

Niagara 2031



October 23rd, 2008

Our Agenda

- 7:40 Foundations of NGMS
- 8:05 NGMS – Work to Date
- 8:30 The Preferred Growth Option
- 8:55 Moving Forward
- 9:15 Adjourn

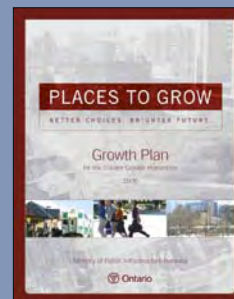
Refreshments

Overview

- Reasons for a Growth Management Strategy
- Phases 1 through 5
- Next Steps

Why Do A Growth Management Strategy?

- Requirement for Integrated Community Sustainability Planning
- Community consultation in future
- Plan for the future
- Integration of land, services and infrastructure (soft and hard)
- Policy requirements- PPS, P2G



Servicing: Perspective and Objectives To Be Met

- Effective solutions that utilize existing infrastructure, while laying the groundwork for future servicing needs (e.g. transit)
- Ensure the health and safety of residents
- Cost-efficient

Economy and Finance: Perspective and Objectives To Be Met

- Ensure opportunities for economic growth and development
- Fiscally responsible
- Tied to multiple year capital strategy
- Foster climate for investment in urban rejuvenation and gateway opportunities

Human Services: Perspective and Objectives To Be Met

- Matching of healthy community check lists
- Projecting demographic needs and supports
- Forecasting economic development and ensuring transferable skills

Public Health: Perspectives & Objectives to be Met

- Strong transportation policy that incorporates and promotes walking, cycling and public transit as viable alternatives to automobile travel
- Improved “live-work” configurations that connect home, school, work, shopping and recreation opportunities
- Access to social supports, community services and affordable housing

Environment: Perspective & Objectives To Be Met

- Ensure community design supports a healthy environment
- Ensure air, water and soil integrity to protect health of residents
- Continue to protect and enhance farmland / greenspace for conservation and agriculture

Social and Cultural: Perspective and Objectives To Be Met

- Support cross-community interaction, coordination and celebration
- Support downtown rejuvenation for sense of place
- Consider facility locations and needs in the future

Backgrounder: What is included in Niagara 2031?

- "Grow South" – making it work
- Redevelopment & intensification
- Housing for everyone
- A variety of places to work
- Transportation planning
- Servicing
- The social & cultural dimension
- Environmental conservation
- Protection of agricultural land



Engaging Niagara

- Resident Survey
- Visualization
- Consultation Highlights

2007 Resident Survey

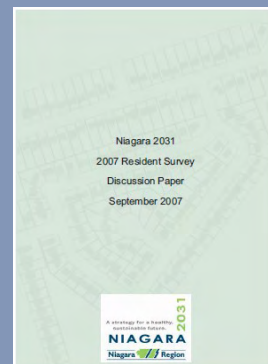
- 1200 residents
- 100 residents per municipality
- Collection of ideas and current thinking
- Accurate to within +/- 2.8% or 19 times out of 20

2007 Resident Survey: Results

- Most believe the urban or downtown areas are the most in need of development and the most appropriate places for a multi-unit residential building to go up, however, only 8% would prefer to live downtown
- 7 in 10 Niagara area residents envision their community changing in the next 20 years, most commonly in size and population
- Of those who work, only 2% take public transit

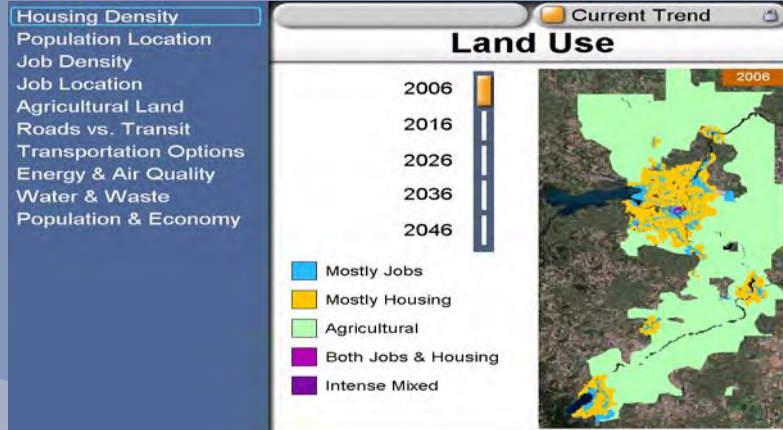
Discussion Paper

- Based on 2007 Survey of Residents
- Related contrary indicators from survey
- Posed questions for discussion



