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# HALDIMAND COUNTY

## Report PDD-36-2019 Population Housing and Employment Forecast Update and Land Needs Assessment



For Consideration by Council in Committee on August 27, 2019

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### OBJECTIVE:

To inform Committee of the Population, Housing and Employment Forecast Update and Land Needs Assessment prepared by Watson & Associates Economists Ltd. and obtain approval to use it in various growth related projects as well as to obtain Committee's approval of the preliminary growth strategy for use in the County's Official Plan update.

### RECOMMENDATIONS:

1. THAT Report PDD-36-2019 Population, Housing and Employment Forecast Update and Land Needs Assessment received;
2. AND THAT the Population, Housing and Employment Forecast Update and Land Needs Assessment prepared by Watson & Associates Economists Ltd., dated June 26, 2019 be accepted as the forecasts and needs assessment for use in growth management analyses, master servicing studies and other land use planning related studies;
3. AND THAT the forecasts and land needs assessment identified in Recommendation #2 be incorporated into the Haldimand County Official Plan and used as part of the County's Municipal Comprehensive Review;
4. AND THAT the preliminary growth strategy outlined in Report PDD-36-2019 be approved in principle and that the implementing Official Plan amendment and public consultation process be initiated;
5. AND THAT staff be directed to develop for Council approval a formal bid solicitation process outlining the criteria and timing for the disposition of the Frank Marshall Business Park lands in accordance with the preliminary growth strategy outlined in Report PDD-36-2019.

**Respectfully submitted:** Mike Evers, MCIP, RPP, BES, Acting General Manager, Community & Development Services

**Approved:** Craig Manley, MCIP, RPP, Chief Administrative Officer

### EXECUTIVE SUMMARY:

The Population, Housing and Employment Forecasts Update and Land Needs Assessment, completed by Watson with County staff, is being presented for Council endorsement and is proposed to be used in various County projects including growth management, master servicing and Official Plan update. The forecasts contained in this report have previously been endorsed by Council for use in the recent Development Charges Background Study. The report is required to be completed by Provincial policy and has been prepared in accordance with prescribed methodologies implemented by the Province.

Council approved a series of guiding principles for the County Growth Strategy in May 2018. At that time a preliminary growth strategy was also reviewed. The County's preliminary growth strategy, has

been updated relative to the updated population and employment forecasts and are intended to be used as the basis for a major Official Plan amendment and will form the basis for the public and stakeholder consultation that is required in order to finalize the changes. The updated Growth Strategy is being presented again for Council's endorsement in principle.

## **BACKGROUND:**

In April 2014, Haldimand County Council approved the Population, Household and Employment Forecasts Update (2011 to 2041) which was prepared by Watson & Associates Economists Ltd. ('Watson'). The update included separate population and housing forecasts for the six urban areas within Haldimand County: Cayuga, Caledonia, Hagersville, Dunnville, Jarvis, Townsend—and the rural area. It also contained employment forecasts for the County as a whole. The forecasts historically have been used for growth and strategic planning purposes, including development charges calculations, master servicing planning, etc. An update to the 2014 forecasts was initiated in 2018 with Watson once again being awarded the project contract. The work scope included an additional assessment of land needs which is a new requirement under provincial policy and foundational component for the County's municipal comprehensive review (Official Plan update).

### **Provincial Policy Context**

The forecast updates are required, in particular, in response to the 2016 Census release and the Province's new Growth Plan, 2019 which requires municipalities to plan for growth (population and employment) to the year 2046. This is a legislative requirement and not simply a response to policy or guidelines. While municipalities can decide how to allocate the numbers amongst communities, these totals need to be the basis for growth in terms of land supply, housing allocation, employment land needs, etc. These projections anticipate growth levels that exceed the 2014 projections and recent growth levels experienced in the County.

The land needs assessment flows from a requirement (of the Province) that municipalities, as part of their municipal comprehensive review of their Official Plan, complete a land needs assessment which follows a prescribed methodology. This methodology was implemented by the Province in 2018 in an effort to ensure that municipalities were using a consistent approach to their land needs assessments, and by extension, applying provincial policy in a uniform manner.

