



**Dufferin County Economic Development Steering Committee  
Agenda**

**Dufferin County Economic Development Strategic Plan**

**Kick-Off Meeting with Global Investment Attraction Group (GIAG)**

John Tennant, Kelly O'Brien and Bill Elliot

Wednesday, January 18, 2017 at 9:00 am  
Sutton Room, 2<sup>nd</sup> Floor 55 Zina St., Orangeville

1. Welcome and Introduction	Sonya Pritchard
2. Introduction of the Global Investment Attraction Group	GIAG Team
3. Review of Major Timelines for Development of the Strategic Plan	GIAG Team
4. Brief Overviews of Municipal Economic Development Strategies <sup>1</sup>	Representatives from Each Municipality/Local ED Committee
5. Discussion with respect to the role of the County Economic Development Steering Committee	All
6. Planned Consultations and Online Survey in March – Getting People Involved	All
7. Other Observations and Questions	All
8. Adjournment	

<sup>1</sup> Five to seven minute overviews are envisaged. The GIAG Team is accessing the strategies and background material listed below. Presenters may be able to provide or point to other written material.

**Resource Documents**

Dufferin County Community Profile – Excerpt from the OP Background Study - Attached County OP and recent Shelburne OPAs - <http://www.dufferincounty.ca/planning/#Resources>  
Resources and Documents

Land Needs Update <https://www.dufferincounty.ca/files/content-pdf/dclnu-final-draft-july-27-2016-compressed.pdf>

Amaranth Strategic Plan <http://www.amaranth-eastgary.ca/amaranth/main/doc/EDSACSPfinal.pdf>

Grand Valley Strategic Plan <http://www.townofgrandvalley.ca/boards-committees/economic-development-committee/>

Mono Strategic Plan <https://mono.civicweb.net/document/15927/Workspace5%20-%20Strategic%20Plan%20Revised%20Mar%202012.pdf?handle=4CCCB759D1DB424099CA5983F0BA9B09>

Mulmur Strategic Plan and Economic Development Plan <http://mulmur.ca/council/strategic-plan>  
Orangeville Community Profile <http://orangevillebusiness.ca/files/2015/08/Orangeville-CP-Updated20151.pdf>

Orangeville Cultural Plan <http://www.orangeville.ca/get-file/262>  
Shelburne Economic Development Strategy  
<http://www.townofshelburne.on.ca/uploads/pdfs/edc-strategic-plan-578e1f72317a5.pdf>  
Equine Sector Development and Headwaters Tourism Strategic Plan  
<http://headwatershorsecountry.ca/wp-content/uploads/sites/4/2014/04/2015-2016-Horse-Country-Strategic-Plan-FINAL.pdf>

Other documents of interest –

Orangeville Land Needs Update <http://www.orangeville.ca/get-file/3723>  
Orangeville Commercial Market Analysis <http://www.orangeville.ca/get-file/3725>

### 4.3 Population, Housing and Employment Trends

This section considers the economic potential for population and employment growth of and within Dufferin County through to 2041 against a backdrop of expectations regarding expected future growth for employment in nearby communities. This section describes the economic forces that are most likely to drive population and employment growth of and within the County between now and 2041.

#### 4.4.1 Current Situation

Dufferin County is one of the sixteen Regions, Counties and Cities included by the Province of Ontario in the Growth Plan for the Greater Golden Horseshoe (GGH). There are six Regions and Cities that define the Greater Toronto Area and Hamilton (GTAH) at the centre of the GGH. The other ten Regions, Counties and Cities within the GGH (a group including Dufferin County) form an outer ring around the GTAH.

The results of the 2011 Census and of the 2011 National Household Survey reveal some interesting characteristics relating to Dufferin County's position within the GGH:

- As of 2011 Dufferin County's total population was 56,881.
- In 2011, a total of 29,655 Dufferin County residents had jobs (employment by place-of-residence (EPOR)).
- In 2011, employers provided a total of 17,885 jobs in Dufferin County (employment by place-of-work (EPOW)).
- Thus Dufferin County's working population exceeds the number of locally available jobs by a margin of 11,770.
- This margin of local resident job holders relative to locally available jobs equals 66% in Dufferin County, the highest such margin among the sixteen Cities, Regions and Counties in the GGH (Durham is second at 63 percent and Kawartha Lakes is third at 57 percent).
- EPOR exceeds EPOW in every one of Dufferin's 8 municipalities.
- NHS commuter data for 2011 are suppressed for Amaranth and Melancthon by Statistics Canada for statistical security reasons; for the remaining six municipalities the total number of out-commuters in 2011 was 9,880 with the major destinations being the nearby Cities and Regions of Peel (6,515), Toronto (1,265), Simcoe (645), York (475) and Halton (430).
- Dufferin County has a minimal economic base of its own, one based on agriculture and manufacturing, both of which are expected to shed jobs in the future as in the past; the following section addresses this issue in some detail.
- Thus employment growth within the County will primarily reflect job growth in those industries serving the needs of the local population.
- In other words Dufferin's future population and employment growth will be determined primarily by the commuting potential offered by job growth in nearby Cities, Regions and Counties and by the willingness and capacity of the County's constituent municipalities to accommodate future population and employment growth.

**Exhibit 4.4.1** tabulates the current situation in Dufferin County described above while **Exhibit 4.4.2** illustrates the current situation spatially.

**Exhibit 4.4.1 - Dufferin County by Area Municipality 2006 and 2011: Population and Employment by Place-of-Residence and Place-of-Work, Major Commuting Destinations**

Population - Employment	Orangeville	East Garafraxa	Amaranth	Grand Valley	Mono	Mulmur	Melancthon	Shelburne	Dufferin Total
Total Population - 2011	27,975	2,595	3,963	2,726	7,546	3,391	2,839	5,846	56,881
Total Population - 2006	26,925	2,389	3,845	2,844	7,071	3,318	2,895	5,149	54,436
Change	1,050	206	118	-118	475	73	-56	697	2,445
Employed (POR) - 2011	14,750	1,500	2,005	1,525	3,910	1,865	1,435	2,675	29,665
Employed (POR) - 2006	14,620	1,420	2,185	1,595	3,930	1,775	1,680	2,530	29,735
Change	130	80	-180	-70	-20	90	-245	145	-70
Employed (POW) - 2011	11,935	240	570	515	1,505	520	270	2,330	17,885
Employed (POW) - 2006	12,275	455	675	590	1,485	455	335	2,670	18,940
Change	-340	-215	-105	-75	20	65	-65	-340	-1,055
Worked in Dufferin	5,985	375	---	305	1,320	455	---	1,260	9,700
% Share	41	25	---	20	34	24	---	47	33
Commuted Out in 2011	6,055	525	---	420	1,520	620	---	740	9,880
% Share	41	35	---	28	39	33	---	28	33
Toronto	710	50	---	80	250	145	---	30	1,265
York	385	0	---	0	60	0	---	30	475
Peel	4,235	310	---	200	1,065	265	---	440	6,515
Halton	355	55	---	0	20	0	---	0	430
Waterloo	80	0	---	0	0	0	---	0	80
Wellington	155	110	---	140	20	0	---	20	445
Simcoe	135	0	---	0	105	210	---	195	645
Grey	0	0	---	0	0	0	---	25	25
Difference	2,710	600	---	800	1,070	790	---	675	6,645
% Share	18	40	---	52	27	42	---	25	22