Riverside Quest

- 15 sessions



Niagara Quest

- 7 sessions

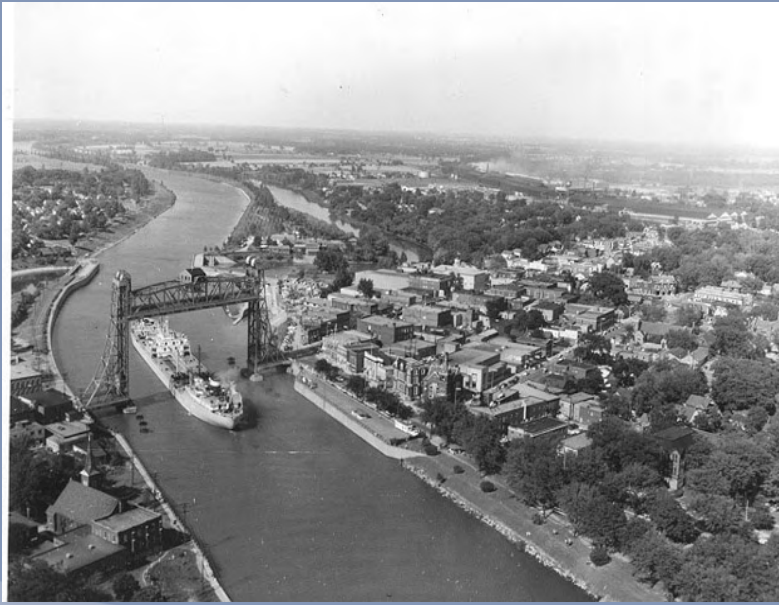




Niagara Region
Building Community. Building Lives.



Niagara Region
Building Community. Building Lives.

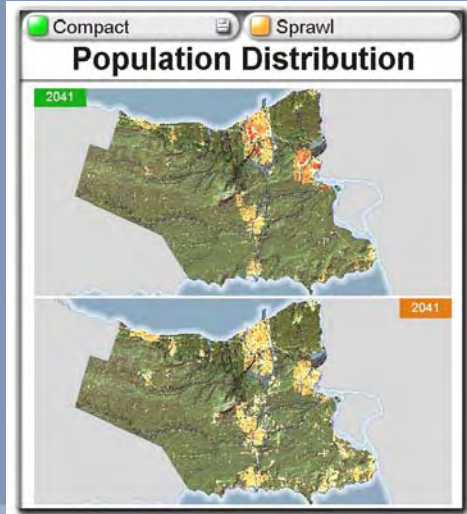


Niagara Region
Building Community. Building Lives.

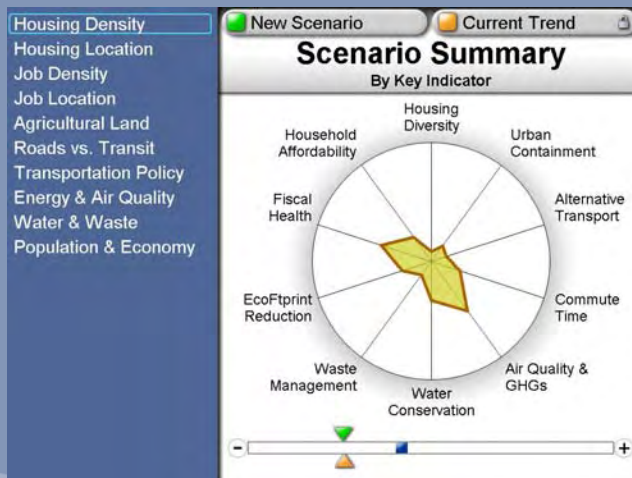


Niagara Region
Building Community. Building Lives.

Niagara Quest



Niagara Quest



Community Consultation

Participants stressed the following:

- i. Policies and guidelines supporting more sustainable communities
- ii. We need to achieve new growth to the greatest extent possible within existing urban boundaries and, though controversial, many support intensification
- iii. A better range of housing choices
- iv. Cost efficiencies in the provision of infrastructure.

Community Consultation (cont'd)

Participants stressed the following:

- v. Aggressively seek new economic opportunities that offer better paying, career-oriented jobs, especially for South Niagara.
- vi. We must make regional and local transit, including high speed rail, and alternate, active transportation a priority.
- vii. Matching growth with availability of health care and educational facilities and services is required.

Niagara 2031: A Strategy for a Healthy, Sustainable Future

Towards A Preferred Option
October 23, 2008



Associated Engineering - Clara Consulting
EDP Consulting - Watson & Associates

Presentation Overview

- **Introductions - Consulting Team**
 - Ron Shishido, Dillon Consulting
 - Lynda Newman, Clara Consulting
 - Paddy Kennedy, Dillon Consulting
 - Jamie Cook, Watson and Associates
 - Darrell Smith, Dillon Consulting
- **Presentation covers the following:**
 1. Context for the GMS;
 2. Summary of Phases 1, 2 and 3;
 3. Overview of Phase 4 and the Preferred Option; and,
 4. Follow up work.



Associated Engineering - Clara Consulting
EDP Consulting - Watson & Associates

GMS Context

- What is a Growth Management Strategy?
 - A process that examines land use and supporting infrastructure to better understand how and where municipalities should grow over a long term horizon.
- Why are we doing it?
 - To create a sustainable plan for accommodating Niagara's long term population, housing and employment growth.
 - We are operating under a new legislative context (Places to Grow, Greenbelt Plan, 2005 PPS).



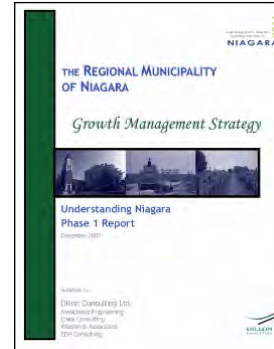
GMS Context

- The GMS has five main phases:
 - Phase 1: Understanding Niagara;
 - Phase 2: Anticipating Niagara;
 - Phase 3: A Range of Options;
 - Phase 4: Develop and Refine a Preferred Option; and,
 - Phase 5: Regional Policy Plan Update and Strategies and Actions.



