



SHAPE NIAGARA

SETTING THE STAGE
FOR STRATEGY

Overview

- “Setting the Stage for Strategy”
 - Environmental scan of current state and influencing factors
- Strategic Planning Process & Timeline



Setting the Stage for Strategy Report

Methodology

- Environmental Scan: Global, National, Provincial & Local document, data and information review
 - Key internal priorities, plans and documents
 - Documents released by external agencies or organizations (Chambers of Commerce, Niagara Workforce Planning Board, national / global agencies)
 - LAM strategic plans, reviews of other Ontario plans
 - Discussions with local Members of Provincial Parliament (MPP)
 - Federal government documents and policy briefs

What's in the *Setting the Stage for Strategy* Report

- Project Overview
 - Objective of the initiative
- What's Happening Outside Niagara
 - Global, National, Provincial trends
- What's Happening in Niagara
 - LAM priorities
 - Population, physical environment, employment & jobs, and community wellbeing information
- Setting the Stage for Strategy
 - Community Vision, SWOT
 - Tying the organization's initiatives with Community priorities

TABLE OF CONTENTS	
Introduction	1
Objective of Shape Niagara?	2
Shape Niagara – Setting the Stage for Strategy	3
Methodology	3
What Comes Next?	4
Recap of First Shape Niagara Report "What We've Heard"	5
Reach	6
What's Happening Outside Niagara	7
Global Trends	8
Global Priorities and Trends	9
What's Happening in the United States	11
National Trends	12
Federal Government Priorities	13
Canada at a Glance	14
Provincial Trends	15
Provincial Government Priorities	16
What's Happening in Niagara	17
Local Area Municipal Priorities	19
Population Growth	20
Physical Environment	22
Employment and Jobs	25
Community Wellbeing	28
Setting the Stage for Strategy	31
Moving Niagara Forward	32
Vision for Niagara	33
SWOT Analysis	34
Tying the Organization's Initiatives with Community Priorities	35
Current Niagara Region Departmental Makeup	36
Community Services	37
Enterprise Resource Management Services (ERMS)	39
Office of the CAO	43
Planning and Development Services	47
Public Health	49
Public Works	51
Summary	55
Next Steps	56

Global Trends

- A summary of global themes include opportunities in technology advances, innovations in policy and services, and how communities are evolving across the globe
 - Digital Economy
 - Increased expectations around Quality of Life and supports for marginalized populations
 - A focus on preserving the Natural Environment
 - What's Happening in the United States



U.S. News and World Report, Best Countries Report (2019)

National Trends

- A summary of top Federal Government priorities for Canada
 - Economic Growth
 - Supporting Canadians
 - post-secondary education, family supports
 - Fighting Climate Change

Ways to Build a Canada that Wins (2018)

Make Canada a magnet for business investment

Ensure a globally competitive North America, make Canada a global innovator

Make Canada an agri-food powerhouse

Develop agile workforce strategies

Make all of Canada an Export Gateway

Ensure the unrestricted movement of goods and people across Canada

Help Small-Medium-Enterprises trade and grow

Canadian Chamber of Commerce, "Ten Ways to Build a Canada that Wins" (2018)

Provincial Trends

- A summary of the preliminary outline of PC provincial government's platform
 - Repeal of Green Energy Act
 - Creation of 6,000 new long-term care beds
 - Development of Housing Supply Action Plan
 - Affected departments will discuss these impacts with Council directly as new announcements are made
- Niagara's MPP's
 - Focus on job creation and economic development
 - Welcomed increased collaboration in advocating for Niagara's needs

Ontario at a Glance

According to the Ontario Chamber of Commerce, expected movement in the Ontario economy include increases in business investment, industrial and commercial activity, machinery and equipment spending. The labour force skill gap still exists, and companies are unable to find the right people to do the jobs. This issue is not expected to change in the near future, and it is a priority for many organizations and levels of government.





What's Happening in Niagara: Local Area Municipalities

“

We need to ensure we are using a unified approach between the Region and municipalities, building on our prior successes. A multi-level approach will lead to a stronger voice for Niagara.