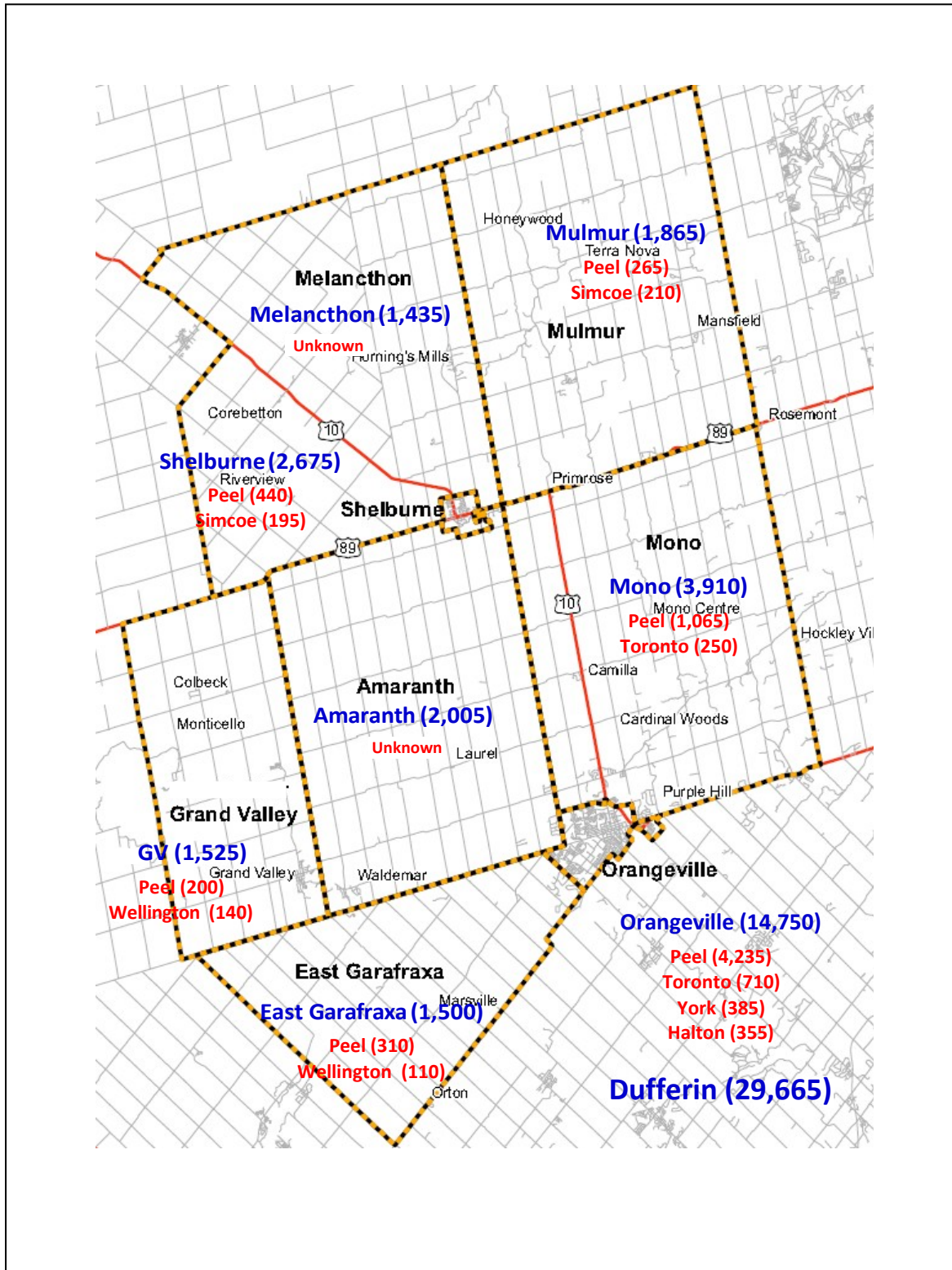
*Red figures estimated by Strategic Projections Inc.*

*Source: Statistics Canada Censuses of 2006 and 2011 and National Household Survey 2011*

*Employed by Place of Residence (POR)*

*Employed by Place of Work (POW)*

**Exhibit 4.4.2 - Dufferin County by Area Municipality in 2011: Employment by Place-of-Residence and Major Commuting Destinations**



Source: Statistics Canada National Household Survey 2011

#### 4.4.2 Dufferin County's Economic Base

Using location quotient analysis we have parsed the 17,855 jobs in Dufferin in 2011 on a place-of-work basis into two key categories: those that are economic base and those that are community base.

Export-based industries produce goods that are shipped to markets outside the community (agriculture, forestry, fishing and manufacturing), or they provide services either to visitors to the community (hotels, tourism attractors, specialized hospitals, colleges and universities) or to businesses outside the community (specialized financial, professional, scientific and technical services). Community-based industries produce services that meet the needs primarily of the local residents in the community (retail, medical, primary and secondary education, and personal and government services).

Growth will typically occur in an area only if its export-base is expanding.<sup>1</sup> Expansion of the export-based industries drives the growth of the community at large. Without growth in its export-based industries growth in a region's community-based activities is unlikely to occur. The export-based industries in a region are often referred to as the economic-base of the area. The terms *export-based* industries and *economic-base* industries can be used interchangeably as they refer to the same concept.

