; some internal DAP business units may not be populating this software at all (e.g. Engineering staff working outside a One Window org structure). Industry workshop participants have noted the challenge faced by file planners is also cultural; they are not convinced that planners truly understand the business/cash flow implications of delays in DAP processing versus the targeted timeframe for a project. Additional training (beyond academic/professional planner certifications) for file planners could/should include MBA-type project management and logistics training.

## **LOCAL MUNICIPALITY FEEDBACK RE. DEVELOPMENT INDUSTRY OBSERVATIONS/FINDINGS**

## **Local Municipality Feedback Re. Development Industry Observations/Findings:**

Following the October 24<sup>th</sup> development industry workshop, Performance Concepts/Dillon met November 2<sup>nd</sup> with staff from the Region and the 12 local municipalities to brief them on the feedback/advice offered by the development industry participants. The Region and local municipal staff engaged in active listening and provided a number of noteworthy observations:

- Many of the DAP process execution challenges in Niagara have been raised by development industry representatives in the GTA and other parts of the province. These challenges, for the most part, do not come as a surprise to Region and municipal staff.
- Niagara features a relatively large group of local municipalities (for the population served). Therefore, it is not unexpected for there to be diverse approaches to DAP application review and processing. DAP standardization must be balanced against unique local circumstances and conditions.
- There is widespread support for MOU updates and improvements that will move Niagara closer to a transparent “who does what” delineation of responsibilities in the two-tier Niagara development approvals system created by the Province.
- Continuous improvement opportunities for DAP (beyond the MOU) should be actively pursued in cooperation with the development industry. These continuous improvement opportunities should address issues associated with Region/local municipality performance, as well as opportunities to improve the quality/consistency of development application submissions from applicants.
- Support for creation of DAP process improvement teams composed of Region/local municipal/industry representatives to address high priority DAP process issues and pinch points.

## **GO-FORWARD RECOMMENDATIONS TO IMPROVE MOU + DAP PERFORMANCE ACROSS NIAGARA**

## Go-forward Recommendations to Improve MOU + DAP Performance Across Niagara:

### 1. MOU Improvement Recommendations

Based on the workshop with the development industry, it is recommended that the following be considered as opportunities to strengthen the existing MOU.

#### Make it Top of Mind

Given the expressed desire by both the development industry and Region/local municipal staff to make improvements and to build-in more understanding and consistency in the way policy and implementation planning is done in Niagara the following specific suggestions are offered as ways to make the MOU a regular top of mind reference document:

- Consider including context on an overall Vision for Niagara Region and positioning the MOU as an important tool to implement the Regional and local Strategic Plans, Official Plans, and other key guiding documents. This would support the importance of the MOU in achieving the desired future in Niagara Region.
- Add clarity to the MOU on the important roles of all participants involved in achieving an effective system including regional and local planning staff, regional and local engineering staff, elected officials and the development industry. This would set the stage for improved understanding of the working relationships between all involved.
- Include a visual/infographic that provides a picture of how the MOU fosters an integrated and seamless planning system. An “at a glance” infographic could provide a reference tool that could be valuable in keeping the MOU commitments top of mind.
- Make the MOU part of the on-boarding process for new staff involved in policy and implementation planning work. New members of local and regional planning and engineering teams should be introduced to the MOU and see it as their guide book on what working together looks like in Niagara Region.

- Take the opportunity that the recent municipal election offers to increase all Niagara Councils' awareness of the MOU. With a number of new members across various Councils, the MOU update could present an opportunity for ongoing education related to planning and development issues across the Niagara.

### **Include a Clear and Collaborative Process Commitment in MOU**

Clarity and consistency were expressed as strong desires from those participating in the development industry workshop. Discussion with the municipal planners identified that with a two-tiered system and 12 unique local municipalities it is unrealistic to expect that the development process will be the same in every Niagara location. While executing identical DAP processes across 12 municipalities is not realistic, nor even desirable, the MOU can be a vehicle to commit to a common DAP streamlining initiative that is clear and collaborative, as well as respectful of the different roles of development proponent and regulator. The following recommendations could be reflected generally in the MOU; with specifics to be worked out as part of the proposed DAP improvement workshop series.

- Include commentary in the MOU on how local and regional staff will work in collaboration with the development industry to achieve desirable development outcomes. This could include elements of a customer service commitment or service delivery standards on the part of municipalities and quality expectations for applications.
- Consider including processing time or ranges of times that all parties could work toward and/or a process for developing application specific schedules collaboratively with applicants.
- Consider including a mechanism/framework for measuring time frames so that all parties are accountable to their commitments.

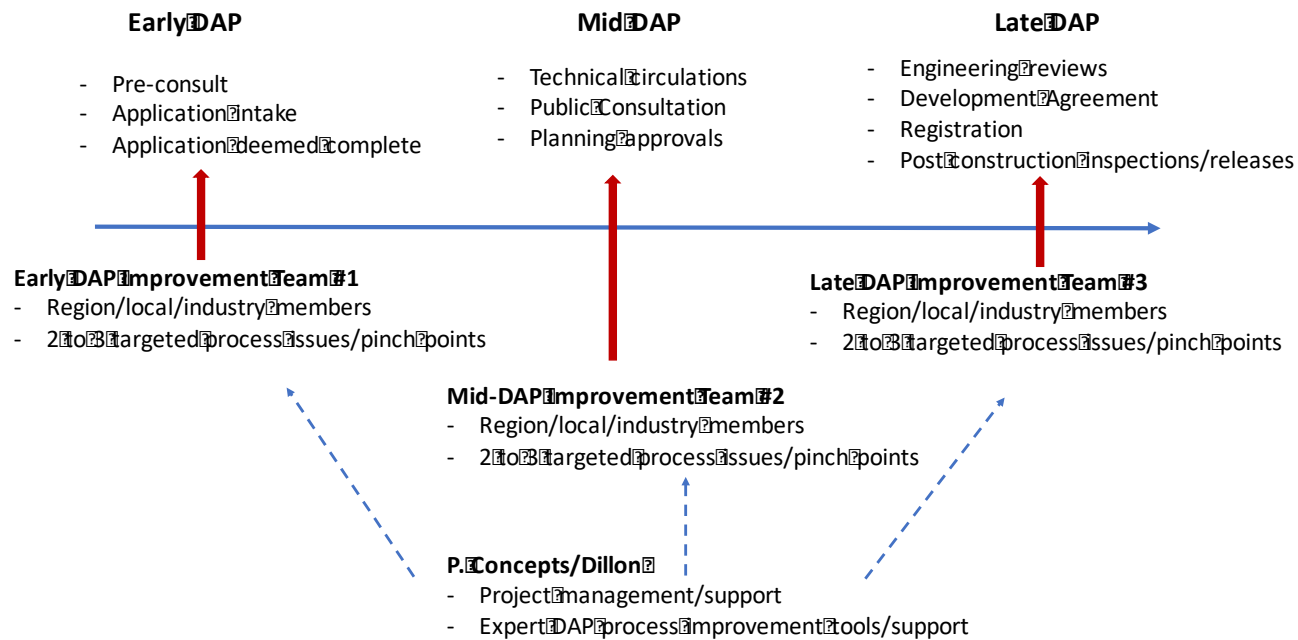
### **Focus on Continuous Improvement in MOU**

It is understood that a Process Improvement Team including representatives from the Region, local municipalities and the development industry worked together following the 2014 MOU update to learn from each other and make improvements. The 2014 MOU lists some of the topics that were part of the improvement discussions. This type of ongoing collaborative effort is an important part of continuous improvement. It is recommended that a framework and process for continuous improvement be embedded strongly in the MOU such that there is an explicit commitment to maintain a culture of municipalities and development industry applicants learning from each other and improving the process of working together on development issues and applications in Niagara. An MOU commitment to adopt/promote continuous improvement should include a mechanism/scorecard that measures and reports results based improvements. Some of the topics/issues for continuous improvement discussion have already come out of the October 24<sup>th</sup> development industry workshop and the November 2<sup>nd</sup> discussion with local planners (as discussed in this report). Other continuous improvement actions/ideas may arise on an ongoing basis.

## **2. Development Approvals Process (DAP) Improvement Recommendations Beyond the MOU**

## Create an Ongoing Continuous Improvement Model Featuring Development Industry Participation

The following figure sets out a recommended process/model for DAP continuous improvement.



Three DAP continuous improvement teams should be created, with a designated team assigned to each of early/mid/late DAP process phases. Each of the continuous improvement teams would feature dedicated staff resources from the Region, a selected sub-set of 3-4 local municipalities, and 2-3 development industry representatives. The teams would target 2-3 process pinch points/improvement opportunities for



analysis and process re-engineering/streamlining. The targeted pinch points/issues for investigation can be universal across all DAP application categories or specific to a particular DAP application category (e.g. Site Plan). Organization design and IT tool solutions should be considered in combination with process re-engineering. Performance Concepts/Dillon would support all three teams via overall project management and advice re. process improvement tools/techniques.

The three improvement teams would work on the first round of 2-3 selected DAP issues/pinch points for a 3-month period. The Mentimeter interactive polling results from the October 24<sup>th</sup> Workshop should inform each improvement team's selection of targeted issues/pinch points. At the conclusion of each team's 3-month reviews, findings should be reported to a Steering Committee of senior staff from the Region/12 local municipalities for approval and implementation directions. Team recommendations would not be strictly binding on any of the participant municipalities, but good faith around willingness-to-implement would be assumed. Two additional 3-month cycles of continuous improvement work by each team would continue be executed during 2019. The overall exercise would then be subjected to a value-for-money "stress testing" review to determine whether/how to move forward with a more permanent model.

The recommended continuous improvement model should be finalized and resourced staffed in early/mid Q1 2019. The DAP issues/pinch points for review should be finalized by the end of Q1. The first three continuous improvement reviews should be executed in Q2 2019.

## **APPENDIX 1 – MENTIMETER INTERACTIVE POLLING RESULTS RE. MOU/DAP IMPROVEMENT PRIORITIES**

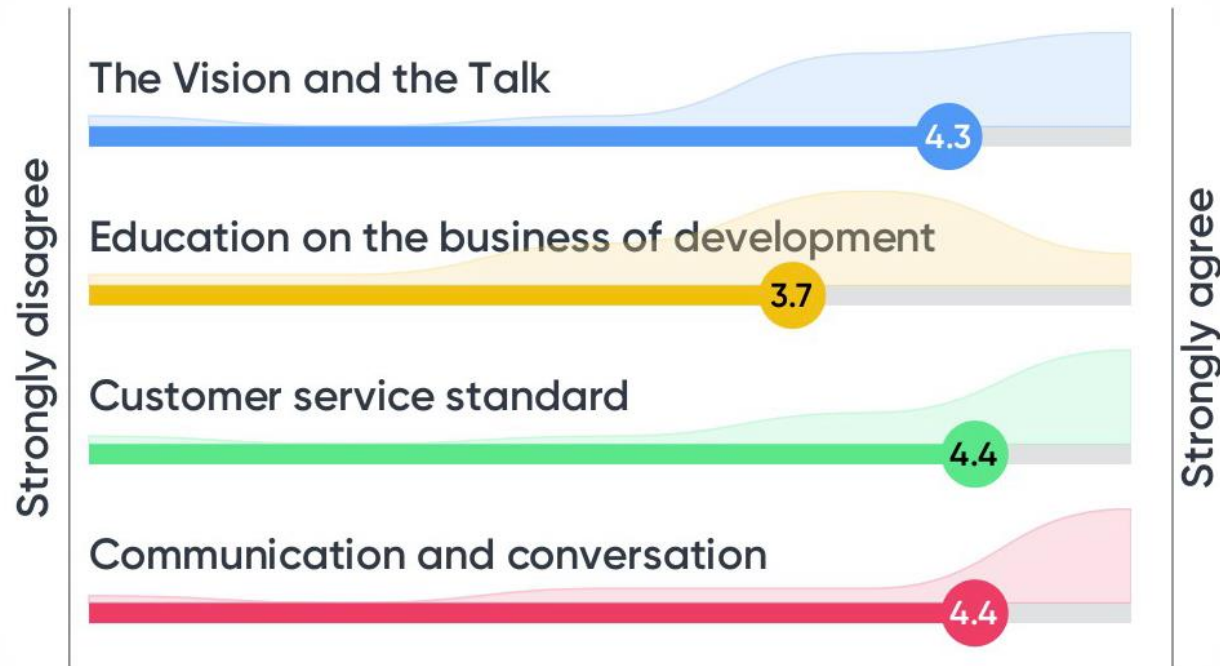
Tell us about what has been working right...

Mentimeter



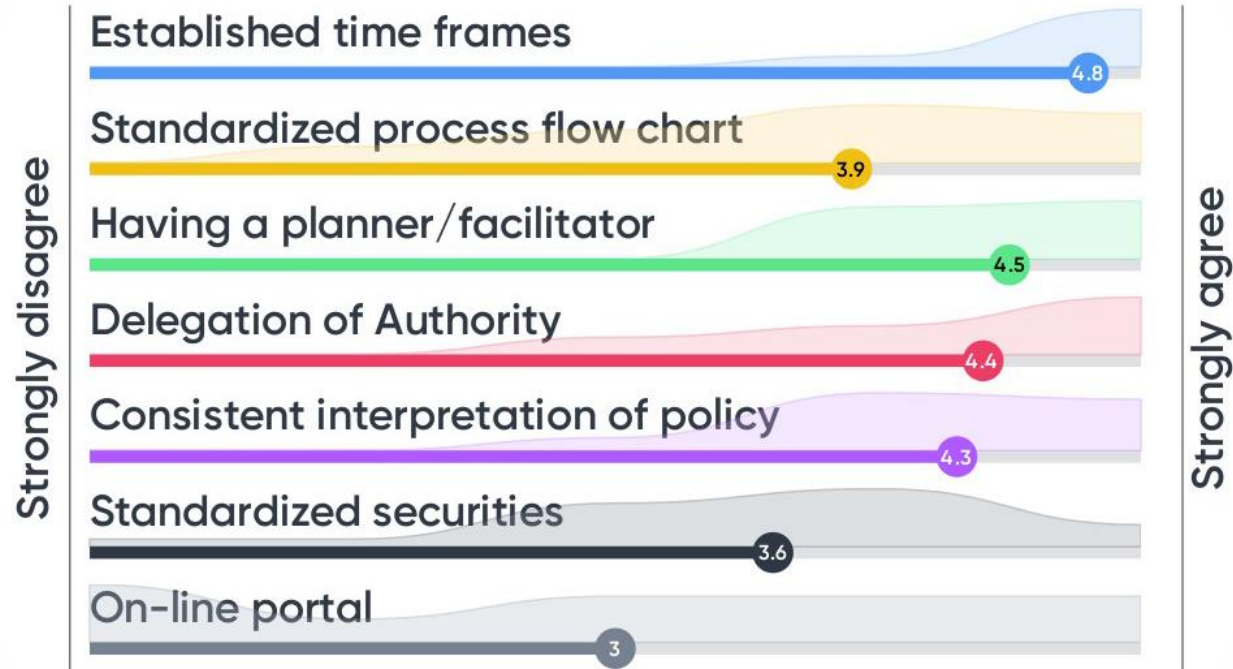
## Whats most important - Culture

Mentimeter



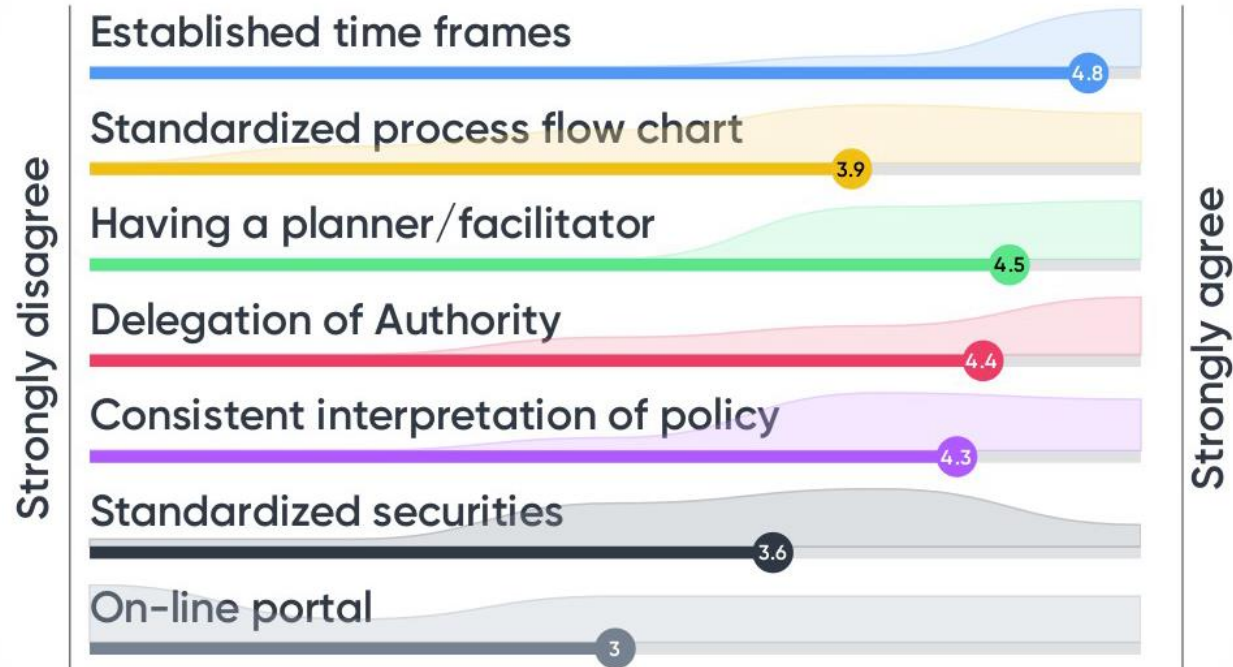
## Whats most important - Consistency

Mentimeter



## Whats most important - Consistency

Mentimeter



## Whats most important - Choke Points

Mentimeter



## What are the top 2 things you think should be fixed?

Mentimeter

1.) Culture Change 2.)  
Standardized check list

communication and  
accountability.

1. Timelines 2. Working with the  
developer not against

Response times ie. calling  
back Dribs and Drabs

consistency in approach  
across region timing of  
apptocaks incl. back end  
registration

planning culture - need great  
emphasis on servicing the  
client accountability

broader interpretation of  
policy

- pre consultation- on same page with staff and  
process involved to get to end goal and buy in -  
accountability on timelines

Predictable schedule Go/no  
go determination as early as  
possible



## What are the top 2 things you think should be fixed?

Mentimeter

Customer service training with response targets and having a planner that is a facilitator or project manager, main person pushing the file and problem solving.

1) Delegation of authority 2) clear timeline and guidelines

Effective communication - pick up the phone.  
Reasonable Timelines for providing comment.

Willingness to collaborate/ not be rigid on rules and process.  
Be nimble Respect for timeframes

Consistency with all agencies involved in the process  
Customer service

1) delegation of authorities 2) clear timeline and guideline

Stick to a schedule be responsible to answer questions be pro active communicate

Terminate NPCA and control priorities Have a facilitator review applications to reduce the number of conditions and meet deadlines

1. I want to have a meeting with staff before I get a requirement in writing that may cause a blockage 1. The development industry should provide input into policies affecting development

## What are the top 2 things you think should be fixed?

 Mentimeter

Accountability and experience of staff.

Transparency - there should be open sharing of information and processing status.

Planners need to be proactive planners need to solve problems not just identify them stick to time lines

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

**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

## 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 applications<sup>1</sup> 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.

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<sup>1</sup> 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 planning<sup>2</sup>.
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.

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<sup>2</sup> 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 Study<sup>3</sup> (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

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<sup>3</sup> 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 complete<sup>4</sup> 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.

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<sup>4</sup> 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**

<b>Environmental Features</b>	<b>Lead Agency</b>	<b>Mandate Authority</b>	<b>Planning Application and Policy Review Agency</b>	<b>Technical Clearance Review</b>
Natural Hazards <sup>5</sup>				
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

<sup>5</sup> 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 <sup>6</sup>
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 <sup>7</sup>	Region	Region
EIS inside Settlement Area <sup>8</sup>	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

<sup>6</sup> 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.

<sup>7</sup> 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.

<sup>8</sup> 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.<sup>9</sup>

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.<sup>10</sup>

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<sup>9</sup> 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.

<sup>10</sup> 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).

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**Subject:** Initiation of a Woodland Bylaw Review

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, March 20, 2019

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## Recommendations

1. That Report PDS 13-2019 **BE RECEIVED** for information; and
2. That staff **BE DIRECTED** to engage the Local Area Municipalities, Niagara Peninsula Conservation Authority (NPCA), Niagara North Federation of Agriculture, Niagara South Federation of Agriculture, Niagara Woodlot Association, Niagara Home Builders Association, Niagara Construction Association and Niagara Parks Commission.

## Key Facts

- The purpose of this report is to inform Committee of the initiation of the Woodland Bylaw Review project.
- Section 135 (2) of the Municipal Act enables Regional Council to prohibit or regulate the destruction or injuring of trees in woodlands as defined in the Forestry Act larger than one hectare in size.
- Niagara Region currently has such a bylaw titled: Tree and Forest Conservation Bylaw (30-2008).
- The Niagara Peninsula Conservation Authority (NPCA) has been administering the current Tree and Forest Conservation Bylaw, on the Region's behalf, since a Service Level Agreement was approved in August 2008.
- The bylaw is 11 years old. This review will consider legislative changes, alignment between the bylaw and the Regional Official Plan, best management practices and operational needs.

## Financial Considerations

Financial costs of undertaking the review internally can be accommodated through the proposed 2019 Planning and Development Services Operating Budget.

## **Analysis**

### Background

Section 135 of the Municipal Act allows municipalities to prohibit and regulate the destruction or injuring of trees through enacting tree bylaws. Upper-tier municipalities may enact such a bylaw for trees in woodlands as defined in the Forestry Act that are greater than one hectare. Local municipalities may also enact such a bylaw for individual trees and trees within woodlands that are less than one hectare. The Act also provides upper-tier and local municipalities with the option to delegate all or part of their power to pass such by-laws to each other, with agreement.

Niagara Region's Tree and Forest Conservation Bylaw (30-2008) has been in place since 1981. The most recent update to the bylaw occurred in 2008 in response to changes to the Municipal Act, a request for amendments to the bylaw from the Township of West Lincoln, as well as to facilitate the transfer of responsibilities for enforcement of the bylaw to the NPCA (see Report DPD 133-2007 and CAO 4-2008).

As a result, the administration and enforcement of the bylaw was delegated to the NPCA and a Service Level Agreement was developed in August 2008. Annual Reports are prepared to inform Council of the activities undertaken throughout the year by the NPCA to provide Good Forestry Practices, educate the public, and enforce the provisions of the bylaw.

Unique to Niagara's Bylaw is the inclusion of a Tree and Forest Conservation By-law Advisory Committee with the purpose of providing advice on matters of tree and forest conservation. Prior to the 2008, the advisory committee provided advice to staff and the former Planning and Public Works Committee. With the changes in administration and enforcement, the decision was made to establish a direct relationship between the advisory committee and the NPCA. However the committee has not met since April 2013.

### The Tree and Forest Conservation Bylaw (30-2008)

The current bylaw regulates the destruction or injury of trees within woodlands that are greater than one hectare. The intent of the existing bylaw is to encourage the conservation and improvement of woodlands in Niagara through Good Forestry Practices. The bylaw prohibits the clearing of woodlands except under specific circumstances and requires landowners to follow Good Forestry Practices when harvesting trees. This is done by requiring landowners to submit a forest management plan or a silvicultural prescription prepared by a Registered Professional Forester (or a member of the Ontario Professional Foresters Association) to obtain a permit.

Additionally, Grimsby, Niagara-on-the-Lake, Niagara Falls and West Lincoln have delegated their authority to regulate trees in woodlands less than one hectare to the Region, as per the Municipal Act, s. 135 (10).

#### Initiation of Woodland Bylaw Review

The Regional Municipality of Niagara is currently undertaking a comprehensive review of the Region's Official Plan. Through the initial stages of the Region's Official Plan review, and based on previous discussions with the NPCA, the need to review the bylaw was identified. In 2014, for example, the Annual Report by the NPCA identified the need to revise the bylaw to update and improve the language to current best management practices/standards.

As detailed in Appendix 1: Project Scope Outline, the objective of this review is to ensure consistent service delivery and application of the bylaw across the Region. The review will consider changes to Provincial legislation, alignment between the bylaw and the current Niagara Region Official Plan policies, current best management practices, and opportunities for enhancements and efficiencies in processes for administration and enforcement.

As part of the review process, public engagement will occur and will at minimum include Local Area Municipality representatives, the North and South Federations of Agriculture, the Niagara Woodlot Association, the logging industry, the Niagara Parks Commission, the Niagara Homebuilders Association, the Niagara Construction Association and the public.

It is anticipated that the review will conclude by the end of 2019, at which time a summary of the review and any recommended changes to the bylaw will be presented for Council's consideration.

#### **Alternatives Reviewed**

The option of postponing the review of the bylaw until the Regional Official Plan review has concluded was considered, but is not recommended. The Regional Official Plan review is a multi-year project, and there are items that require immediate attention such as ensuring the language of the bylaw aligns with current best management practices, as identified in 2014. In addition, recent changes to the Municipal Act (more particularly section 270 which introduced the requirement for municipalities to adopt a policy addressing the manner in which the municipality will protect and enhance the tree canopy and natural vegetation in the municipality) warrant consideration through a review of comparator municipalities.

In 2018, the responsibility for plan review and technical clearance for the natural environment policies of the Regional Official Plan (Chapter 7) returned to the Region.

Furthermore, the MOU between the Region and local area municipalities is currently being updated (see report PDS 4-2019). A review of the bylaw is timely to ensure administration and enforcement requirements remain clear.

Postponing the review could result in an extended period with an out of date bylaw, and may result in issues with interpretation and enforcement. Given the aforementioned changes, and considering there has been no review of the bylaw since its approval in 2008, the option to move forward with the review immediately is prudent and responsible.

### **Relationship to Council Strategic Priorities**

“Doing Business Differently” and “Advancing Organizational Excellence” are strategic priorities of Council. The review will identify opportunities for continuous improvement and ensure consistent service delivery and application of the bylaw across the Region.

### **Other Pertinent Reports**

- PDS 2-2019 Environmental Planning Function Overview
- PDS 4-2019 Memorandum of Understanding for Planning Function and Services between Niagara Region and Local Area Municipalities
- PDS 10-2019 Update on Natural Environment Work Program – New Regional Official Plan
- CAO 4-2008 Tree and Forest Conservation By-law Amendments
- DPD 133-2007 Tree and Forest Conservation Bylaw Amendments
- Service Level Agreement Tree and Forest Conservation By-Law August 2008



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**Appendices**

Appendix 1	Tree and Forest Conservation Bylaw (30-2008)
Appendix 2	Project Scope Outline

THE REGIONAL MUNICIPALITY OF NIAGARA

BY-LAW NO. 30-2008

A BY-LAW TO PROHIBIT OR REGULATE THE  
HARVESTING, DESTRUCTION OR INJURING  
OF TREES IN WOODLANDS IN THE  
REGIONAL MUNICIPALITY OF NIAGARA AND  
TO REPEAL BY-LAW 47-2006, AS AMENDED

WHEREAS Section 135(2) of the *Municipal Act, 2001*, S.O. 2001, c. 25, as amended, permits the enactment of a by-law by the Council of The Regional Municipality of Niagara to prohibit or regulate the destruction or injuring of trees in Woodlands;

AND WHEREAS pursuant to Section 135(7) of the *Municipal Act*, a municipality may require that a permit be obtained to injure or destroy trees in Woodlands designated in the by-law and impose conditions on a permit, including conditions relating to the manner in which destruction occurs and the qualification of persons authorized to injure or destroy trees;

AND WHEREAS Regional Council deems it desirable to enact a Tree and Forest Conservation By-law for the purposes of:

- preserving and improving the Woodlands in the Regional Municipality of Niagara through Good Forestry Practices;
- promoting Good Forestry Practices that sustain healthy Woodlands and related natural habitats and environments;
- helping to achieve the goal of 30% forest cover in the Niagara Region;
- minimizing the destruction or injuring of trees in Woodlands;
- regulating and controlling the removal, maintenance and protection of trees in Woodlands;
- minimizing and guarding against dangerous conditions which may result in injury;
- protecting, promoting and enhancing the aesthetic values of Woodlands;
- contributing to human health, recreation, enjoyment and quality of life through the maintenance of woodland cover;
- providing for the production of wood and other products derived from trees;
- supporting the objective of the Regional Policy Plan to maintain, restore and, enhance the ecological health, integrity and biodiversity of the Core Natural Heritage System and its contributions to a Healthy Landscape as defined in the Regional Policy Plan; and
- enhancing and implementing processes and decisions made with respect to applications made under the *Planning Act*, R.S.O. 1990, c. P.13, as amended.