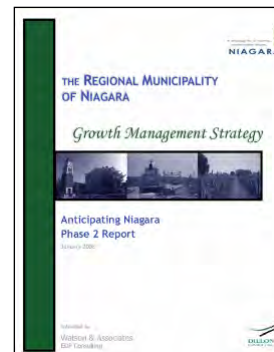
Phase 1: Understanding Niagara

- Understanding Niagara identified the existing conditions with respect to:
 - Legislative context;
 - Natural heritage;
 - Agriculture;
 - Population and housing;
 - Communities;
 - Land supply;
 - Economic development;
 - Social and cultural; and,
 - Infrastructure (Water and wastewater, transportation, stormwater and solid waste).

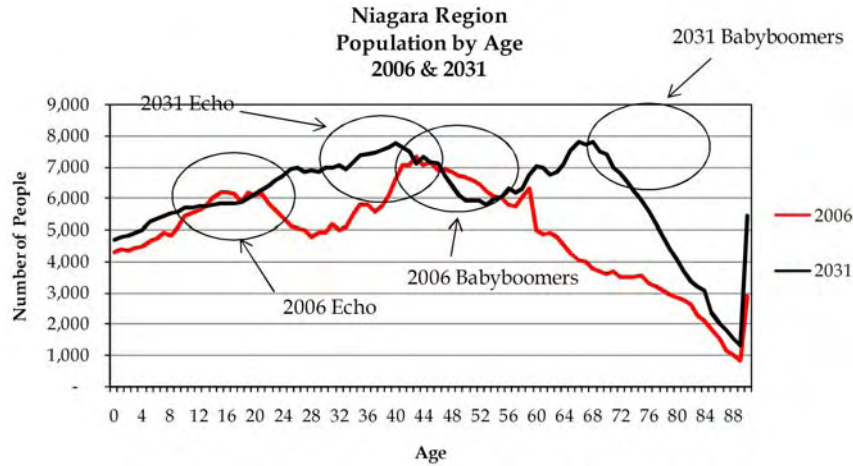


Phase 2: Anticipating Niagara

- Analysis of key drivers for population and employment growth in Niagara.
- Produced three alternative growth scenarios for Niagara:
 - Low;
 - Medium; and,
 - High.
- Recommended that the Medium growth scenario be used for the GMS:
 - 545,000 people by 2031 (118,000 people between 2001-2031);
 - 249,000 jobs by 2031 (63,000 jobs between 2001-2031); and,
 - 221,000 units by 2031 (59,000 housing units 2001-2031).



Region of Niagara *Growth Management Strategy*



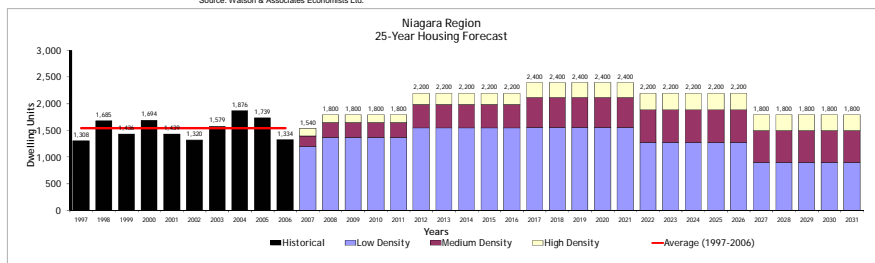
Associated Engineering - Clara Consulting
 EDP Consulting - Watson & Associates

Region of Niagara *Growth Management Strategy*

Medium Growth Scenario (545,000 people by 2031)

| Year | Population | Households | PPU |
|-----------|------------|------------|------|
| 2001 | 427,000 | 162,400 | 2.63 |
| 2011 | 463,000 | 178,200 | 2.60 |
| 2021 | 510,000 | 201,200 | 2.53 |
| 2031 | 545,000 | 221,200 | 2.46 |
| 2001-2031 | 118,000 | 58,800 | |

Source: Watson & Associates Economists Ltd.

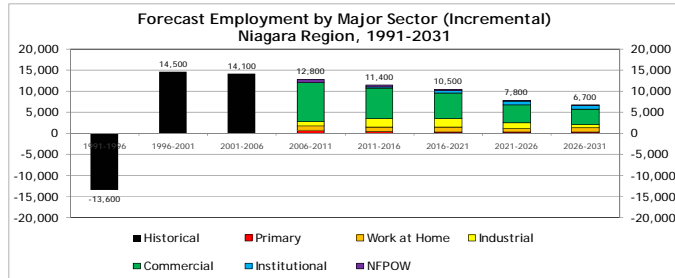


Associated Engineering - Clara Consulting
 EDP Consulting - Watson & Associates

Medium Growth Scenario (249,200 jobs by 2031)

| Year | Population | Employment | Employment Activity Rate |
|-----------|------------|------------|--------------------------|
| 2001 | 427,000 | 186,000 | 43.6% |
| 2011 | 463,000 | 212,800 | 46.0% |
| 2021 | 510,000 | 234,800 | 46.0% |
| 2031 | 545,000 | 249,200 | 45.7% |
| 2001-2031 | 118,000 | 63,200 | |

Source: Places to Grow, 2006



Associated Engineering - Clara Consulting
 EDP Consulting - Watson & Associates

Phase 3: Three Growth Options for Niagara

- **Points of Reference:**
 - The Medium Scenario forecast assumes no major transportation corridor;
 - Assumes three distinct market areas in Niagara;
 - Infrastructure capacities identified in Phase 1 were updated to help evaluate the Options; and,
 - Land supply information was used to inform the creation and evaluation of the Options. Land supply information was assembled with the help of the local municipalities.