Using the location quotient parsing procedure for Dufferin:

- We calculate the number of jobs on a place-of-work basis in Dufferin and in Ontario as a whole for each of 20 industries on a per capita basis.
- We attribute all Dufferin jobs in the primary (agriculture, forestry, mining, etc.) and manufacturing sectors to its economic-base since most of the products produced in these industries are destined for markets outside the region.
- We compare the per capita job levels of Dufferin to Ontario across all of the remaining industries, most of which are services, and attribute all jobs above the norm in Dufferin to be economic-base jobs since, because they are above the norm, they represent jobs providing services to people not normally residing in the community (or exportable services). If per capita job levels in an industry in Dufferin County exceed the per capita job levels in that industry Province-wide, the excess is considered above the norm.

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<sup>1</sup> The exception to this correlation is where an area serves as a residential base for commuters to nearby job centres as is the case with Dufferin County.

- When economic-base service jobs crop up in the retail and food-accommodation sectors (such as occurs in Dufferin's case) it is a sign that tourism forms part of the County's economic-base.
- When economic-base service jobs crop up in the health, education and government sectors (this is not so in Dufferin) it is a sign that the area in question is a major regional service provider to surrounding less populated communities.

These calculations are summarized in **Exhibit 4.4.3**.

**Exhibit 4.4.3** reveals that Dufferin has a few jobs that can be attributed to tourism (105 in retail trade and 167 in food and accommodation) but no other jobs among Dufferin's various service industries can be attributed to exportable services.

Aside from these service industry jobs Dufferin's economic base jobs are primarily focused in manufacturing (1,870), agriculture (740) and mining and quarrying (15).

The total number of economic base jobs in Dufferin in 2011 was 2,901. Thus economic base jobs account for only 16 percent of the total jobs provided by employers in Dufferin. That share is very low compared to most regions where economic base job shares range anywhere from 25 to 33 percent.

**Exhibit 4.4.3** reveals that the total number of manufacturing jobs per capita in Dufferin in 2011 was just 33, well below the provincial average of 49. **Exhibit 4.4.4** identifies the individual manufacturing industries that accounted for the County's manufacturing job base.

Major contributors are plastics and rubber products (490, or about one quarter of all the manufacturing jobs in Dufferin), transportation equipment (310, 17 percent), food (150, 8 percent), machinery (135, 7 percent) and furniture and related (105, 6 percent). These five industries collectively account for 63 percent of Dufferin's total jobs in manufacturing.

Our national and provincial projections foresee job declines continuing in the future in both the agriculture and manufacturing sectors, suggesting that Dufferin's economic job base is likely to erode in the future in the absence of offsetting gains in other sectors.



**Exhibit 4.4.3 - Dufferin County Employed by Place-of-Work in 2011: Economic Base (EB) and Community Base (CB) Components**

Industry	Number		Per 1,000 Persons		Dufferin	
	Ontario	Dufferin	Ontario	Dufferin	EB	CB
Total population	12,851,821	56,881	---	---	---	---
Total employment by place-of-work	5,632,230	17,880	438	314	2,901	14,979
Agriculture, forestry, fishing and hunting	87,820	740	7	13	740	0
Mining, quarrying, and oil and gas extraction	23,855	15	2	0	15	0
Utilities	49,280	190	4	3	0	190
Construction	187,295	690	15	12	0	690
Manufacturing	630,365	1,870	49	33	1,870	0
Wholesale trade	266,170	505	21	9	0	505
Retail trade	672,275	3,080	52	54	105	2,975
Transportation and warehousing	221,110	310	17	5	0	310
Information and cultural industries	156,405	275	12	5	0	275
Finance and insurance	343,390	685	27	12	0	685
Real estate and rental and leasing	116,600	280	9	5	0	280
Professional, scientific and technical services	446,120	975	35	17	0	975
Management of companies and enterprises	5,900	30	0	1	4	26
Administrative and support, waste management and remediation services	207,030	565	16	10	0	565
Educational services	436,145	1,265	34	22	0	1,265
Health care and social assistance	626,900	2,470	49	43	0	2,470
Arts, entertainment and recreation	115,495	355	9	6	0	355
Accommodation and food services	359,905	1,760	28	31	167	1,593
Other services (except public administration)	254,975	1,120	20	20	0	1,120
Public administration	425,195	700	33	12	0	700