”

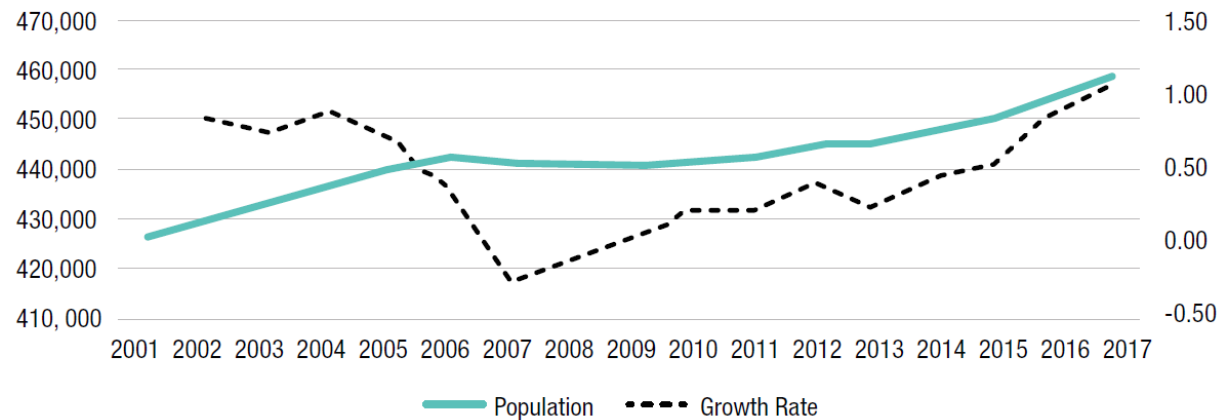
- Key priorities of senior leaders at Local Area Municipalities:
 - Alignment between upper and lower tier priorities
 - Cooperation and support across levels of government in Niagara
 - One voice and a collective focus

Strategic Priority	Number of LAMs that have Priorities Aligned with Region
 Economy	10/10
 Resident Life	10/10
 Service Delivery	10/10
 Transit Active Transportation	7/10

Local Area Municipal Strategic Plans (2018)

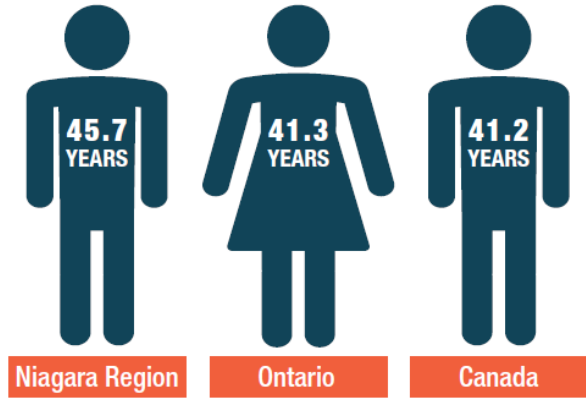
What's Happening in Niagara: Niagara-Specific Data

Population and Growth Rate



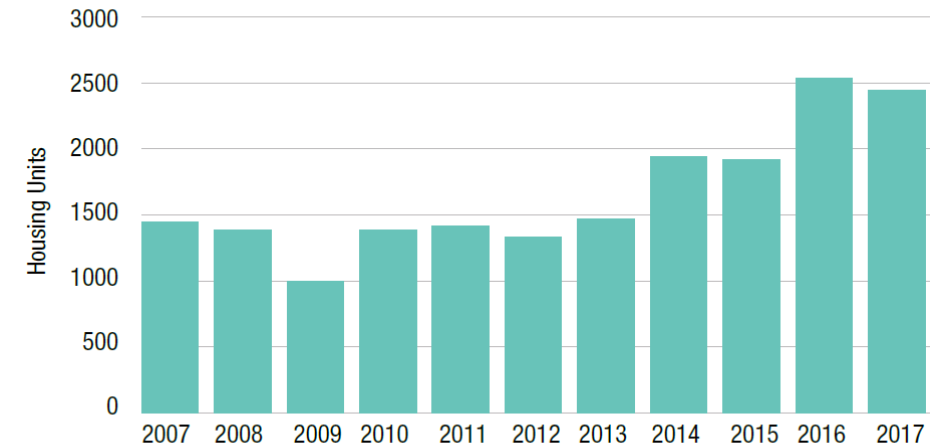
Statistics Canada, Annual Population Estimates (2001-2017)