AND WHEREAS Section 447.4(1) of the *Municipal Act* permits a municipality to enter into agreements with a person or body in relation to matters of mutual interest for the purpose of coordinating the enforcement of by-laws;

AND WHEREAS Regional Council has approved entering into an agreement with the Niagara Peninsula Conservation Authority (the "NPCA") wherein the NPCA will administer and enforce this Tree and Forest Conservation By-law;

NOW, THEREFORE, the Council of the Regional Municipality of Niagara hereby enacts as follows:

## **1. DEFINITIONS**

In this By-law:

- 1.1 "Agricultural Use" means the commercial production of crops and/or raising of livestock for human use and includes ploughing, seeding, harvesting, leaving land fallow as part of a conventional rotational cycle, production of tree fruits and grapes, grazing, animal husbandry, and buildings and structures associated with these activities;
- 1.2 "Area Municipality" means any one of the municipalities of the Town of Fort Erie, Town of Grimsby, Town of Lincoln, City of Niagara Falls, Town of Niagara-on-the-Lake, Town of Pelham, City of Port Colborne, City of St. Catharines, City of Thorold, Township of Wainfleet, City of Welland, and the Township of West Lincoln;
- 1.3 "Basal Area" means the area of the cross-section of the stem or trunk of a tree taken at a point of measurement 1.37 metres above the highest point on the tree where the ground meets the stump;
- 1.4 "Board" means the Board of Directors for the NPCA;
- 1.5 "Building Permit" means a building permit issued by an Area Municipality under the *Building Code Act, 1992*, S.O. 1992, c.23, as amended;
- 1.6 "Bumper Tree" means a poor quality, low value tree that grows in close proximity to higher value trees and is located along skid roads to protect residual trees from damage during logging and skidding operations;
- 1.7 "Business day" means any day falling on or between Monday and Friday of each week but does not include statutory holidays;

- 1.8 “Circumference” means the measurement of the perimeter or outer boundary of a stem or trunk of a tree at a specified point of measurement with such measurement including the bark;
- 1.9 “Coppice growth” means clump growth where more than one tree stem grows from a single tree stump and the point of measurement for such growth means that point on each stem measured immediately above the point of fusion, provided such point of fusion is less than 1.37 metres above the highest point of undisturbed ground at the base of the coppice or clump growth;
- 1.10 “Damage” means lasting injury to trees remaining after the completion of the injuring or destroying of trees and caused by the harvesting, injuring or destroying of any trees, that has the effect of inhibiting or terminating growth and may include but is not limited to:
- 1.10. a broken branches in the crown of a tree;
  - 1.10. b the breaking off or splitting of the stem of any tree and the noticeable tipping of any tree;
  - 1.10. c the splitting of, removal of or damage to the bark of a tree; or
  - 1.10. d damage to the root structure of a tree;
- except that damage does not include injury to Bumper Trees;
- 1.11 “DBH” or “Diameter at Breast Height” means the diameter of the stem of a tree measured at a point that is 1.37 metres above the ground;
- 1.12 “Diameter” means the diameter of the stem of a tree measured at a specified point of measurement with such measurement including the bark of the stem;
- 1.13 “Ecological Functions” means the natural processes, products or services that living and non-living environments provide or perform within or between species, ecosystems and landscapes, including hydrological functions and biological, physical, chemical and socio-economic interactions;
- 1.14 “Farmer” means a person who has a current and valid farm registration number under the *Farm Registration and Farm Organizations Funding Act, 1993*, S.O. 1993, c. 21, as amended;
- 1.15 “Forest Management Plan” means a course of forest management action prescribed for a particular woodland area after specific assessments and evaluations have been made by a Registered Professional Forester or a member in good standing of the Ontario Professional Foresters Association in accordance with the Ministry of Natural Resources document “A Silvicultural Guide to Managing Southern Ontario Forests”, as amended from time to time;

- 1.16 "Good Forestry Practices" means:
- 1.16.a the proper implementation of harvest, renewal and maintenance activities known to be appropriate for the forest and environmental conditions under which they are being applied and that minimize detriments to forest values, including: significant ecosystems; important fish and wildlife habitat; soil and water quality and quantity; forest productivity and health; vulnerable, threatened and endangered species as regulated by Provincial or Federal statute and the aesthetic and recreational opportunities of the landscape;
  - 1.16.b the cutting and removal of hazardous, severely damaged, diseased and insect-infested trees which must be removed in order to prevent contamination or infestation of other trees or because they no longer contribute to the achievement of forest values;
  - 1.16.c in the case of hazardous, damaged, diseased or insect-infested trees, the maintenance of a Woodland after the cutting and removal is completed unless it is determined through a report prepared by a Registered Professional Forester or a member in good standing of the Ontario Professional Foresters Association that trees must be removed and a Woodland would not be maintained but in no case shall clearcutting be allowed; and,
  - 1.16.d the forestry management practices as set out in the Ministry of Natural Resources document "A Silvicultural Guide to Managing Southern Ontario Forests";
- 1.17 "Heritage Tree" means a tree identified and designated by the Council of an Area Municipality as having heritage significance;
- 1.18 "NPCA" means the Niagara Peninsula Conservation Authority;
- 1.19 "Negative impact" means any impairment, disruption, destruction or harmful alteration to any living plant or animal or to their habitat or Ecological Functions;
- 1.20 "Officer" means an individual appointed by the NPCA for the administration and enforcement of this By-law;
- 1.21 "Owner" means a person having any right, title, interest or equity in land or any such person's authorized representative;
- 1.22 "Own Use" means use that does not include a commercial sale, exchange or other disposition of trees destroyed or injured;
- 1.23 "Permit" means a permit to injure or destroy trees issued under Sections 5 and 6 of this By-law;

- 1.24 “Person” means an individual or a corporation and their respective heirs, executors, administrators or other duly appointed representatives;
- 1.25 “Point of Measurement” means the point on a tree trunk measured above the highest point at which the ground meets the tree. For Coppice Growth the Point of Measurement shall be at the point on the tree trunk where the tree stems separate provided that such point of separation is less than 1.37 metres from where the ground meets the tree;
- 1.26 “Prescription” means a written course of forest management action prescribed for a particular woodland area by a Registered Professional Forester or a member in good standing of the Ontario Professional Foresters Association after specific assessments and evaluations have been made by a Registered Professional Forester or a member in good standing of the Ontario Professional Foresters Association;
- 1.27 “Region” means the Regional Municipality of Niagara;
- 1.28 “Regional Council” means the Council of the Region;
- 1.29 “Registered Professional Forester” refers to that term as defined in the *Professional Foresters Act, 2000*, S.O. 2000, c.18, as amended;
- 1.30 “Sensitive Natural Area” means lands that are in a Woodland and:
- 1.30.a within the Environmental Protection designation of the Natural Heritage System and adjacent lands, as defined in the Regional Policy Plan; or
  - 1.30.b within a Natural Area as designated in the Niagara Escarpment Plan;
- 1.31 “Significant Community Tree” means a tree identified and designated by the Council of an Area Municipality as having community significance;
- 1.32 “Silviculture” means the theory and practice of controlling forest establishment, and the composition, growth and quality of forests to achieve the objectives of forest management;
- 1.33 “Total Basal Area” means the sum of the Basal Areas of individual trees;
- 1.34 “Tree” or “Trees” means any living species of woody perennial plant, including its root system, which has reached or can reach a height of at least 4.5 meters at physiological maturity;

- 1.35 “Tree Marker” means a person certified to mark trees as a result of successfully completing the Ministry of Natural Resources Tree Marker course; or a Registered Professional Forester; or a member in good standing of the Ontario Professional Foresters Association;
- 1.36 “Tree Saving Plan” means a plan, prepared for the purpose of protecting and preserving trees on properties where development or disturbance of the natural forest cover is to occur. Such plans shall attempt to retain as many trees as possible and as a minimum shall include all of the following:
- 1.36.a an inventory and graphic display of trees on the property including location, size, species, general age distribution health and any individual trees or grouping of trees with particular significance such as but not limited to age, species and size;
  - 1.36.b identification of natural features and functions present, whether they should be protected, and if not, why;
  - 1.36.c a statement identifying whether any threatened or endangered species are present and if so, how they are to be protected;
  - 1.36.d a description and a map of the trees to be removed and retained including written reasons why the trees are to be removed or retained;
  - 1.36.e an indication as to how the trees to be retained will be marked or otherwise identified as trees to be protected;
  - 1.36.f the layout of the proposed development superimposed on the woodland area, including existing and proposed grades, services/utilities, roads, surface drainage and building envelopes;
  - 1.36.g the specific measures to be used during and after construction or site disturbance to protect and preserve individual trees or clumps of trees identified for retention, including but not limited to fencing around the dripline, the avoidance of storage or dumping of materials over root zones and operation of equipment over root zones;
  - 1.36.h a tree replanting program using native species;
  - 1.36.i a statement indicating that the plan conforms to the Region’s Tree and Forest Conservation By-law; and
  - 1.36.j consideration of the relationship between an Environmental Impact Study, prepared as part of a development application, and requirements of the Regional Policy Plan;
- 1.37 “Wildlife” means all wild mammals, birds, reptiles, amphibians, fishes, invertebrates, plants, fungi, algae, bacteria and other wild organisms;

- 1.38 "Woodland" or "Woodlands" means land on one or more properties with a density of at least:
- 1.38.a 1,000 trees, of any size, per hectare;
  - 1.38.b 750 trees, measuring over five (5) centimetres in diameter at DBH, per hectare;
  - 1.38.c 500 trees, measuring over twelve (12) centimetres, in diameter at DBH, per hectare; or
  - 1.38.d 250 trees, measuring over twenty (20) centimetres, in diameter at DBH, per hectare;

but does not include:

- 1.38.f a cultivated fruit or nut orchard;
- 1.38.g a plantation established for the purpose of producing Christmas trees and which is being actively managed and harvested for the purposes for which it was planted, except that this does not refer to plantations that have ceased being managed or harvested for their intended purpose for a period of 15 years or more; or
- 1.38.h a bona fide tree nursery that is being actively managed and harvested for the purposes for which it was planted.

## **2. APPLICATION OF THE BY-LAW**

This By-law shall apply to:

- 2.1 all Woodlands having an area of one (1) hectare or more;
- 2.2 all Woodlands having an area of less than one (1) hectare, upon delegation of such authority by an Area Municipality to the Region; and
- 2.3 Heritage Trees and Significant Community Trees identified and designated by the Council of an Area Municipality, upon delegation of such authority by an Area Municipality to the Region.

## **3. GENERAL PROHIBITIONS**

- 3.1 No person through their own actions or through any other person shall injure or destroy any Tree located in Woodlands:
  - 3.1.a Unless exempted by Section 4; or
  - 3.1.b Unless in possession of a valid Permit issued by the NPCA under Sections 5 and 6 of this By-law and in accordance with its terms or conditions.



3.2 No person through their own actions or through any other person shall:

- 3.2.a Contravene the terms or conditions of a Permit issued under this By-law;
- 3.2.b Fail to comply with an order issued under Section 8 of this By-law; or
- 3.2.c Remove or deface any order that has been posted pursuant to Section 8 of this By-law.

3.3 No person through their own actions or through any other person shall injure or destroy any Tree that has been designated by the Council of an Area Municipality as a Heritage Tree or a Significant Community Tree, provided that the authority to regulate such trees has been delegated to the Region by the Area Municipality.

#### 4. **EXEMPTIONS**

Despite Section 3 of this By-law, this By-law does not apply to:

- 4.1 activities or matters undertaken by a municipality or a local board of a municipality;
- 4.2 activities or matters undertaken under a licence issued under the *Crown Forest Sustainability Act, 1994*, S.O. 1994, c.25, as amended;
- 4.3 the injury or destruction of trees by a person licensed under the *Surveyors Act*, R.S.O. 1990, c. s.29, as amended, to engage in the practice of cadastral surveying or his or her agent, while making a survey;
- 4.4 the injury or destruction of trees imposed after December 31, 2002:
  - 4.4.a as part of a Tree Saving Plan required as a condition of approval in a plan of subdivision that has received draft approval under Section 51 of the *Planning Act*;
  - 4.4.b as part of a Tree Saving Plan required as a condition on a consent approved under Section 53 of the *Planning Act*;
  - 4.4.c as a requirement in a Tree Saving Plan approved and included in an site plan control agreement or a subdivision agreement entered into under Sections 41 and 51 respectively of the *Planning Act*;
  - 4.4.d in a development agreement between an Owner and an Area Municipality;
  - 4.4.e as a condition to a development permit authorized by regulation made under Section 23(b) of the *Niagara Escarpment Planning and Development Act*, R.S.O. 1990, c. N.2, as amended; or
  - 4.4.f as a condition to a development permit authorized by regulation made under section 70.2 of the *Planning Act* or as a requirement of an agreement entered into under the regulation;

- 4.5 the injury or destruction of trees by a transmitter or distributor, as those terms are defined in section 2 of the *Electricity Act*, S.O. 1998, c.15, Sched. A, as amended, for the purpose of constructing and maintaining a transmission system or a distribution system, as those terms are defined in that section;
- 4.6 the injury or destruction of trees undertaken on land described in a licence for a pit or quarry or a permit for a wayside pit or wayside quarry issued under the *Aggregate Resources Act*, R.S.O 1990, c. A.8, as amended;
- 4.7 the injury or destruction of trees undertaken on land in order to lawfully establish and operate or enlarge any pit or quarry on land:
  - 4.7.a that has not been designated under the *Aggregate Resources Act* or a predecessor of that Act; and
  - 4.7.b on which a pit or quarry is a permitted land use under a by-law passed under section 34 of the *Planning Act*;
- 4.8 the injury or destruction of trees that is required in order to erect any building, structure or thing, including yard areas, in respect of which a Building Permit has been issued and has taken into consideration the protection of trees surrounding the structure or work within the building envelope, provided that only those trees necessary to accommodate the building structure or thing, including yard areas, are removed;
- 4.9 the injury or destruction of trees that is required in order to install and provide utilities, including a private waste disposal system, to the construction or use of the building, structure or thing in respect of which a Building Permit has been issued;
- 4.10 the injury or destruction of trees that is required in order to install, provide or maintain a driveway of sufficient width for vehicular access to the building, structure or thing in respect of which a Building Permit has been issued;
- 4.11 the injury or destruction of trees on lands, including buffer lands, used for the purpose of a licenced waste disposal site that has been approved, where applicable, under the *Environmental Protection Act*, R.S.O. 1990, c. E.19, as amended, the *Ontario Water Resources Act*, R.S.O. 1990, c. O.40, as amended, the *Environmental Assessment Act*, R.S.O. 1990, c. E.18, as amended, the *Planning Act*, and/or the *Niagara Escarpment Planning and Development Act*;
- 4.12 the injury or destruction of trees for the construction of drainage works under the *Drainage Act*, R.S.O. 1990, c. D.17, as amended;

- 4.13 the injury or destruction of trees that:
- 4.13.a are dead;
  - 4.13.b are diseased, as identified in a Prescription or Forest Management Plan; or
  - 4.13.c pose a hazard to human safety or property;
- 4.14 the injury or destruction of trees by an Owner of a Woodland who may harvest, destroy or injure trees for his or her Own Use on his or her property provided that:
- 4.14.a the Owner, prior to the cutting, has advised the Officer of the proposed cutting;
  - 4.14.b the Owner has been the registered owner of the Woodlands for at least two (2) years prior to the date of the commencement of the destruction or injury of the trees;
  - 4.14.c Good Forestry Practices are employed in accordance with the Ministry of Natural Resources document "A Silvicultural Guide to Managing Southern Ontario Forests";
  - 4.14.d the destruction or injuring, in that part of the Woodland where trees have been destroyed or injured, does not reduce:
    - 4.14.d.i the number of trees per hectare below that necessary to constitute a Woodland; and
    - 4.14.d.ii the total basal area to below 20 square metres per hectare; and
  - 4.14.e the harvesting, injury or destruction of trees does not involve a Sensitive Natural Area, in which case a Permit under this By-law is required, except that for the purposes of this section no fee is required; or
- 4.15 the harvesting, injury or destruction of trees by a Farmer that involves the clearing of all or part of a Woodland for agricultural use on land that is owned by the Farmer doing the clearing and is part of a farm operation or farm corporation that has existed for at least three (3) years prior to such clearing.
- The clearing shall be carried out in accordance with Normal Farm Practices as defined in the *Farming and Food Production Protection Act, 1998*, S.O. 1998, c. 1, as amended, provided that:
- 4.15.a the land that is cleared is put into agricultural use within three (3) years of the date on which such clearing commences;
  - 4.15.b prior to the clearing, the Farmer advises the Officer of the proposed clearing. For the purposes of this section the marking of trees, a Forest Management Plan or a Prescription, a fee and a Permit are not required; and

- 4.15.c the land being cleared for agricultural use is outside the Urban Areas as defined in the Regional Policy Plan, and is designated and zoned for agricultural use in the Official Plan and Zoning By-law of the Area Municipality and, where applicable, in the Niagara Escarpment Plan;

except where the injuring or destruction of trees involves a Sensitive Natural Area in which case a Permit is required pursuant to the provisions of Sections 5 and 6 of this By-law, but no fee shall be required.

## **5. PERMITS**

### **5.1 GOOD FORESTRY PRACTICES PERMITS**

- 5.1.a Upon application by an Owner, the NPCA may issue a Good Forestry Practices Permit to permit the harvesting, injuring or destruction of trees in accordance with Good Forestry Practices provided that:

5.1.a.i a Prescription or Forest Management Plan, identifying accepted silviculture techniques and environmental protection measures where a Sensitive Natural Area is involved, has been authored by a Registered Professional Forester or a member in good standing of the Ontario Professional Foresters Association who is authorized to prepare Prescriptions or Forest Management Plans and the Prescription or Forest Management Plan has been submitted with the application for a Permit as per Section 6;

5.1.a.ii the trees to be cut are marked by a certified Tree Marker in accordance with a Prescription or Forest Management Plan and only such trees are cut; and

5.1.a.iii the injuring or destruction of trees will not reduce the number of trees per hectare below the minimum number of trees per hectare required to be considered a Woodland;

or provided that:

5.1.a.iv a plan, using Good Forestry Practices and including the identification of the trees to be cut, has been prepared to the satisfaction of the Officer by a certified Tree Marker with previous experience marking trees in Niagara Region and the plan has been submitted with the application for a Permit as per Section 6;

5.1.a.v the trees to be cut are marked by a certified Tree Marker in accordance with the plan under paragraph 5.1.a.iv and only such trees are cut; and

5.1.a.vi the injuring or destruction of trees will not reduce the number of trees per hectare below the minimum number of trees per hectare required to be considered a Woodland.

## **6. PERMIT APPLICATION PROCESS**

6.1 Every person who intends to injure or destroy trees personally or through another person, where a Permit to do so is required under this By-law, shall first complete and submit an application for a Permit in the form approved by the NPCA from time to time.

6.2 Any person who submits an application under Section 6 shall post and display a copy of the Permit as issued pursuant to this By-law, in the immediate area where the destruction or injury of the trees is to occur, in a position that is clear and visible to all persons.

6.3 Applications for Permits will be processed only if:

- 6.3.a the appropriate application form, approved by the NPCA from time to time, has been completed in full, duly signed and submitted to the NPCA;
- 6.3.b the requirements that must be submitted with an application have been included;
- 6.3.c applications are in keeping with the general purpose and intent of this By-law; and
- 6.3.d except as otherwise stated in this By-law, the prescribed application fee, as set forth in Schedule "A" has been paid in full.

6.4 A Permit application that does not meet the requirements of clauses 6.3.a, 6.3.b and 6.3.c will be returned to the applicant with the prescribed fee within 30 days.

6.5 A Permit may be:

- 6.5.a issued by the NPCA to the Owner for a term of up to one (1) year from the date of issue and shall not be transferable; or
- 6.5.b renewed one time only by the NPCA for one term of up to one (1) year contiguous with the expiry date of the original Permit and after a written request from the Owner for renewal is made to the NPCA who must be satisfied that there are reasonable grounds for the renewal.

- 6.6 NPCA may impose conditions to a Permit that relate to, but which are not restricted to:
- 6.6.a the manner and timing in which harvesting, injury or destruction is to occur;
  - 6.6.b the species, size, number and location of trees to be injured or destroyed or to be planted;
  - 6.6.c the marking of trees to be cut with paint;
  - 6.6.d the qualifications of persons authorized to injure or destroy trees;
  - 6.6.e the submission of additional information required before the Permit becomes effective;
  - 6.6.f measures to be implemented to mitigate the direct and indirect effects of the injuring or destruction on Sensitive Natural Areas; and
  - 6.6.g a follow-up fuelwood (firewood) harvest.
- 6.7 When denying a Permit, the NPCA will notify the applicant in writing by registered mail. The Board shall provide written reasons for its decision to the applicant.

## **7. APPEALS TO REGIONAL COUNCIL**

- 7.1 An applicant for a Permit under Section 6 may appeal to Regional Council if the NPCA refuses to issue a Permit, within 30 days after the refusal.

## **8. ORDERS TO DISCONTINUE ACTIVITY**

- 8.1 Where an Officer is satisfied that a contravention of this By-law has occurred, the Officer may make an Order requiring the person who contravened the By-law or who caused or permitted the injuring or destruction of trees in contravention of the By-law to stop the injuring or destruction of trees. The order shall set out:
- 8.1.a the municipal address or the legal description of the land;
  - 8.1.b reasonable particulars of the contravention; and
  - 8.1.c the period within which there must be compliance with the order.
- 8.2 An Order issued under this section may be served personally or by registered mail to the last known address of:
- 8.2.a the Owner of the Woodland; and
  - 8.2.b the person identified as injuring or destroying trees.
- 8.3 Where service of an Order is made by registered mail, service shall be deemed to have been served on the fifth day after the order is mailed.

- 8.4 Where service cannot be carried out under subsection 8.2, it is deemed sufficient if the Officer places a placard containing the terms of the Order in a conspicuous place on the affected lands. The placing of the placard shall be deemed to be sufficient service of the Order on the person to whom the Order is directed. The placard shall not be removed without the approval of the Officer.
- 8.5 If the person to whom the Order is directed is not satisfied with the terms of the Order, the person may appeal to the Board by filing a notice of appeal by personal service or registered mail to NPCA within 30 days of the date of the Order.
- 8.6 Where an appeal has been filed, the Board shall, at a public hearing, consider the appeal and a report from the Officer concerning the appeal.
- 8.7 Before conducting a hearing under this section, the NPCA shall give notice to the applicant and to such persons as the NPCA considers should receive notice and in the manner directed by the NPCA.
- 8.8 After hearing an appeal, the Board may confirm or revoke any Order issued under this By-law or may issue a Permit with conditions, provided that in the opinion of the Board, the general intent and purpose of this By-law has been maintained.
- 8.9 The proceedings at the hearing held by the Board shall be in accordance with the provisions of the *Statutory Powers Procedure Act*, R.S.O. 1990, c. S.22, as amended. The decision of the Board under this section shall be final.

## **9. PENALTY**

- 9.1 Any person who contravenes any provision of this By-law, or an Order issued under section 8 is guilty of an offence and is liable:
- 9.1.a on first conviction, to a fine of not more than \$10,000 or \$1,000 per tree, whichever is greater; and
- 9.1.b on any subsequent conviction, to a fine of not more than \$25,000 or \$2,500 per tree, whichever is greater.
- 9.2 Despite subsection 9.1, where the person convicted is a corporation:
- 9.2.a the maximum fines in clause 9.1.a are \$50,000 or \$5,000 per tree; and
- 9.2.b the maximum fines in clause 9.1.b are \$100,000 or \$10,000 per tree.

- 9.3 If a person is convicted of an offence for contravening this By-law or an Order issued under section 8, the court in which the conviction has been entered, and any court of competent jurisdiction thereafter, may order the person to rehabilitate the land or to plant or replant trees in such a manner and within such period as the court considers appropriate, including any silvicultural treatment necessary to re-establish the trees.

## **10. ENFORCEMENT**

- 10.1 Regional Council hereby delegates to the NPCA the authority to enforce this By-law, to issue Permits under this By-law and to impose conditions to such Permits.
- 10.2 The Board may appoint from time to time by resolution, persons it deems qualified and necessary to act as Officers to administer and enforce the provisions of this By-law.
- 10.2 An Officer, appointed by resolution of the Board, or any person authorized by an Officer, may at all reasonable times enter upon and inspect any land and Woodland for the purposes of enforcing this By-law, determining compliance with this By-law, determining compliance with terms and conditions of a Permit issued under this By-law, determining compliance with an Order issued under Section 8 of this By-law or laying charges under this By-law.
- 10.3 Any person who obstructs or interferes with an Officer, or any person or agent authorized by an Officer, in the discharge of his or her duties under this By-law, shall be considered in violation of this By-law.

## **11. TREE FOREST CONSERVATION BY-LAW ADVISORY COMMITTEE**


- 11.1 The NPCA will establish a Tree and Forest Conservation By-law Advisory Committee, which shall be a technical advisory committee to the NPCA. Representation on the committee shall include, at a minimum, representatives from the Area Municipalities, Niagara North Federation of Agriculture, Niagara South Federation of Agriculture, the Niagara Woodlot Association, and logging industry.
- 11.2 The Tree and Forest Conservation By-law advisory Committee shall review and provide advice on matters of tree and forest conservation as requested by the NPCA.



**12. ADMINISTRATION**

- 12.1 Schedule "A" shall form part of this By-law.
- 12.2 If any section or part of this By-law is found by any court of competent jurisdiction to be illegal or beyond the power of Regional Council to enact, such section or part shall be deemed to be severable and all other sections or parts of this By-law shall be deemed to be separate and independent therefrom and to be enacted as such.
- 12.3 The short title of this By-law is the "Tree and Forest Conservation By-law".
- 12.4 By-law 47-2006 of the Regional Municipality of Niagara and all amendments thereto, are hereby repealed.
- 12.5 Despite subsection 11.4, By-law 47-2006, as amended, shall continue to apply to proceedings in respect of offences that occurred before its repeal.
- 12.6 This by-law shall come into force on July 31, 2008.

THE REGIONAL MUNICIPALITY OF NIAGARA

  
\_\_\_\_\_  
(Peter Partington, Regional Chair)  
\_\_\_\_\_  
(Pam Gilroy, Regional Clerk)

Passed: April 10, 2008

**REGIONAL MUNICIPALITY OF NIAGARA  
TREE AND FOREST CONSERVATION BY-LAW  
SCHEDULE A – FEES**

<b>Application for a Good Forestry Practices Permit</b>	<b>\$0.00</b>
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<b>Application for a Special Permit</b>	<b>\$0.00</b>
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## PROJECT SCOPE OUTLINE

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**Project Title:** Woodlands Bylaw Review  
**Prepared By:** Adèle Labbé and Vanessa Aykroyd  
**Date of Document:** January 2019

### 1. INTRODUCTION

#### 1.1 Project Background and Purpose/Justification

The Regional Municipality of Niagara is currently undertaking a comprehensive review of the Region's Official Plan. Included in that official plan review is the existing Environmental Policy Chapter 7 and the Region's Woodland By-law 30-2008 (hereon in referred to as "the bylaw"). This work has identified the need to review the bylaw as it is 10 years old.

The Niagara Peninsula Conservation Authority (NPCA) has been administering the bylaw, on our behalf, since a service level agreement was developed in August 2008. At that time, the NPCA was also fulfilling the role of plan review and technical clearance for Chapter 7 of the Regional Official Plan as described in the 2014 Memorandum of Understanding (MOU) between the Region, the NPCA and the Local Area Municipalities (LAMs). In 2018, the responsibility for plan review and technical clearance for Chapter 7 of the Regional Official Plan returned to the Region. Furthermore, the MOU between the Region and LAMs is currently being revised. A review of the bylaw is timely to ensure administration and enforcement requirements remain clear.

#### 1.2 Project Objectives – Specific, Measureable, Attainable, Relevant, and Timely

The Objective is to review the bylaw in 2019 to ensure consistent service delivery and application of the bylaw across the Region and to consider the following:

1. A review of any changes to provincial legislation that provide RMoN with the power to enact/delegate the administration and enforcement of such a bylaw.
2. A review alignment between the Regional Official Plan and the by-law.
3. Whether the bylaw is in line with similar municipal tree and forest protection bylaws within the GGH and commonly accepted best practices.
4. Whether the bylaw is able to fulfill the current objectives as outlined in the preamble of the current bylaw, and any other objectives identified through the review.
5. Enhancements to the administration and enforcement (i.e., processes for exemption, permitting, enforcement, etc.) of the bylaw
6. Efficiencies in administration and enforcement of the bylaw in the context of the Service Level Agreement and the Protocol for Planning Services between the NPCA and the Region.
7. A review of the administration and enforcement resource requirements for operational budget review.

## 2. PROJECT DESCRIPTION

### 2.1 Project Scope

IN SCOPE	OUT OF SCOPE
Review of the bylaw committee structure and purpose to support the review	No anticipated updates to the ROP at this time
Recommend changes to bylaw as required by provincial legislation	No anticipated updates to any other bylaws
Recommend changes to bylaw as required to align with current ROP	
Recommend changes to bylaw as required to align with current or potential bylaw objectives	
Recommend changes to bylaw to align with comparative municipal woodland, forest, and tree conservation bylaws	
Recommend changes to bylaw to include current Best Management Practices	
Provide recommendations to enhance the administration and enforcement processes	
Provide recommendations regarding resource requirements to inform the operational budget	
Provide recommendations to the Environmental Work Program as deemed necessary	
Consult with Local Area Municipalities regarding any changes or recommendations	
Consult with other local stakeholders with regarding any changes or recommendations	
Provide recommendations regarding the Service Level Agreement in the context of a recommended Updated Bylaw	
Determine whether the bylaw can apply to Regionally owned trees outside of woodlands	

### 2.2 Project Deliverables

1. Legislation and Policy Review
2. Similar Bylaw and BMP Comparison
3. Engagement Plan
4. Communication Plan
5. Information reports to Committee/Council
6. Draft 2019 Woodland Bylaw if needed
7. Recommendation report to Committee/Council

### 2.3 Completion Criteria

1. All pertinent information presented and reviewed to SMT/CLT (as necessary) and to Council via information reports.
2. Community Engagement has taken place and incorporated into the draft bylaw as deemed appropriate and desirable.
3. A Communication Plan is enacted to provide information on the bylaw review project as well as changes to the bylaw to those persons or entities affected.
4. A recommendation report is considered by Regional Council.

## 2.4 Constraints

1. There is no separate funding associated with the project at this time.
2. Project team must attend to the other responsibilities of their roles within the department, which may take time away from the project.
3. Data regarding woodlands is dated (early 2000s) and based on work that was undertaken to inform the development of Chapter 7 Natural Environment of the existing Official Plan.

## 2.5 Assumptions

1. Community Engagement may be contentious due to two separate, high profile incidents within the past year that have garnered media attention. These incidents are not involved in the purpose or focus of this bylaw review.
2. Responsibility of the administration and enforcement of the bylaw is undecided at this time.
3. Regional Council is interested in better understanding the administration and enforcement of the bylaw, and agree that a review is necessary.

## 2.6 Known Risks

1. Potential for concerns by private residents since the bylaw applies to private property.
2. Potential for illegal or legal clearing of woodlands to occur by persons or parties who may assume that the review will result in increased/additional constraints to development.
3. Undetermined status/potential changes to Provincial Legislation by the current government may affect the outcomes of the review and deliverables.

## 2.7 Project Team

Name	Role	Department/Organization	Contact Information
Rino Mostacci	Sponsor/Commissioner	Niagara Region	X3276
Diana Morreale	Director, Development Approvals	Niagara Region	X3367
Jennifer Whittard	Manager, Environmental Planning	Niagara Region	X3430
Adèle Labbé	Project Manager/ Senior Environmental Planner	Niagara Region	X3250

Name	Role	Department/Organization	Contact Information
<b>Vanessa Aykroyd</b>	Project Manager/ Landscape Architect	Niagara Region	X3493
<b>Donna Gibbs</b>	Director, Legal and Court Services	Niagara Region	X3651
<b>Shawn McCauley</b>	Ass. Director, Transportation Ops, Public Works	Niagara Region	X3321
<b>Lyndsey Ferrell</b>	Planning Finance	Niagara Region	X3425
<b>Peter Criscione</b>	Communications Consultant	Niagara Region	X3747

## 2.8 Key Project Stakeholders

Name	Role	Department/Organization	Contact Information
<b>Dan Drennan (Current Bylaw Inspector)</b>	Collaborate with project team	NPCA	905-788-3138 x 247
<b>Mickey Cruickshank</b>	Legal Counsel	Niagara Region	X3472
<b>Bylaw Advisory Committee</b>	Consult with Project Team	Area Municipalities, Niagara North Federation of Agriculture, Niagara South Federation of Agriculture, Niagara Woodlot Association, logging industry.	
<b>Niagara Homebuilders Association</b>	Consult	Niagara Homebuilders Association	
<b>Niagara Construction Association</b>	Consult	Niagara Construction Association	
<b>Niagara Parks Commission</b>	Consult	Niagara Parks Commission	
<b>Public</b>	Consult	Public	

## 3. PROJECT STRATEGY

### 3.1 Project Approach

**Waterfall Methodology: Plan project phases and execute.**

#### Phase 1: Project Initiation

1. Review previous file information
2. Develop Project Charter, obtain sponsorship and present to CLT
3. Initiation (Information) Report to Council

#### Phase 2: Background Research

1. Confirm status of Tree Forest Conservation Bylaw Advisory Committee
2. Legislation and Policy Review
3. Similar Bylaw and BMP Comparison
4. Review resource requirements to administer and enforce the bylaw and compare to neighbouring Regional Municipalities
5. Collaboration meeting with current Bylaw Inspector

#### Phase 3: Engagement and Communication Planning

6. Develop Engagement Plan
7. Develop Communication Plan
8. Information Report to Committee/Council (Phases 2 and 3)

#### Phase 4: Engagement and Analysis

9. Execute engagement plan
10. Analyze feedback
11. Determine direction of bylaw update (major updates/changes)
12. Information Reports to Committee/Council (Phase 4)

#### Phase 5: Draft new Bylaw

13. Draft 2019 Woodland Bylaw
14. Recommendation report to Committee/Council

### 3.2 Communication Plan

#### 3.2.1 Project Meeting Schedule

Purpose	Date	Location
Working meetings – Project Managers (Vanessa and Adele)	Bi-weekly	PW Boardroom
Project Check-in with Project Team	End of each phase and as needed	TBD
Collaboration meetings with Bylaw Inspector	During Phase 2	TBD

### 3.3 Project Schedule

Task/Deliverable	Task Lead	Estimated Start Date	Estimated Completion Date
Initiation Report to Council (Project Charter, direction to strike up Advisory Committee)	Adele/Vanessa	February 2019	February 20, 2019 (for March 20 PEDC)
Legislation and Policy Review	Adele	February 2019	End of February 2019
Similar Bylaw and BMP Comparison	Vanessa	February 2019	End of February 2019
Other Background research	Adele/Vanessa	February/March 2019	End of March 2019
Engagement Plan	Adele/Diana	March 2019	Mid-March 2019
Communication Plan	Vanessa	March 2019	Mid-March 2019
Information report to Committee/Council (Background Research Summary, Engagement)	Adele/Vanessa	Mid-March 2019	April 10, 2019 (for May 8 PEDC)
Execute Engagement	Adele/Vanessa	After May 16, 2019 (council meeting)	Mid-June 2019
Analysis of engagement results	Adele/Vanessa	Mid-June	End of June
Information Report to Council	Adele/Vanessa	End of June	July 11, 2019 (for August 7 PEDC)
Draft 2019 Woodland Bylaw	Adele/Vanessa/Legal	July	End of August (for circulation and review to key stakeholders)
Recommendation report to Committee/Council	Adele/Vanessa	Mid-September	October 9, 2019 (for Nov 6 PEDC)

### 3.4 Project Budget

Expense/Purchase	Estimated Budget	Expended to Date	Estimate to Complete	Variable Costs
Engagement sessions (# of sessions tbd): refreshments, light snacks, materials	TBD			
Solicitor (potential)	TBD			



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## MEMORANDUM

PDS-C 9-2019

**Subject: Recommendations from the Agricultural Policy and Action Committee meeting held February 22, 2019**

**Date: Wednesday, March 20, 2019**

**To: Planning and Economic Development Committee**

**From: Ann-Marie Norio, Regional Clerk**

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The Agricultural Policy and Action Committee, at its meeting held on February 22, 2019, passed the following motion for consideration by the Planning and Economic Development Committee:

Minute Item No. 7.1

APAC-C 03-2019

Irrigation Working Group Update

1. That Correspondence Item APAC-C 03-2019, respecting an Irrigation Working Group Update, **BE RECEIVED** for information; and
2. That Regional Council **ENDORSE** the formation of a volunteer Niagara Water Resource Board.