Source: Statistics Canada National Household Survey 2011 and C4SE





#### Exhibit 4.4.4 - Dufferin County Employed by Place-of-Work: Manufacturing by Industry in 2011

	Number
Total manufacturing	1,850
Plastics and rubber products	490
Transportation equipment	310
Food	150
Machinery	135
Furniture and related product	105
Wood product	90
Chemical	90
Printing and related support activities	85
Primary metal	85
Fabricated metal product	85
Electrical equipment, appliance and component	65
Beverage and tobacco product	50
Non-metallic mineral product	30
Computer and electronic product	30
Miscellaneous	30
Paper	20
Textile mills	0
Textile product mills	0
Clothing	0
Leather and allied product	0
Petroleum and coal product	0

Source: Statistics Canada National Household Survey 2011

We understand that there is some local interest on the establishment of a green and renewable energy sector. Such a trend is not supported by some of the job data. For example, the 2011 data suggest that the number of jobs in utilities per capita was less in Dufferin than across the province in general. The data also indicate no people were employed in Dufferin in petroleum and coal product manufacturing. But it is supported by some of the job data. For example, there were 65 people employed in electric equipment, appliance and component manufacturing, a result that might support the view that a renewable energy sector is emerging in the County.

On balance we conclude that Dufferin is now and will continue to be primarily a location for commuters to nearby job centres. This conclusion is supported by Dufferin's excess of employment by place-of-residence to employment by place-of-work, its significant daily out-commuting numbers, and Dufferin's lower than average economic base to total job base share.

### 4.4.3 Recent Trends

#### *Recent Trends in Population Growth*

- Dufferin's population growth slowed from a pace of 1,224 per year between 1986 and 2001 to a pace less than half that at just 588 per year from 2001 to 2011
- Orangeville accounted for the majority of the County's growth in both periods (58.8 percent and 46.4 percent respectively) (**Exhibit 4.4.5**)
- Shelburne's share of the growth increased (from 6.7 percent in the earlier period to 27.8 percent) while that of Mono declined (14.4 to 10.8)
- As of 2011 these three collectively accounted for 72.8 percent of the County's population (Orangeville 49.2 percent, Mono 13.3 percent and Shelburne 10.3 percent)
- The remaining growth was scattered across the other five municipalities in the County
- The population of Grand Valley fell slightly over the last decade (though we note that Grand Valley's capacity to grow has been curtailed by servicing constraints)

#### *Recent Trends in Employed by Place-of-Work Growth*

- Dufferin's employed by place-of-work growth slowed from a pace of 513 jobs per year between 1986 and 2001 to a pace of just 109 jobs per year from 2001 to 2011
- Dufferin's employed by place-of-work was lower in 2011 than in 2006 by 1,055 jobs (**Exhibit 4.4.5**)
- Orangeville accounted for 55.0 percent of the County's EPOW growth from 1996 to 2001 and for 87.6 percent of its growth from 2001 to 2011
- Orangeville accounted for 66.7 percent of the County's EPOW total in 2011

### Exhibit 4.4.5 - Dufferin County by Area Municipality 1986 to 2011: Population, Dwellings and Employment by Place-of-Work