Population's Median Age



Statistics Canada, Median Age (2016)

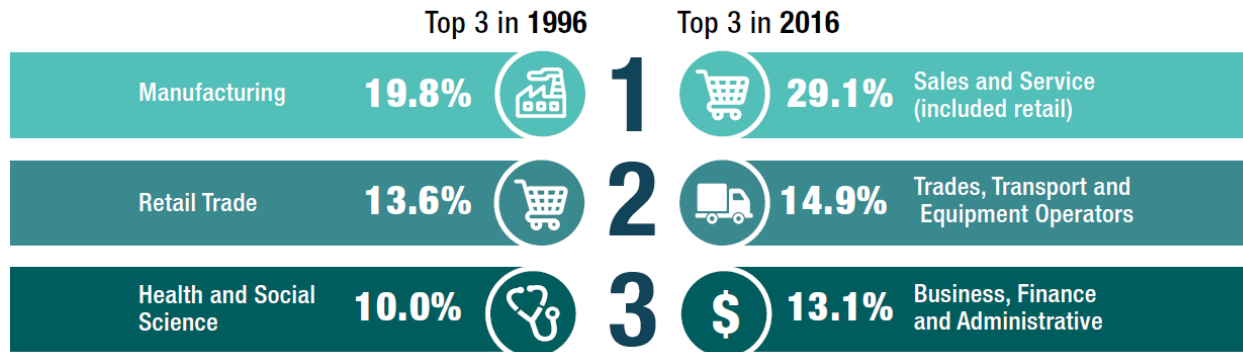
Housing Starts



Canada Mortgage and Housing Corporation, Housing Now Tables (2018)

What's Happening in Niagara: Niagara-Specific Data

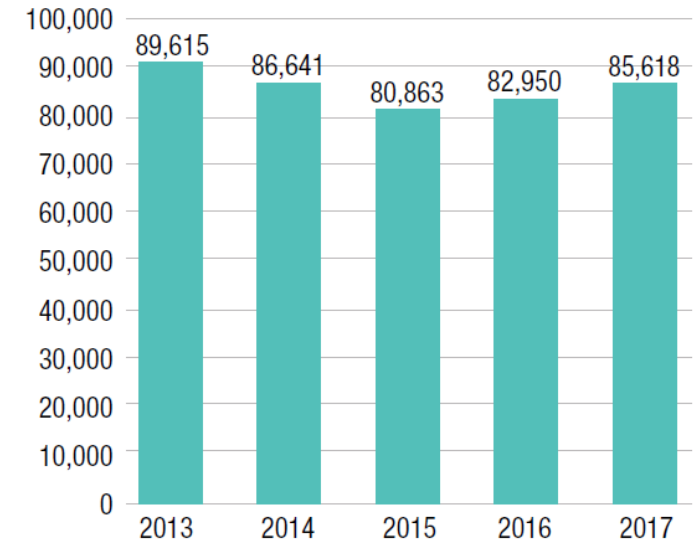
Job Sector Changes in Niagara



Statistics Canada, Niagara Census Profile (1996, 2016)

Note: Industry classification code description for job sectors have changed slightly from 1996 to 2016

Average Household Income in Niagara



Municipal Tax Study, BMA Management Consulting Inc. (2013-2017)