Associated Engineering - Clara Consulting
 EDP Consulting - Watson & Associates

Phase 3: Three Growth Options for Niagara

- Three growth options for accommodating the Medium Growth Scenario were developed.
- The three options feature a set of common considerations:
 - Conform to the policies of the PPS;
 - Conform to the Greenbelt Plan and Niagara Escarpment Plan;
 - Focus growth in fully-serviced areas;
 - Meet the Places to Grow 40% residential intensification target;
 - Use the Core Natural Heritage System and Prime Agricultural lands to identify areas not suitable for growth;
 - Does not assume the presence of a the Niagara to GTA Corridor;
 - Use the same overall housing unit mix.



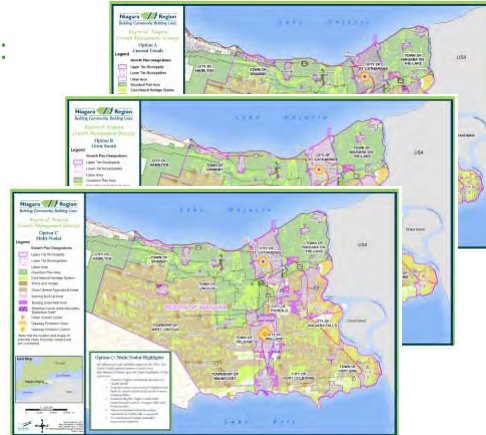
Phase 3: Three Growth Options for Niagara

- Each option featured a set of unique characteristics:
 - Geographic location and allocation of population, housing and employment;
 - Overall intensification level and assumptions; and,
 - Density assumptions used for land supply.