	1986	1991	1996	2001	2006	2011	Change		Share %	
							86-01	01-11	86-01	01-11
Population	1986	1991	1996	2001	2006	2011	86-01	01-11	86-01	01-11
Dufferin County Total	32,650	39,897	45,657	51,003	54,436	56,881	18,35	5,878	100.0	100.0
East Garafraxa	1,841	2,002	2,084	2,214	2,389	2,595	373	381	2.0	6.5
Amaranth	2,771	3,156	3,450	3,736	3,845	3,963	965	227	5.3	3.9
Grand Valley	2,091	2,559	2,773	2,842	2,844	2,726	751	-116	4.1	-2.0
Mono	4,270	5,782	6,552	6,912	7,071	7,546	2,642	634	14.4	10.8
Orangeville	14,455	17,921	21,498	25,248	26,925	27,975	10,793	2,727	58.8	46.4
Mulmur	2,086	2,591	2,903	3,099	3,318	3,391	1,013	292	5.5	5.0
Melancthon	2,149	2,447	2,607	2,739	2,895	2,839	590	100	3.2	1.7
Shelburne	2,987	3,439	3,790	4,213	5,149	5,846	1,226	1,633	6.7	27.8
							Change		Share %	
Dwellings	1986	1991	1996	2001	2006	2011	86-01	01-11	86-01	01-11
Dufferin County Total	10,535	13,190	15,260	17,180	18,795	21,257	6,645	4,077	100.0	100.0
East Garafraxa	545	605	655	700	770	893	155	193	2.3	4.7
Amaranth	815	960	1,105	1,200	1,240	1,312	385	112	5.8	2.7
Grand Valley	670	845	920	925	965	1,048	255	123	3.8	3.0
Mono	1,355	1,805	2,120	2,285	2,340	2,832	930	547	14.0	13.4
Orangeville	4,740	6,100	7,265	8,600	9,430	10,265	3,860	1,665	58.1	40.8
Mulmur	685	880	990	1,090	1,195	1,643	405	553	6.1	13.6
Melancthon	680	795	870	925	1,005	1,100	245	175	3.7	4.3
Shelburne	1,045	1,200	1,335	1,455	1,850	2,164	410	709	6.2	17.4
							Change		Share %	
Employment	1986	1991	1996	2001	2006	2011	96-01	01-11	96-01	01-11
Dufferin County Total			14,235	16,800	18,940	17,885	2,565	1,085	100.0	100.0
East Garafraxa			275	330	455	240	55	-90	2.1	-8.3
Amaranth			440	490	675	570	50	80	1.9	7.4
Grand Valley			605	525	590	515	-80	-10	-3.1	-0.9
Mono			725	1,430	1,485	1,505	705	75	27.5	6.9
Orangeville			9,575	10,985	12,275	11,935	1,410	950	55.0	87.6
Mulmur			380	570	455	520	190	-50	7.4	-4.6
Melancthon			335	330	335	270	-5	-60	-0.2	-5.5
Shelburne			1,900	2,140	2,670	2,330	240	190	9.4	17.5

Source: Statistics Canada Censuses of 1986 to 2011 and National Household Survey 2011

#### 4.4.4 Potential Trends

##### Future Employment Growth in Dufferin and Nearby Regions and Counties

- **Exhibit 4.4.6** below summarizes the employment growth from 2011 to 2041 projected by *Places to Grow* for each of the Cities, Regions and Counties that are the destinations of the majority of Dufferin's commuters

- Employment in this table includes an estimate for those with no fixed place of work
- The Growth Plan properly calls for modest future growth in employment within Dufferin itself (by 9,000 over the three decade span, from 23,000 in 2011 to 32,000 in 2041)
- Major employment gains are projected for York (363,000), Peel (284,000), Halton (213,000) and Toronto (200,000)
- Large gains are also projected for Waterloo (124,000), Simcoe (106,000) and Wellington (47,000)

Given current out-commuting patterns from Dufferin the Growth Plan employment projections below tend to favour future population growth within Dufferin in the following order: Orangeville, Mono, Shelburne, Mulmur, East Garafraxa, Grand Valley, Amaranth and Melancthon.

**Exhibit 4.4.6 - Places to Grow Schedule 3 (November 2012 Update): Employment by Selected Region and County within the GGH, Growth from 2011 to 2041**

	2011	2041	Change
Dufferin	23,000	32,000	9,000
York	539,000	902,000	363,000
Toronto	1,516,000	1,716,000	200,000
Peel	682,000	966,000	284,000
Halton	254,000	467,000	213,000
Wellington	110,000	157,000	47,000
Waterloo	269,000	393,000	124,000
Simcoe	175,000	281,000	106,000

Source: Places to Grow Schedule 3 (November 2012 Update)

**4.4.5 Population Projections**

The projections offered for Dufferin County’s area municipalities reflect only the economic pressures we foresee for growth in the area tied to the Growth Plan’s allocations for population and employment growth in the GGH.

In that connection it should be noted that:

- C4SE produces long term projections for the United States and Canada by state and province and by metropolitan area (more than 350 in the US and 50 in Canada);

- C<sub>4</sub>SE expects the GGH will grow by more between now and 2041 than the Growth Plan's updated projections of November 2012; and
- C<sub>4</sub>SE expects that the population of Dufferin County in 2041 will reach 90,000, or 5,000 more than the Province's Growth Plan.