Cost of Living



Family of four in 2017

\$71,294

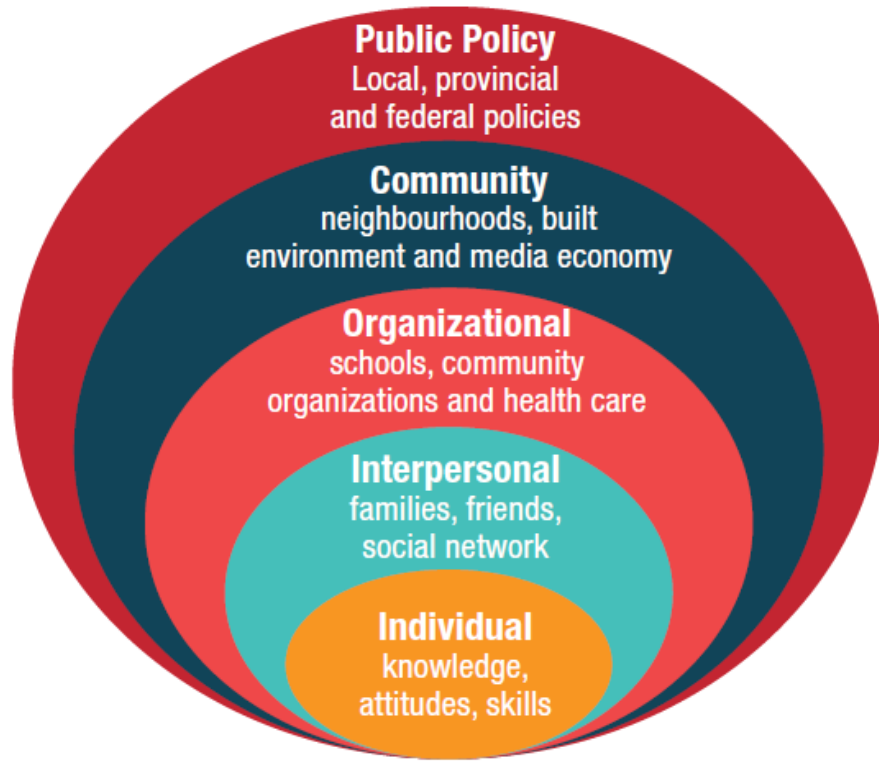


8.9%
Increase in
just one year

Niagara Poverty Reduction Network (2017)

What's Happening Niagara-Specific Data

Socio Ecological Model



SHAPE NIAGARA

Category	Regional Service Description	Impact on Wellbeing
Infrastructure	Transportation (active, public transit, automobile, commercial), roads and bridges, waste management, water, wastewater, buildings	<ul style="list-style-type: none"> Safe and affordable housing Water and sanitation Access to services through safe and maintained transportation infrastructure
Access to Services	Senior services, child and family services, housing and homelessness, transportation and walkability (enabling mobility and access to services) Public health services, bike lanes and pathways, ambulances and emergency services	<ul style="list-style-type: none"> Equitable access to health programs and services Healthy child development Physical and social environment Social inclusion
Physical Environment	Environmental protection, sustainable development, land use planning policy, urban design, active transportation infrastructure	<ul style="list-style-type: none"> Access to greenspace Food security through access to nutritious food, agriculture and food production
Economy	Supports for jobs and skilled labour, investment attraction	<ul style="list-style-type: none"> Employment and job security Equitable income distribution Addressing precarious employment and working conditions
Governance and Advocacy	Proactive leadership, fiscal responsibility, open government, advocacy for Niagara	<ul style="list-style-type: none"> Ensuring active participation and engagement of communities in decision making Equitable access to services
Community Wellbeing	Safety, police presence, community planning, walkability, engagement, newcomer supports	<ul style="list-style-type: none"> Social inclusion Built environment conducive to physical activity, recreation and walkability for all ages Sense of belonging promoting social cohesion

Setting the Stage for Strategy

- Before the development of a Strategic Plan, need to be informed
 - Environmental Scan
 - Shape Niagara reports
 - SWOT analysis
 - Departmental Initiatives



Organizational Strengths

- Ability to leverage global brand recognition: Niagara Falls, Niagara Wine Industry, Welland Canal and all surrounding attractions
- Collaboration with local community organizations, post-secondary institutions
- Partnerships with local area municipalities to better serve residents such as development and customer service
- Economic designations and incentives to drive growth
- Ongoing work to build connective transportation network
- Building organizational maturity around data driven decisions, project management and asset management



Organizational Weaknesses

- Coordination with local area municipalities and Region to bring a singular voice to higher levels of government and customer service
- Ability to handle future increases in service demand. Including, factors such as growth from Greater Toronto Area and aging population.
- Sustainable funding for Regional services such as infrastructure projects and social services
- Widespread densely populated areas, service delivery reach can be challenging
- Customer service including opportunities to increase hours of operation or access to services