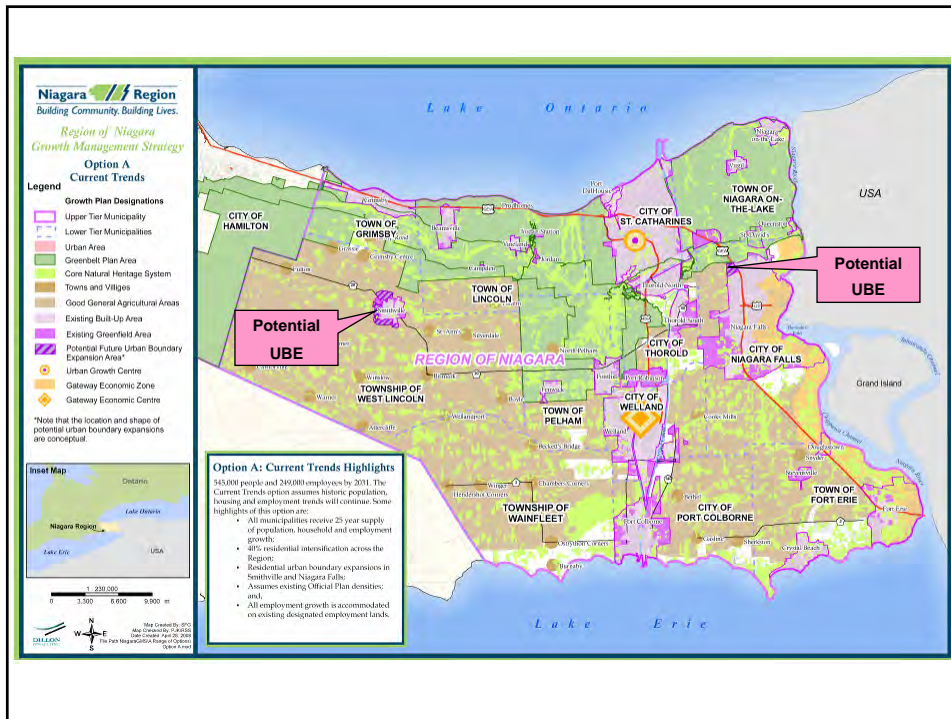


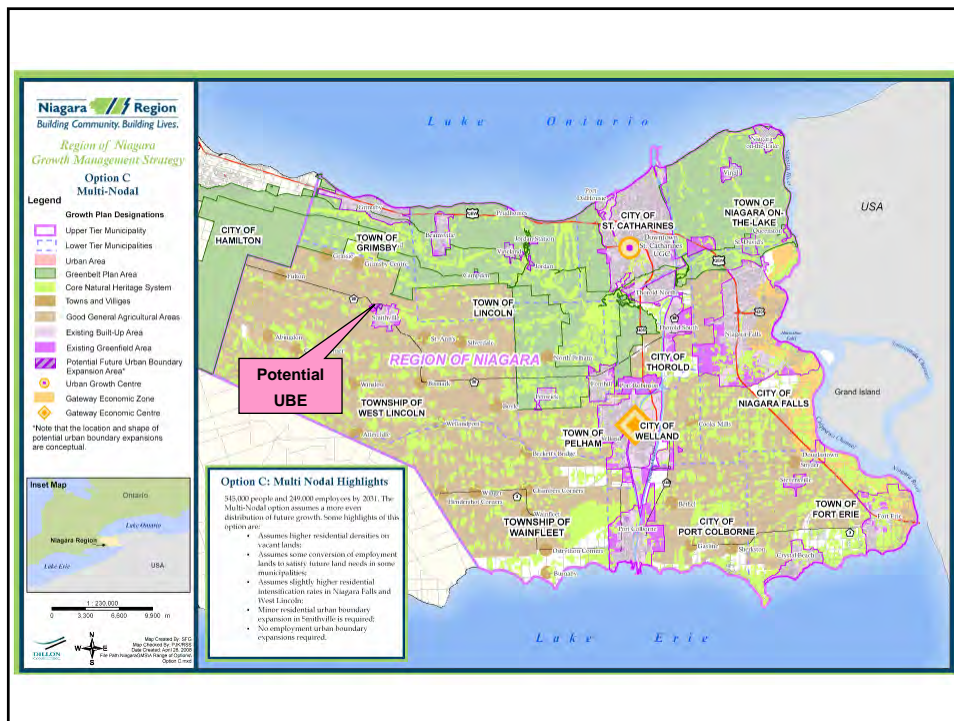
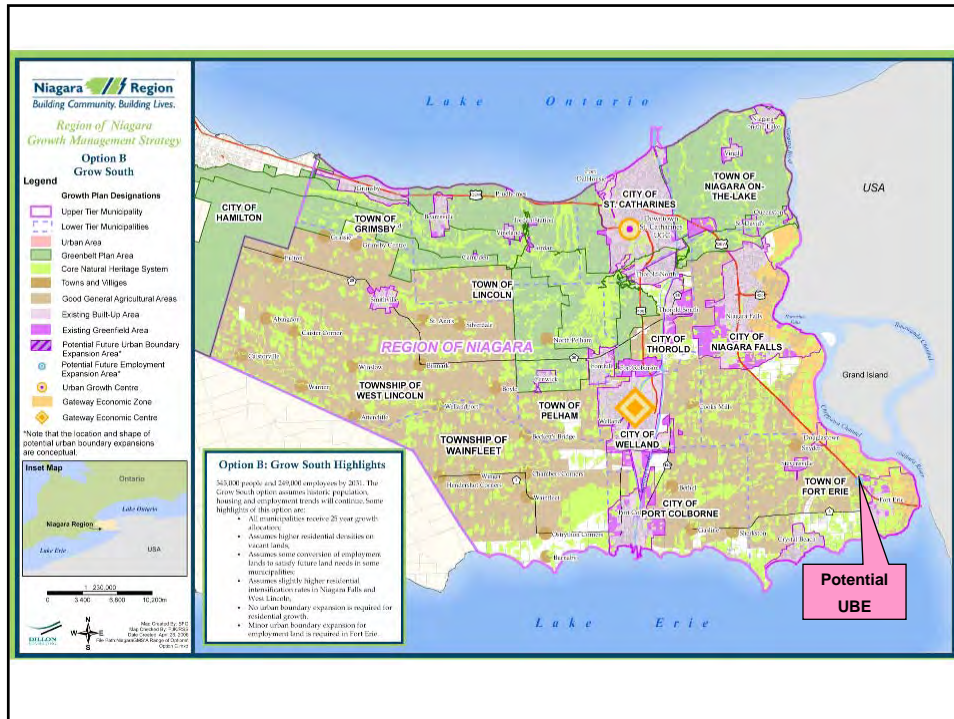
Phase 3: Three Growth Options for Niagara

- Three options for Growth:
 - Option A Current Trends
 - Option B Grow South
 - Option C Multi Nodal



Associated Engineering - Clara Consulting
 EDP Consulting - Watson & Associates





Phase 3: Evaluation Highlights

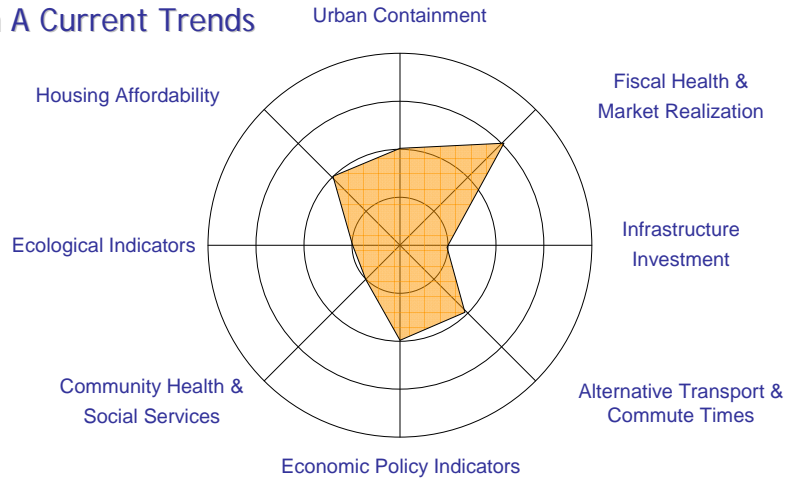
- Purpose of the evaluation was to assess and document the implications of growth and to inform the creation of a Preferred Option for Niagara.
- Evaluation criteria is based on a range of considerations.
- Criteria covers eight general categories and is intended to reflect the “Niagara-Quest” look.
- Each category has a number of very specific indicators and related measures, including a mix of qualitative and quantitative measures.