C<sub>4</sub>SE's US and Canadian projections are created using a framework that takes into account the strong economic and social ties between the US and Canada and that reflects the major economic and demographic factors influencing the geographic dispersion and economic well-being of their respective populations. Long term expectations regarding economic activity by industry at the national level – driven by expectations regarding the growth in world trade, etc. – are used to develop detailed national projections of employment by industry. Those regions of each country already specializing in the economic activities expected to create the most jobs in the future attract workers away from those regions expected to face relative declines in activity. C<sub>4</sub>SE's projection framework ensures that economics driven migration patterns steer the ebb and flow of people throughout both countries in the future. Projections provided at the national, state and provincial level by the US Census Bureau, by Statistics Canada and by a variety of state and provincial agencies reflect their expectations about fertility rates, mortality rates and net migration flows. But their assumptions about migration typically simply extrapolate past trends. Little or no consideration at all is given to the considerable impacts industrial restructuring is now having and will continue to have on where businesses choose to locate and therefore where people are drawn to live.

C<sub>4</sub>SE's base case projections call for the Greater Toronto Area to grow faster than all other metropolitan areas in the US and Canada over the next few decades.

These points are made here for the following reasons:

- The potential for population and employment growth in the GGH is enormous because the GTA, which is the central focus of the GGH, is creating jobs at a faster pace than any other part of Canada or Ontario; thus the area is attracting migrants from other parts of Ontario, Canada and the rest of the world to fill these jobs; the need for higher rates of immigration in the future than in the past stems from the fact that the Baby Boom Generation did not replace itself; fertility rates have been below replacement rates across Canada since the mid 1960s; Canada's, Ontario's and the GTA's job creation potential exceeds its supply of local labour because of this; as a result immigration flows will help equilibrate labour markets across the country, especially in the GTA and the GGH; all of which means enormous population and employment growth throughout this area
- The communities to the east and south of Dufferin County will generate more than enough jobs between now and 2041 to support growth in the County's population to 2041 to a total of 85,000

Economics is not the only consideration, and we fully recognize that the differing allocations offered in the County's Growth Management Strategy (GMS) and by the Province through the Ministry of Infrastructure (MOI) take into account other equally important factors influencing where growth will occur within the County including land use policies, capacities to grow and willingness to grow.

Because of the enormous pressures to grow that will prevail in the decades ahead throughout the GGH, Dufferin will face significant pressure to accommodate at least the share of population and employment growth allocated to it by the Growth Plan. Because employment growth throughout all nearby communities will be significant the County will have no trouble attracting future new residents to whichever of its constituent municipalities are designated to accommodate growth.

#### **4.4.6 Land Use Planning and Servicing Constraints**

As indicated above, there are other equally important factors influencing where growth will occur within the County including land use policies, capacities to grow and willingness to grow. The following summarizes the land use planning and servicing constraints that have been considered in developing the updated forecasts and allocations.

##### ***Orangeville***

###### *Growth and Land Use:*

- The Province forecasts a population of 36,490 by 2031, representing an increase of 7,470 persons from 29,020 in 2011 (not including the unallocated population).
- Orangeville has limited vacant greenfield areas within the Town's municipal boundary. Orangeville has recently re-acquired greenfield lands that were previously set aside for institutional uses.
- Orangeville has recently not experienced the same level of growth as it has historically, largely due to servicing constraints (GMS, S. 7.5). Orangeville is largely surrounded by the Protected Countryside area of the Greenbelt Plan, which poses constraints to any outward urban expansion.
- Issues of intensification and neighbourhood compatibility will continue to be a focus as the Town addresses issues of intensification within the built-up area.

###### *Servicing Constraints:*

- Orangeville has completed a Schedule 'C' Class Environmental Assessment to expand the Water Pollution Control Plant to accommodate future development. The expansion is anticipated to increase the capacity from roughly 14,000 to 17,500 m<sup>3</sup>/day. This plant expansion is currently undergoing detailed design and construction is expected to commence in early 2014 and be completed in 3 years (Staff Report PW-2013-66, September 10, 2013 and discussions with Douglas Jones, Director of Public Works, Orangeville, October 15, 2013).



- The Town anticipates that the Province's growth target of 36,490 persons to 2031 will be accommodated with these plant improvements (an increase of 7,470 persons from 29,020 in 2011). The major constraint affecting the provision of additional servicing capacity is the assimilative capacity of the Credit River, given the low flows associated with the headwaters of the River in proximity to the Town.
- Increasing servicing capacity beyond these planned improvements would require a major change in treatment processes and therefore poses a significant constraint to accommodating additional growth beyond the 36,490 population. Based on further discussion with the Town it is our understanding that the Town may be updating their Long Term Servicing Strategy to assess whether there is additional servicing capacity within the current system.
- With respect to water, Orangeville is investigating the provision of additional wells, and will require another well or two to achieve full build-out.
- The Town is also in the process of updating their Development Charge By-law in late 2013, and will be undertaking a further review of the growth projections and allocations at that time.