External Opportunities

- Geographic location, access to Greater Toronto Area and Buffalo, natural assets and greenspace
- Potential provincial or federal funding opportunities
- Emerging economic sectors, such as sports tourism and cannabis
- Explore broadband opportunities for rural areas
- Opportunities to align services to emerging higher level government priorities. Such as federal requirements for coordinated of services
- Enhance organization's reputation including transparency, trust and accountability



External Threats

- Provincial and federal unknowns in policy and funding
- Workforce pressures such as the inability to retain and recruit skilled workforce
- Lack of succession planning in local businesses
- Dependency on seasonal and precarious employment
- Youth and young family retention
- Increasing housing prices
- Impact of aging population on regional services and economy, however these could present as potential opportunities

Aligning Regional Services to the Community Priorities

- Direct linkage made to the 17 Community Priorities identified in the *What We've Heard* report



Planning and Development Services

How Niagara Grows

Aligning to Niagara's Community Priorities:

Niagara's community would like to see sustainable and thoughtful growth that is aligned with diverse community needs and transparency in spending. The community also identified the importance of protecting and maintaining a resilient natural environment, as well as protecting the rural character of the Region, key natural assets and agricultural land.

The Region's Planning and Development Services initiatives align with the following priorities around growth, sustainable development and environmental protection:

4. Environmental Responsibility and Sustainable Development	What We've Heard Report, page 41
5. Accountable and Collaborative Government	What We've Heard Report, page 41
7. Preserving Niagara's Natural Assets	What We've Heard Report, page 42
16. Responsible Spending	What We've Heard Report, page 45

Past Organizational Initiative

Expedited Process for Development

An expedited planning approvals process was developed to increase approval certainty and accelerate the review period for development initiatives. The project created an evidenced-based evaluation procedure to evaluate sites and created the ability to showcase "shovel-ready" sites as part of Niagara's competitive advantage in attracting new investment.

Upcoming Organizational Initiatives

Official Plan

Growth Management including a housing strategy, employment land strategy, urban structure and land needs assessment.

Natural Systems including agriculture, natural heritage system, aggregates and climate change.

Employment Land Strategy

Planning and Economic Development will be working on an Employment Land Strategy, as part of the Official Plan work to identify strategies to protect Niagara's employment lands. As part of this, there are efforts underway with the St. Lawrence Seaway and Hamilton Port Authority to investigate land acquisition as part of a Niagara Port Strategy.



Aligning Regional Services

- Past Initiatives – successes coming from the 2015-2018 Council Strategic Plan



Enterprise Resource Management Services (ERMS)

Corporate Services Supporting the Organization

Aligning to Niagara's Community Priorities:

Community members identified a desire to stay informed about where their tax dollars are spent through transparency in government spending, and decision-making.

Fostering "organizational excellence" is a generic term, which encapsulates the goal of improving the way the Niagara Region as an organization functions. The focus of the community comments received identified a desire to build on collaboration, customer service and opportunities to foster informed decisions as an organization.

The Region's ERMS initiatives align with the following community priorities around accountability and organizational excellence:

8. Infrastructure in Support of Growth.....	What We've Heard Report, page 42
11. Equitable Access to Regional Services	What We've Heard Report, page 43
14. Communication and Engagement with the Community.....	What We've Heard Report, page 44
16. Responsible Spending.....	What We've Heard Report, page 45

Past Organizational Initiative

Enhanced Financial Management Service

The implementation of an integrated enterprise solution to provide system functionality that improves efficiency and effectiveness, reduces risk, enables effective internal controls, ensures better management of the organization, and improves the client experience.

Value for Money Audits

Determining if Regional programs, including the execution of policies and procedures, are delivered in an efficient, effective and economical manner. Over 13 recommendations were compiled to address corporate project management methodology, asset management, cost estimation, document management, performance measurement and other issues.

Southwestern Integrated Fibre Technology (SWIFT)

Looking to secure federal and provincial funding to improve Niagara's information infrastructure and to provide better connections for residents and businesses in rural communities. Through the project, Niagara is now a key partner in a larger buying group to attract broadband providers.