The purpose of this report is to introduce the draft of the Population, Housing and Employment Forecast Update and Land Needs Assessment that complies with provincial legislation for the Committee's consideration. The full draft is included as Attachment 1 to this report. The report also updates the proposed growth strategy relative to the updated population forecast in relation to the guiding principles previously approved by Council. The report seeks Committee's endorsement of the Growth Strategy to move forward with an implementing Official Plan Amendment and associated community consultation.

## **ANALYSIS:**

### **Population, Housing & Employment Forecasts**

The intent and purpose of population, housing and employment projections is to provide a 'tool' that gives an estimate of growth demands that is used for the following:

- As the basis for land supply estimates and distribution as set out in the County Official Plan;
- To implement statutory Provincial requirements, including the Growth Plan, which requires updated population and household projects be prepared at the local level;
- As the basis of other municipal studies including master servicing studies, capital forecasts and transportation initiatives and recreational master planning.

The projections are also used as the basis for the calculation of development charges in terms of mitigating growth related costs. In this regard, the forecasts included herein have been used in the recently completed Development Charges Background Study which was approved in May 2019.

The basic objectives for this portion of the study were as follows:

- Assess economic, demographic and local conditions and any implications in terms of the nature, type and demand of different types of development activity in certain parts of the County in order to ensure that the forecasts are relevant; and
- Assess whether the distribution of the growth in the forecasts, including the proportions of growth allocated to the various urban and rural areas, need to be re-assessed.

In line with the legislative requirements and the objectives set out above, the scope of work for the project has focused on the requirement for review and update of the detailed forecasts (previously prepared and approved in 2014) with an aim to provide a “most likely” growth scenario until 2046 (to align with the Growth Plan). The project has taken into account local variations in demographics and economic conditions and has examined historical trends/activity, market character, permit data, infrastructure availability/planning (servicing capacity, planned upgrades/projects), land availability (greenfield, infill), current/proposed development projects and proximity to employment markets in the commuter-shed. The complete forecast set is included as Attachment 1. Staff have summarized some of the key aspects of the forecasts below:

### *Population & Housing*

- The emphasis of the updated projections is on the distribution of growth within the County amongst the 6 urban centres and the remaining rural area.
- In terms of population, the County is forecasted to grow by approximately 21,000 persons between 2016 and 2046 to a total population of 67,800. This represents an average annual growth rate of 1.2% which is above the forecast rate for Ontario as a whole over the same period (i.e. 0.9%). Using the Council approved population allocation principles the distribution of population for each urban area and remaining rural area is forecast as follows (shown as net population increase with percentage of total in brackets):
  - Caledonia - 13,600 (65%), bringing total population to 24,500. Approximately 70% of this growth is approved (but not yet built) or within application review.
  - Cayuga - 1,400 (7%), bringing total population to 3,300. Approximately 40% of this growth is approved (but not yet built) or within application review.
  - Dunnville - 1,300 (6%), bringing total population to 7,400. Approximately 40% of this growth is approved (but not yet built) or within application review.
  - Hagersville - 3,400 (16%), bringing total population to 6,500. Approximately 70% of this growth is approved (but not yet built) or within application review.
  - Jarvis - 700 (3%), bringing total population to 2,700. Approximately 78% of this growth is approved (but not yet built) or within application review.
  - Townsend - 300 (<1%), bringing total population to 1,300. Approximately 100% of this growth is approved (but not yet built) or within application review.
  - Remaining rural - 500 (2%), bringing total population to 22,300. Approximately 50% of this growth is approved (but not yet built) or within application review.
- In terms of household forecasts, the construction of approximately 9,000 dwelling units is predicted over the forecast period (2016 to 2046). This represents a 1.4% annual growth rate consistent with Provincial projections that take into account the variation in economic cycles over such a long timeframe. Housing unit mix is forecast as:
  - Low density (single and semi-detached) - 61% (5,480 total units)

- Medium density (multiples, including townhouses) - 18% (1,590 total units)
- High density (apartments) - 22% (1,970 total units)

The shift in unit type preference/construction to more high density (when compared to the previous 2014 forecasts) will be driven by the aging County population and rising housing prices relative to household income.