Respectfully submitted and signed by

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Ann-Marie Norio  
Regional Clerk

**THE REGIONAL MUNICIPALITY OF NIAGARA  
AGRICULTURAL POLICY & ACTION COMMITTEE  
MINUTES**

**APAC 1-2019  
Friday, February 22, 2019  
Committee Room 4  
Niagara Region Headquarters  
1815 Sir Isaac Brock Way, Thorold ON**

Committee: Councillors Butters, Disero, Easton, Steele, Witteveen  
(Committee Chair); G. Janes, C. Mullet Koop, J. Schonberger,  
L. Troup, A. Vaughn, K. Wiens

Absent/Regrets: Bradley (Regional Chair), Councillor Jordan; J. Kikkert, B.  
Schenck (Committee Vice Chair), A. White

Staff: E. Acs, Manager, Community Planning, K. Lotimer, Legislative  
Coordinator, K. Provost, Economic Development Officer

Others Present: S. Marshall (Ontario Tender Fruit), H. Swierenga (OFA Member  
Services Representative)

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**1. CALL TO ORDER**

Kelly Lotimer, Legislative Coordinator, called the meeting to order at 9:02 a.m.

**2. DISCLOSURES OF PECUNIARY INTEREST**

There were no disclosures of pecuniary interest.

**3. SELECTION OF CHAIR AND VICE CHAIR**

**3.1 Call for Nominations for Committee Chair**

Kelly Lotimer, Legislative Coordinator, called for nominations for the position of Chair of the Agricultural Policy and Action Committee, for a two year term (2019 - 2020).

Moved by K. Wiens  
Seconded by G. Janes

That Councillor Disero, **BE NOMINATED** for the position of Chair of the Agricultural Policy and Action Committee, for a two year term (2019 - 2020)

Moved by A. Vaughn  
Seconded by Councillor Easton

That Councillor Witteveen, **BE NOMINATED** for the position of Chair of the Agricultural Policy and Advisory Committee, for a two year term (2019 - 2020)

3.2 Motion to Close the Nominations for Committee Chair

Kelly Lotimer, Legislative Coordinator, called a second and third time for nominations for the position of Chair of the Agricultural Policy and Action Committee. There being no further nominations it was:

Moved by Councillor Steele  
Seconded by K. Wiens

That the nominations for the position of Chair of the Agricultural Policy and Action Committee for a two year term (2019 - 2020), **BE CLOSED**.

**Carried**

3.3 Voting for the Position of Committee Chair

Voting by a show of hands resulted in the following:

Councillor Disero = 4

Councillor Witteveen = 6

Based on the results of the vote, Ms. Lotimer announced that Councillor Witteveen had received the majority of the votes and would be the Chair of the Agricultural Policy and Action Committee for a two-year term (2019-2020).

3.4 Call for Nominations for Committee Vice-Chair

Kelly Lotimer, Legislative Coordinator, called for nominations for the position of Vice-Chair of the Agricultural Policy and Action Committee, for a two year term (2019 - 2020).

Moved by K. Wiens  
Seconded by G. Janes

That Bill Schenck, **BE NOMINATED** for the position of Vice-Chair of the Agricultural Policy and Action Committee, for a two year term (2019 - 2020)

3.5 Motion to Close the Nominations for Committee Vice-Chair

Kelly Lotimer, Legislative Coordinator, called a second and third time for nominations for the position of Vice-Chair of the Agricultural Policy and Action Committee. There being no further nominations it was:

Moved by J. Schonberger

Seconded by Councillor Easton

That the nominations for the position of Vice-Chair of the Agricultural Policy and Action Committee for a two year term (2019 - 2020), **BE CLOSED.**

**Carried**

3.6 Voting for the Position of Committee Vice-Chair

There being only one nominee for the position, Ms. Lotimer announced that Bill Schenck would be the Vice-Chair of the Agricultural Policy and Action Committee for a two year term (2019 - 2020).

At this point in the meeting, Councillor Witteveen assumed the chair.

4. **PRESENTATIONS**

4.1 Natural Environment Work Program - New Regional Official Plan

Sean Norman, Senior Planner, provided information respecting the Natural Environment Work Program - New Regional Official Plan. Topics of the presentation included:

- New Regional Official Plan
- Natural Environment Planning
- Scope for Natural Environment Work Program
- Key Issues to be Addressed
- Official Plan Policies
- Upcoming Consultation and Engagement

Moved by K. Wiens

Seconded by A. Vaughn

That staff **BE DIRECTED** to invite a representative from the Ontario Phragmites Working Group to make a presentation at the Agricultural Policy and Action Committee meeting being held on Friday, April 26, 2019.

**Carried**

5. **DELEGATIONS**

There were no delegations.

6. **ITEMS FOR CONSIDERATION**

6.1 **APAC-C 01-2019**

Agricultural Policy and Action Committee 2019 Meeting Schedule

Moved by Councillor Steele

Seconded by Councillor Disero

That Correspondence Item APAC-C 01-2019, dated February 22, 2019, respecting the 2019 APAC Meeting Schedule, **BE RECEIVED** and the following recommendation **BE APPROVED**:

That the Agricultural Policy and Action Committee meetings be held on the following dates:

April 26, September 17 and November 29, 2019.

**Carried**

7. **CONSENT ITEMS FOR INFORMATION**

7.1 **APAC-C 03-2019**

Irrigation Working Group Update

Sarah Marshall, Manager, Ontario Tender Fruit Growers, provided an update from the Irrigation Working Group.

Moved by Councillor Disero

Seconded by Councillor Easton

That this Committee **RECOMMENDS** to the Planning and Economic Development Committee:

1. That Correspondence Item APAC-C 03-2019, respecting an Irrigation Working Group Update, **BE RECEIVED** for information; and
2. That Regional Council **ENDORSE** the formation of a volunteer Niagara Water Resource Board.

**Carried**

7.2 APAC-C 02-2019

Agricultural Policy and Action Committee Representation for the Niagara North Federation of Agriculture

Moved by Councillor Butters  
Seconded by Councillor Steele

That Correspondence Item APAC-C 02-2019, respecting the Agricultural Policy and Action Committee Representation for the Niagara North Federation of Agriculture, **BE RECEIVED** for information.

**Carried**

7. **CONSENT ITEMS FOR INFORMATION**

Moved by J. Schonberger  
Seconded by G. Janes

That the following items **BE RECEIVED** for information:

APAC-C 1 -2018  
Agricultural Policy and Action Committee Minutes  
January 26, 2018

APAC-C 2-2018  
Agricultural Policy and Action Committee Minutes  
April 20, 2018

**Carried**

8. **OTHER BUSINESS**

8.1 Agricultural Policy and Action Committee Meetings

Gracia Janes, Committee member, enquired about increasing the number of Agricultural Policy and Action Committee meetings per year. Chair Witteveen advised of his ability to call additional committee meetings when necessary.

8.2 Representation from Cannabis Industry on the Agricultural Policy and Action Committee

Kai Wiens, Committee member, enquired as to whether or not the Agricultural Policy and Action Committee members would entertain the addition of a representative from the Cannabis Industry.

Moved by J. Schonberger  
Seconded by Councillor Butters

That staff **BE DIRECTED** to invite a representative from the Cannabis Industry to make a presentation at the Agricultural Policy and Action Committee meeting being held on Friday, April 26, 2019.

**Carried**

8.3 Emily 911 Project

Arden Vaughn, Committee member, provided information on the Emily 911 project.

Moved by A. Vaughn  
Seconded by C. Mullet Koop

That the Agricultural Policy and Action Committee **ENDORSE** the Emily 911 Project.

**Carried**

8.4 Niagara North Federation of Agriculture Bus Tour

Arden Vaughn, Committee member, advised committee members of the Niagara North Federation of Agricultural Bus Tour taking place on June 20, 2019. More information regarding this tour will be provided at an upcoming Agricultural Policy and Action Committee meeting.

8.5 Agriculture Asset Management

Councillor Witteveen, Committee Chair, requested that staff provide information respecting the agricultural asset management work that was done through the Greater Golden Horseshoe Food and Farming Alliance.

8.6 Long Term Strategies

Councillor Witteveen, Committee Chair, requested that staff provide information highlighting the findings and extracts for the agricultural component of the long term strategies report completed by Brock University and Niagara Region.

9. **NEXT MEETING**

The next meeting will be held on Friday, April 26, 2019, at 9:00 a.m. in Committee Room 4.

10. **ADJOURNMENT**

The meeting adjourned at 11:16 a.m.

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Councillor Witteveen  
Committee Chair

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Kelly Lotimer  
Legislative Coordinator

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Ann-Marie Norio  
Regional Clerk



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## **MEMORANDUM**

**APAC-C 03-2019**

**Subject: Irrigation Working Group Update and Historical Background**

**Date: February 22, 2019**

**To: Agricultural Policy and Action Committee**

**From: Ann-Marie Norio, Regional Clerk**

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Attached is an update and historical background provided by the Irrigation Working Group for information.

Respectfully submitted and signed by,

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Ann-Marie Norio  
Regional Clerk

**Irrigation Update and Historical Backgrounder for NAPAC meeting February 22<sup>nd</sup>, 2019**

- The cycle of drought like conditions in the Niagara region appears to be occurring more frequently (2001, 2007, 2012, 2016 and in 2018 to a lesser extent).
- In early July 2016 extreme dry conditions were reported to the minister of agriculture and minister of environment.
- At that time, the OMAFRA water specialist calculated that in the Niagara region alone growers were facing a water deficit of approximately 50 mm.
- When there are drought conditions, growers with irrigation (the majority of which is overhead) are in a constant cycle of trying to keep up and are putting great strain on current water infrastructure.
- Those without any irrigation capacity truck water in or simply deal with the effects of no water for their crops (reduced yields, plant stress and in some cases plant death).
- During the 2016 drought industry asked for a streamlined approval process for those requiring emergency permits to take water.
- The 2016 drought resulted in a 15% yield reduction for tender fruit crops and a 24% reduction in wine grape yields vs. 2015.

**Niagara Irrigation Strategic Action Plan**

- Due to the economic impact of the drought, a funding project proposal was submitted and approved in 2017 led by the Niagara Peninsula Fruit and Vegetable Growers with cash and implementation support from Ontario Tender Fruit Growers, Grape Growers of Ontario and the Niagara Region to develop a **Niagara Irrigation Strategic Action Plan**.

- The strategy was based on the following vision.

Farms in Niagara have reliable access to  
irrigation water used efficiently and safely  
to sustain their productivity

- To achieve this vision, the strategy recommended the following actions:
- Recruit, engage and fund an irrigation point person for the Region as a whole for a two-year trial period with specific deliverables to be accomplished
- Raise the positive profile of irrigation in the public space
  - across the government so that (i) planning decision-makers have better understanding in order to expedite approval of irrigation projects and (ii) infrastructure funding programs are accessible to support capital costs of irrigation infrastructure
  - build public support and understanding as to why irrigation is a shared public-private responsibility with the full cost burden not falling on the grower
  - coordinate actions and influence policy under the mandates of different regulatory bodies to enable irrigation access
- Work to secure public infrastructure dollars, in the context of global climate change, to:
  - Make improvements to the capacity, reliability and efficiency of the NOTL open drainage ditch system
  - Subject to a satisfactory engineering and economic feasibility study, for systems (a) to deliver irrigation water west of the canal in west St. Catharines and (b) to provide greater security for pumping water from Lake Ontario to service farms in Lincoln
  - Enable growers to access C.A.P. funding for individual irrigation projects on-farm

- The strategic action plan was presented and endorsed by the NAPAC at their January 2018 meeting.
- In February 2018 a localized Lincoln irrigation meeting was held chaired by Lincoln Mayor Sandra Easton with participation from growers and municipal representatives from Lincoln, St Catharines and NOTL.
- At that meeting a federal grant application proposal was discussed that included the following objectives;
- To move forward on recommendations from the Niagara Irrigation Strategic Action Plan and coordinate action amongst growers, ministries and municipalities to increase domestic food security, reduce energy emissions and increase water conservation by completing the following:
  1. Formation of a volunteer "Niagara Water Resource Board (NWRB) with representation from each municipality and grower association to establish a job description and specific deliverables of the irrigation ambassador and regional water security initiatives;
  2. The NWRB will design and implement an emergency response system for low water occurrences resulting in a cohesive system for the entire region;
  3. The NWRB will develop and disseminate communication materials to the public to increase awareness of the need to ensure local food sustainability and the strategies growers will use to ensure efficient use and conservation of water resources;
  4. The Irrigation Ambassador will build relationships, conduct surveys and assessments and make recommendations that will ensure the sustainability of the agricultural sector environmentally and economically.

#### **Ambassador Deliverables:**

1. Ambassador will work with growers in Zone B, the City of St Catharines and OPG to contract a feasibility assessment of conveying water from sources above the escarpment at Decew Falls to the farmland at lower elevations. The assessment will include the best way to store water centrally for distribution during high demand. The goal is to reduce energy costs and environmental emissions and minimize risk of ground water depletion by finding alternate sources to help replenish aquifers. The work will result in an organizational model for the construction and management of such a system. Grower buy in and acreage involved to be solidified.
2. Ambassador will work with NOTL Drainage System Superintendent and the NOTL irrigation committee on improving the capacity, reliability and coverage areas of the open irrigation system in Zone C.
3. Ambassador will work with growers involved in independent existing water systems in Area A (Lincoln) to determine synergies and efficiencies that could be realized with possibly one common intake, one common pumping system and the additional coverage that could be serviced.
4. Ambassador will assess and make recommendations on what tools are needed to strengthen the profile and priority given to irrigation needs in planning and legislation. Coordination of meetings and presentations with all stakeholders.
5. All stakeholders will work together to design and implement an Emergency Response Plan across the region that will ensure the protection of water sources while establishing a cohesive water rationing system with equal access to growers in the region to increase the security of agricultural production.

- A project proposal was submitted for these deliverables to the Federal EcoAction Plan program in the summer of 2018 with cash support from the Region, municipalities of Niagara on the Lake, Lincoln and St Catharines and the tender fruit and grape growers' organizations.
- Funding for the above project was not approved.
- A preproposal was sent to the Disaster Mitigation and Adaptation Fund was submitted by the Niagara on the Lake Irrigation committee in 2018 to upgrade their infrastructure but they were not asked to submit a full proposal.

#### **Current Funding Environment**

- Provincial programs for agriculture are on hold with no indication of when they will open.
- A Federal program has just recently been launched. The Canadian Agricultural Strategic Priorities Program (CASPP) which is an investment of \$50.3 million over five years.
- Funding available through this program will help facilitate the sector's ability to address emerging issues and capitalize on opportunities. **Program website - <http://www.agr.gc.ca/eng/programs-and-services/canadian-agricultural-strategic-priorities-program/?id=1549325740130>**

# **NIAGARA REGION ECONOMIC DEVELOPMENT**

## **ECONOMIC DEVELOPMENT STRATEGY 2019-2024**

# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

September 2017

- RFP for Long Term Master Plan (20 years) issued, proposals evaluated, interviews
- Brock University and Niagara College partner with Niagara Region and RFP cancelled and revised

February 2018

- Revised Long Term Master Plan (20 years) RFP issued, financial contributions from Brock University and Niagara College

May 2018

- Contract awarded following evaluation and interview process to Global Investment Attraction Group

September 2018

- Research, stakeholder consultations and visioning session completed

October 2018

- Consultants contract cancelled and draft reports completed
- Building on previous work, four year strategy development continued internally

January 2019

- Strategy timeline changed to five years and work continues on strategy development
- Consultants given second contract to provide peer review

March 2019

- Five year Economic Development Strategy presented to PEDC

# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## ECONOMIC ANALYSIS AND FORECASTING

- Economic Research and Analysis
- Context Review of Niagara Region Municipal Economic Development
- Aggregated Report on Stakeholder Interviews
- A Vision of Niagara Region in 2041

## STAKEHOLDER CONSULTATIONS

- **168** responses to the online survey, July – October 2018, from businesses and organizations
- **64** individual Interviews, from businesses across sectors, government and education
- **10** Sector Focused Round Tables, manufacturing (2), agribusiness (2), tourism (2), health sciences, real estate, construction, technology sectors, over 50 businesses and industry associations
- **1** facilitated visioning session
- **Over 100** stakeholders reviewed the draft strategic action plan

# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## STAKEHOLDER CONSULTATIONS

- Senior management from Brock University, Niagara College and Niagara Region
- Municipal EDOs and CAOs
- Private sector businesses in manufacturing, agriculture, tourism, health services, real estate and construction
- Chambers of Commerce
- Niagara Industrial Association
- Niagara Workforce Planning Board
- Niagara Connects
- Economic Development Working Group
- Innovate Niagara, Spark Niagara, VRIC, Biolinc
- Venture Niagara, Niagara Angel Network
- St. Catharines and Niagara Falls Enterprise Centres
- Niagara Health System
- OMAFRA, Ontario MEDJCT
- Niagara District Airport, St. Lawrence Seaway Management Company, Hamilton Port Authority
- The Ontario Greenhouse Alliance, Flowers Canada, Federations of Agriculture, Ontario Federation of Agriculture, Golden Horseshoe Food and Farming Alliance, Wine Council of Ontario, Winery & Grower Alliance of Ontario, Ontario Tender Fruit Growers, Grape Growers of Ontario



# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## STRATEGIC ACTION PLAN

### TIMELINE

- Ongoing
- Short: One to two years
- Medium: Three to four years
- Long: Five plus years

### ACTIVITY DESCRIPTION

**LEAD:** Identified organization(s), departments or community stakeholders who will be responsible for the success of the activity

**PARTNER(S):** Identified organization(s), departments or community stakeholder

**PERFORMANCE MEASURES:** Activity completed in support of goal

# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## STRATEGIC ACTION PLAN THEMES

### Economic Development: Supporting Business Growth and Diversification Across Niagara

- Economic Development support to local municipalities e.g. NFTZ, Business Research and Analysis.
- Support export diversification by Niagara companies through NFTZ programs.
- Engage the private sector through the Economic Development Working Group.
- Review of Development Charges, Waivers and other incentive programs.
- Define NED's role in tourism.
- Advance opportunities in agriculture and manufacturing, including supply chain opportunities.
- Succession Planning solutions.
- Joint Aftercare Program for new company investments.
- Strengthen the technology sector.

# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## STRATEGIC ACTION PLAN THEMES

### Employment Land Strategy: Identifying and Creating Regionally Significant Employment Lands

- Identify opportunities with the St. Lawrence Seaway to promote Transport Canada lands for employment and to attract investment.
- Support the Regional Employment Lands Study.
- Provide economic development input to the Municipal Comprehensive Review (Official Plan).

# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## STRATEGIC ACTION PLAN THEMES

### Marketing Niagara Region: Raising the Profile of Niagara as a Place to Live and Do Business

- Investment missions to targeted markets with qualified lead generation initiatives in sectors where Niagara has a competitive advantage.
- Promote Niagara as a location for business investment.
- Develop a communications and public relations campaign to promote Niagara's business and investment successes.
- Develop and implement a Niagara Ambassadors program with local business leaders.

# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## STRATEGIC ACTION PLAN THEMES

### Streamline the Planning Processes: Expediting the Approvals Process

- Ensure timely approvals process through working with Regional and local area planning staff.
- Host a workshop to identify and address barriers to industrial and commercial development.

# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## STRATEGIC ACTION PLAN THEMES

Increasing Niagara's Competitiveness: Addressing Unnecessary Regulatory Burdens on Business

- Economic Trade Corridor designation and National Trade Corridors Fund application.
- Support agricultural stakeholders on irrigation issues.
- Advance land use planning policies that support agriculture and business development opportunities.

# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## STRATEGIC ACTION PLAN THEMES

Workforce: Meeting Current and Future Talent, Professional, Skilled Trades and Labour Needs

- Partner with Local Immigration Partnership to promote Niagara as a destination for skilled immigrants.
- Develop an educational program to promote skilled trades occupations to parents and students.
- Develop stakeholder partnerships to meet the current and future talent, professional, skilled trades and labour needs in collaboration with Brock University and Niagara College.
- Increase competitiveness in Niagara businesses through the adoption of new technologies, professional development and training opportunities in collaboration with post-secondary educational institutions.

# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## STRATEGIC ACTION PLAN THEMES

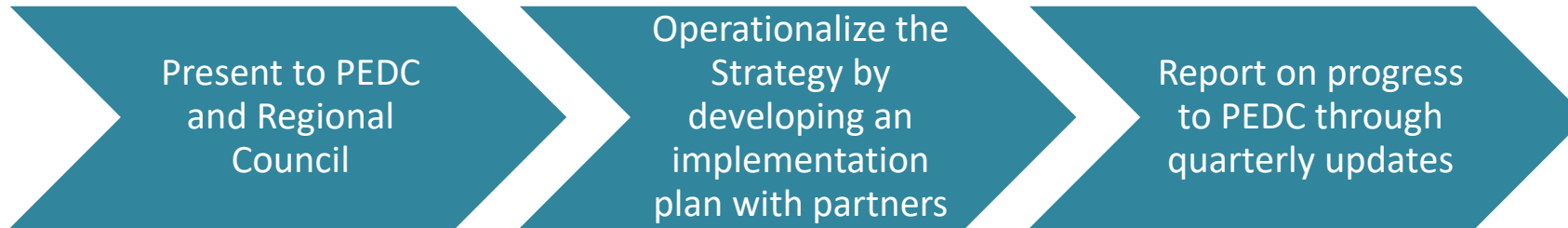
Advocacy: Improving Transportation Infrastructure Ensuring Niagara Remains Competitive in the Global Economy

- Secure federal and provincial funding for the East/West Corridor.
- Development of a fully integrated intra-regional transit system with schedules that support employment.
- Access to broadband across Niagara, urban and rural areas.
- Expanded Go Train services in Niagara.
- Economic opportunities at municipally owned airports in Niagara.
- Extend natural gas into rural areas in Niagara.
- Lower electricity costs to regain manufacturing competitiveness in Southern Ontario.
- Provincially funded campaign to promote skilled trades and careers in manufacturing.
- Feasibility of a Niagara Port facility with Hamilton Port Authority and St. Lawrence Seaway Management Company.



# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

## Next Steps



# ECONOMIC DEVELOPMENT STRATEGY 2019-2024

Questions?

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**Subject:** Economic Development Strategy: 2019 – 2024

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, March 20, 2019

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## Recommendations

That Report ED 2-2019 **BE RECEIVED** for information.

## Key Facts

- The purpose of this report is to provide the PEDC with an overview of the Economic Development Strategy: 2019-2024.
- The development of the Niagara Economic Development Strategy: 2019-2024 was based on extensive statistical research and stakeholder engagement including: roundtables, one-on-one interviews, and an online survey.
- The Economic Development Strategy includes an action plan with specific activities, leads, partners, and key performance measures.

## Financial Considerations

Funding for the activities described in this report has been incorporated into the council approved 2019 Operating Budget.

## Analysis

This report introduces one presentation by Niagara Economic Development (NED). The focus is to inform PEDC on the Niagara Economic Development Strategy: 2019-2024, provide an overview on the strategy's development, stakeholder engagement, and strategic action plan that will guide NED activities for the next five years.

### Economic Development Strategy Overview

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,

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following a major change of direction, NED continued to develop a shorter-term strategy internally, building on the work completed by GIAG and additional sector consultations.

The shorter five year Economic Development Strategy provides a review of the methodology to develop the strategy, a brief synopsis of Niagara region's economy; a strategic assessment based on a Strengths, Weakness, Opportunity, and Threats analysis; and a Strategic Action Plan that is broken down into seven key areas with specific economic development-related activities.

### Niagara Economic Development

NED operates in a two-tier structure where the six local economic development offices focus primarily on business retention and expansion activities and NED focuses on economic development for the region as a whole, including investment attraction, lead generation, and research. This structure is supported by Team Niagara, which includes representation from all 13 municipalities.

To maximize NED's effectiveness the department works in collaboration with stakeholders across Niagara including, but not limited to, Niagara Development Corridor Partnership, Brock University, Niagara College, Niagara Industrial Association, and local Chambers of Commerce.

### Economic Development Strategy and Methodology

The economic development strategy is intended to inform and provide guidance to strategic decision making at Niagara Region. It has been developed in consultation with the Shape Niagara report which will inform Regional Councillors in the development of their strategic action plan. The development and adoption of a longer-term strategy will be explored during the five years, if it receives consensus from stakeholders, will be developed and timed to start in 2024.

The methodology for the development of the economic development strategy included:

- Economic Analysis and Forecasting
- A Review of External Influences and Trends
- Extensive Stakeholder Consultations
- Strategy and Action Plan Development

### Economic Analysis and Forecasting

The Niagara region's economy has experienced unprecedented growth over the past four years and this growth is forecast to continue through to 2022. Niagara has recently experienced a record level of industrial and commercial investment. Between 2015 and 2017 in industrial building construction grew by 362.6% while investment in commercial building construction grew by 19.1%. Investment figures and building permits available for up to Q3 2018 indicate that investment activity may outpace 2017.

From 2011 to 2016, Niagara's population grew by 3.8%, which was slightly lower than Ontario's growth at 4.6% and Canada at 5.0%. From 2018 to 2026, Niagara's population is forecast to grow by 6.9%, compared to 7.1% of Ontario, and 7.5% for Canada. Niagara continues to show potential for continued economic growth on pace with Ontario and Canada.

### Niagara Region's Economic Strategic Assessment



### Niagara's Economic Strategic Action Plan

The development NED strategic action plan was based on the extensive stakeholder engagement that was conducted both by GIAG and NED staff. The strategic action plan, prior to being finalized, was circulated for feedback and revisions to all stakeholders that were involved in the strategy's development.

Once all feedback had been received, reviewed, and incorporated into the strategic action plan it was then examined by GIAG as part of a third-party audit process. The result was the identification of seven key areas that will guide NED's activities for the next five years:

- Economic Development: Supporting Business Growth and Diversification across Niagara Region

- 
- Employment Land Strategy: Identifying and Creating a Provincially Significant Employment Zone
  - Marketing Niagara Region: Raising the Profile of Niagara as a Place to Live and Do Business
  - Streamline Planning Processes: Expediting Approvals Process
  - Increase Niagara's Competitiveness: Addressing Unnecessary Regulatory Burdens on Businesses
  - Workforce: Meeting Current and Future Talent, Professional, Skilled Trades and Labour Needs
  - Advocacy: Improving Transportation Infrastructure Ensuring Niagara Remains Competitive in Global Economy

Contained within each of the areas are specific economic development activities that will be completed over the course of the next five years. All activities in the strategic action plan have an identified lead, partner, specific NED staff member who will be supporting the activity, and key performance measures.

### **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.

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**Prepared by:**

Ken Scholtens  
Manager, Business Development &  
Expedited Services  
Economic Development

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**Recommended by:**

Valerie Kuhns  
Acting Director  
Economic Development

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**Submitted by:**

Ron Tripp, P.Eng.  
Acting Chief Administrative Officer

*This report was reviewed by Ken Scholtens, Manager Business Development & Expedited Services and Valerie Kuhns, Acting Director, Economic Development.*

## **Appendices**

Appendix 1                      Niagara Economic Development Strategy: 2019-2024



# NIAGARA ECONOMIC DEVELOPMENT STRATEGY 2019-2024

MARCH 2019

**NIAGARA**  
CANADA





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## Executive Summary

In February, 2018 Niagara Economic Development (NED) issued an RFP for consulting services to develop a long term economic development master plan for the Niagara region. The original scope of the economic development master plan envisioned a time horizon beginning in 2018 and ending in 2041, in partnership with Brock University and Niagara College, but was later re-scoped to a shorter five-year time horizon. This was envisioned as a unique opportunity to work with Niagara's two post-secondary institutions and position the region for sustained economic growth in the future. The Global Investment and Attraction Group (GIAG) was successfully awarded the contract and had worked on developing the strategy until November, 2018 when the decision was made to have staff complete the strategy internally.

The Niagara Economic Development Strategy since its conception has been based on statistical research, analysis, and extensive stakeholder engagement. This included a series of sector roundtables with businesses and industry leader, one-on-one interviews with business owners, community stakeholders, and both Brock University and Niagara College, as well as an online survey. The resulting strategy is a compilation of the research, stakeholder engagement, and work completed GIAG, complemented by additional research and engagement undertaken by NED.

The Economic Development Strategic Action Plan was developed internally by NED staff. The Action Plan was primarily based on the research and the extensive stakeholder engagement completed by GIAG and NED. The Strategic Action Plan is prioritized into seven key areas with specific actions and key performance indicators that will be to measure the successful implementation of the plan. It is important to note, however, that basing the action plan on stakeholder engagement was only the first step. Once a preliminary draft had been finalized it was subsequently shared with all businesses, partners, and community and industry stakeholders that had provided input throughout the development of the Niagara Economic Development Strategy process. This ensured that the priority areas and actions were vetted by the very stakeholders that will be partners in the strategy's successful implementation.

Drafting the Niagara Economic Development Strategy: 2019-2024 is merely the first step and will be followed by its implementation over the next five years. The real work will be in operationalizing the plan and collaborating with our partners to support the on-going success of the region. The economic development strategy is important to support Niagara's on-going success, however, a longer-term vision for the Niagara region is still absent. Within the next five years Niagara Economic Development is committed to partnering with Niagara stakeholders to develop a vision for Niagara region that will ensure the economic prosperity of not only today's residents, but future generations.