Aligning Regional Services

- Upcoming Initiatives – initiatives or projects that are underway or already approved to move forward



Community Services

Services Supporting Niagara's Residents

Aligning to Niagara's Community Priorities:

Niagara's community identified the need to support residents in a way that makes Niagara a place where everyone can thrive. An importance was placed around supporting populations in need by ensuring necessary services are provided including senior services, affordable housing, services for young families and vulnerable populations.

The Region's Community Services initiatives align with the following community-identified priorities:

3. Supporting populations in need through employment, affordable housing and transit.....	What We've Heard Report, page 41
9. Affordable Housing.....	What We've Heard Report, page 43
10. Quality of Life and Public Safety.....	What We've Heard Report, page 43
11. Equitable Access to Regional Services.....	What We've Heard Report, page 43
15. Youth and Young Family Retention.....	What We've Heard Report, page 45

Past Organizational Initiative

"Bend the Curve" on the Ontario Works Caseload

Goal was to increase the number of Ontario Works and Ontario Disability Support Program clients with employment. The BENN (Building Employment Networks Niagara) system launched in November of 2017. The shift from a manual tracking to system automation has resulted in an increase in the quantity of referrals and efficiency (real-time) of matches to training programs and employment opportunities. The long term goal is to further reduce the Ontario Works caseload.

Upcoming Organizational Initiatives

Long Term Care Home Redevelopment Projects

The redevelopment of two Long Term Care (LTC) homes has been undertaken to meet provincial compliance and fire code requirements. The new homes will be designed to enhance efficiencies and will be situated on campuses with co-located services to support long-term care residents and the local community.

Affordable Housing

To fulfill Niagara Region's provincially legislated responsibility, staff are preparing an updated 10-year Housing and Homelessness Action Plan (HHAP) to be presented to Council for approval in the spring of 2019. The revised HHAP will be integrated with the work on the new Regional Official Plan now in development, further contributing to an overarching regional Affordable Housing Strategy. This strategy will include a Regional Housing Statement, a review of and recommendations for Regional policies and financial incentives with the aim of increasing the availability of affordable housing in Niagara.



Aligning Regional Services

- Potential Initiatives – pending approval, or for consideration in the development of the Implementation Plan



Public Health and Emergency Medical Services

Building a Healthier Niagara

Mental Health Promotion Strategy (MHP)

Mental health, as part of Niagara's Top Ten was identified as one of the top burdens of disease in Niagara. The goal of the MHP strategy is to build mental health literacy and reduce stigma, ensuring that MHP is embedded into all initiatives within Public Health by making "every contact count".

Parenting Strategy

A framework to guide decision-making about how we support and engage with parents and families in Niagara. By using a Social Determinants of Health lens, this strategy is aligned with the Health Equity Strategic Plan and Mental Health Promotion Strategy to support populations in need. The strategy will equip parents in Niagara with the knowledge, skills, and resources necessary for their children and family to thrive, and ultimately make Niagara the best place to raise a family.

Potential Organizational Initiatives

Emergency Medical Services (EMS) Transformation

EMS call volume has been steadily increasing over the last few years and is projected to continue according to this trend. Paired with hospital offload delay issues, this has prompted a review of how ambulances and paramedics are dispatched. EMS is identifying new ways of doing business to better handle this volume by providing tailored care to make services available, accessible and affordable. EMS transformation is in progress as a pilot and has dedicated resources around project coordination. A complimentary restructuring of the physical footprint of ambulance bases, the hub model has been deferred to 2020.

Potential Opportunities

- A corporate and public health movement towards outcome focus with supporting data and dashboards, utilizing business intelligence software
- Transforming the way Niagara Emergency Services (EMS) deliver service, through the EMS transformation and hub projects
- Customer service changes to bring multi-modal opportunities for clients to access services
- Connective transportation to connect people to needed services

Potential Obstacles

Potential provincial funding and policy changes with the new Provincial government
Emerging issues in health, for example, opioid crisis, and legalization of cannabis
Climate change impacts on environment and health status in Niagara
Provincial government plans to restructure the health sector, and review Regional governments



Aligning Regional Services

- Potential opportunities – a scan of internal & external opportunities



Public Works

Infrastructure and Service Delivery

Transportation Services, Master Plan Implementation

Implement strategic investments in all modes of transportation to support growth and create a balance of community expectations for active transportation and complete streets such as capacity improvement, East-West Transportation Corridor, escarpment crossing.