- In accordance with forecast demand and land availability, overall housing growth for the 30 year forecast (2016 to 2046) has been allocated as follows:
  - Caledonia - 61%, an incremental increase of 5,500 bringing total households to 9,250
  - Cayuga - 6%, an incremental increase of 540 bringing total households to 1,260
  - Dunnville - 7%, an incremental increase of 610 bringing total households to 3,220
  - Hagersville - 14%, an incremental increase of 1,270 bringing total households to 2,420
  - Jarvis - 3%, an incremental increase of 270 bringing total households to 1,160
  - Townsend - 1%, an incremental increase of 110 bringing total households to 580
  - Remaining rural - 8%, an incremental increase of 720 bringing total households to 8,680

The predominate causes of the (rate of) growth in population and dwelling units, is due to the net migration to Haldimand County from Hamilton and southwest GTA (of particular significance for Caledonia given its proximity to these areas), and the reduction in household size (i.e. persons per unit which drops from current 2.67 to 2.55 over forecast period).

When compared to the previous (2014) forecast update, the following key observations can be made:

- Rural housing activity is forecast to decline and is influenced by market demand for urban housing, aging population and Provincial planning policy which directs growth to settlement areas.
- The growth increase in Caledonia is significant and is driven mostly by the proximity to the Greater Toronto Area/Hamilton area and other potential development.
- The forecast growth is anticipated to remain relatively steady in Cayuga and Hagersville, while Dunnville, Jarvis and Townsend are anticipated to experience moderate to low population and housing growth levels.

Lastly, it is important to note that the study has examined the County's intensification opportunities relative to the existing Provincially imposed County target of 32%. The County will need to accommodate considerably more new households within the existing built up portions of the urban areas (as defined by the Province and reflected in the Official Plan) to meet the target. This will likely need to be accomplished through more compact forms of development, including high density projects. To encourage this type of development, the County may need to consider pre-zoning/permissive zoning of sites, financial tools or other policies. This portion of the study concludes that Hagersville has the largest supply of lands (potential), comprising 29% of the intensification total. This is followed by Caledonia and Dunnville which each make up 22% and Cayuga and Jarvis at 14% and 13% respectively.

### *Employment*

- Employment forecasts are presented for the entire County, including distribution amongst urban areas and the rural area. Employment is identified as both number of jobs and number of jobs by category. The key part of the forecast is the actual job statistics. A total of approximately 8,100 new

jobs are forecast between 2016 and 2046 to a total County-wide employment figure of approximately 26,110. Of that 8,100 total, 5,900 jobs (or 74%) are anticipated to be accommodated within urban areas with the balance in the rural areas (agricultural, hamlets, Lake Erie Industrial Park, etc.).

- The majority of jobs are anticipated to be in the commercial/institutional sector (3,920 jobs or 48%) and industrial sector (2,850 jobs or 35%). Based on the forecast population growth and changing nature of the economy, it is also anticipated that a significant share of employment growth will be in the 'work at home' category (1,000 jobs or 12%).
- Distribution within the County (by area) is forecast as follows (shown as net jobs and percentage of total growth in brackets):
  - Caledonia - 3,860 (48%)
  - Cayuga - 420 (5%)
  - Dunnville - 590 (7%)
  - Hagersville - 770 (10%)
  - Jarvis - 240 (3%)
  - Townsend - 60 (1%)
  - Remaining rural - 2,140 (26%)