## Niagara Economic Development

Niagara Economic Development (NED) reports directly to the Chief Administrative Officer (CAO) and reports to Regional Council through the Planning and Economic Development Committee. This corporate structure provides NED with greater latitude to work across departments within the corporation and to partner with Niagara's local area municipalities.

The department works 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. Implementation of the MOU is led by Team Niagara, which includes representation from all municipalities, and was also formed in 2012. The group meets quarterly, principally to discuss trade and investment activities (outward and inward missions), strategic planning, and marketing. The Team Niagara Action Plan 2015-2018 will be updated in 2019.

The primary role of NED is to support the growth of Niagara's economy and ensure competitiveness by:

Figure 1: Niagara Economic Development Mandate



One of NED's on-going initiatives has been working towards a trade corridor designation for the region. One of the early results of this work as Niagara region was the first municipality in Ontario to have received the Federal Foreign Trade Zone point designation in 2016. Through a dedicated co-ordinator position, the Niagara Foreign Trade Zone (NFTZ) offers businesses the opportunity to work with a team of public and private sector experts to access information, programs, and, incentives specifically developed to help companies initiate and improve their international trade efforts. By working with the

NFTZ, companies and suppliers that are involved in the production of products for final export to other countries can find and apply for tax, duty and tariff exemptions that can significantly improve their bottom line.

The Niagara Development Corridor Partnership Inc. (NDCPi) in Fort Erie provides office space and administrative support. Although, the day-to-day operations of the NFTZ have been subcontracted to the NDCPi, with a grant from Niagara Region, the coordinator is part of the NED team. NED provides oversight and strategic management through bimonthly update meetings and the investment attraction activities in the NFTZ Strategic Plan are integrated into the NED Trade and Investment Work Plan.

NED has historically worked in collaboration with stakeholders across Niagara region. This can be seen through the partnership between the Regional Innovation Centre, Innovate Niagara, and NED to support new and innovative tech and digital media companies and entrepreneurs to start and grow in Niagara. NED has also worked collaboratively with both Brock University and Niagara College, Niagara region's two post-secondary educational institutions, to ensure businesses have access to the research and training programs to support their growth and success.

## Economic Development Strategy and Methodology

The economic development strategy is intended to inform and provide guidance to strategic decision making at Niagara Region. It has been developed in consultation with the Shape Niagara report which informs Regional Councillors in the development of their strategic action plan. It aligns with longer-term Regional strategies, for example, the Transportation Master Plan. Municipal economic development strategies have also been taken into consideration, recognizing that they have a unique perspective on the community for which they are developed. The Niagara Region Economic Development Strategy aims to support the local strategies wherever possible.

Although the Economic Development Strategy is a five-year strategy, designed to overlap terms of Regional Council, it provides an adequate timeframe to achieve the identified results. The development and adoption of a longer-term strategy will be explored during the five years, if it receives consensus from stakeholders, and will be developed and timed to start in 2024. The figure below shows the methodology for the development of the Economic Development Strategy.

Figure 2: Economic Development Strategy Methodology



The development of this economic development strategy builds on foundational work conducted by economic development consultants, the Global Investment Attraction Group, between May and October 2018. This initial work was carried out in partnership with Brock University and Niagara College. It included economic research and analysis, the development of a 'Visioning Discussion Paper', an analysis of other Niagara Local Area Municipal economic development strategies, and the results of extensive stakeholder involvement. Stakeholders were consulted through an online survey, individual interviews, and sector round tables. Additional stakeholder consultations were held during November 2018 so that ultimately, manufacturing, agribusiness, tourism, health services, construction, real estate, and technology sectors all participated and provided input. Individual interviews ensured that major stakeholders throughout the region also had an opportunity to provide their insights as well.

The draft strategic action plan captured the results of this extensive consultation process and was circulated back to stakeholders for comment before being finalized. Once received by the Planning and Economic Development Committee, and Regional Council, a business plan will be created to implement the strategy. It will provide further operational definition on performance measures and partners. The activities have been aligned with the functions of NED and assigned to individual team members to be accountable for achieving results, either through leadership or supporting partnership roles. These areas include 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

### Vision for the Future

Implementation of the Economic Development Strategy over the next five years will help to establish the environment and infrastructure to ensure a strong economic future for the region. It is important that an economic development strategy takes into account the technological developments and global trends will have an influence on Niagara region. It is not possible to accurately predict their effect, but it is important to be aware of them as we move through the implementation of the Economic Development Strategy and particularly when considering a longer-term plan in 2024.

Both the employment and population of Niagara are forecasted to grow between 2017 and 2041. The St. Catharines-Niagara Census Metropolitan Area is expected to add an estimated 80,000 new jobs and 168,000 new residents over the next 20 years. It should be expected that the increasing housing pressures in the Greater Toronto Area and the expansion of inter-regional public transit will make the Niagara region a preferred destination for people looking for more affordable housing options and a different quality of life. It will therefore be critical for Niagara's economic prosperity to ensure that a healthy economic base will continue to exist to provide residents with local employment opportunities.

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.<sup>1</sup> What is being referred to

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<sup>1</sup> A Vision of Niagara Region in 2041 Discussion Paper by the Global Investment Attraction Group.

as the Fourth Industrial Revolution, or Industry 4.0, is essentially a digital revolution, and a revolution of technological breakthroughs, such as Robotic Process Automation, Artificial Intelligence, Blockchain, and the Internet of Things to name a few. The global economy is already undergoing massive changes as a result of Industry 4.0 and is transforming jobs, skills, and overhauling industries. Niagara's economic prosperity will be dependent on the ability of local businesses and municipalities to adopt and adapt to these technologies.

Niagara historically consisted of manufacturing branch plant facilities, employing large numbers of people and outsourcing parts and components extensively to local firms. Today, and in the future, these small and medium sized enterprises (SMEs) which have ridden through the challenges have adapted and innovated in order to expand and diversify their client base. Today, they see themselves in the aggregate as constituting an innovative Niagara-based "machine shop" able to be part of supply chains for leading-edge manufacturers located well beyond the region. As the nature of work changes, and the economy grows these innovative and adaptable businesses will need to continue to adapt to the changing economy.

In order to remain competitive, companies, regardless of sector, need to embrace technological change and the changing nature of work. The post-secondary institutions have a role in aligning their programs with the skills necessary for the changing nature of work. Economic development can facilitate stronger relationships between education/workforce development and industry. Economic development also has a role in bringing the innovation and technology eco-system together to encourage the growth of the technology sector in the region and the adoption of new technologies in industry. One of the world's leaders in the development of Industry 4.0 systems is General Electric who have established a state-of-the-art facility in Welland in 2018. For example, the new Welland facility (now owned by Advent International) is based on a sophisticated GE Industry 4.0 system, GE "Brilliant Factory," which is among those which GE not only adopts for its own facilities but actively seeks to sell to third parties.

It is also important to recognize that the region of Niagara is part of a much larger mega-economic area, commonly referred to as the Great Lakes Region. This region includes eight U.S. states (Minnesota, Wisconsin, Illinois, Indiana, Michigan, New York, Ohio and Pennsylvania) and two Canadian provinces (Ontario and Quebec). If the region were a country, it would have the third largest economy in the world. The region is highly integrated in terms of trade, accounting for more than 50% of all U.S./Canada binational trade and 30% of all U.S./Canada economic activity. Niagara region's unique geographic position provides a unique economic advantage as a vital cross-road in this larger regional economy.

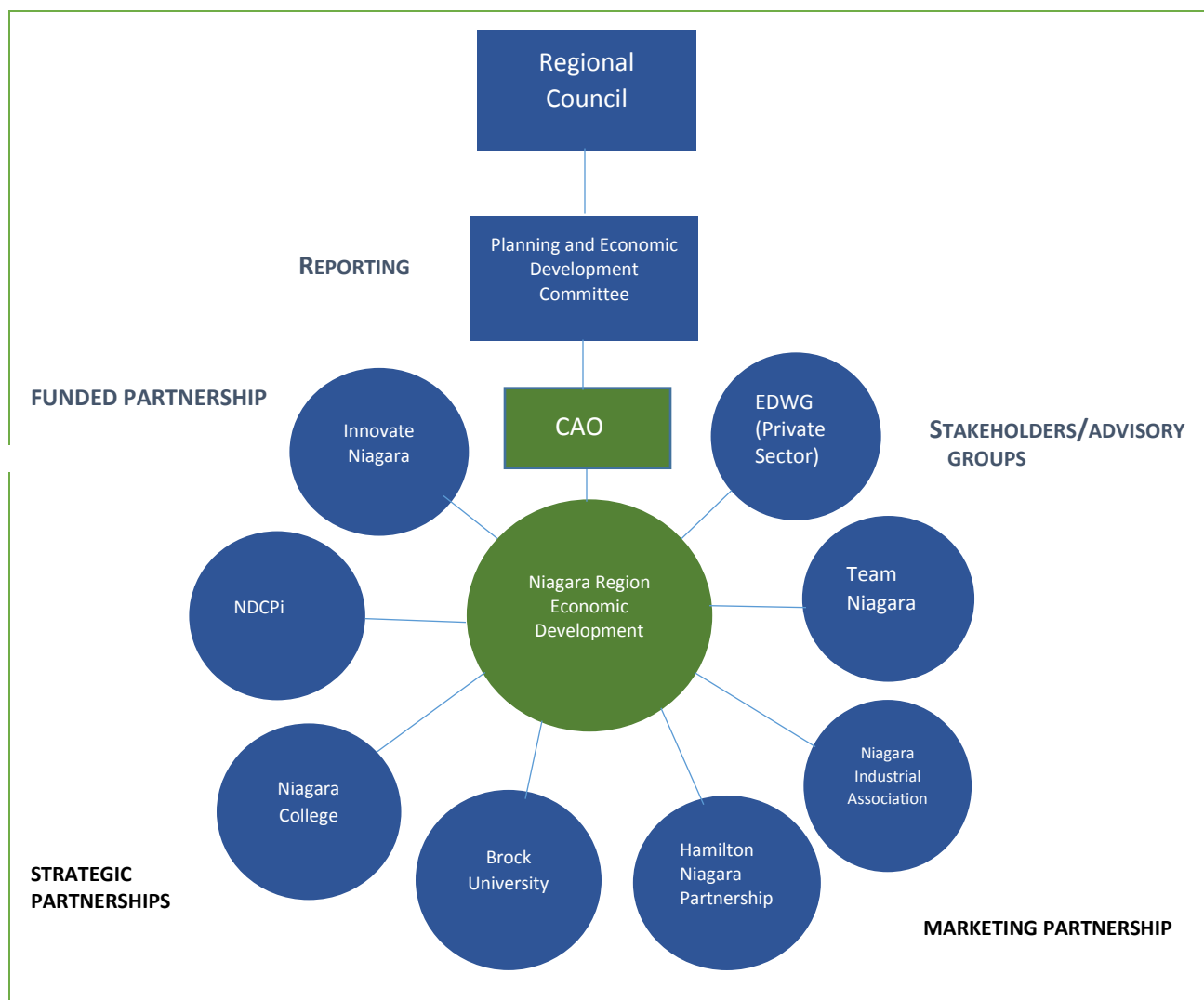
Niagara region is well positioned to be the first municipality to apply successfully for the federal Economic Trade Corridor designation, due to the vital role it plays in facilitating trade crossing the border between Canada and the United States and thereby supporting the economies of both Canada and Ontario. Recognizing that important role, it was the first municipality in Ontario to receive the Foreign Trade Zone Point designation in 2016. The Economic Trade Corridor designation would stimulate investment in infrastructure. This would ultimately increase the region's role in support of the federal and provincial economies by establishing Niagara as a focal point for trade related activities. Demographic shifts, increasing population of Ontario, focused around urban areas, e.g. Toronto now experiencing growth coming around the Golden Horseshoe.



## Economic Development Eco-System in Niagara region

NED team members operate within an eco-system of stakeholders in the Niagara region and beyond. Figure 3 illustrates, at a high level, some of those relationships, describing them as either, funded strategic, advisory, or marketing partnerships.

Figure 3: Economic Development Stakeholder and Partner Network



These stakeholders include, but are not limited to, Team Niagara (which includes the six municipal economic development offices and the CAOs from municipalities without economic development offices), Niagara Development Corridor Partnership Inc. (membership includes economic development staff in Fort Erie, Lincoln, Niagara Falls, Port Colborne and St. Catharines), Brock University, Niagara College, Innovate Niagara, Chambers of Commerce, Niagara Industrial Association, and Niagara Workforce Planning Board. In addition, there are relationships with the Ontario Government, principally the Ministry of Economic Development, Job Creation and Trade, and the Ontario Ministry of Agriculture, Food, and Rural Affairs, as well as the Federal Government, principally the Trade Commissioner Service, both in Canada and overseas.

To achieve results in the activities described in the Strategic Action Plan, NED will work with all of our local, provincial, and federal partners on the implementation of the Plan. In many instances, NED will not be the lead on the project, but will play a supporting role in partnership with other stakeholders.

## Niagara's Economy

The Niagara region has experienced unprecedented growth over the past four years and this growth is forecast to continue through to 2022. From 2011 to 2016, Niagara's population grew by 3.8%, which was slightly lower than Ontario's growth at 4.6% and Canada at 5.0%. From 2018 to 2026, Niagara's population is forecast to grow by 6.9%, compared to 7.1% of Ontario, and 7.5% for Canada. Niagara continues to show potential for continued economic growth on pace with Ontario and Canada.

As of 2017, nominal GDP was \$16.8 billion. The Conference Board of Canada predicts real GDP will increase by 1.4% in both 2018 and 2019, following a 1.6% increase in 2017. It is important to note that these figures are for the St. Catharines-Niagara CMA and do not include Grimsby and West Lincoln. Therefore, this growth would be stronger when you consider the development coming from Hamilton and the GTA.

Niagara has recently experienced a record level of industrial and commercial investment. For instance, from 2015 to 2017 investment in industrial building construction grew by 362.6% while investment in commercial building construction grew by 19.1%. Investment figures and building permits available for up to Q3 2018 indicate that investment activity may outpace 2017.

Niagara has had strong job growth over the last five years. From 2013 to 2018, Niagara had 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%).

During this time period, the top 10 sectors by job growth included: health care and social assistance by 4,694 jobs; accommodation and food services by 4,271 jobs; manufacturing by 1,766 jobs; education by 1,662 jobs; retail trade by 1,646 jobs; construction by 1,313 jobs; arts, entertainment and recreation by 1,292 jobs; professional, scientific and technical services by 1,110 jobs; public administration by 878 jobs; and, administrative support, waste management and remediation by 686 jobs.

## Manufacturing

Manufacturing has always been a significant sector of Niagara's economy and is a focus of activities in the Strategic Action Plan. Historically, Niagara was a powerhouse employing tens of thousands of people in automotive, paper, and steel manufacturing. Although the sector has gone through a decline that began in the 1980s, since 2012 it has seen positive growth in employment. While manufacturing in Niagara once consisted of many branch plant facilities employing large numbers of people in each facility, the sector is now predominantly comprised of small and medium-sized enterprises (SMEs). Today the sector is continuing to diversify and grow and remains a major contributor to the region's economy. Manufacturing accounts for 2.8% of the total number of businesses in Niagara but provides 8.5% of total jobs.

Manufacturing is also a major contributor to regional gross domestic product (GDP). In 2017, nominal GDP for the St. Catharines-Niagara census metropolitan area (CMA) was \$16.8 billion and manufacturing accounted for an estimated \$2.4 billion or 14% of that total. In recent years, the manufacturing sector in

Niagara has experienced substantial growth in jobs, exports and new investment. Manufacturing GDP is forecast to grow at 1.3% (CAGR) annually from 2019 to 2022 keeping pace with total GDP growth at 1.5% for the St. Catharines-Niagara CMA.

As noted, there have been significant job increases in the manufacturing sector in Niagara over the last five years with an increase of 1,766 jobs or 10.4%, which is higher than the job growth in this sector in Ontario (2.5%) and Canada (1.5%). Growth has occurred in the subsectors of beverage manufacturing, motor vehicle manufacturing, and architectural and structural metals manufacturing. In 2018, beverage manufacturing accounted for 2,519 jobs in Niagara, which was a 56.6% growth from 2013 (compared to a 20.5% growth in Ontario). In 2018, the motor vehicle subsector accounted for 2,048 jobs in Niagara, which was an increase of 439 jobs or 27.3% from 2017. In 2018, the architectural and structural metals manufacturing subsector had 1,269 jobs and an increase of 385 jobs (43.6%) over 2013, compared to a 3% job growth in Ontario.

## Tourism

The Niagara region has long been amongst the prominent tourism regions in Canada given world-renowned Niagara Falls and the large variety of attractions in the area including natural heritage, cultural heritage and modern entertainment. Many of Niagara's other economic sectors are intertwined into the tourism sector as well with the increasing interest in touring wineries and breweries, culinary offerings, produce, and specialty food offerings. Given these characteristics, tourism has historically been a major economic contributor in Niagara, generating a significant amount of business activity, jobs, and other economic benefits.

As a result tourism is actually comprised of a large number of industries that provide a variety of products and services to tourists, which is what makes it so important to the regional economy. Therefore, unlike manufacturing and agriculture that have dedicated North American Industry Classification System (NAICS) codes to capture data, the codes that relate to tourism span and number of industries.

In 2018, tourism in the Niagara region supported 39,995 jobs and 2,824 businesses across a variety of industries including transportation services; travel arrangement; accommodation and hospitality; food service; beverage manufacturing; and, arts, entertainment and recreation. In 2017, the Niagara region was a destination for almost 13 million visitors with total tourism expenditures of \$2.4 billion.

Tourism is also comprised of many businesses. In 2018, the tourism sector in Niagara consisted of 2,824 total businesses. 1,546 of these businesses had employees on payroll and 1,278 did not have employees. Of the businesses with employees, 67.8% had fewer than 20 employees, 28.8% had 20 to 99 employees, and 3.4% of businesses had more than 100 employees. This indicates that the sector is largely comprised of small businesses.

Of the nearly 13 million visitors to Niagara in 2017, total tourism-expenditures reached \$2.4 billion. 65% of total expenditures were from Canadian visitors, 27.3% were from the United States visitors, and 7.7% were from overseas visitors.

## Agribusiness

Agriculture and agriculture-related businesses are a fundamental pillar of the Niagara economy, having the climate, land base, experienced operators, research capability, and skills that make it a leading region in the production of agribusiness products. This has made Niagara a critical part of the Greater Golden Horseshoe's agriculture sector contributing \$838.1 million in gross farm receipts. This represented 43% of the total for the Greater Golden Horseshoe. The agribusiness sector has strengths in tender fruit, floriculture, the wine industry, and the greenhouse industry. In recent years, the sector has diversified to produce higher-value agriculture outputs.

In 2016, gross farm receipts totaled \$838.1 million, which was \$112.3 million over \$725.8 million in 2011. In 2016, total GDP impact for agriculture was \$1.41 billion, which was a \$19 million increase over 2011. In 2016, Niagara had 1,827 farms. This was a decrease of 187 farms or 9.3% in total farms since 2011. In 2016, Niagara also had 218,251 acres of farmland, which was a decrease of 4,660 acres over 222,911 acres in 2011.

Niagara experienced an overall decrease in the total number of farms and a decrease in total farm area, but saw substantial gains in gross farm receipts and GDP impact. This is indicative of the fact that companies and farms are consolidating, becoming more efficient, finding new market opportunities, and/or producing higher-value crops than previous years. The legalization of cannabis, the development of agricultural and processing businesses, as well as value-added services to agriculture provides an excellent opportunity for Niagara to leverage its traditional agricultural and agribusiness sectors. The opportunity to locate new value-add manufacturing in the processing of cannabis into higher-value products is just one area for new economic growth.

It is also important to note that three sub sectors account for 84.2% of total gross farm receipts in the agriculture sector. These include the greenhouse industry with 49.1% of total gross farm receipts, poultry with 18.4% of total gross farm receipts, and, tender fruit with 16.7% of total gross farm receipts.

*Sources: The Conference Board of Canada, Metropolitan Outlook, 2018; Statistics Canada, Table 34-10-0175-01, 2018; Statistics Canada, 2016 Census Profile; Statistics Canada, Canadian Business Counts, June 2018; Statistics Canada, TSRC and ITS, 2017; Statistics Canada, Census of Agriculture, 2011 and 2016; Emsi 2018.1*

## Strategic Assessment

Information gained throughout the strategy development process ranging from data analysis, background reviews, existing studies, and from the extensive stakeholder consultations process (online survey, one-on-one interviews, sector round tables) have been put together to help to prioritize economic development initiatives. The Aggregated Stakeholder Consultations Report is included as an appendix at the end of the report.

This SWOT analysis is characterised as follows:

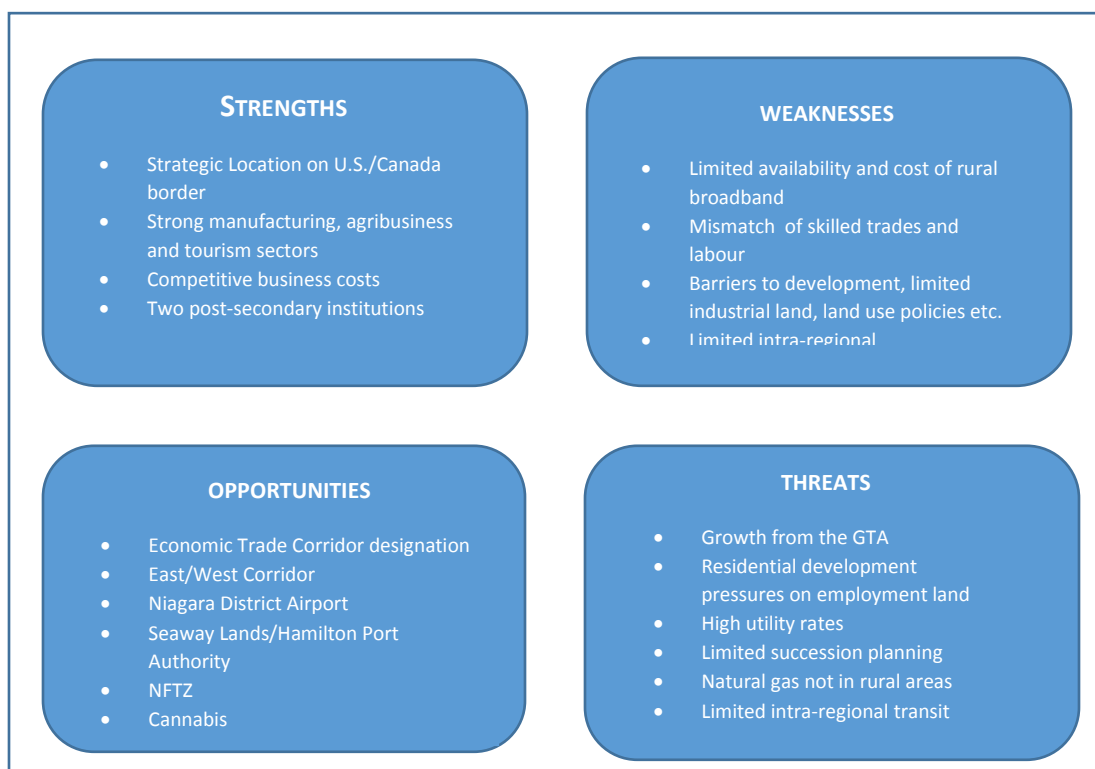
**STRENGTHS (Positive, Internal):** Competitive advantages or assets in Niagara Region

**WEAKNESSES (Negative, Internal):** Local issues or characteristics that limit current or future growth for Niagara.

**OPPORTUNITIES (Positive, Internal and External):** Areas where Niagara can encourage economic growth.

**THREATS (Negative, Internal and External):** Trends or deficiencies that threaten the Niagara's economic growth.

Figure 4 SWOT Analysis



## Niagara Economic Strategic Action Plan

Niagara Economic Development (NED), in collaboration with local businesses, associations, community stakeholders, and post-secondary education institutions, has developed a five-year strategic action plan. The activities included below are based on strengths of the Niagara economy and addresses identified weaknesses, or gaps, that affect the region's competitiveness and ability to retain and attract investment. Most importantly, based on the extensive stakeholder engagement that was conducted throughout 2018 the result is that many of the activities reflect the input provided by the participants of the consultations. The success of Niagara Region Economic Development's Action Plan will only be achieved through meaningful partnerships and collaboration with our partners across Niagara.

Throughout the consultation process it became clear that no single department, government, association, institution, or business is capable of supporting the continued growth and success of the Niagara economy alone. It is with this in mind that the proposed Niagara Economic Strategic Action Plan has identified leaders and partners that will be necessary to enact this plan and support the continued economic growth of Niagara. This five-year plan provides a high-level overview and has been divided into seven target areas/goals based on the findings from the Stakeholder Consultation Plan:

- Economic Development: Supporting Business Growth and Diversification across Niagara Region
- Employment Land Strategy: Identifying and Creating a Provincially Significant Employment Zone
- Marketing Niagara Region: Raising the Profile of Niagara as a Place to Live and Do Business
- Streamline Planning Processes: Expediting Approvals Process
- Increase Niagara's Competitiveness: Addressing Unnecessary Regulatory Burdens on Businesses
- Workforce: Meeting Current and Future Talent, Professional, Skilled Trades and Labour Needs
- Advocacy: Improving Transportation Infrastructure Ensuring Niagara Remains Competitive in Global Economy

Each of the target areas will be operationalized through identified activities and associated timelines, activity leads, partners, and performance measures. Within the next five years NED will undertake a long-term strategy review with a 20-year time horizon. A successful Niagara Economic Strategic Action Plan will include increased job creation and retention; accelerated economic and greater competitiveness and prominence of the region through the action taken in associated with each of the seven target areas/goals.

The following Action Plan should be read using the following:

- **Time-Line:** The expected time horizon for the successful completion of the described economic development activity:
  - On-going: No assigned timeline
  - Short: One to two years (2019-2020)
  - Medium: Three to four years (2021-2022)
  - Long: Five plus years (2023+)
- **Activity:** The described activity to support regional economic development
- **Lead:** Identified organization(s), departments, or community stakeholder who will be responsible for the success of the Activity
- **Partners:** Identified organization(s), departments, or community stakeholder who will be necessary partners for the success of the Activity
- **Performance Measure:** How the success of the Activity will be measured



## Economic Development: Supporting Business Growth and Diversification across Niagara Region

The Niagara region is home to a diverse economy that includes strong agri-business, manufacturing, and tourism sectors. The economic success of the region will be founded on supporting local businesses to grow and expand as well as attracting new businesses to the region. Niagara Region Economic Development is orientated towards facilitating inward investment, but has an important and critical role to support local economic development offices to facilitate growth within existing businesses.

GOAL: INCREASED BUSINESS DEVELOPMENT SUPPORT				
Time-Line	Activity	Lead	Partners	Performance Measure
On-Going	Niagara Region Economic Development will support local municipalities in their economic development functions. This includes the services of the Niagara Foreign Trade Zone Coordinator to engage companies in federal programs to encourage export activity; economic and business research and analysis; expedited development services; and, support to communities without economic development officers on regionally significant projects.	Team Niagara	Niagara Region Economic Development: Director, Economic Development; Economic Development Officer; Manager, Economic Research and Analysis; Manager, Business Development and Expedited Services; NFTZ Coordinator	Increased collaborative economic development activities between Niagara Region Economic Development and local economic development offices are achieved.
On-Going	Promote the Niagara Foreign Trade Zone programs through marketing activities and support the export diversification of existing Niagara manufacturing companies into new foreign markets.	Niagara Development Corridor Partnership Inc. (NDCPi) Niagara Region Economic Development: Niagara Foreign Trade Zone (NFTZ) Coordinator; Manager, Strategic Marketing	Team Niagara Canadian Border Services Agency NFTZ Task Force Local chambers of commerce Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade	Performance measures are outlined in the Niagara Foreign Trade Zone Strategy.

# Niagara Economic Development Strategy: 2019-2024

Short	Engage the private sector as advisors to Niagara Region Economic Development through the Economic Development Working Group. Representation will include all sectors and major stakeholders.	Team Niagara Niagara Region Economic Development: Director, Economic Development	Niagara Industrial Association Private sector businesses Brock University Niagara College	Regular Economic Development Working Group meetings to provide input into Niagara Region Economic Development initiatives.
Short	Participate in a review of Niagara Region development charges, waivers, and other incentive programs.	Niagara Region Planning and Development Niagara ERMS	Niagara Region Economic Development: Manager, Business Development and Expedited Services	Ensure Niagara Region has competitive development charges and incentives available for investors.
Medium	Conduct research into the impact of development charges on economic development with a focus on investment attraction, business expansion, and sector development.	Team Niagara Local municipal finance departments Niagara Region Economic Development: Manager, Economic Research and Analysis	Tourism stakeholders Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade Niagara Region ERMS Niagara Region Planning and Development	Development Charge Impact Report is completed and circulated.
Medium	Define the role of Niagara Region Economic Development in tourism including research into new opportunities e.g. sports tourism.	Niagara Region Economic Development: Director, Economic Development; Economic Development Officer	Team Niagara Tourism Sector Stakeholders	Tourism role defined and supported with appropriate resources.
Medium	Advance projects of regional significance, including but not limited to opportunities in new agricultural and manufacturing industries, and supply chain development opportunities to support business growth and retention.	Team Niagara	Niagara Region Economic Development: Economic Development Officer Agricultural producers Food processors Niagara Industrial Association Brock University Niagara College Ministry of Economic Development, Job Creation and Trade Local chambers of commerce	Key projects are identified and necessary support provided.

			Agriculture federations Niagara Region Agriculture Policy and Action Committee	
Medium	Support and coordinate facilitated stakeholder events to provide succession planning solutions for Niagara-based companies. For example, this could include identifying opportunities for the purchase of existing operations as a succession strategy.	Team Niagara Niagara Industrial Association Local chambers of commerce Ministry of Economic Development, Job Creation and Trade Financial institutions with business advisory services	Niagara Region Economic Development: Manager, Business Development and Expedited Services	Succession planning strategies are promoted through stakeholders.
Long	Develop a joint aftercare program with local economic development offices to support new company investments in the region. This program will engage companies that have recently expanded into Niagara and their parent company to acknowledge their investment and the early identification of potential issues.	Team Niagara	Niagara Region Economic Development: Manager, Trade and Investment; Economic Development Officer; Manager, Business Development and Expedited Services; NFTZ Coordinator	Aftercare program will be in place and functioning.
Long	Consult with sector stakeholders to explore the need for a formalized collaborative group to support and strengthen the nascent information technology sector in Niagara.	Innovate Niagara Spark Niagara Accel North Niagara Region Economic Development: Manager, Strategic Initiatives	Team Niagara Innovation and information technology sector stakeholders Niagara College Private sector partners, if needed	Explore the need for additional support of the technology sector if required.

## Employment Land Strategy: Identifying a Creating Regionally Significant Employment Lands

Existing employment lands in Niagara are located throughout the region. The development of these lands has historically been aligned with the economic development initiatives of the individual municipalities with little regional involvement. This has resulted in a number of smaller employment areas that have limited the ability to create a truly regional employment area. Niagara Region Planning and Development, with support from Niagara Region Economic Development, is reviewing the opportunity to create a large provincially significant regional employment zone. This will allow Niagara region to be more competitive in its investment attraction initiatives, both foreign and domestic. By providing new opportunities for Niagara to grow the manufacturing sector and attract new agribusinesses investments where the ability to co-locate with producers is needed.