W/WW Financial Sustainability and Asset Management

Meeting legislative requirements (Safe Drinking Water Act) to implement and demonstrate a rigorous asset management program in the sustainability of W/WW systems. Tying in with asset management efforts, doing the right work, on the right asset, at the right time, for the right cost while minimizing risk.

Enhancement of Management Cycle of Pavements

Improving how the cycle of pavement maintenance is managed, including crack sealing, patching and resurfacing.

Leveraging New Technologies in W/WW

In an effort to improve service delivery, W/WW will leverage new technologies to pursue Automated Systems, Advanced Reporting Systems, event-based preventative maintenance, GIS improvements, workforce mobilization.

GO Train-Enabling of Capital Investments

Ambitious and aggressive project plans for key transportation projects adjacent and supportive of GO station locations. Upcoming or potential projects include Casablanca Blvd, St. Paul W Canadian National Railway Bridge, Louth Street / Ridley Road, Thorold Stone Rd Extension, and Bridge Street.

New Waste Collections Contract

To be developed with input through a service level review. Includes a social marketing and outreach campaign to support implementation of new service.

Potential Opportunities

- East-West Transportation Corridor to relieve traffic congestion
- Innovations in service and funding opportunities
- Material recycling opportunities for road construction
- Potential for smaller funding opportunities through Federation of Canadian Municipalities (FCM) for capital projects

Potential Obstacles

- Cap and Trade and Provincial Gas Tax, leading to higher energy costs, funding impacts
- Increasing construction costs (trade tariffs)
- Climate change impacts (more severe or wet weather)
- Provincial legislation and regulation, for example, divertible material service standards, Ministry of Environment, Conservation and Parks surplus soil policies, MPAC restrictions on data use
- Provincial and federal policy changes
- Funding uncertainty from all government levels (provincial, federal, regional, local)



Aligning Regional Services

- Potential obstacles – a scan of what is stopping us



Office of the CAO

Economic Development

Skilled Labour Shortage

The Economic Development department is collaborating with organizations such as Niagara Workforce Planning Board, Niagara Industrial Association, Niagara's post-secondary institutions and School Boards to tackle the mismatch between labour skills and jobs across the Region.

East-West Transportation Corridor

Economic Development will support Public Works to develop an application to secure infrastructure funding from Transport Canada's National Trade Corridors Fund. The funding would construct a portion of the East-West Transportation Corridor, which would run roughly from Fort Erie to Hamilton Airport in support of goods movement. It would tackle the congestion issue on the Queen Elizabeth Way (QEW) which is a significant risk for the tourism, agriculture and manufacturing sectors in Niagara.

St. Lawrence Seaway Management Review

Elected officials have presented a joint submission with five Niagara area municipalities along the Seaway corridor to the federal government regarding a consultative review of the St. Lawrence Seaway conducted by Transport Canada in 2018. The recommendation to Transport Canada is a new management model for marine-strategic lands and an analysis of non-strategic land. Niagara has recommended that Transport Canada, with support from the Ontario Ministry of Transportation, consider a partnership with the Hamilton Port Authority with respect to the management of marine-adjacent strategic parcels of the St. Lawrence Seaway through Niagara.

Strategic Marketing

Conducting targeted marketing activities to position Niagara as a competitive location for business investment.

Trade and Investment

Promoting the Niagara Region through investment attraction and lead generation activities (investment missions) to strategically targeted sectors and within specific geographies.