## **Shelburne**

### *Growth and Land Use:*

- The Province forecasts a population of 8,400 by 2031, representing an increase of 2,554 persons from 5,846 in 2011 (not including the unallocated population).
- Shelburne annexed lands to the west of the Town in 2001 in anticipation of an urban boundary expansion (approx. 75 ha). These lands have not yet been included within the Shelburne urban area. In addition, there are approximately 10 hectares of land located at the south-west limit of the municipality that have not been included in the urban boundary in the Town's Official Plan.

### *Servicing Constraints:*

- The Town has completed Town-wide modeling of its water distribution system, an Environmental Assessment (EA) for increasing municipal water storage capacity (Notice of Completion issued February 2013) and is currently finalizing an EA for a new municipal well to address water supply requirements for future population growth including development of the west side land to 10,000 population and longer term (30-40 year) water servicing requirements.
- For municipal sanitary servicing, Shelburne is in the process of completing an assimilative capacity study to support an EA process to expand the sewage plant for a future total population of 10,000. In addition, the Town has implemented a Town-wide water metering program and completed upgrades and replacements to existing water mains, sanitary sewers and stormwater drainage systems to address infiltration and inflow. The Town also expects to complete planning requirements for the west side land in 2014.

- Based on discussions with the Town, it is anticipated that they will be able to support a total population of roughly 10,000 persons over the next 20 years (an increase of 4,154 persons from 5,846 in 2011), with respect to water supply/storage and wastewater treatment capacity. It is recognized that the assimilative capacity study in support of a total population of 10,000 persons is preliminary and has not been approved by the Province. Further justification will be required from the Town to support the allocation of any additional population, beyond the 8,400 persons currently allocated by the Province to 2031. For the purposes of this analysis, a population forecast of 10,000 persons has been carried on a contingency basis. The Town must satisfy the Province with respect to the servicing feasibility, and financial and environmental sustainability of this forecast, otherwise an alternative forecast and associated land need may be brought forward in the County Official Plan.

## **Grand Valley**

### *Growth and Land Use:*

- The Province forecasts a population of 5,740 by 2031, representing an increase of 2,910 persons from 2,830 in 2011 (not including the unallocated population).
- County Council on March 11, 2010, passed a resolution supporting the allocation of roughly 1/3 of the unallocated population (i.e., roughly 500 units) to Grand Valley.
- Grand Valley has appealed their urban area expansion OPA #4 to the OMB, along with 2 other major landowners, following the Ministry's modifications to not include the expansion lands within the urban area. The urban expansion area generally includes lands to the west and south of the existing Grand Valley urban area to accommodate growth and a portion of the County's unallocated population. The urban expansion areas, including an employment conversion are intended to accommodate roughly one third of the GMS unallocated population of 4,000 persons, or 1,333 persons to 2031.
- OMB mediation occurred in late 2013, with a settlement reach in December 2013. The settlement identified that Grand Valley may accommodate a total population of 7,168 persons to 2031. Based on the additional land needs, the Town demonstrated that 42 hectares of new settlement area lands are required to accommodate the population and employment allocations to 2031. The Town undertook additional locational analysis to determine where the settlement area should be expanded; these lands are reflected with the Grand Valley urban settlement area as shown on **Figure 5**. Furthermore, the settlement recognized that the Town may request the County for an additional population of up to 310 people, which represents the difference between population and jobs currently allocated to the Town, and the maximum anticipated servicing capacity of the water pollution control plant which is 6,050 persons. This would result in an additional 6 hectares of land which have been identified as "Deferred Lands" to the settlement.
- It is recommended, that the approved growth forecasts and associated land needs, including the approved urban expansion areas and deferred lands (310 people) be

included. and the revised urban settlement area boundaries be carried forward in the County Official Plan.

*Servicing Constraints:*

- Growth in Grand Valley has been historically constrained due to a lack of servicing supply.
- Based on discussions with the Town and Province, an update to the Town's assimilative capacity study supports wastewater treatment plant upgrades to accommodate a total population of 6,050 persons within the urban settlement area (excluding limited growth within the rural area of the Town).