GOAL: SUPPORT THE AVAILABILITY OF SHOVEL READY INDUSTRIAL LAND IN NIAGARA FOR DEVELOPMENT				
Time-line	Activity	Lead	Partners	Performance Measure
Long	Work with the St. Lawrence Seaway to identify and promote development opportunities for Transport Canada owned lands to attract investment in manufacturing, shipping, and distribution.	Niagara Region Economic Development: Manager, Business Development and Expedited Services	Transport Canada St. Lawrence Seaway Management Company Hamilton Port Authority Niagara Region Planning and Development Niagara Region Public Works Team Niagara NFTZ Coordinator	Identify lands for development and estimate development costs.
Long	Niagara Economic Development will support the Regional Employment Lands Study and act on the recommendations that involve regional economic development. This will determine the feasibility of creating a Regionally owned provincially significant employment zone within the Niagara Economic Zone & Centre.	Niagara Region Planning and Development	Niagara Region Economic Development: Managers, Strategic Initiatives and Business Development and Expedited Services Niagara Region Public Works Local Area Planning Departments Team Niagara	Employment Lands Study will be completed and finalized.
Long	Provide input into the Niagara Region's Municipal Comprehensive Review	Niagara Region Planning and Development	Niagara Region Economic Development: Director, Economic	Collaboration with Niagara Region Planning

	(Official Plan) to ensure the economic development perspective is considered.		Development; Manager, Business Development and Expedited Services; Economic Development Officer Team Niagara Local Planning Departments	and Development and input into the Official Plan provided.
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## Marketing Niagara Region: Raising the Profile of Niagara as a Place to Live and Do Business

The success of the Niagara region, in terms of economic and population growth, is dependent on successfully marketing the region to target audiences. Niagara Region Economic Development, through collaboration and partnership with local stakeholders, will manage two distinct marketing initiatives. One will be targeted at foreign and domestic companies that are looking to expand their operations with the goal of raising the profile of the Niagara region as a competitive place to do business. The second will be predicated on the successful attraction of new residents to the region to increase the population for the long-term sustainable growth of the Niagara region. In collaboration with other community stakeholders Niagara Region Economic Development will work towards attracting new and recent immigrants to Ontario as well as families that are looking for an alternative to the lifestyle available to them in the Greater Toronto Area.

GOAL: MARKET NIAGARA TO ATTRACT NEW BUSINESS INVESTMENT AND RESIDENTS				
Time-Line	Activity	Lead	Partner(s)	Performance Measures
On-Going	Identify target markets for investment attraction activities in designated sectors. This includes leading investment missions, qualified lead generation initiatives, and participating in trade shows and events.	Niagara Region Economic Development: Director, Economic Development; Manager, Trade and Investment Team Niagara	Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade Niagara Development Corridor Partnership	KPIs in Manager, Trade and Investment work plan achieved including qualified lead generation, trade missions, and trade shows.
On-Going	Conduct targeted marketing activities to promote Niagara as a location for business investment.	Niagara Region Economic Development: Managers, Strategic Marketing and Trade and Investment	Team Niagara	Marketing plan developed with the associated KPIs achieved.
Short	Coordinate with stakeholders to develop a communications and public relations campaign to promote Niagara's business and investment successes.	Team Niagara Niagara Region Economic Development: Manager, Strategic Marketing	Niagara Region Strategic Communications and Public Affairs Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade Economic Development Working Group Niagara College Local chambers of commerce	Communications Plan developed and implemented.

# Niagara Economic Development Strategy: 2019-2024

Short	Develop and implement a Niagara Ambassadors program with local business leaders from different sectors to promote the region and meet potential investors in Niagara.	Team Niagara Niagara Region Economic Development: Manager of Strategic Marketing, Manager, Trade and Investment; NFTZ Coordinator	Economic Development Working Group Local chambers of commerce Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade Niagara-based businesses	Ambassadors identified and engaged in both inbound and outbound investment attraction activities.
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## Streamline Planning Processes: Expediting Approvals Process

Under the direction of Niagara Regional Council, Niagara Region has been proactive in supporting business growth and economic prosperity. Over the next five years, Niagara Region Economic Development will continue to identify and reduce barriers to new private sector investment. This will be accomplished by ensuring that the Niagara Region and local area municipalities have competitive and complementary permit approval processes. Niagara Region Economic Development with local area municipalities will proactively engage the private sector to have a customer-first approach to business development and investment in Niagara.

GOAL: ENSURE THAT NIAGARA REMAINS PRO-DEVELOPMENT AND BECOMES A DESTINATION OF CHOICE FOR FUTURE INVESTMENT				
Time-Line	Activity	Lead	Partners	Performance Measure
On-Going	Engage and work with Regional and local area planning staff on industrial and commercial projects. This could include identifying opportunities for closer collaboration with local municipal partners to ensure timely approval processes.	Team Niagara Niagara Region Planning and Development	Local planning and building departments Niagara Region Economic Development: Manager, Business Development and Expedited Services	Increased investor awareness regarding permit and development timelines.
On-Going	Host a facilitated workshop with businesses and stakeholders to identify and address barriers to industrial and commercial development.	Team Niagara Niagara Region Economic Development: Manager, Business Development and Expedited Services	Niagara Region planning and development Local planning and building departments Commercial and industrial realtors Industrial, commercial, and institutional construction companies	Meeting scheduled with development stakeholders to ensure open communication. Barriers and challenges addressed on an on-going basis.



## Increasing Niagara's Competitiveness: Addressing Unnecessary Regulatory Burdens on Businesses

Niagara Region Economic Development supports the Province's initiative to reduce the regulatory burden on businesses across Ontario. Development in Niagara is regulated by a number of different polices and bodies including, but not limited to, the Green Belt, Niagara Escarpment, Provincial Policy Statement (Provincially Significant Wetlands), Niagara Peninsula Conservation Authority, Niagara Escarpment Commission, and provincial ministries. This complex regulatory environment has the effect of increasing the difficulty of manufacturers and agribusinesses to do business and affecting Niagara's economic development competitiveness. Niagara Region Economic Development will work with local community stakeholders to address concerns regarding the existing regulatory environment and advocate for necessary changes that are aligned with Niagara Region's pro economic development agenda, while ensuring that Niagara's unique environmental landscapes are recognized economic assets and protected.

GOAL: REDUCE REGULATORY BURDEN ON BUSINESSES IN NIAGARA				
Time-Line	Activity	Lead	Partners	Performance Measures
On-Going	Support advocacy initiatives to the federal government for the Niagara region to receive the Economic Trade Corridor designation and infrastructure funding through the National Trade Corridors Fund.	The Offices of the Regional Chair and CAO Local Mayors	Niagara Region Economic Development: Manager Strategic Initiatives; NFTZ Coordinator Niagara Region Planning and Development Niagara Region Public Works Local Members of Parliament Local chambers of commerce	Application submitted and infrastructure funding awarded from the National Trade Corridors Fund and the Economic Trade Corridor designation.
Medium	Support the work of agricultural stakeholders to find solutions to on-going irrigation issues.	Agriculture sector stakeholders	Team Niagara Niagara Region Economic Development: Economic Development Officer Niagara Region Planning and Development APAC	Identify resources to implement the irrigation strategy.
Long	Support regional advocacy initiatives to advance land use planning policies that support agriculture uses and business	Niagara Region Planning and Development	Niagara Region Economic Development: Director of Economic Development Local area municipalities	Advocacy plan developed and implemented.

	development opportunities where appropriate.		Niagara Peninsula Conservation Authority Niagara Escarpment Commission Agriculture sector stakeholders	
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## Workforce: Meeting Current and Future Talent, Professional, and Skill Trades and Labour Needs

Access to a talented, professional, skilled, and educated workforce is increasingly a top concern for businesses and essential to ensure the continued growth of the regional economy. The proximity of Niagara to significant national and global economic drivers makes the region both attractive to new investment as well and new opportunities build, attract, and retain a talented and skilled workforce within Niagara. Correspondingly, the existing job skills gap is not isolated to Niagara, but affecting communities across Canada. This challenge has been raised not only by local businesses looking to recruit new workers, but also companies looking to expand into Niagara. Finding a solution to this issue will require efforts and action from all levels of government, educational stakeholders, and employers themselves. Niagara Region Economic Development will work with local partners to create a solution that address the challenges directly related to Niagara's workforce. Additionally, developments in other jurisdictions have shown the importance of ensuring that the local workforce has the on-going training and professional development not only for today's jobs, but for the jobs of the future.

GOAL: WORKFORCE DEVELOPMENT TO ADDRESS SKILL GAPS THAT ARE AFFECTING TALENT RECRUITMENT				
Time-Line	Activity	Lead	Partner(s)	Performance Measure
Short	Niagara Region Economic Development to partner with the Local Immigration Partnership to promote Niagara as a destination for skilled immigrants.	Niagara Region Economic Development: Manager, Strategic Marketing	Local Immigration Partnership Niagara College Niagara Workforce Planning Board Niagara Folks Arts Festival Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade	Marketing plan will be developed with associated KPIs achieved.
Medium	Develop an educational campaign aimed at parents and students to promote skilled trade occupations in collaboration with other stakeholders.	Niagara Workforce Planning Board Niagara Region Economic Development: Manager, Strategic Marketing	Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade Niagara College Local boards of education Team Niagara Local chambers of commerce	Educational campaign developed and promoted.
Long	Facilitate the development of stakeholder partnerships to meet current and future talent, professional,	Niagara Workforce Planning Board	Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade	Alignment of stakeholder strategies to develop

	skilled trades, and labour needs through collaboration with Brock University and Niagara College.	Niagara Region Economic Development: Manager, Strategic Initiatives	Brock University Niagara College Team Niagara Local Boards of Education Local Chambers of Commerce	a work-ready labour force.
Medium	Support the capacity for increased innovation, science, and technology transfer between post-secondary educational institutions and Niagara-based businesses to increase their competitiveness through adapting new technologies and professional development and training opportunities.	Brock University Niagara College Niagara Industrial Association Niagara Region Economic Development: Manager, Strategic Initiatives	Team Niagara Niagara Workforce Planning Board Local board of education Local chambers of commerce	Alignment of research and academic programming to support regional economic development.

## Advocacy: Improving Transportation Infrastructure Ensuring Niagara Remains Competitive in Global Economy

The Niagara region is strategically located on one of the key transportation corridors into the eastern United States. This provides businesses the opportunity to move goods in and out of the region, which is fundamental to their success. To further leverage our geographic advantage it is critical that transportation infrastructure can support increased trade with the United States. This requires key investments, in partnership with the federal and provincial governments, in regional infrastructure to increase Niagara's competitiveness and attractiveness to new businesses.

GOAL: IMPROVE NIAGARA'S TRANSPORTATION AND INFRASTRUCTURE				
Time-Line	Activity	Lead	Partner(s)	Performance Measure
On-Going	Support advocacy efforts to the provincial government for funding of the East/West Corridor highway.	The Offices of the Regional Chair and CAO Niagara Region Public Works Niagara Economic Development: Manager, Strategic Initiatives	Niagara Region Planning and Development NFTZ Coordinator Local area municipalities City of Hamilton Regional MPs/MPPs	Solid business case established and presented to the provincial government.
Short	Support advocacy efforts for the development of a fully integrated intra-regional transit system with schedules that support employment.	Niagara Region Public Works	Niagara Region Planning and Development Niagara Region Economic Development: Director of Economic Development Local area municipalities Local chambers of commerce Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade Brock University Niagara College Tourism stakeholders Niagara Workforce Planning Board	Regional transit system developed.

Medium	Ensure access to broadband is available to all areas in Niagara, both urban and rural.	SWIFT NRBN The Office of the Regional Chair and CAO Appointed Regional Councillor	Niagara Region Economic Development: Manager, Strategic Initiatives Niagara Region IT Local area municipalities Agriculture sector stakeholders	Progress in achieving regional broadband coverage for Niagara.
Medium	Support the creation of a business case for expanded services in Niagara with Metrolinx.	GO Implementation Team Metrolinx	Niagara Economic Development: Manager, Strategic Initiatives Tourism Stakeholders	Maintain on-going support.
Long	Support expanded economic opportunities at municipally owned airports.	Niagara Region Planning and Development Niagara Region Public Works: Director of Transportation Niagara Region Economic Development: Director; Economic Development Officer	Niagara District Airport Niagara Central Airport Local area municipalities Tourism stakeholders Team Niagara	Maintain on-going support to the Airport Strategic Plan.
Long	Research the feasibility for public-private partnerships to extend natural gas into rural areas of Niagara.	Niagara Region Economic Development: Director, Economic Development; Manager, Research and Analysis	Private-sector natural gas providers Team Niagara Local area municipalities Niagara Region Public Works Niagara Region Planning and Development Federations of Agriculture	Completed feasibility report.
Long	Support advocacy efforts to the provincial government for lower electricity costs to regain the manufacturing sector's competitiveness in southern Ontario.	The Office of the Regional Chair and CAO Niagara Region Economic Development: Director, Economic Development	Team Niagara Local offices of Niagara's Members of Provincial Parliament Local chambers of commerce Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade Large scale users of electricity	Develop a business case research to support advocacy efforts.

Long	Support the Region's advocacy efforts to develop a provincially funded campaign to promote skilled trades and labour and the available careers in manufacturing and other sectors to parents and students to ensure positions are filled.	The Office of the Regional Chair and CAO Niagara Economic Development: Director of Economic Development; Manager Strategic Initiatives	Team Niagara Niagara Industrial Association Ministry of Economic Development, Job Creation and Trade Niagara College Brock University Local chambers of commerce Niagara Workforce Planning Board	Provincial campaign in place with results.
Long	Collaborate with and support key stakeholders to determine the feasibility of a Niagara port facility.	Hamilton Port Authority St. Lawrence Seaway Management Company	Niagara Region Economic Development: Director, Economic Development; Manager, Strategic Initiatives; Manager, Trade & Investment Team Niagara Transport Canada	Feasibility study completed.

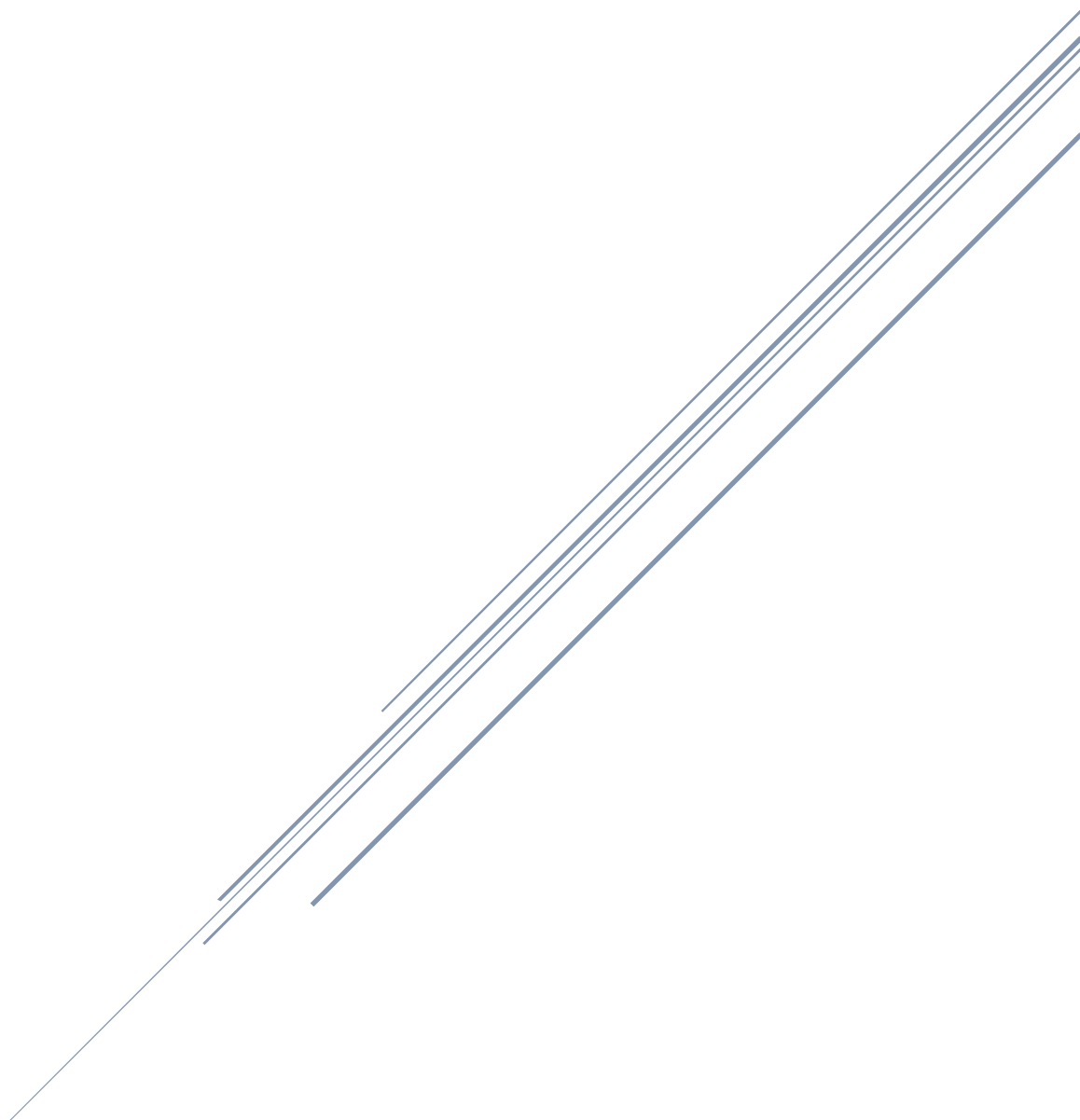
## Appendices

Appendix 1 A Vision of Niagara Region in 2014 Discussion Paper, Global Investment Attraction Group



# 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.<sup>1</sup>

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.<sup>2</sup>

## 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 people<sup>3</sup> extends into Niagara region. It ranks fifth among major US and Canadian metropolitan regions,<sup>4</sup> contains over one-

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<sup>1</sup> Thomas Friedman, “Thank You for Being Late: An Optimist’s Guide to Thriving in the Age of Accelerations,” November 2015.

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

<sup>3</sup> Canadian Census 2016.

<sup>4</sup> 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.<sup>5</sup>

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.<sup>6</sup> 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 –

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

<sup>6</sup> 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](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.<sup>7</sup>

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,<sup>8</sup> connected homes and

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<sup>7</sup> 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.

<sup>8</sup> 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.<sup>9</sup>

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.<sup>10</sup>

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

<sup>9</sup> 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.

<sup>10</sup> 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.<sup>11</sup> 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.<sup>12</sup> 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.<sup>13</sup> 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.<sup>14</sup> 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.<sup>15</sup>

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<sup>11</sup> 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.

<sup>12</sup> 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.

<sup>13</sup> 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.

<sup>14</sup> 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.

<sup>15</sup> 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](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 21<sup>st</sup> 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).<sup>16</sup> 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,<sup>17</sup> 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.<sup>18</sup> 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.

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<sup>16</sup> United Nations, "World Population Aging," 2015

([http://www.un.org/en/development/desa/population/publications/pdf/ageing/WPA2015\\_Report.pdf](http://www.un.org/en/development/desa/population/publications/pdf/ageing/WPA2015_Report.pdf)). Accessed on June 20, 2018.

<sup>17</sup> 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.

<sup>18</sup> 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](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).

<b>Exhibit 1</b> <b>Demographic Projections for Ontario to 2040</b> <b>Ontario Ministry of Finance</b>		
<b>DEMOGRAPHICS</b>	<b>2016</b>	<b>2040</b>
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"> <li>• 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).</li> <li>• 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).</li> </ul>		
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, CO<sub>2</sub> 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"<sup>19</sup> 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

<sup>19</sup> World Economic Forum, "The Global Risks Report 2018 – 13<sup>th</sup> 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.<sup>20</sup> 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.<sup>21</sup> 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.<sup>22</sup> 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.

<b>Exhibit 2</b> <b>Economic and Labour Force Projections for Ontario to 2040</b> <b>Ontario Ministry of Finance</b>		
<b>Metric</b>	<b>Actual (Annual Average) 1982-2015</b>	<b>Projection (Annual Average) 2016-2040</b>
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)<sup>23</sup> flows – though significant in absolute terms – have yet to recover to peaks prior to the 2008-2009 recession.

<sup>20</sup> 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.

<sup>21</sup> Conference Board of Canada.

<sup>22</sup> 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.

<sup>23</sup> "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.<sup>24</sup>

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.<sup>25</sup> 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.<sup>26</sup>

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.<sup>27</sup>

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.<sup>28</sup>

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

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

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

<sup>26</sup> Statistics Canada, The Daily, March 1, 2018 and April 25, 2018.

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

<sup>28</sup> 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.<sup>29</sup> 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;

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<sup>29</sup> 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 21<sup>st</sup> 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;<sup>30</sup> 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.<sup>31</sup>

<sup>30</sup> 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

<sup>31</sup> 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.<sup>32</sup>

**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

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<sup>32</sup> 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.<sup>33</sup>

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.

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<sup>33</sup> 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
<b>Industry 4.0</b>	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"> <li>• 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</li> <li>• GE's new Welland facility is adopting the company's advanced Brilliant Factory Industry 4.0 platform systems</li> <li>• Other global Industry 4.0 leaders include Bosch and Siemens</li> </ul>
<b>Artificial Intelligence (AI)</b>	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. <sup>34</sup> Canada is a recognized leader with Montreal, Toronto and Edmonton having emerged as the Canadian hubs.	<ul style="list-style-type: none"> <li>• AI is a major and rapidly moving area of advances that will have wide-spread impact, including creation of autonomous systems</li> <li>• 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.<sup>35</sup></li> </ul>

<sup>34</sup> 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.

<sup>35</sup> 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
<b>Internet of Things (IoT)</b>	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. <sup>36</sup>	<ul style="list-style-type: none"> <li>• 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.</li> <li>• IoT is at the centre of smart city initiatives, connecting and engaging with tourists, and Industry 4.0.</li> </ul>
<b>Broadband Optical Fibre</b>	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. <sup>37</sup>	<ul style="list-style-type: none"> <li>• To apply the latest technology and utilize advanced software systems, high-speed broadband is essential to businesses and agricultural enterprises</li> <li>• Providing tourists with wireless access to online information and social media tools, requires broadband and WiFi access</li> </ul>
<b>5G Networks</b>	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"> <li>• 5G network access will become a basic requirement for autonomous vehicles and for many IoT networks, all important to Niagara</li> </ul>

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

<sup>37</sup> 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
<b>Cyber Security</b>	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. <sup>38</sup>	<ul style="list-style-type: none"> <li>• 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.</li> </ul>
<b>Precision Agriculture</b>	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. <sup>39</sup>	<ul style="list-style-type: none"> <li>• 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.</li> </ul>
<b>Mobility, including Autonomous Vehicles</b>	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. <sup>40</sup>	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Technology holds out the promise of increasing the vehicle capacity on highways, potentially offering options other than just constructing more high capacity highways.</li> </ul>

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

<sup>39</sup> 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.

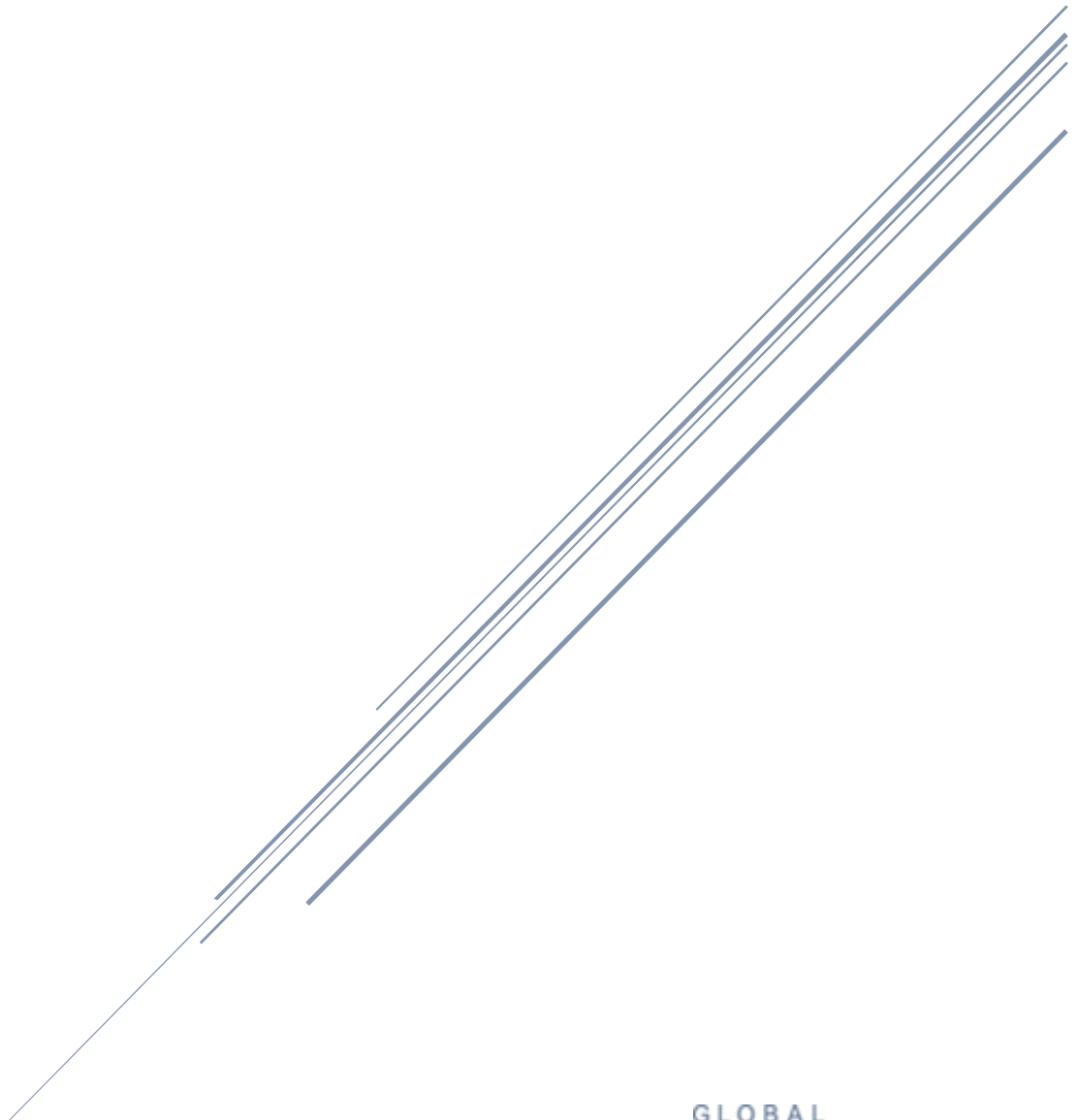
<sup>40</sup> Center for Automotive Research, Ann Arbor, Michigan, "Technology Roadmap Analysis – Current Year to Beyond 2030," February 28, 2017 (Prepared for Innovation, Science and Economic Development Canada)

Exhibit 3 (Continued)		
Prominent Emerging Technology Platforms and Their Potential Impact		
	Outlook	Considerations for Niagara Region
<b>Augmented and Virtual Reality</b>	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"> <li>• Brock's Cool Climate Oenology &amp; 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.</li> <li>• Augmented reality will be a valuable tool specific skills and situational training.</li> <li>• Augmented and Virtual Reality can enhance tourists' experiences though storytelling and by providing views and access to locations and situations not otherwise readily available</li> </ul>
<b>Blockchain</b>	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"> <li>• Blockchain is being widely applied to transportation and supply chains and associated contracts and financial transactions, an apparent natural fit for Niagara</li> </ul>

Appendix 2 Aggregated Stakeholder Consultation Report, Global Investment  
Attraction Group

# Aggregated Stakeholder Consultation Report

January 31, 2019



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## Introduction

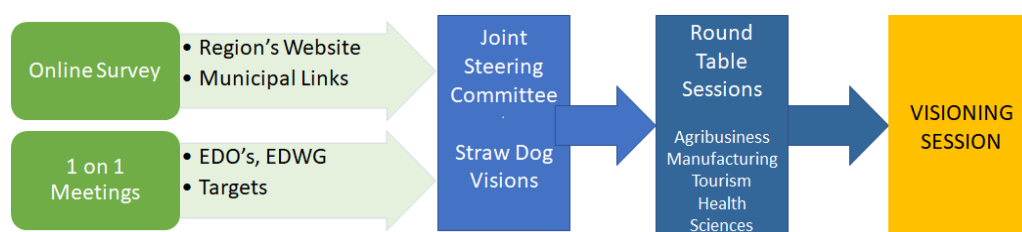
The economic development process influences the economic well-being of communities and regions, including job and wealth creation and the general quality of life. Due to the number of Stakeholders engagement, collaboration and partnerships are an important part of the undertaking.

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"<sup>1</sup> 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

<sup>1</sup> 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>		
<b>Name</b>	<b>Sector Represented</b>	<b>Company/Organization</b>
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>		
<b>Name</b>	<b>Title</b>	<b>Organization</b>
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

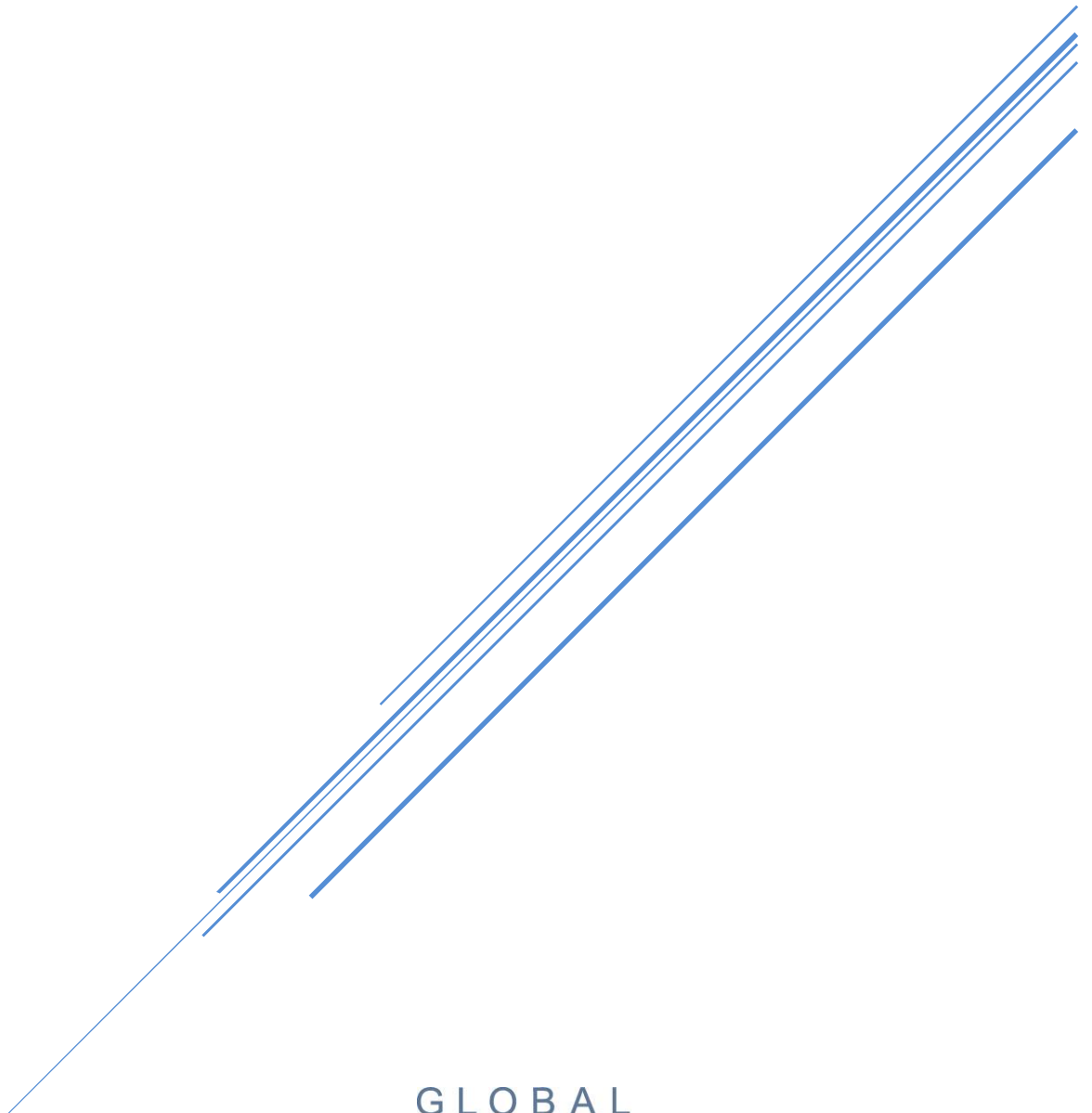
5. What does 2041 look like?
  - a. Technological change
  - b. Political change
  - c. Workplace change
  - d. What drives prosperity
  - e. Sector opportunities
  - f. Global economy
6. What should the key takeaways / actions be from today's session?