Phase 3: Evaluation Highlights

- The evaluation table is divided into eight categories:
 - Urban containment
 - Housing affordability
 - Ecological indicators
 - Community health and social services
 - Economic policy indicators
 - Fiscal health and market realization
 - Infrastructure investment
 - Alternative transport and commute times

Region of Niagara *Growth Management Strategy*

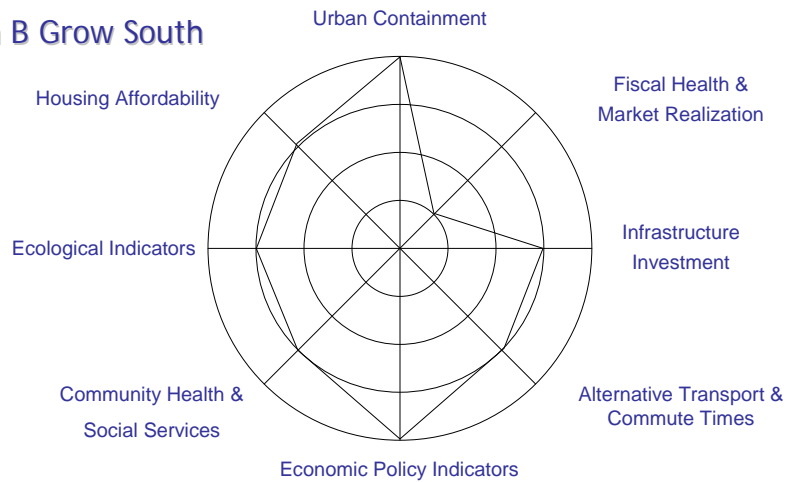
Option A Current Trends



Associated Engineering - Clara Consulting
EDP Consulting - Watson & Associates

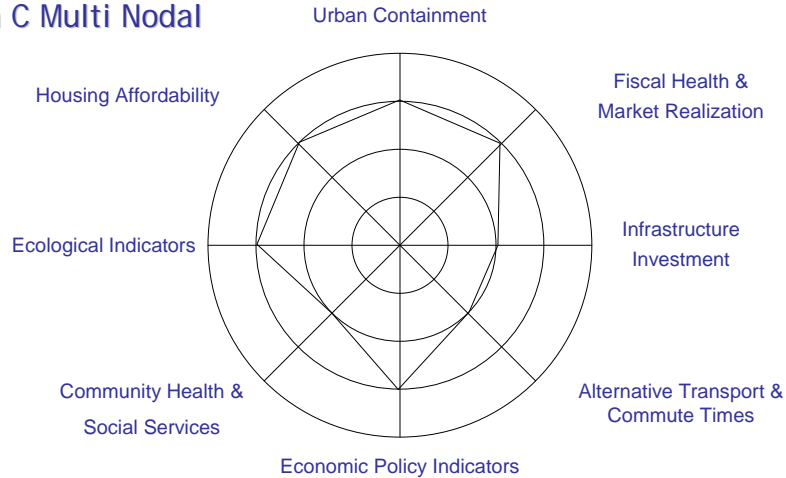
Region of Niagara *Growth Management Strategy*

Option B Grow South



Associated Engineering - Clara Consulting
EDP Consulting - Watson & Associates

Option C Multi Nodal



Phase 3: Evaluation Findings

- Evaluation showed that none of the three options were completely desirable.
 - Option A performed "least well" against a number of categories;
 - Option B performed "very well" in most categories, except the "fiscal health and market realization" category; and,
 - Option C performed "well" and "somewhat well" in most categories.

Feedback on the Three Options

- Public feedback supported both Option B and Option C.
- Niagara's lower tier municipalities were split down the middle, with five municipalities supporting Option B and five municipalities supporting Option C. Two other municipalities were neutral in terms of the selection of a preferred option.
- Most municipalities recognized the need to create a fourth option which better balances the needs of all of Niagara's communities.



How the Preferred Option was Created

- The creation of the preferred option considered:
 - Input from Regional staff;
 - Formal feedback from local municipalities;
 - Formal feedback from Conservation Authority and Regional committees;
 - Formal feedback from members of the public, including private sector; and,
 - Other considerations such as historic demand, infrastructure capacity, land supply and a whole host of other technical information.



Option D: Preferred Growth Option

- **Rationale for Population and Housing Allocations**
 - Forecast housing demand allocations within Niagara Region will be driven by a number of local and regional demand and supply factors, including:
 - Demand
 - Proximity and access to surrounding employment markets;
 - Future trends in housing prices and forecast housing demand by density type;
 - Impacts of aging population on future housing preferences by type and location;
 - Workplace flexibility (i.e. work at home, flex hours, telecommuting);
 - Access to arts, culture, entertainment and recreational amenities;
 - Quality of life; and
 - Local marketing efforts.



Option D: Preferred Growth Option

- **Rationale for Population and Housing Allocations**
 - Supply
 - Supply of designated residential lands in surrounding market areas;
 - Supply of designated residential lands within Niagara Region to accommodate ground oriented housing;
 - Future market choice for compact housing forms;
 - Water & wastewater servicing capacity; and
 - Timing of major transportation infrastructure improvements.