### Land Needs Analysis & Growth Strategy

The Province's Growth Plan requires municipalities to complete a land needs assessment in accordance with a Province-issued methodology as part of any municipal comprehensive review (Official Plan update). Given the County is now embarking upon this update, and due to the direct 'tie in' to the forecasts, Watson has worked with Planning staff to complete a formal land needs assessment. The assessment examines the County's community land (residential, institutional & commercial) and employment land needs to the year 2041 (permitted forecast year for this type of assessment). In following the Province's methodology, and using a set of greenfield density targets similar to those presently in effect for the County (48 persons and jobs per hectare for community lands and 16 jobs per hectare for employment), the assessment concludes the following:

- The County has a surplus of residential community land of approximately 384 hectares (950 acres). Of this surplus, approximately two thirds exists within Townsend and Jarvis where demand is limited and capacity constraints exist. While there is a surplus, it is generally not aligned with market demand and servicing capabilities which leads to a need to rationalize the land budget within the County.
- The County has a deficit of non-residential community land (commercial, institutional) in all of the urban areas except for Townsend. Relative to the existing designated land, these deficits are minor and can be addressed through changing designations within the existing settlements.
- The County has a surplus of urban employment land of approximately 127 hectares (314 acres). Of this surplus, over half is within Jarvis, while shortages exist in Hagersville. As with the residential supply, the lands are not located in the right location relative to need and servicing capabilities.

Generally, this assessment corroborates the analysis completed by staff in 2018, which was presented as part of a Council workshop in May 2018 and as part of the Council orientation in early 2019. Within that analysis, staff laid out a general strategy with principles to guide the urban boundary reviews that are proposed as part of the upcoming municipal comprehensive review (Official Plan update). The principles, which were endorsed by Council on May 22, 2018, are as follows:

- Rationalizing land supply relative to market demand;
- Better align servicing capabilities and capacities to land demand and supply;
- Re-examining existing designations to respond to changing markets, to build stronger community and to ensure appropriate balance of land uses are provided;

- Create opportunities for economic development and managed growth;
- Create conditions for contiguous assemblages of lands for (future) comprehensive development;
- Avoiding areas that are not feasible and/or cost effective to develop; and
- Avoiding areas that would lead to major capital works (to bring lands 'on line').

Fundamental to the growth strategy is the aim to meet our growth pressures responsibly by 'right-sizing' our urban areas relative to need and demand while ensuring broad growth opportunity throughout the County. In this regard, by applying the principles previously endorsed by Council, the growth strategy aims to accomplish this by:

- eliminating some of the oversupply through urban boundary compression, with the main focus areas being Jarvis and Townsend to align with servicing capacity;
- increasing supply in areas where demand is high and growing through urban boundary expansion, with the main focus being Caledonia;
- adjusting designations to better build community, integrate land uses and proactively respond to changing land needs, with the main focus being the Frank Marshall Business Park in Dunnville and the north end of Caledonia around the former Georgia Pacific plant; and
- eliminating harder to develop areas such as:
  - lands surrounded by/with constraints throughout (floodplain, undermined, etc.)
  - small, isolated pockets of land
  - lands with limited connectivity (to existing road network, servicing infrastructure, etc.).

The updated Growth Strategy outlined below incorporates the above strategy components and also incorporates the required Provincial land needs methodology for projecting land requirements under the Growth Plan with the following modifications:

1. The target date used is 2046 which aligns with proposed changes to the Provincial Policy Statement introduced by the Province on July 22, 2019.
2. Incorporation of alternative density targets for Haldimand under the Growth Plan ranging from 40 (as set out in recent Growth Plan changes) to 48 (being the density used in Watson's analysis) for greenfield areas and 32% intensification across the whole of the County rather than for each individual urban area.

The updated Growth Strategy is laid out in more detail below for each urban area and demonstrated in a series of attachments to this report:

- Caledonia - Attachment 2: the strategy focus for Caledonia is five fold:
  1. Urban boundary expansion/contraction - Employment: an expansion of approximately 37 hectares (91 acres) of employment land at the north end of Caledonia exposure to existing and future extensions of the Provincial Highway system which also has potential to be serviced and has limited development constraints. Further, it is situated in an area that is large enough and contiguous enough to be planned and developed as a business park in accordance with the Council approve Economic Development Strategy.  
  