Appendix 3 Economic Analysis and Forecasting Draft Discussion Paper, Global  
Investment Attraction Group

# 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 or 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 share<sup>1</sup> is a regional analysis method that is used to estimate how much of regional job growth can be

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<sup>1</sup> For further information on shift share analysis, please see [http://www.economicmodeling.com/wp-content/uploads/2007/10/emsi\\_understandingshiftshare.pdf](http://www.economicmodeling.com/wp-content/uploads/2007/10/emsi_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%

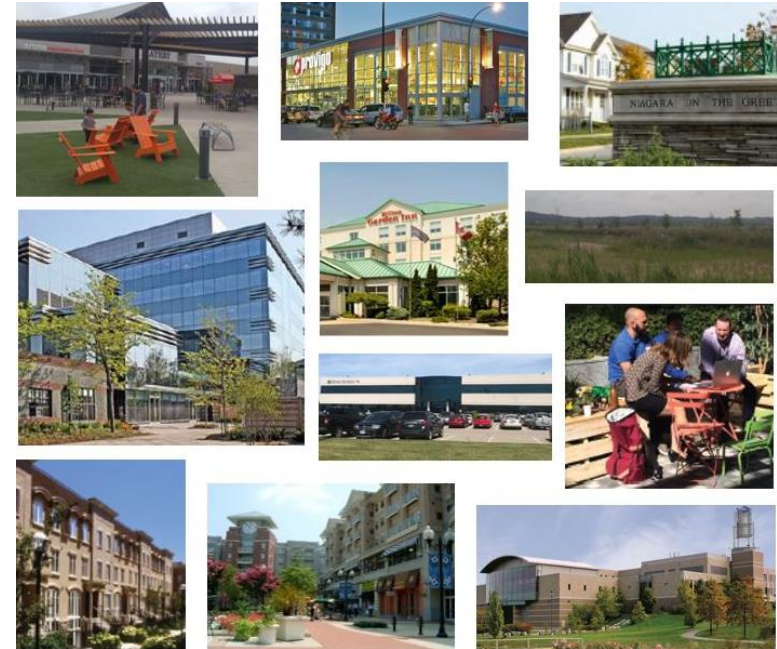
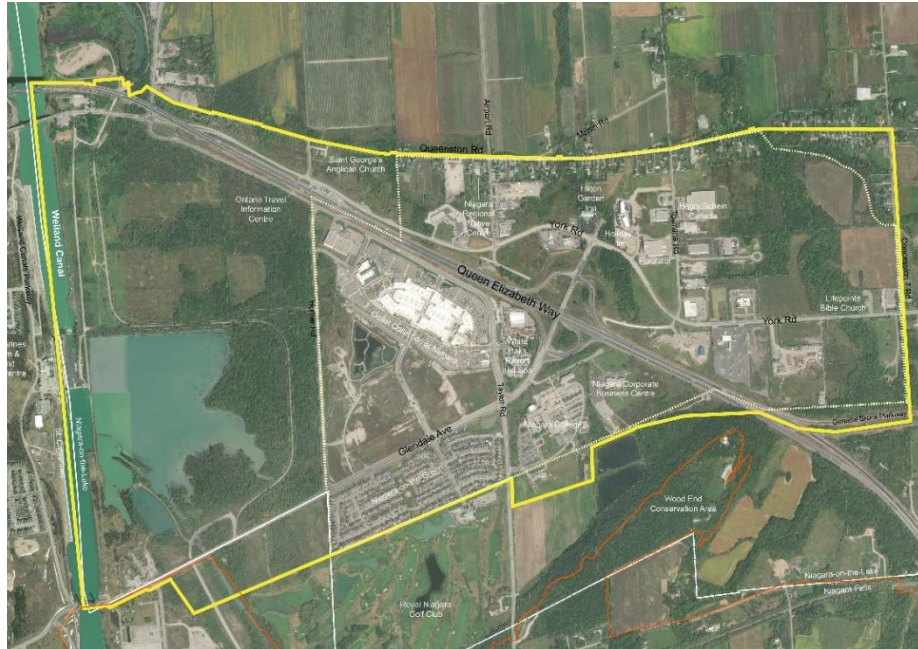
Note: establishment estimates counts of less than 5 are suppressed for confidentiality purposes and shown as '-'

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%.



# Glendale Niagara District Plan Study - Phase 2



## Study Update Presentation to the Niagara Region Planning and Economic Development Committee

March 20, 2019

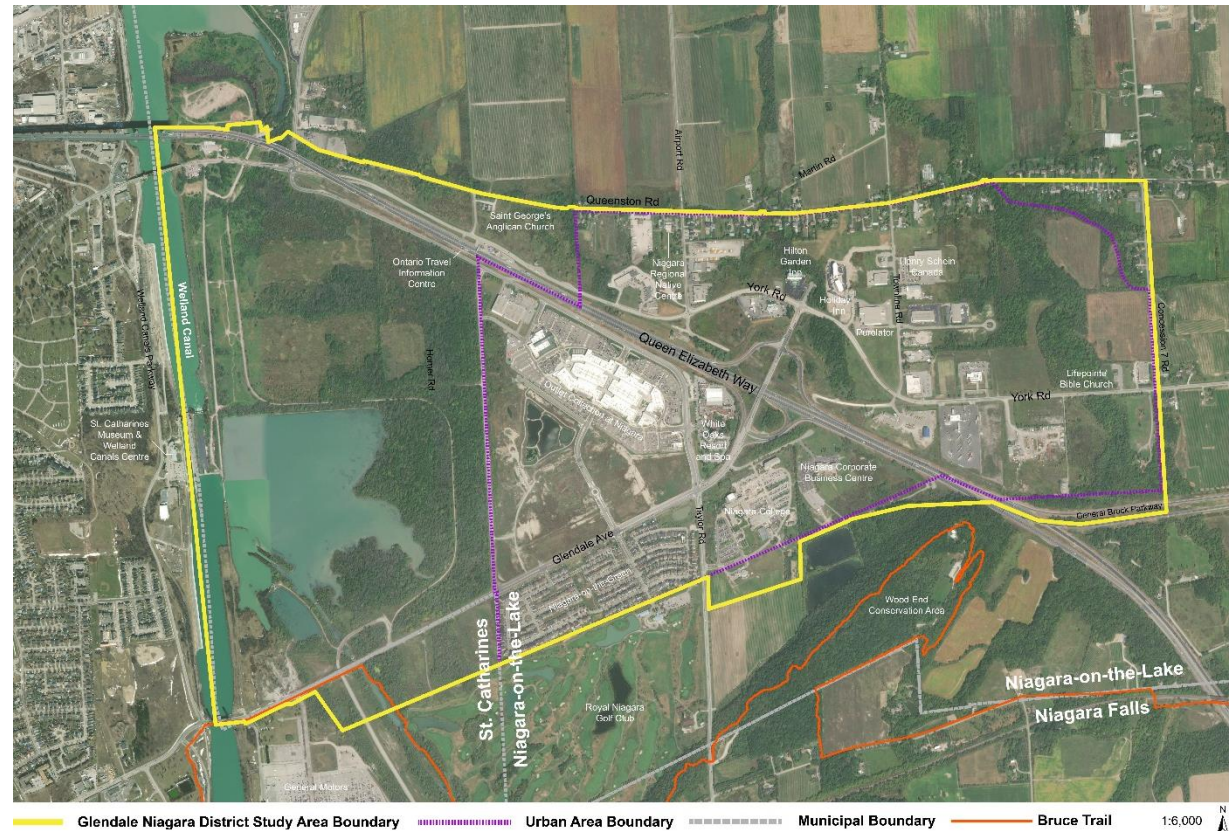
# Intent of Presentation

- **Provide an overview of:**
  - Why one is being prepared for Glendale
  - The two-phase District Plan Study approach
- **Provide an update on the status of Phase 2 of the Study:**
  - Work program
  - Next steps
  - Opportunities for stakeholders and public input
- **Answer questions and obtain feedback**



# Why a District Plan for Glendale Niagara?

- Over 400 hectares already designated for urban growth
- Opportunity to transform the area into a compact, complete and iconic community
- Coordinate the interests of multiple jurisdictions
- Implement the Growth Plan



# Glendale Niagara District Plan Study

In 2018 Niagara Region initiated a two-phase District Plan Study:

## Phase 1 - Vision Exercise and Concept Plan

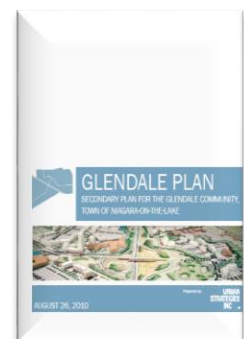
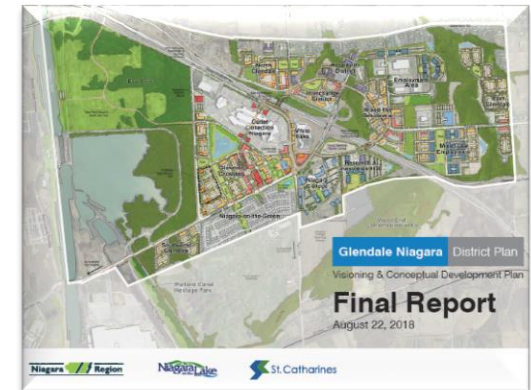
- Led by The Planning Partnership
- Completed in August 2018
- Endorsed by Regional Council in October 2018

## Phase 2 - District Plan and Component Studies

- Commenced in November 2018
- Being led by IBI Group
- Anticipated to be complete by July 2019

## Implementation - July 2019 onward

- Regional Official Plan Amendment (ROPA)
- Local municipal policy updates and initiatives





# Phase 1 – Vision



## Vision Statement

**Glendale @ Niagara** will be a vibrant community for people of all ages, lifestyles, and abilities - a place to live, work, play, learn and grow.

Its urban districts, with a mix of uses, will protect, integrate and celebrate the natural and rural surroundings reflecting the distinct character of the area.

**Glendale @ Niagara** will be framed by a new park on the Welland Canal, the creek valleys, the Niagara Escarpment and agricultural lands.

**Glendale @ Niagara** will put mobility first with a robust transit system, cycling trails and pedestrian routes seamlessly connecting areas north and south of the QEW.



## Phase 2 – Objective

- To refine the Phase 1 Vision in more detail and to guide future Secondary Planning at the local municipal level
- Provide recommendations to support and plan for development and infrastructure investment

## Phase 2 – Ongoing Work Program

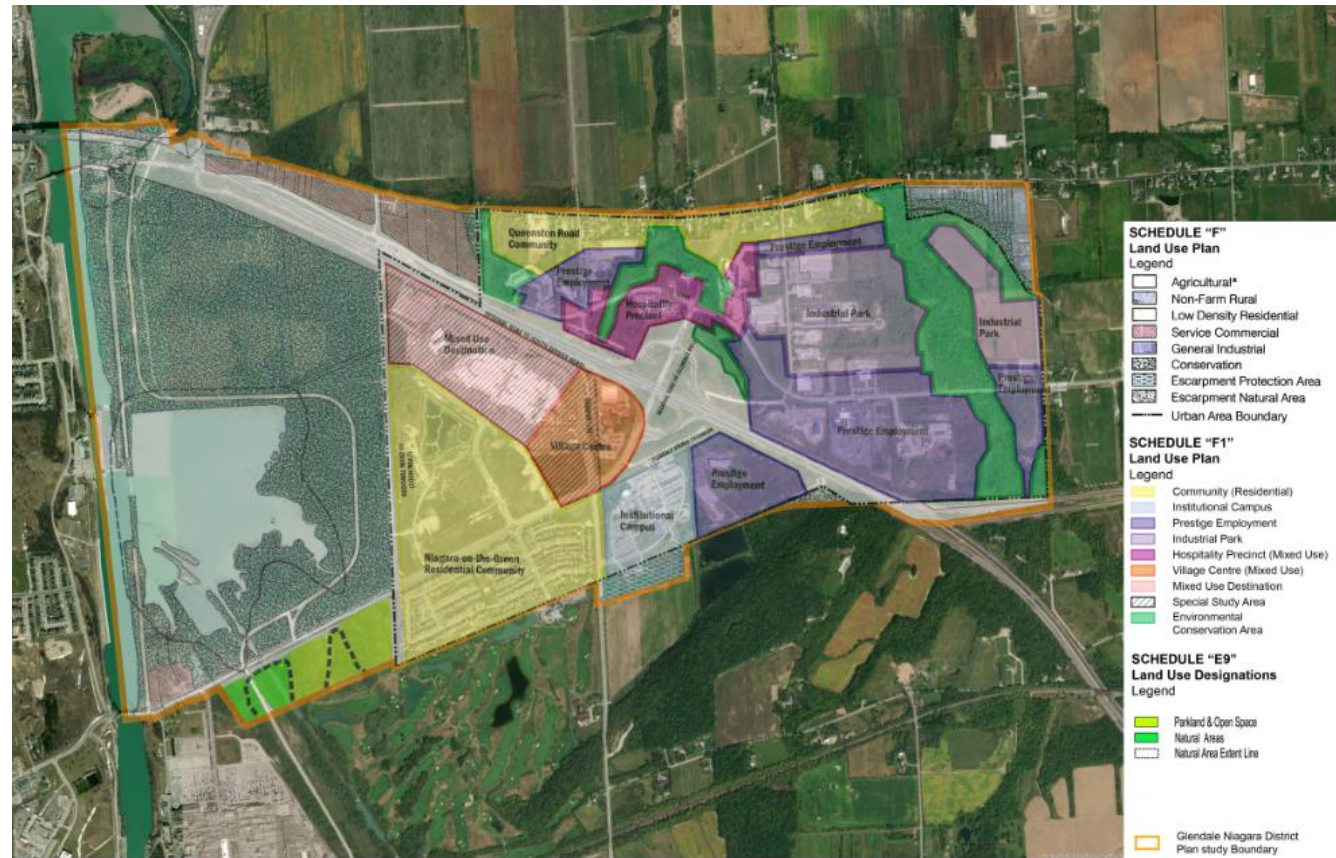
- ✓ Background and Contextual Review
- ✓ Components of technical analysis:
  - Urban Design - arrangement, form and function of urban spaces
  - Commercial Land Needs - potential market opportunities
  - Transportation - infrastructure needs and opportunities for improved mobility
- ✓ Draft Land Use Plans
- ✓ Preliminary Draft Demonstration Plans

**Draft  
Options  
Analysis**



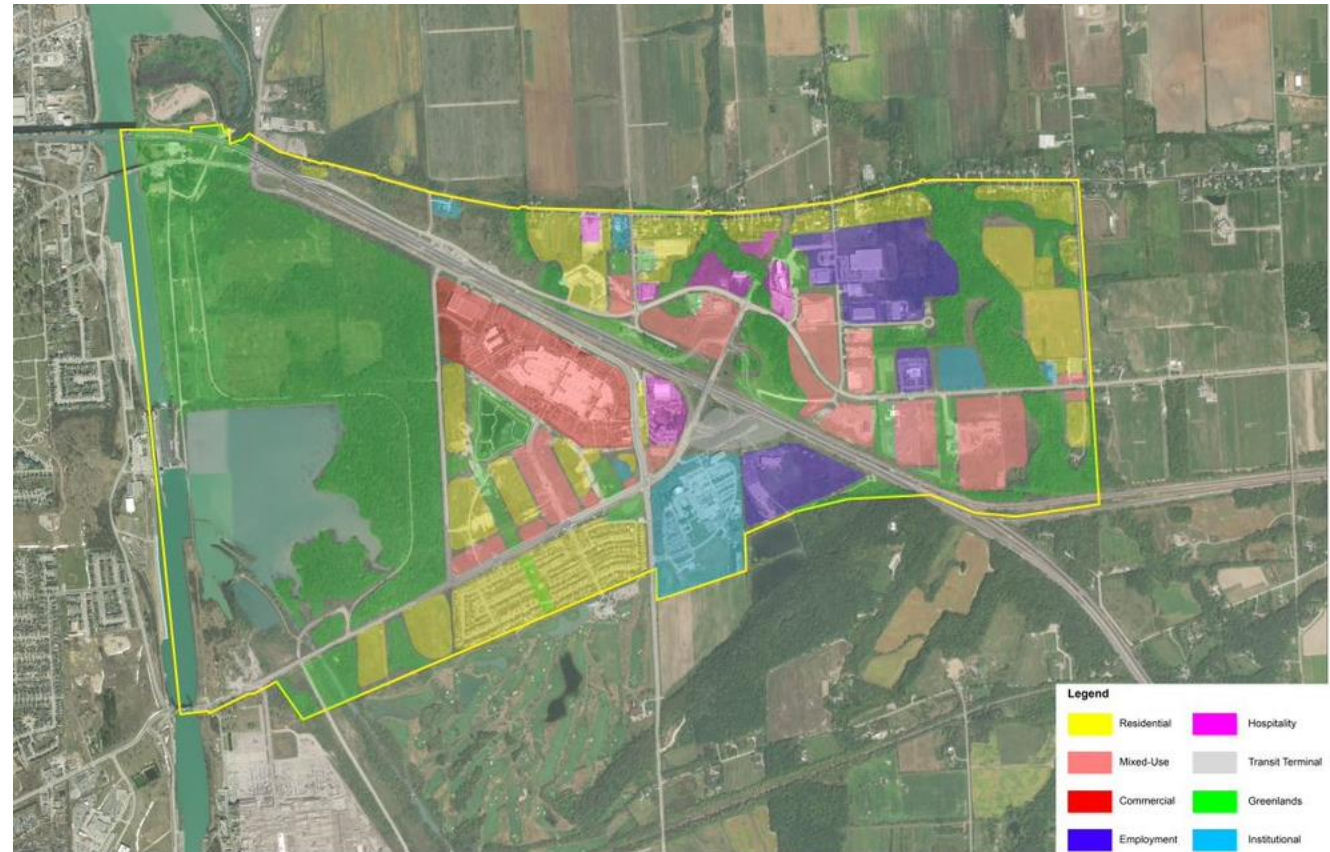
# Land Use – Existing Land Use Plan

- More traditional, suburban approach to land use planning:
  - Discrete, separate land uses
  - Large amounts of land for industrial
  - Lower density



# Land Use – Phase 1 Vision

- Plan for a complete community
- More integrated mix of land uses
- Defined nodes
- Regional economic driver
- Positive urban experience
- High quality urban design



## Land Use – Phase 2 Draft Option Approach

- Two draft land use concepts are being refined based on:
  - Findings of technical findings (i.e. transportation, urban design and commercial market)
  - Active development plans/proposals
  - Additional stakeholder consultation
  - Policy updates
- The unique opportunities of each concept are being evaluated and the preferred land use concept will be presented



# Building Heights

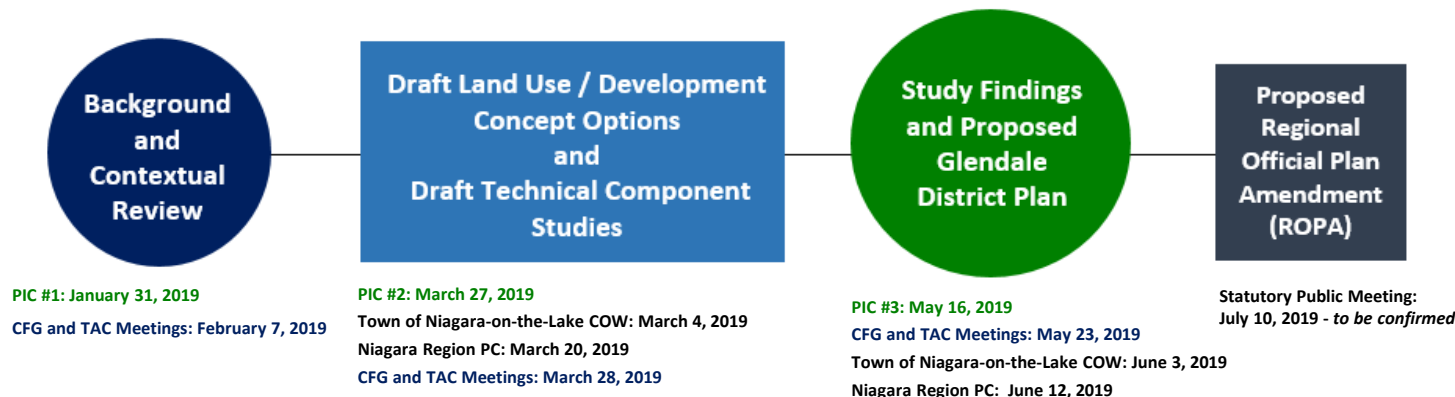
Appropriate building heights will be determined considering:

- Existing height permissions
- Federal height restrictions associated with the Niagara District Airport
- Protection of views/vistas
- Providing appropriate transitions and interface
- Opportunities for gateway or landmark features



# Opportunities for Stakeholder & Public Input

- 3 Public Information Centres (PICs)
- 3 Community Focus Group (CFG)
- 4 Technical Advisory Committee (TAC)
- One-on-One Stakeholder Meetings (e.g. landowners, developers, Niagara College, Niagara Regional Native Centre)
- Regional Website, Facebook and Twitter
- Interactive Web-based Engagement (Arch GIS Crowdsource)
- Committee and Council Meetings



## Phase 2 – Next Steps

- Draft and Final Component Studies
- Preferred Land Use Concept and Demonstration Plan
- District Plan
  - Recommended policies
  - Guidelines
  - Implementation strategies
- Regional Official Plan Amendment (ROPA)

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**Subject:** Glendale Niagara District Plan – Phase 2 Update

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, March 20, 2019

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## **Recommendations**

That Report PDS 12-2019 **BE RECEIVED** for information.

## **Key Facts**

- The purpose of this report is to provide an update to Committee on background information on Niagara's District Plan Program in general, for the benefit of new Council members, and an update on the status of the Glendale Niagara District Plan.
- A District Plan is a pro-active development strategy for a targeted area of Niagara, intended to support the Region's focus on growth and economic prosperity. It sets out a high-level framework for the land-use planning, design and development of complete communities in areas that currently are, or have the potential to become, iconic in nature.
- Phase 1 of the Glendale Niagara District Plan took place between May and September 2018, and involved a comprehensive visioning exercise intended to develop an exciting urban vision for the area.
- Phase 2 of the Glendale Niagara District Plan commenced in October 2018 and is being led by IBI Group. In Phase 2, the vision set out in Phase 1 is being further assessed, and additional technical background information and component studies are being prepared, including a transportation plan, a public realm and urban design study, and a commercial market review.
- The Glendale Niagara District Plan involves a wide variety of engagement opportunities including input from a Technical Advisory Committee, a Community Focus Group and the general public.

## **Financial Considerations**

The Glendale Niagara District Plan was funded through the 2017 & 2018 Council approved operating budget. The remaining budget dollars have been requested to be encumbered to 2019 to see Phase 2 to completion.

## **Analysis**

### Background

The Glendale Niagara District Plan is being prepared by Niagara Region in cooperation with the Town of Niagara-on-the-Lake and the City of St. Catharines. The District Plan is following a two-phase approach:

1. Visioning Exercise and Conceptual Plan (May 2018-September 2018)
2. Technical Review, Component Studies and preparation of the District Plan (October 2018- June 2019)

Following a competitive bid process for the retention of consulting services to assist staff in the preparation of the District Plan, the project was awarded in May 2018 as follows:

Phase 1 – The Planning Partnership + Jamie Springer, HR&A Advisors

Phase 2 – IBI Group

### District Plans for Niagara

A District Plan is a pro-active development strategy for a targeted area of Niagara, intended to support the Region's focus on growth and economic prosperity. It sets out a high-level framework for the land-use planning, design and development of complete communities in areas that currently are, or have the potential to become, iconic in nature. District Plans are developed in collaboration with a variety of stakeholders, including the local municipalities in which they are situated, other governmental authorities, affected landowners, local businesses, organizations and residents. Once complete, key directions, policies and strategies of the District Plan are incorporated into the Niagara Region Official Plan through a Regional Official Plan Amendment (ROPA), and into the local Official Plans through a subsequent Secondary Plan exercise undertaken by the local area municipality.

## Glendale Niagara District Plan

The Glendale Niagara District Plan is intended to create a vision for the future of the 700 ha area surrounding the Glendale Avenue/QEW interchange in the Town of Niagara-on-the-Lake (a small portion of the study area also extends into the adjacent City of St. Catharines). Approximately 400 hectares of this area is considered to be a strategic growth centre for Niagara and is expected to provide for thousands of new residents and jobs over the course of the next 20+ years. A location map has been included as Appendix 1.

### Phase 1

Phase 1 of the Glendale Niagara District Plan took place between May and September 2018, and involved a comprehensive visioning exercise intended to develop an exciting urban vision for the area. The visioning exercise included a wide array of consultation tools, including two workshops held in June (2 days) and August (1 day) 2018, involving nationally and internationally recognized specialists, group activities, and a bus tour of the district. A representative group of residents, agencies, interest groups, business and government leaders participated in the visioning exercise, in order to ensure that the District Plan reflected the collective hopes and desires for the future condition of Glendale Niagara as it grows and expands. In total, over 200 persons participated in these engagement exercises.

Through consultation with technical agencies, stakeholders and the public, background work was analyzed to develop a guideline for growth and the future development of the District. Through this phase of the Study, a high-level conceptual demonstration plan was prepared based on the results of the visioning exercise.

### Consultant's Final Report for Phase 1

The consultant provided a final report on Phase 1 of the Glendale Niagara District Plan study (link provided under other pertinent reports). It provides a synopsis of events and a consolidation of themes that developed through the two workshop sessions, as well as a final vision and conceptual development plan for the district which will be further refined in Phase 2 of this project.

### Phase 2

Phase 2 of the District Plan commenced in October 2018 and is being led by IBI Group. In Phase 2, the vision set out in Phase 1 is being further assessed, and additional technical background information and component studies are being prepared, including a transportation plan, a public realm and urban design study, and a commercial market review. Development strategies, key frameworks and land use policies will be developed in Phase 2 in order to assist in implementing the vision for the district through

a Regional Official Plan Amendment and future Secondary Plans at the local municipal level.

To date, the consultants have developed a draft Background Report which will be made available to Council and the public once finalized. In addition, two Technical Advisory Committee meetings, one Community Focus Group meeting and one Public Information Centre have been held in order to provide the public and our stakeholders with project information and to receive their input into the development of the District Plan. An update presentation was also provided to Niagara-on-the-Lake Town Council on March 4, 2019.

Future work in Phase 2 includes the following (in some cases, dates are approximate and subject to change):

2 Development Plans and 2 Demonstration Plans (draft)	Mid-March 2019
<b>Update to NOTL Committee-of-the-Whole</b>	Mar 4 2019
<b>Update to Regional Planning Committee</b>	Mar 20 2019
<b>Public Information Centre #2 (Options)</b>	Mar 27 2019
<b>Technical Advisory Committee Meeting #5 and Community Focus Group Meeting #2</b>	Mar 28 2019
Preferred Development Plan and Demonstration Plan (draft)	Apr 12 2019
Component Studies (final)	Apr 26 2019
Policy Development and Key Strategies (draft)	Apr 26 2019
Implementation Plan (draft)	Apr 26 2019
<b>PIC #3 (Present Draft Preferred Plan)</b>	May 16 2018
ROPA (draft)	May 17 2019
<b>Technical Advisory Committee Meeting #6 and Community Focus Group Meeting #3 for endorsement</b>	May 23 2019
Final Development Plan, Demonstration Plan, ROPA	May 24 2019
<b>Present District Plan to NOTL Committee-of-the-Whole for endorsement</b>	June 3 2019
<b>Present District Plan to Regional Planning Committee for endorsement</b>	June 12 2019
<b>STATUTORY PUBLIC MEETING FOR ROPA</b>	July 10 2019

#### Technical Advisory Committee

In order to assist staff and the consultants in understanding the impact of this project on agency stakeholders, a Technical Advisory Committee (TAC) was struck at the start of the project in May 2018. Members of the TAC include representatives of various departments at Niagara Region and the Town of Niagara-on-the-Lake, including Niagara Region Public Health and Niagara Regional Housing; as well as other governmental authorities and utilities. The Niagara Escarpment Commission, Niagara Peninsula Conservation Authority, Niagara College, Ministry of Transportation, Ontario

Travel, Niagara EMS, St. Lawrence Seaway Authority, and others were involved in the process throughout Phase 1 and provided specialized input into the development of a vision for Glendale Niagara. The TAC met on two occasions over the course of the Phase 1 study and will meet an additional four (4) times over the course of Phase 2. To ensure that there is broad stakeholder support, it is intended that the Technical Advisory Committee reach consensus on endorsement of the final District Plan prior to staff bringing it forward to Town and Regional Council for endorsement.

#### Community Focus Group

For Phase 2, a Community Focus Group (CFG) was formed in order to provide opportunity for additional input on the component studies, land use plans and demonstration plans from the perspective of local residents, landowners and business operators. Approximately 18 members of the public have agreed to participate in the Community Focus Group, representing a wide range of community interests. The CFG has met on one occasion thus far (February 7, 2019) and will meet again on two additional occasions prior to the conclusion of the study. To ensure that there is broad community support, it is intended that the CFG reach consensus on endorsement of the final District Plan prior to staff bringing it forward to Town and Regional Council for endorsement.

#### Current Status of Phase 2 and Next Steps

The consultants are currently developing two draft alternative land-use plans and demonstration plans for discussion purposes, which will be available to the public and Councils in mid to late March. These alternatives will be presented to the public on Wednesday, March 27, 2019 at the second Public Information Centre; and will be provided to the Technical Advisory Committee and the Community Focus Group on March 28, 2019. It is intended that these draft alternatives be discussed and evaluated in detail by all stakeholders prior to any further recommendations being brought forward to Committee. The final recommended plan may include desired elements from each of the two alternatives, in the form of a “hybrid” option.

During May 2019 the consultants will finalize their component studies that will inform the final land-use plans, including a transportation study, an urban design/public realm study and a commercial land needs study. A final District Plan will then be presented to the Technical Advisory Committee, the Community Focus Group and the public via the third Public Information Centre in late May. In June 2019, staff plans to present the final District Plan to both Niagara-on-the-Lake and Regional Councils for endorsement, which will be then followed by a Regional Official Plan Amendment.