Potential Opportunities

- Increased market interest and growth coming from the Greater Toronto Area
- Economic Trade Corridor designation award which would support infrastructure-funding applications and create unique marketing opportunities
- Niagara Foreign Trade Zone role in export diversification for Niagara companies
- Creation of a provincially significant employment zone with the Niagara Gateway Economic Zone and Centre

Potential Obstacles

- Meeting current and future labour needs for skilled trades and professional occupations
- Shortage of employment land that is shovel-ready and development pressures on land zoned for employment
- Infrastructure pressures, for example, congestion on the QEW
- Scheduling of public transit needs to align with employment needs
- Lack of succession planning in Niagara businesses

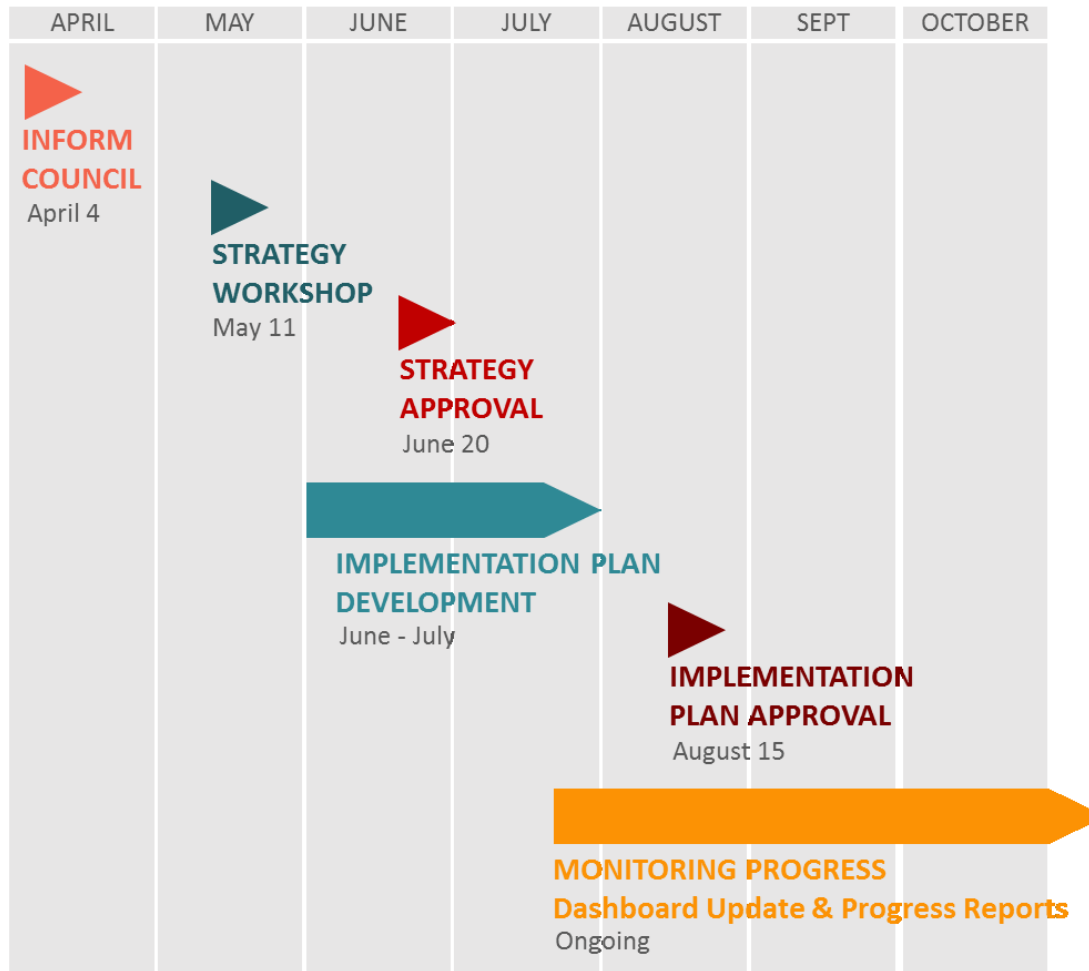


Strategic Planning Process & Timelines

Anticipated Timeline



2019



Council Strategic Planning Workshop

- Full day workshop to develop Council's 2019-2022 Strategic Plan
 - May 11 at Armenian Community Centre in St. Catharines
 - Vision Setting
 - Council's Strategic Priorities
 - The goals to define these priorities; and
 - The objectives to achieve these priorities
 - Preliminary work and input on an implementation plan to action the strategy

Questions?