The expansion would be off-set by a contraction of approximately 33 hectares (81 acres) of employment land at the northwest edge of the urban area. These lands have been identified given they are challenging to service, have development constraints (with natural hazard, undermining hazard and regulated area) and access limitations due Highway 6 corridor controls. As noted, this contraction off-sets the quantum of employment expansion described above and thus results in minimal impact to further increasing the existing employment land surplus in Caledonia.
  2. Urban boundary expansion - Residential: the growth strategy presented by staff in early 2018 identified that over the planning horizon Caledonia would experience a shortage of

residential land supply. This analysis was based upon the residential lands available at that time and assumed that the majority of population growth in Caledonia would be accommodated in the greenfield area (i.e. given limitations of supply of land capable for intensification in Caledonia). Since that time, the Province has implemented its land needs methodology which sets out strict parameters for assessing land need, including accommodating significant population via intensification and in line with targets. Further, additional residential land (via re-designation of non-core employment lands in the urban area) has been proposed at the north end of Caledonia (Gateway lands – Empire) which has been factored into the overall supply. Collectively, these factors reduce the amount of additional land required to be added to Caledonia during the planning period. That said, the supply of residential land in Caledonia remains constrained when forecasting out to 2046 (and beyond) when considering anticipated development densities and significant challenges in accommodating intensification at the current County target of 32% in Caledonia.

Based on the above-noted density targets and infill opportunities in Caledonia, an expansion of approximately 145 hectares (358 acres) of residential land is proposed at the north-east edge of the community. This area aligns with expected long term need to 2046 and is identified given it can be serviced, presents opportunity to develop on both sides of major servicing corridor (i.e. water transmission main and sanitary along #66 and McClung Road), has limited development constraints and consists of land parcels that are large enough to allow for continuation of master community planning in this portion of Caledonia. These lands are suitably identified as residential given the compatibility with the lands that surround them (i.e. agricultural, natural areas, recreational and residential). Given there is a longer term need for this supply coming on-line, it will be necessary to develop policy that clearly sets out requirements for phasing (e.g. physical development of these lands permitted only when existing designated lands are approaching build out/supply diminishing), secondary planning (e.g. to further set out type of residential land uses, densities, opportunities for neighbourhood commercial, etc.) and detailed servicing plans/infrastructure being in place.

In staff's view, it makes sense to identify lands for a longer term planning horizon at this stage to assist with long term servicing planning/investment, contribute to orderly growth, and it provides the ability to respond in case demand increases higher than currently expected. This would be a positive response also to the Province's recent policy initiatives that aim to get housing supply on line faster to meet demands as they arise.

3. Urban boundary expansion - Future Development: an area of approximately 50 hectares (123 acres) is identified as 'future development' at the north end of Caledonia. The use of these is uncertain at this time given the mixture of uses within the area (institutional, commercial, and residential), fragmentation of the lands and its proximity to Highway 6. These lands would be longer term need in the community with appropriate land use being determined through future assessment. Staff propose that a policy framework be developed for these lands as part of the updated Official Plan that clearly sets them out as 'future urban growth area'. The lands would be within the boundary but not specifically designated for a use and would be covered by policy that would require secondary planning and demonstration of need to prevent them from being prematurely developed.
4. Urban boundary expansion - Non-development Area: it is also noted that the lands developed as the McClung Soccer Park are included as part of the expansion lands; however, these lands would be given a non-development designation and are not to be considered as part of any supply given they are not available for development due to long

term legal agreements that govern those lands and limit them to recreational soccer facility use.

5. Designation adjustments: the collection of lands surrounding and including the former Georgia Pacific plant (now a demolished/vacant site) are ideally positioned for a reset of the land use designation from urban industrial/employment to a mixture of community type uses including commercial, recreational, institutional and residential. This new vision would allow for the development of a community gateway along Argyle Street North. It would build off of and complement recent and proposed developments in the vicinity (e.g. commercial developments like Food Basics, Empire's gateway proposal) by adding commercial, institutional and residential land. Existing undermined land is proposed to be turned into recreational space thus creating a contiguous built community along Argyle Street that links with the existing developed community.