Once the process is complete at the Regional level, it will be up to Niagara-on-the-Lake to amend the existing Glendale Secondary Plan to reflect the revisions and recommendations of the District Plan.



## Conclusion

The Glendale Niagara District Plan study is a collaborative process involving input from a Technical Advisory Committee, a Community Focus Group and the general public. Both phases of the study involve community outreach tools such as design workshops, public information centres and social media/online engagement platforms. Regional Planning Committee will be updated at key milestones through the project and invited to participate in public events.

## **Alternatives Reviewed**

This report has been provided for information. No other alternatives have been reviewed.

## **Relationship to Council Strategic Priorities**

This report supports Council's strategic areas for fostering innovation, investment, and entrepreneurship; positioning Niagara globally; and, doing business differently.

## **Other Pertinent Reports**

Previously, staff submitted the following memorandums and reports related to this project:

[PDS-C 21-2018](#) to advise the Committee of the commencement of the Glendale Niagara District Plan; and,

[PDS-C 31-2018](#) to provide an update on the District Plan study after the first workshop sessions.

[PDS-34-2018](#) to provide information on the conclusion of Phase 1 of the Study, and to request endorsement of the Phase 1 vision and authorization to proceed to Phase 2.

Glendale Niagara District Plan information and reports can be found here:

<https://www.niagararegion.ca/projects/district-plans/glendale.aspx>

The Phase 1 final report can be viewed here:

<https://www.niagararegion.ca/projects/district-plans/pdf/glendale-district-plan-phase-one-final-report.pdf>

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**Prepared by:**

Kirsten McCauley, MCIP, RPP  
Senior Planner, Secondary Plans  
Planning and Development Services

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**Recommended by:**

Rino Mostacci, MCIP, RPP  
Commissioner  
Planning and Development Services

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**Submitted by:**

Ron Tripp, P.Eng.  
Acting Chief Administrative Officer

*This report was prepared in consultation with Tom Villella, Consulting Project Manager, and reviewed by Doug Giles, Director of Community and Long Range Planning.*

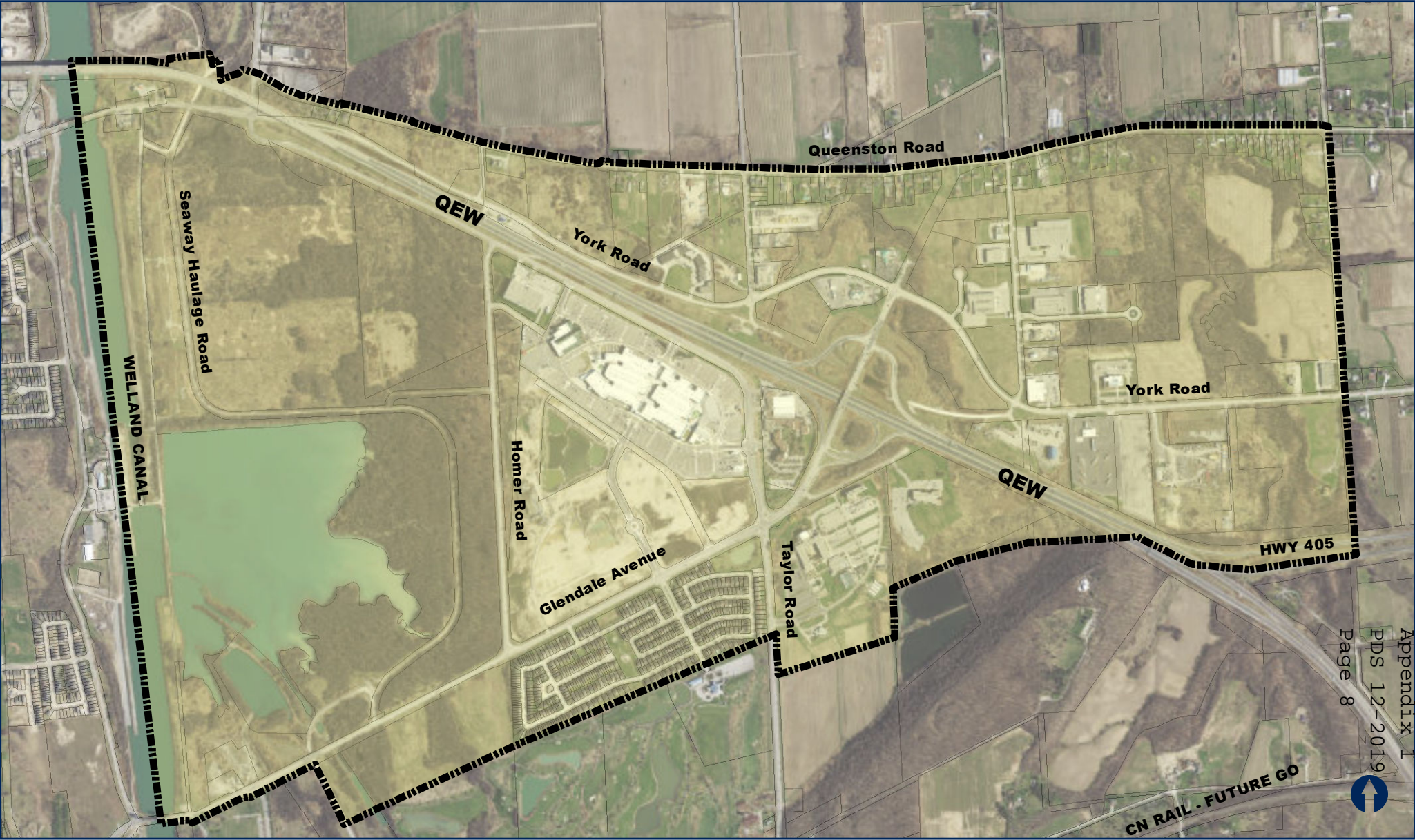
**Appendices**

Appendix 1


Study Area Map

Page 8


# **GLENDALE NIAGARA DISTRICT PLAN** **STUDY AREA**



Legend



Main Study Area Boundary



Study Area

# 2018 Niagara Region Employment Inventory Results

Planning and Development Committee  
March 20, 2019

# Employment Inventory Overview

- Annual data collection exercise (May – September)
- Team of six (6) post secondary students conduct door-to-door surveys
- Targets all signed businesses in Niagara, in urban and rural areas



# Key Differences - Employment Inventory and Census

Employment Inventory	Statistics Canada Census
Collected Annually (May- Sept)	Collected Every 5 Years
Address Level Data	Aggregated Data (large geographies)
Micro Level Analysis	Macro Level Analysis

# inventory

in·ven·to·ry | invən,tôre 

***an itemized list of current assets***

education levels

foreign investment

industry

international trade

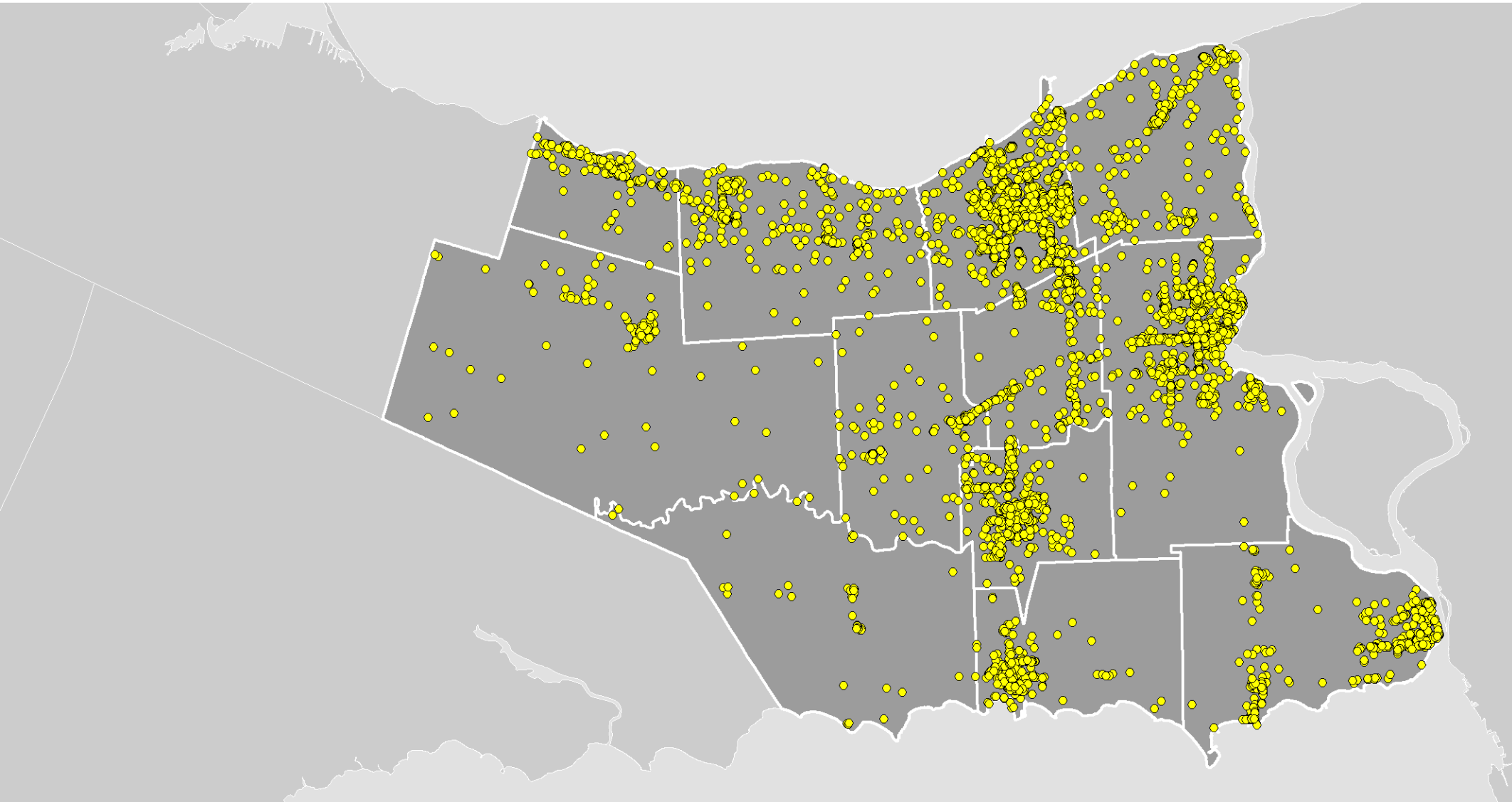
location information

number of employees

sector

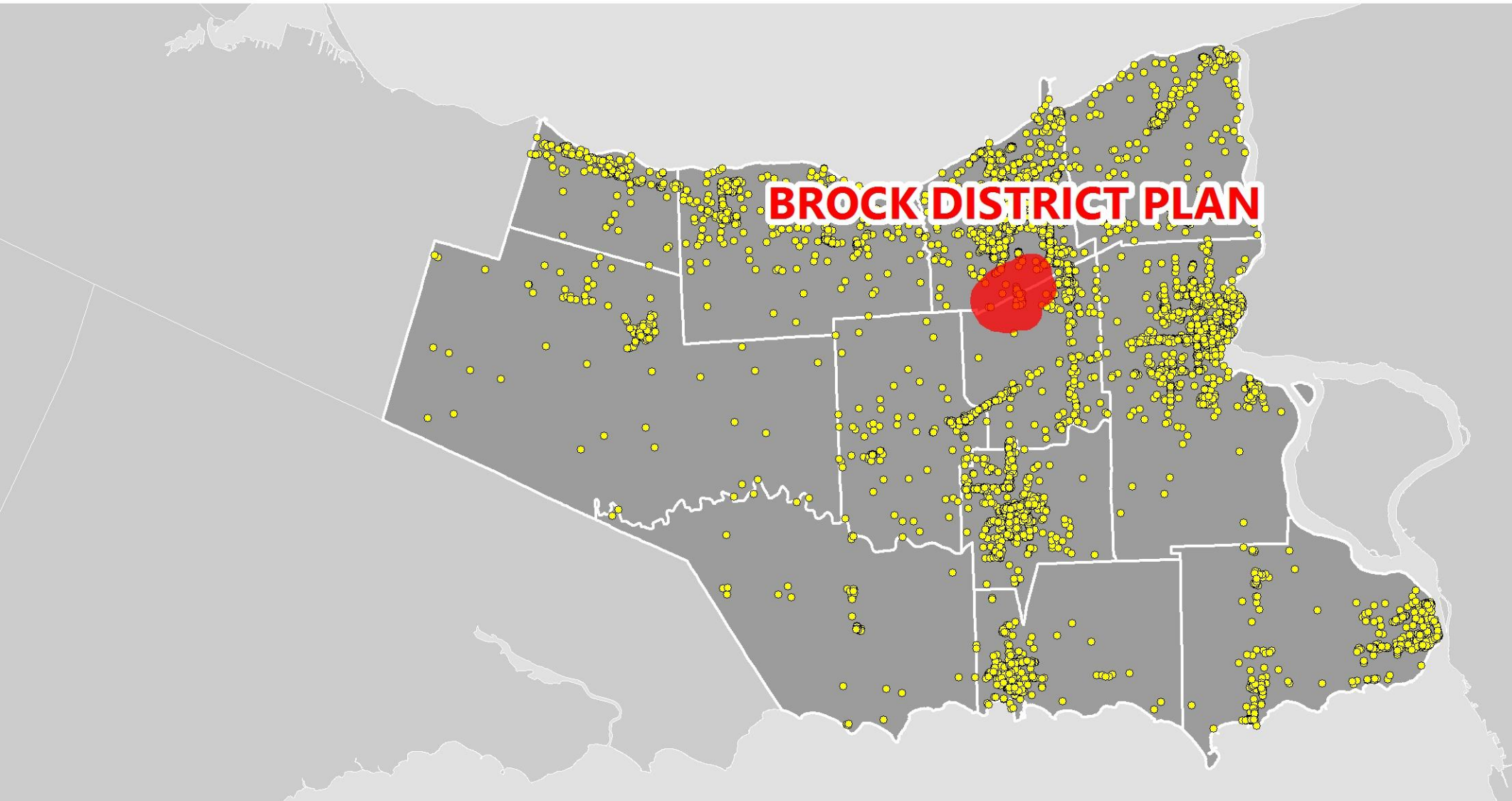
tourism

# GIS Mapping – Captures Over 11,000 Businesses





# GIS Mapping – Custom Geography





# GIS Mapping – Custom Geography

## Niagara Region - Headquarters

*Municipality:* Thorold  
*Sector:* Public Administration  
*Industry:* Municipal & Regional  
*Street Number:* 1815  
*Street Name:* Sir Isaac Brock Way  
*Total Employees:* 886  
*Survey Status:* Complete  
*Additional Details:* • • •

Niagara Region - Regional Headquarters

McDonald's

Thorold City Hall

ParaMed

Subway

Niagara Region - Environmental Centre

Life Labs (Main Record)

Computan

Norgen Biotek Corp.

Bazaar Marketing

Accenture Canada

CAA Niagara (Main Record) Eagles Nest Christian Academy

Shell Canada

March of Dimes Canada





# NIAGARA EMPLOYMENT INVENTORY



## KEY INDICATORS



Businesses Surveyed

**11,720**

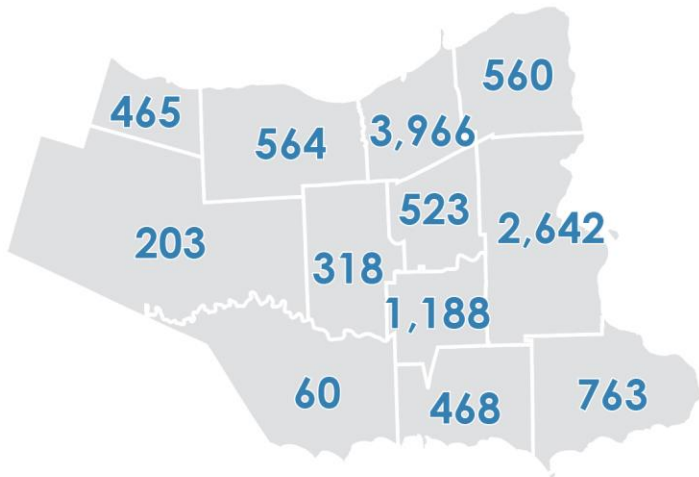
Jobs Captured

**161,300**

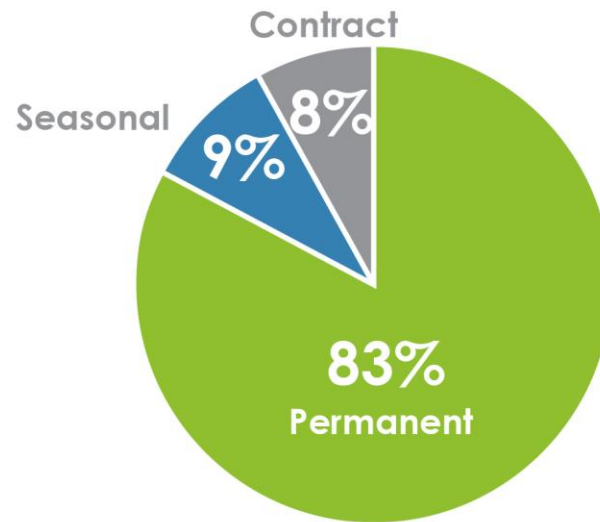
Business Sectors Represented

**20**

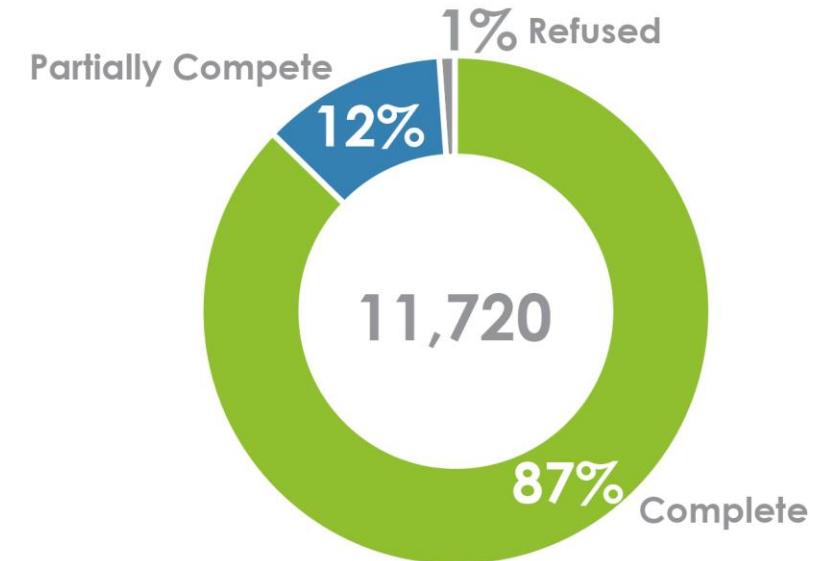
Businesses by Municipality



Type of Employment



2018 Participation Rate

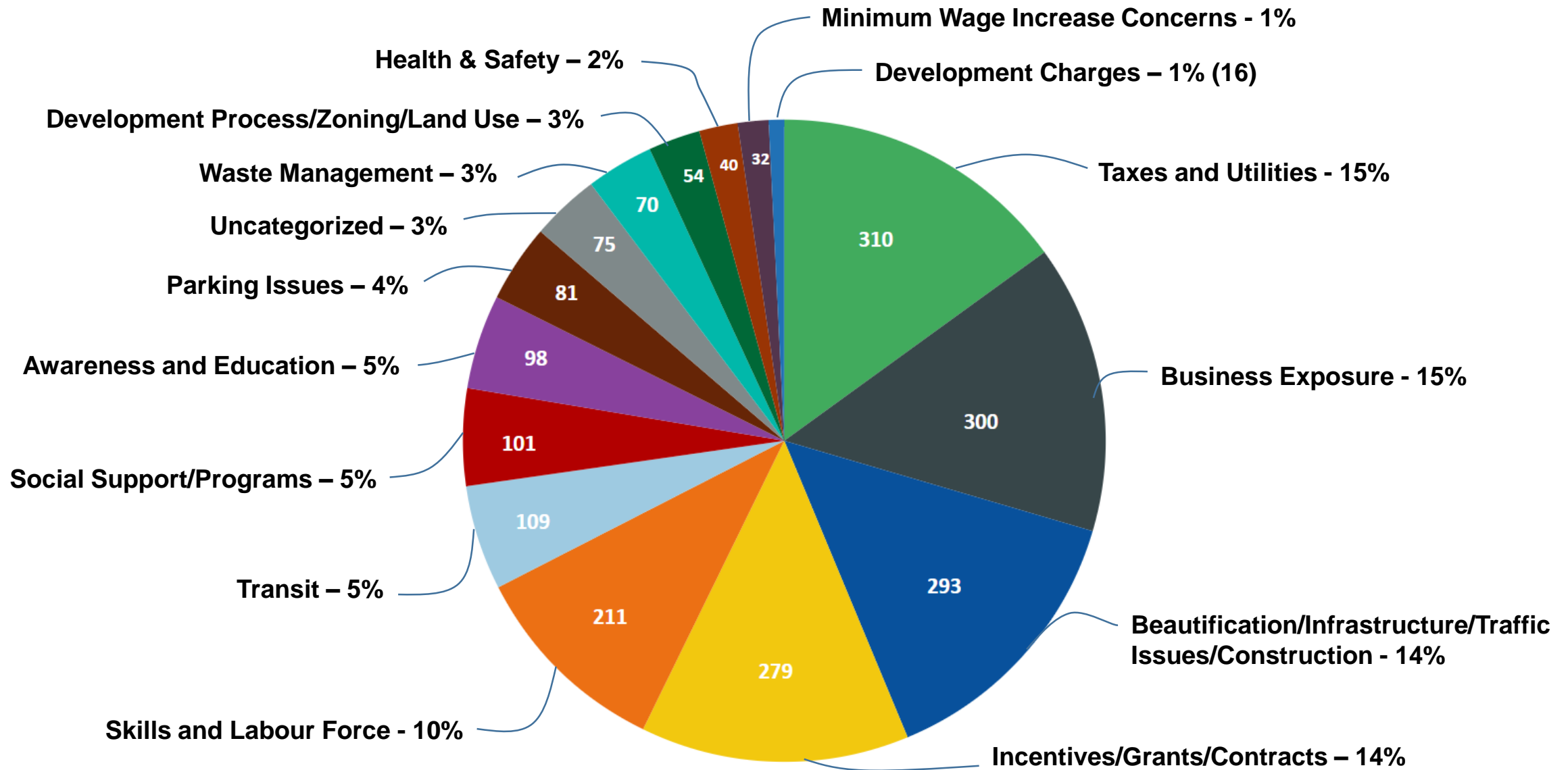


# Engaging the Business Community

**“Is there anything Niagara Region can do to support your business? “**

2069 responses received and classified into themes (15)

# How Can Niagara Region Support Your Business 2018?



# Partnerships and Collaboration



# Open Data

[Log in](#) [Register](#) [Contact](#)


 [Datasets](#) [Organizations](#) [Groups](#) [Showcases](#) [About](#)




## Niagara Open Data

Working together to put data in the hands of the people.


### Featured Apps




**Niagara Sports Clubs and Facilities Dashboard**



**Welland's Open Data Recognized Globally**



**Open Data Day 2018 - Let's Collect Data**



**Project Site Selection for Mixed Use Athletic Facility - University Western**

### Most Viewed

#### Urban Areas Boundaries

Urban Areas are settlement areas where development is concentrated and contain a mix of land uses. Urban Areas are designated in official plans and contain minimally provided

### Most Recent

#### City of Welland Public Service Requests 2019

This tabular data set contains service requests received from the public that have been completed by City staff. Not all requests for service received by the City are included



Greenshot  
Exported to: Copy to clipboard  
Greenshot

# Next Steps

- Disseminate data to local municipal partners (Q1)
- Publish to Niagara Region Open Data Portal (Q1)
  - Subset of attributes
- Team deployment (active surveying) – May 13, 2019



# Questions?



# NIAGARA EMPLOYMENT INVENTORY



## KEY INDICATORS



Businesses Surveyed

**11,720**

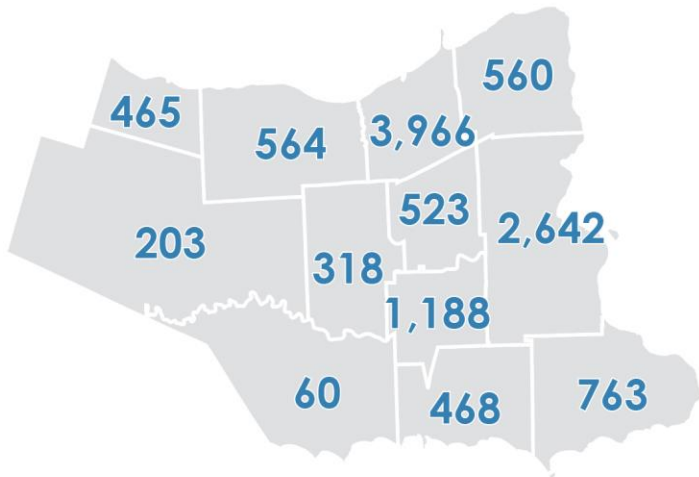
Jobs Captured

**161,300**

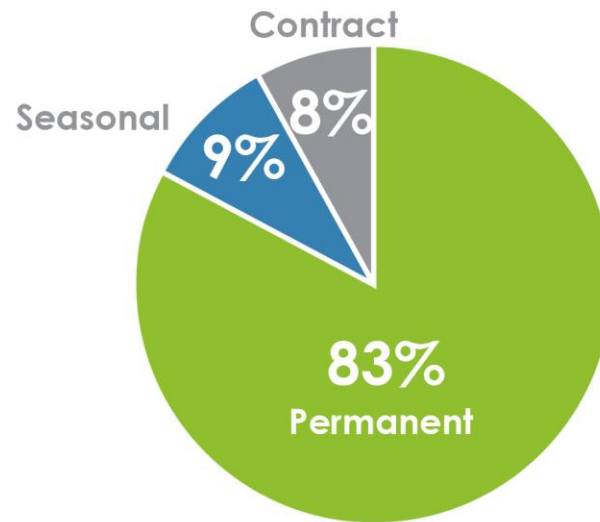
Business Sectors Represented

**20**

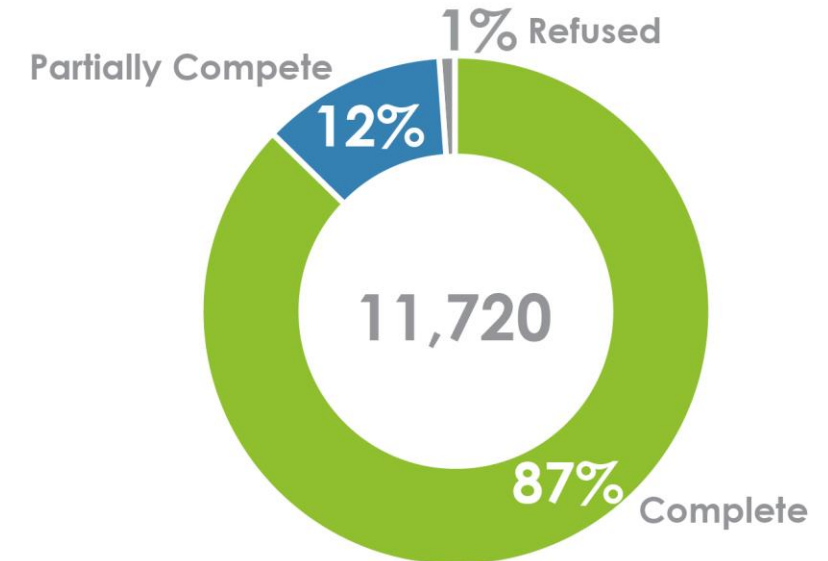
Businesses by Municipality



Type of Employment



2018 Participation Rate



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**Subject:** Niagara Region 2018 Employment Inventory Results Report

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, March 20, 2019

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## Recommendations

1. That Report PDS 6-2019 respecting the 2018 Niagara Region Employment Inventory Results report **BE RECEIVED** for information; and
2. That a copy Report PDS 6-2019 **BE DISTRIBUTED** to the Local Area Municipalities, Local Economic Development Offices, Niagara Workforce Planning Board and the Niagara Chambers of Commerce.

## Key Facts

- This report highlights the key performance indicators of the data collected during the 2018 Employment Inventory period.
- The Employment Inventory is an annual primary data collection exercise where a small team of post-secondary students attempt to visit every publically accessible (signed) business within Niagara during the summer months.
- In 2018, the Employment Inventory team inventoried over 11,700 businesses throughout the urban and rural areas of Niagara and collected the location of approximately 142,000 jobs.
- This year's data collection resulted in an 87% full participation rate, compared to 68% from 2016 and 76% in 2017. This increase is attributed to ongoing support from local municipal partners and other special interest stakeholders.
- Data captured through the Employment Inventory has become a key asset for:
  - Internal Regional departments
  - Local area municipalities
  - Local Economic Development offices
  - Niagara Workforce Planning Board
  - Local Employment Ontario agencies

- The results are currently assisting in informing Regional service delivery decisions such as:
  - Providing sufficient levels for servicing child care centres
  - Providing up-to-date employer data for the Building Employment Networks Niagara (BENN) application
  - Locating premises for the Environmental Health Legionella Exposure Inventory
  - Assisting with waste management communication outreach
  - Informing Economic Prosperity Dashboard indicators
- In an effort to promote innovation and foster greater transparency and accountability, a subset of the data captured through the 2018 Employment Inventory will be made publically available through the Niagara Region Open Data portal.

### Financial Considerations

The Niagara Employment Inventory was funded through the Council approved 2018 operating budget with contributions from Planning and Development Services, Economic Development, SAEO, and Internal Control and Organizational Performance.

The total cost of the project (rounded to the nearest \$100) was **\$99,900** and is broken down as follows:

Student wages	\$93,600
Mileage disbursement	\$4,400
Cellular fees	\$1,600
Attire and branding	\$300
<b>Total</b>	<b>\$99,900</b>

## Analysis

Niagara Region is among several municipalities in Ontario that collect employment data on an annual basis. The project was initiated in 2016, when the Planning and Development department partnered with Economic Development to embark on a primary data collection exercise to gather information about the types and size of businesses in Niagara.

Each year, the Employment Inventory is conducted by a small team of post-secondary students between the months of May and September. The primary method of data collection is through door-to-door interviews with local business owners, with any additional follow-up engagement conducted through email and telephone communication.

The 2018 Employment Inventory team visited over 11,700 businesses and collected the physical location of 142,000 full and part time jobs. Compared to the 2017 results, this is an increase of almost 500 surveyed businesses and over 11,000 additional jobs identified.

The Employment Inventory is a comprehensive dataset of business information that indicates: number of jobs, business locations, business size, type of business sector, level of foreign investment, and exporting patterns relating to each business. The inventory is a geo-coded, spatial enabled dataset, which facilitates analysis at the street address level.

The questionnaire (Appendix 1), was developed leveraging best practices from our Greater Toronto and Hamilton area counterparts as well as consultation from the following internal and external stakeholders:

- Internal Regional departments
- Local area municipalities
- Local Economic Development offices
- Local Employment Ontario agencies
- Niagara Workforce Planning Board

With assistance from local municipal partners and other special interest stakeholders, the inventory continues to experience a steady growth in the response rate, achieving an 87% full participation rate in 2018.

Each year, the inventory questionnaire features a unique subset of questions that are specifically tailored to gain insight into the local business community. The project team will continue to engage internal and external stakeholders to explore whether to include additional or different questions.