Option D: Preferred Growth Option

Rationale for Employment Allocations

Demand

- Proximity and access to GTA and U.S. employment markets
- Existing and emerging employment clusters (e.g. tourism, agriculture, logistics, value-added processing and wineries)
- Influence of Provincial Growth Plan initiatives (i.e. Gateway Economic Zone and Centre)
- Local marketing efforts

Supply

- Supply of net developable, serviced (serviceable) and marketable designated employment lands
- Water & wastewater servicing capacity
- Timing of major transportation infrastructure improvements

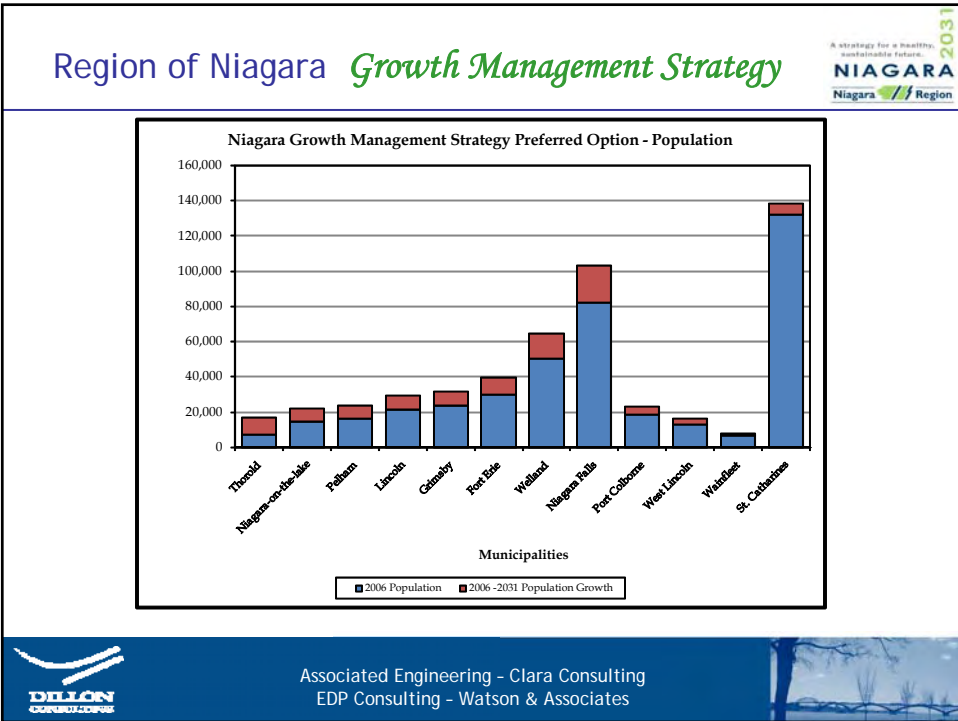
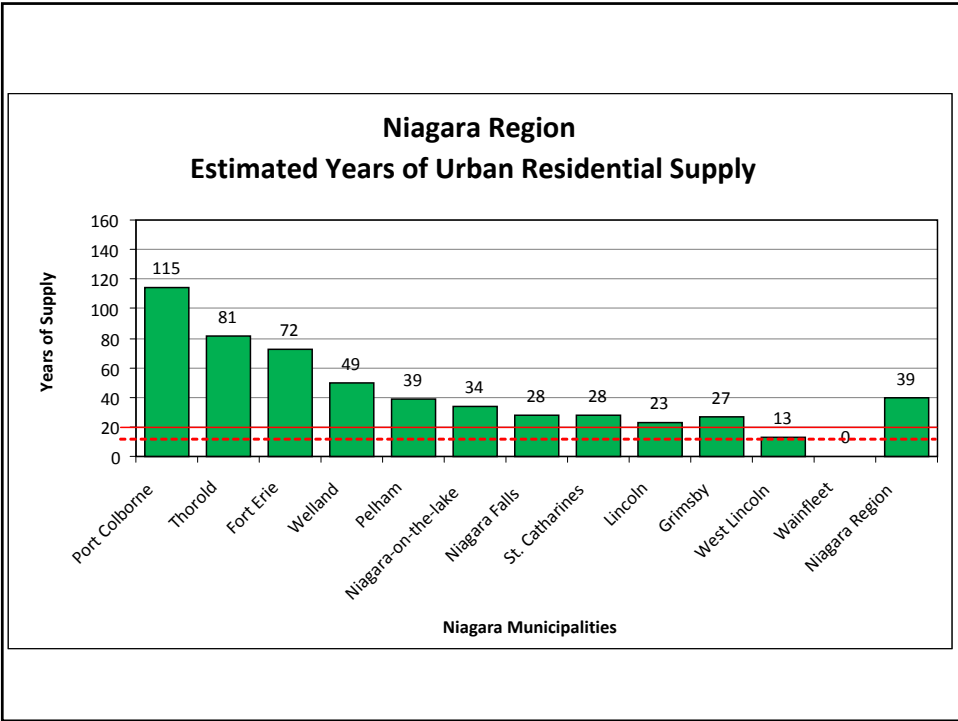


Option D: Evaluation Highlights

• Key Findings - Residential Growth

- Niagara Region will continue to compete directly with surrounding municipalities for future housing development (i.e. Hamilton, GTA, GGH Outer Ring);
- Opportunities exist for steady growth across a broad range of housing forms on designated residential lands for all of Niagara's local municipality's over the next 10 years;
- Over the longer term (i.e. post 10 years), several of the QEW Niagara municipalities, including West Lincoln, may potentially experience supply constraints for low-density housing subject to forecast demand levels and future markets for higher density housing forms; and,
- A gradual increase in forecast housing demand is anticipated for South Niagara