## Results

Table 1 (below) illustrates the proportion of complete and partially complete survey responses over the 3-year survey. This year's data collection resulted in an 87% full participation rate, compared to 68% from 2016 and 76% in 2017. A full participation rate indicates a business that provided responses to all survey questions from beginning to end.

Table 1 – Inventory Response Rate

Year	Complete Survey Response	Partially Complete Survey Response	Refused to Participate
2016	68%	30%	2%
2017	76%	22%	2%
<b>2018</b>	<b>87%</b>	<b>12%</b>	<b>1%</b>

The rise in participation rate can be attributed to increased familiarity with the survey team, a streamlined data entry methodology, and joint communication outreach conducted by our local Chamber of Commerce's and other interest groups. The Employment Inventory continues to see a low refusal rate of just 1%.

A partially completed response still results in successfully capturing the physical location of the business and the associated industry code. Regional staff continue to work with local area municipalities and other partners to bolster the number of completed responses.

Table 2 (below) illustrates the number of businesses inventoried and the number of jobs reported from respondents over the 3-year survey period. It is important to note that the totals do not reflect an overall increase in the number of business and jobs per year. The increase is largely linked to the expanded survey area (which now includes all rural and agricultural areas), as well as the significant improvement in the survey participation rate.

Table 2 – Number of Businesses and Jobs Reported

Year	Businesses Inventoried	Full Time Jobs Reported	Part Time Jobs Reported	Total Jobs Reported
2016	10,743	71,899	38,239	110,138
2017	11,202	91,216	39,848	131,144
<b>2018</b>	<b>11,720</b>	<b>98,706</b>	<b>43,478</b>	<b>142,184</b>

*\* Home-based and mobile businesses were not inventoried.*

Table 3 (below) illustrates the municipal breakdown of the number of businesses and jobs over the 3-year survey period.

**Table 3 – Distribution of Businesses and Jobs by Municipality**

Municipality	Number of Businesses (2016)	Number of Jobs Reported (2016)	Number of Businesses (2017)	Number of Jobs Reported (2017)	Number of Businesses (2018)	Number of Jobs Reported (2018)	Number of Unique Jobs Reported* (2016-2018)
Fort Erie	709	6,351	719	6,867	763	8,414	8,790
Grimsby	443	4,009	455	4,750	465	5,204	5,767
Lincoln	440	4,198	543	6,650	564	6,964	7,759
Niagara Falls	2,514	22,929	2,553	32,982	2,642	32,687	37,484
Niagara on the Lake	456	7,082	513	9,707	560	11,238	11,966
Pelham	271	1,743	301	2,275	318	2,677	2,903
Port Colborne	461	2,912	465	3,917	468	4,176	4,561
St Catharines	3,657	43,045	3,771	44,254	3,966	48,130	58,021
Thorold	460	4,980	491	5,307	523	5,674	6,196
Wainfleet	43	179	58	402	60	507	523
Welland	1,161	11,221	1,158	12,122	1,188	14,149	14,803
West Lincoln	128	1,489	175	1,911	203	2,364	2,524
Niagara Region	10,743	110,138	11,202	131,144	11,720	142,184	161,297

\* Number of Unique Jobs Reported (2016-2018) column indicates the combined 3-year total of jobs reported. This combined 3-year total accounts for completed responses received in any survey year and does not include duplicates.

As the Employment Inventory matures and the participation rate increases among employers, the results will be used in conjunction with Statistics Canada data and other data sources to accurately monitor the regional economy, gain insights into where economic gains are occurring, and better understand where Niagara Region and local municipalities can take action to help facilitate economic growth and opportunity.

The data collected each year through the Employment Inventory provides detailed local business information that is not available through Statistics Canada data. In most cases, Statistics Canada data is updated once every 5 years, whereas the Employment Inventory is updated on a yearly basis. Statistics Canada data is ideal for performing analysis at the regional and municipal level, but lacks the ability to analyze raw business data at the street address level. Collecting annual business data at the street address level allows for micro analysis to be done at custom geographies and time series.

Reliable and comprehensive data about our business community is integral towards understanding the Region's employment context and facilitating the Region to respond quickly to emerging economic development opportunities. Furthermore, the Employment Inventory dataset plays a significant role in supporting decisions related to population and employment growth and forecasting, infrastructure investment (including public transit), socioeconomics, and the ongoing monitoring of economic conditions and trends.

Table 4 (below) illustrates the number of businesses and jobs captured in 2018 based on the 2-digit North American Industry Classification System (NAICS). NAICS is a standardized industry classification system used to classify business establishments according to type of economic activity or industry.

The top three sectors by number of jobs captured were associated with “Retail Trade”, followed by “Accommodation and Food Services” and “Health Care and Social Assistance” respectively. These three sectors account for almost 45% of the total number of jobs reported by respondents in 2018.

**Table 4 – Number of Businesses and Jobs by NAICS Sector**

NAICS Industry Sector (2-Digit)	Number of Businesses 2018	Number of Jobs 2018	Number of Jobs Proportion of Region
Retail trade	2,647	23,733	16.7%
Accommodation and food services	1,647	19,110	13.4%
Health care and social assistance	1,227	17,939	12.6%
Manufacturing	845	15,577	11.0%
Educational services	232	10,280	7.2%
Arts, entertainment and recreation	378	8,706	6.1%
Public administration	195	7,421	5.2%
Construction	373	5,474	3.8%
Other services (except public administration)	1,602	5,407	3.8%
Administration and support, waste management and remediation services	279	4,857	3.4%
Professional, scientific and technical services	715	4,269	3.0%
Finance and insurance	461	4,065	2.9%
Transportation and warehousing	221	3,563	2.5%
Agriculture, forestry, fishing and hunting	139	3,409	2.4%
Real estate and rental and leasing	286	3,230	2.3%
Wholesale trade	262	3,107	2.2%
Information and cultural industries	152	1,097	0.8%
Utilities	32	704	0.5%
Management of companies and enterprises	12	161	0.1%
Mining, quarrying, and oil and gas extraction	7	75	0.1%
Undetermined	8	0	0.0%
Total	11,720	142,184	100.0%

The Employment Inventory also provides a key opportunity for the Region to personally connect with local businesses in order to further develop partnerships, fostering an environment for innovation and development within the Niagara business community.

Table 5 (below) highlights the responses received when business owners were asked “Is there anything Niagara Region could do to help support your business?”. For reporting purposes, the responses have been categorized into themes, however, the raw comments will be shared with internal staff as well as our local municipal partners.



**Table 5 - “Is there anything Niagara Region could do to help support your business?”**

Response Theme	Responses Received	Proportion
Taxes and Utilities	310	15.0%
Business Exposure	300	14.5%
Beautification/Infrastructure/Traffic Issues/Construction	293	14.2%
Incentives/Grants/Contracts	279	13.5%
Skills and Labour Force	211	10.2%
Transit	109	5.3%
Social Support Programs/Programs	101	4.9%
Awareness and Education	98	4.7%
Parking Issues	81	3.9%
Uncategorized	75	3.6%
Waste Management	70	3.4%
Development Process/Zoning/Land Use	54	2.6%
Health and Safety	40	1.9%
Minimum Wage Increase Concerns	32	1.5%
Development Charges	16	0.8%
<b>Total</b>	<b>2069</b>	<b>100%</b>

In keeping with Niagara Region’s collaborative One Team mandate, this year’s inventory featured a series of questions for our SAEO department to assist in gaining better insights to the educational levels that are required to work for businesses. This demonstrates the capacity for the inventory to feature additional questions (on a limited scale) from other potential stakeholders in subsequent surveys.

Table 6 (below) illustrates the responses from businesses when asked, “What educational levels are required to work for your business?”.

**Table 6 – Minimum Education Levels Required**

Education Question	Yes	No	Decline
Require a high school diploma (or equivalent)	3,964	3,696	416
Require a college diploma or university degree	2,452	5,154	433
Employ workers with trades certificates or are involved in an apprenticeship program	1,713	5,865	449

Other departments within the Region also benefit from this dataset. The results are currently assisting in informing Regional service delivery decisions such as:

- Providing sufficient levels for servicing child care centres
- Providing up-to-date employer data for the Building Employment Networks Niagara (BENN) application used to match Ontario Works and Ontario Disability Support clients to available training and job opportunities
- Locating premises for the Environmental Health Legionella Exposure Inventory
- Assisting with waste management communication outreach
- Informing Economic Prosperity Dashboard indicators

A subset of the 2017 Employment Inventory results was previously released to the public through the Niagara Region Open Data Portal. Open Data promotes innovation and fosters greater transparency and accountability. Since May 2018, the 2017 Employment Inventory Open Data dataset has attracted 677 page views and a total of 112 download events.

The following list identifies the attributes that are made openly available to the public:

- Business Name
- Street Address, Unit #
- Municipality
- Postal Code
- Business Website
- 6-digit North American Industry Classification System (NAICS) code
- Employee Size category based on Statistics Canada, Canadian Industry

Statistics.

- Micro 1-4 employees
- Small 5-99 employees
- Medium 100-499 employees
- Large 500 + employees

## **Alternatives Reviewed**

The goal of the Employment Inventory is to update the data on an annual basis to monitor, understand, and track trends over time. With successive years of data collection, historic trends analysis of the data will show how specific businesses, business sectors and geographic areas of employment in Niagara evolve over time as our economy changes.

Continuing to collect this level of data annually provides a baseline to analyze historical trends, forecast employment growth, supplement other employment sources and provide a resource back to the community.

## Relationship to Council Strategic Priorities

The Employment Inventory is a key tool that the Niagara Region uses to strengthen its economic competitiveness by better understanding its current employment landscape and workforce composition. Data collected through the Employment Inventory plays a significant role towards informing future decisions related to population and employment growth, infrastructure investment, public transit planning, economic development, and the ongoing monitoring of economic conditions. The Niagara Region continues to rely on this dataset as a valuable asset when developing robust business cases designed to attract investment, innovation, and entrepreneurship to Niagara and strengthen the Region's position globally.

## Other Pertinent Reports

- PDS 13-2016
- PDS 1-2017
- PDS 5-2018

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### Prepared by:

John Docker  
Planner  
Planning and Development Services

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### Recommended by:

Rino Mostacci, MCIP, RPP  
Commissioner  
Planning and Development Services

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### Submitted by:

Ron Tripp, P.Eng.  
Acting Chief Administrative Officer

*This report was prepared in consultation with Daniel Turner, Employment Inventory Data Intern, and reviewed by Isaiah Banach, Manager, Long Range Planning.*

## Appendices

Appendix 1                      2018 Employment Inventory Questionnaire

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## 2018 Niagara Region Employment Inventory

Niagara Region is conducting an annual inventory of businesses to gather information for planning policy and economic development purposes. Information collected through this inventory will be grouped together and publicly reported to Regional Council in 2018. Information collected through this inventory will also be shared with Niagara's local municipal governments, economic development offices and Employment Ontario agencies. A subset of the information collected will be released publicly through Niagara Region's open data program, observing your rights and freedoms outlined in the Municipal Freedom of Information and Protection of Privacy Act. For more information about this initiative please visit [www.niagararegion.ca/employmentinventory](http://www.niagararegion.ca/employmentinventory).

### Business Identification

Business Name:	<input type="text"/>		
Business Contact Name:	<input type="text"/>		
Business Street Address:	<input type="text"/>		
Unit/Suite #:	<input type="text"/>	Municipality:	<input type="text"/>
		Postal Code:	<input type="text"/>
Business Telephone #:	<input type="text"/>	Business Contact Email:	<input type="text"/>
Business Website:	<input type="text"/>		
Business Mailing Address: (only if different from above)	<input type="text"/>		

What year did this business open **in Niagara**?

Is this business involved in the tourism sector? Yes ☐ No ☐ Does your business sell goods or services outside Canada? Yes ☐ No ☐

Does this business have foreign or international ownership? Yes ☐ No ☐ ***If yes, what is the primary country of origin of the foreign ownership?***

Provide details about the specific services and/or agricultural activities associated with this business. (e.g. Full-service restaurant, Home furnishing store, Insurance agency, Machine shop, Engineering services, Roofing contractor, Vineyard, Dairy cattle farm, etc).

What is the INDOOR floor size (GFA) of this business?

☐ Feet ☐ Metres ☐ Estimate

What is the OUTDOOR operating area of this business (if applicable)?

☐ Acres ☐ Hectares ☐ Estimate

How many people are presently employed (including owners) at **THIS** location?

**Please return completed form to Niagara Region, Planning and Development Services at your earliest convenience.**

**E-mail:** [employmentinventory@niagararegion.ca](mailto:employmentinventory@niagararegion.ca) **Fax:** 905-641-5208 **Mail:** Employment Inventory, 1815 Sir Isaac Brock Way, PO Box 1042, Thorold, ON L2V 4T7

	<b># of Full Time Employees</b> (work more than 30 hours per week)	<b># of Part Time Employees</b> (work less than 30 hours per week)
<b>PERMANENT</b>		
<b>SEASONAL</b> (between 4-6 months per year)		
<b>CONTRACT</b>		

Do your employees work shift work?  
(work outside the hours of 7:00 am to 6:00 pm)

☐ Yes   ☐ No

Do your employees work weekends?   ☐ Yes   ☐ No

**Educational required to work for this business (payroll employees)**

Do employees require a High School Diploma (or equivalent) to work for this business (not including summer students)?   ☐ Yes   ☐ No

Do any positions require a College Diploma or University Degree to work for this business?   ☐ Yes   ☐ No

Do you require employees to possess a Trades Certificate or be involved in an Apprenticeship Program?   ☐ Yes   ☐ No

**Business Productivity**
**Niagara Region is interested in learning more about business productivity across various industry sectors of the economy. This information will be used to inform regional economic development programming and activities**

Could the productivity and/or efficiency of your business benefit from adopting new technologies?   ☐ Yes   ☐ No

Do you require any assistance in adopting new technology into your business?   ☐ Yes   ☐ No

Do you have procedures or processes in place to evaluate employee productivity (i.e. employee performance management)?   ☐ Yes   ☐ No

**Additional Information**

Is there anything the Niagara Region could do to help support your business?

**Consent**

Do you consent to receive email communication from NIAGARA REGION on specific regional programs or services that may be related to your business?   Yes ☐   No ☐

Please return completed form to Niagara Region, Planning and Development Services at your earliest convenience.

E-mail: [employmentinventory@niagararegion.ca](mailto:employmentinventory@niagararegion.ca)   Fax: 905-641-5208   Mail: Employment Inventory, 1815 Sir Isaac Brock Way, PO Box 1042, Thorold, ON L2V 4T7

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**Subject:** Workforce Development Initiative

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, March 20, 2019

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## **Recommendations**

That Report ED 3-2019 **BE RECEIVED** for information.

## **Key Facts**

- Meeting current and future talent, professional, skilled trades and labour needs is a major theme identified in the Economic Development Strategy.
- Finding a solution to current workforce challenges in Niagara will require employers, education and government to work together collaboratively.
- Successful models and best practices in other communities will be researched and current workforce development initiatives in Niagara will be included as a basis for an initial stakeholder meeting.

## **Financial Considerations**

There are no financial implications.

## **Analysis**

Access to a talented, professional, skilled, and educated workforce is increasingly a top concern for businesses and essential to ensure the continued growth of the regional economy. The proximity of Niagara to significant national and global economic drivers makes the region both attractive to new investment as well as new opportunities to build, attract, and retain a talented and skilled workforce within Niagara. Correspondingly, the existing job skills gap is not isolated to Niagara, but affecting communities across Canada.

This challenge has been raised, not only by local businesses looking to recruit new workers, but also companies looking to expand into Niagara. Finding a solution to this issue will require efforts and action from all levels of government, educational stakeholders, and employers themselves. Niagara Region Economic Development will work with local partners to create a solution or solutions that address the challenges directly related to Niagara's workforce. Additionally, developments in other jurisdictions have shown the importance of ensuring that the local workforce has the on-going training and professional development not only for today's jobs but for the jobs of the future.

As a first step, Niagara Economic Development will facilitate a forum for all stakeholders to identify the major issues and discuss a strategy or strategies to address them. Amongst the questions to be answered initially will be who will lead the initiative and where will the funding come from for the programming? Stakeholders will include Niagara Region, Brock University, Niagara College, Niagara businesses, Niagara Industrial Association, Niagara Workforce Planning Board, Innovate Niagara, Niagara District School Board, Niagara Catholic District School Board, local Economic Development Offices, Unions, Chambers of Commerce as well as others.

These workforce challenges are not unique to Niagara and so models that have been successful in other communities and best practices will be researched by the stakeholder group to inform a solution for Niagara. This research will include the RETAINs model outlined by Councillor Darte at the last PEDC meeting. Regional Talent and Innovation Networks (RETAINs) is a model developed in the U.S. by Edward Gordon, President, Imperial Consultants, Chicago.

A RETAIN acts as a broad non-profit intermediary, linking businesses, educational institutions, unions, government agencies, and relevant non-profit groups. It acts as a catalyst to create a significantly updated talent pipeline for a 21st-century workforce. In the short-term a RETAIN establishes a new system that rapidly fills vacant jobs through better coordinating job training efforts across its partnership network. It also raises the productivity of current workers by initiating on-going employee reskilling. In the long term, a RETAIN updates local educational programs to better prepare more students and the current workforce for the rapidly changing job and career requirements of a high-tech economy. RETAINs focus on talent development through a wide array of innovative programs. They are financed in the U.S. by private and public funds including business investment, foundation grants and local, state and federal funding initiatives.

Work will begin in March to bring the stakeholder group together for an initial meeting and updates will be provided to PEDC on the progress achieved.

### **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

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## **Other Pertinent Reports**

ED 2-2019 Economic Development Strategy 2019-2024

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**Prepared by:**

Valerie Kuhns  
Acting Director, Economic Development  
Economic Development

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**Submitted by:**

Ron Tripp, P.Eng.  
Acting Chief Administrative Officer

*This report was reviewed by Valerie Kuhns, Acting Director, Economic Development.*



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**Subject:** New Official Plan Consultation Timeline Framework

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, March 20, 2019

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## **Recommendations**

1. That Report PDS 9-2019, respecting the New Official Plan Consultation Timeline Framework, **BE RECEIVED**; and
2. That Report PDS 9-2019 **BE CIRCULATED** to the Local Area Municipalities and the Niagara Peninsula Conservation Authority (NPCA).

## **Key Facts**

- In November 2017, Council approved a High Level Process Framework for the New Official Plan.
- In 2018 Council approved frameworks for priority Background Studies, developed through consultation with Area Planners, for Growth Management, namely; Urban Structure, Employment Lands Strategy, Housing Strategy and Land Needs Assessment, as well as Natural Environment and Rural Systems, namely; Natural Environment, Agriculture, Climate Change and Aggregates.
- In 2018, a presentation to Local Councils on the High Level Official Plan framework occurred and individual meetings held with Area Planners to gather planning input.
- On July 5, 2018, a Special Meeting of Council occurred under the Planning Act to hear public comments on the development of a New Official Plan. The Council passed a motion relative to consultation for the New Official Plan.
- The progression of Background Studies, which will inform the New Official Plan, has allowed staff to develop a more detailed Consultation Timeline Framework for the Official Plan.
- The Consultation Framework incorporates consultation during key steps of the Background Reports development, as well as the draft policy stage.

## **Financial Considerations**

Council approved the resources to complete the New Official Plan over the next 5 years as part of the 2017 Budget Process. The completion of the necessary Background Studies and preparation of the New Official Plan will require the combination of significant staff and consulting resources over the next three years.

## **Analysis**

### **Background**

When the Regional Official Plan was approved in the mid 1970's, the Region's role and content of the Plan focused on protecting agricultural lands and establishing urban (settlement area) boundaries.

Over the years, amendments occurred to reflect the Region's increased planning functions under an evolving provincial planning system. In 2017, a budget was established to develop a contemporary and user friendly Official Plan that provides a consistent structure and reflects the current comprehensive planning framework.

### **Key Official Plan Objectives**

The key objectives of the New Official Plan in terms of structure and content are to:

- promote and achieve great development outcomes;
- be more user friendly for the public, stakeholder groups, consultants, staff and Council;
- be more concise and provide clearer policy guidance where necessary and latitude where appropriate; and
- address Provincial requirements, Regional interests and provide guidance to the Local Area Municipalities.

### **Priority Background Studies**

In 2018 Council approved frameworks for eight interrelated priority Background Studies, developed through consultation with Area Planners, for Growth Management, namely; Urban Structure, Employment Lands Strategy, Housing Strategy and Land Needs Assessment, as well as Natural Environment and Rural Systems, namely; Natural Environment, Agriculture, Climate Change and Aggregates (See **Appendix 1**). These Background studies are essential to inform the preparation of the new Official Plan.

### **Consultation**

Several important consultation steps have taken place already to both inform and create awareness of the development of the New Official Plan.

Imagine Niagara was a consultation process initiated in 2013 to gather input for the updating of the Official Plan to 2031. It was a nine month process with over 4,000 surveys and 2,000 resident comments which identified important themes outlined in

**Appendix 2.** While provincial planning now requires planning policy to address growth to 2041, planning staff consider the themes generated from public input under Imagine Niagara to be current and relevant. In the proposed timeline there will be the opportunity for the public to comment in general on policy matters and objectives, as well as on more specific policy as it develops.

Regional Council approved a High Level Process Framework for the new regional Official Plan in November 2017. This framework was presented to Planning and Economic Development Committee in January 2019 by the Director of Community and Long Range Planning.

In 2018 meetings were held with Area Planners to develop the frameworks for the Background Studies, the frameworks were approved by Council and on July 5, 2018, a Special Meeting of Council occurred under the *Planning Act* to hear public comments on the development of a new Regional Official Plan. Throughout the second half of 2018, presentations to each Local Council regarding the Framework of the new Regional Official Plan took place.

### **Consultation Timeline Framework**

The Consultation Timeline Framework, included in **Appendix 3**, provides for the following key aspects:

- the creation of a consolidated draft New Official Plan by end of 2020 for consultation, refinement and approval by end of 2021;
- opportunities for input at key stages of Background study formulation and draft policy stages;
- stakeholder and public input;
- keeping local Councils and Area Planners informed;
- a webpage and e-mail for the New Official Plan for comment;
- Public Information Centres (Public Open Houses) that will seek comments based on policy direction based on the results of background studies.

The Consultation Timeline Framework identifies major points of public and stakeholder consultation and target timelines, recognizing that flexibility is required to adapt to evolving provincial direction, new issues and shifting priorities. Council will be advised of any major changes to the consultation framework.

While not depicted in the Consultation Timeline Framework, each phase will include inter-departmental collaboration, engagement with working groups established for

various work programs, and input from the Planning Advisory Committee. The public and Indigenous communities will also be engaged throughout the process.

“Phase 1 – Project Initiation” of the Consultation Timelines Framework in Appendix 3 has been completed. The following is a summary of the upcoming public and stakeholder consultation activities identified in Appendix 3.

#### Phase 2 – Background and Options

A number of background reports and discussion papers will be prepared to help inform the development of policy options for the New Official Plan. The reports and discussion papers will be brought to Committee and Council for endorsement before being released for consultations. It is anticipated that the endorsed documents will be posted on the Official Plan website for information and feedback. In addition, stakeholder consultations will be held on background and options, leveraging opportunities to group topics of interest to various stakeholder groups. This phase will conclude with four Public Open Houses, spread geographically across the region to provide easy access for residents in central, north-east, north-west and southern Niagara.

#### Phase 3 – Recommendations

The consultations at the background and options phase will help to inform the development of recommendations for the New Official Plan. It is anticipated that additional consultations will be held with stakeholders, as needed, to further refine the options and develop a recommended approach. A report summarizing the consultation feedback to date and recommended direction for the New Official Plan will be brought to Committee and Council for endorsement.

#### Phase 4 – Draft Policies and Schedules

Once the policy direction has been established for the new Official Plan, policies and schedules will be drafted for further consultation. Policy sets and applicable schedules for each topic area will be posted on the Official Plan website for information and input. Additional stakeholder consultations will be held on draft policies and schedules. The public will also have opportunities to provide input through Public Open Houses and Public Meetings at Committee. This phase will conclude with a report to Committee and Council seeking endorsement of the draft consolidated Official Plan in principle.

#### Phase 5 & 6 – Draft Official Plan

The draft consolidated Official Plan will be posted on the Official Plan website for information and input. During this phase, the statutory Public Open House and statutory Public Meeting will also be held on the draft Official Plan, as required under the *Planning Act*. This input will inform the development of the final Official Plan to be brought to Committee and Council for adoption and the Province for approval (Phase 6).

## Alternatives Reviewed

On July 5, 2018, a Special Meeting of Council occurred under the *Planning Act* to hear public comments on the development of a New Official Plan. The Council passed a motion relative to consultation for the New Official Plan, being: That Regional Council **AUTHORIZE** the preparation of a comprehensive New Official Plan in accordance with the requirements of the *Planning Act* involving the area municipalities including open houses in each municipality.

The scenario of holding an Open House in every municipality was discussed with Area Planners and it was felt the process would likely result in comments on local issues that would not relate to Regional planning responsibilities. A significant level of input was gathered through Imagine Niagara, which was considered in the structure of background reports, and this Consultation Framework will provide the opportunity for public comment on substantive planning/policy content.

The New Official Plan has many components – the sections addressed by the priority Background Studies, as well as servicing, transportation and cultural heritage. There will be public and stakeholder input at various stages of these studies. The co-ordination and gathering of input requires the grouping of topics and locations for input.

## Relationship to Council Strategic Priorities

The new Regional Official Plan 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
- PDS-21-2018 – Municipal Comprehensive Review Update-New Regional Official Plan and Growth Management Program

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**Prepared by:**

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Official Plan Policy Consultant  
Community and Long Range Planning

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**Recommended by:**

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Commissioner  
Planning and Development Services

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**Submitted by:**

Ron Tripp, P.Eng.  
Acting Chief Administrative Officer

*This report was prepared in consultation with Lindsey Savage, MCIP, RPP, Senior Planner-Regional Official Plan, and reviewed by Doug Giles, MCIP, RPP, Director, Community and Long Range Planning.*

**Appendices**

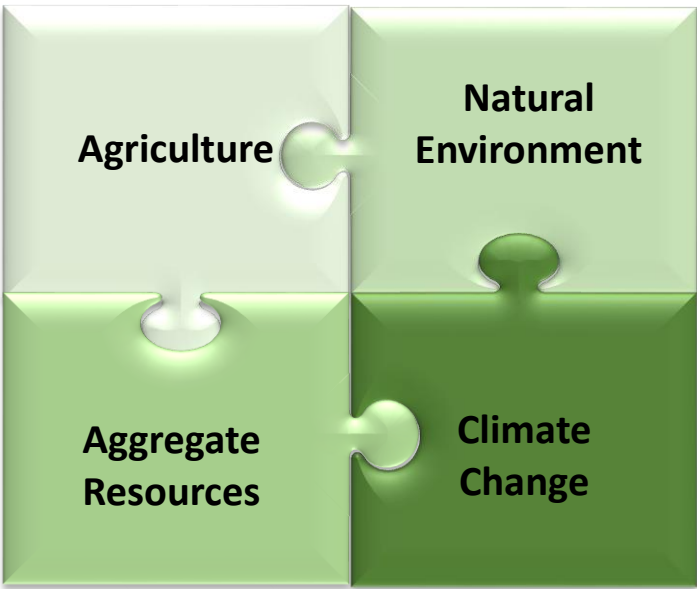
Appendix 1	Priority Background Studies	Page 7
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APPENDIX 1 – PRIORITY BACKGROUND STUDIES

Growth Management



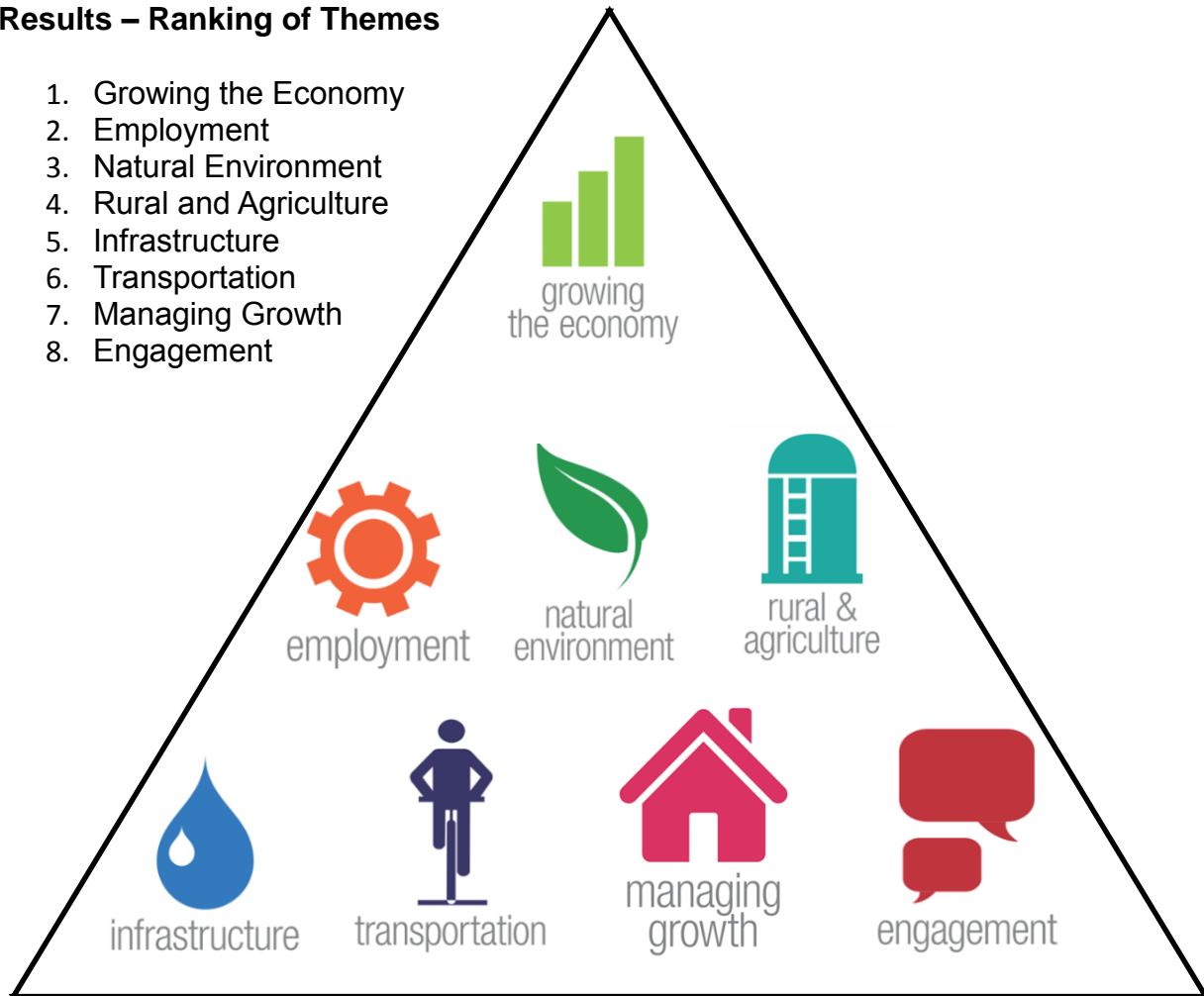
Natural Systems



## APPENDIX 2 – IMAGINE NIAGARA THEMES

### Results – Ranking of Themes

1. Growing the Economy
2. Employment
3. Natural Environment
4. Rural and Agriculture
5. Infrastructure
6. Transportation
7. Managing Growth
8. Engagement





## APPENDIX 3 – CONSULTATION TIMELINE FRAMEWORK