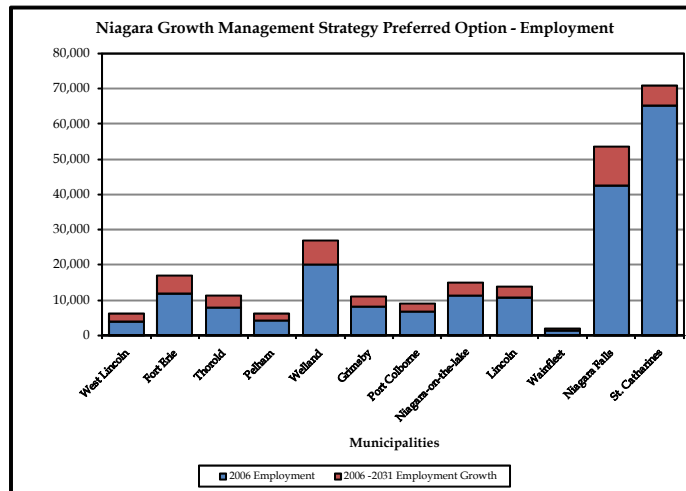
Option D: Evaluation Highlights

- **Key Findings - Non-Residential Growth**

- Future industrial development opportunities are anticipated to be strongest for Niagara Falls, Fort Erie and the remaining QEW Niagara municipalities;
- Construction of the Highway 406 link to the QEW Niagara at Netherby Rd. will have a positive influence on the marketability of employment lands in Welland and south Niagara;
- Proposed Hamilton Airport Employment District will be a significant driver of growth on employment lands in Niagara Region, especially in West Niagara;
- Commercial employment growth will continue to be strongly weighted to Niagara Falls based on continued economic growth potential in the tourism sector.

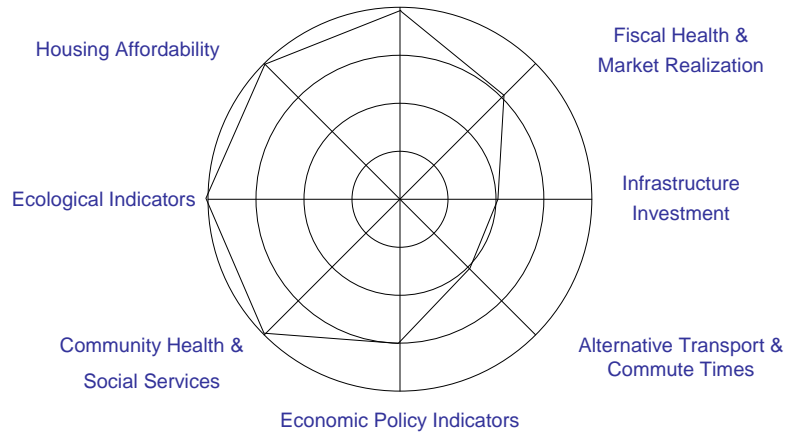


Associated Engineering - Clara Consulting
 EDP Consulting - Watson & Associates



Associated Engineering - Clara Consulting
 EDP Consulting - Watson & Associates

Option D: Preferred Option Urban Containment



Associated Engineering - Clara Consulting
EDP Consulting - Watson & Associates

Option D: The Growth Strategy Foundation

- **The Preferred Option -**
 - ✓ All municipalities will grow
 - ✓ Utilizes existing land supply and infrastructure
 - ✓ Supports Regional direction for "Growth South"
 - ✓ Capitalizes on market opportunities in north and west Niagara
 - ✓ Conforms to Provincial Policy Statement and the Growth Plan
 - ✓ Supports the Urban Growth Centre in St. Catharines
 - ✓ Supports the Gateway Economic Centre in Welland and area
 - ✓ Supports the Gateway Economic Zone along corridor between Niagara Falls and Fort Erie
- **The Preferred Option can be used as the basis for drafting an Amendment to Regional Policy Plan.**



Associated Engineering - Clara Consulting
EDP Consulting - Watson & Associates

Follow Up Work

- Additional work will be required before the next 5 year review to update the Growth Strategy based on the outcomes of:
 - Phase 1 and 2 of Niagara to GTA Corridor Environmental Assessment;
 - Economic Gateway Study;
 - Regional Transportation Master Plan;
 - Updated Master Servicing Plan;
 - More detailed technical studies done at the local level such as:
 - municipal comprehensive reviews done through local Official Plan updates (e.g. Wainfleet)
 - Detailed local land supply assessments (e.g. West Lincoln)



Complete Phase 4

Immediate Next Steps -

- Release background material on the Preferred Option, October 2008
- Release Phase 3 and 4 Report, November 2008
- Council endorsement of a Preferred Option in December 2008

Phase 5 - Moving Ahead to a Sustainable Future

- A new look at our urban areas – a major amendment to the Regional Policy Plan
- Unfinished business – servicing and capacity issues with Wainfleet and West Lincoln
- Infrastructure and the capital budget – a review of the Master Servicing Plan

Moving Ahead to a Sustainable Future (cont'd)

- Incentives for new ways of growing – a review of Development Charges and the *Smarter Niagara* Incentives
- Connecting Niagara – taking transit to the next level
- New places to work – completing the Gateway Zone and Centre
- Housing for everyone – housing for new demographic and economic realities

Moving Ahead to a Sustainable Future (cont'd 2)

- Indicators of sustainability – monitoring results/measuring success
- Committing to review – a new five year cycle of sustainability and resiliency
- Future decisions driving re-assessment – GO Transit, and the Niagara to GTA Corridor