Of note, the potential expansion of Caledonia has been assessed at a high level as part of a preliminary wastewater treatment analysis completed as part of the Caledonia Master Servicing Plan. That analysis envisions the construction of a new wastewater treatment plant to service existing greenfield (vacant) lands in Caledonia as well as potential future expansion lands. Funding was approved in the 2019 Rate Supported Water and Wastewater Budget to initiate a siting exercise and feasibility study for a new wastewater treatment plant proposed to be located on the north side of the Grand River. Additionally, funding is identified in the ten year forecast of the 2019 Rate Supported Water and Wastewater Budget to conduct the Environmental Assessment, acquire land, complete design and construct a new wastewater treatment plant.

- Cayuga – No Attachment: the strategy, at this time, does not propose any significant changes within Cayuga or to its urban boundary. The current land budget aligns with the recently expanded servicing capacity for this community.
- Dunnville – Attachment 3: the strategy focus for Dunnville is on existing urban designation adjustments, in particular, repositioning approximately 20 hectares (49 acres) of land within the Frank Marshall Business Park from employment to residential. This would serve to address, in part, the limits of residential land supply for Dunnville identified earlier in this section of the report. This change would also serve to eliminate the surplus employment land supply in Dunnville (which sits at just over 19 hectares/48 acres). It is noted that some minor boundary adjustments (not mapped on Attachment 3) will be considered to properly align parcels with functional development capabilities (e.g. Cross Street West). This will not result in any major shifts in the urban boundary but instead represents some minor rounding out.
- Hagersville – Attachment 4: no boundary changes are envisioned at this time; however, there are several large blocks of land that currently exist within the urban boundary without an urban designation (i.e. currently sit as Agricultural designation). These lands measure a total of 73 hectares (180 acres). The opportunity exists to address the employment lands shortfall in Hagersville (i.e. 12 hectares/30 acres) by designating some of these lands for such uses. Other considerations for these lands will include residential and non-residential (commercial, institutional) development opportunities. It should be noted that Hagersville contains the majority of the identified potential infill/intensification land supply given several large vacant land parcels within the built up area and is expected to meet a large portion of the County's 32% target.
- Jarvis – Attachment 5: the strategy focus for Jarvis is two fold:
  1. Urban boundary contraction - employment: a contraction of approximately 52 hectares (128 acres) of employment land at the northeast edge of the urban area. These lands have been identified given the servicing limitations. These reductions would still leave approximately 13 hectares (32 acres) of surplus employment lands in the community.

2. Urban boundary contraction - residential: a contraction of approximately 67 hectares (165 acres) of residential land at the south end of the urban area. These lands have been identified given they are challenging to service and have development constraints (with hazard/regulated area and lagoon development separation requirements). These reductions would still leave approximately 30 hectares (74 acres) of surplus residential lands representing possible growth of over 700 units. Of this 700, approximately 150 already have approvals meaning a further 550 units can be developed beyond those already in the pipeline.

Most importantly, the adjustments (contractions) to the boundary of Jarvis also serve to align land supply with serviceability considering the completion of a recent EA to add capacity by constructing a forcemain to Townsend. The realignments of land supply for both Jarvis and Townsend result in the vacant land supply (residential, commercial, industrial) aligning with the total capacity available (over 1,200 units).

- Townsend – Attachment 6: the strategy focus for Townsend is on urban boundary contraction of approximately 147 hectares (363 acres) of residential land. These lands are surplus to market demand and the majority are frozen for development by the Province (i.e. due to ownership by Infrastructure Ontario). While there are presently no servicing capacity constraints for these lands, Council has approved the construction of a forcemain from Jarvis to Townsend that will service the growth in that community, thus creating limitations in terms of what can be accommodated with respect to Townsend’s land supply. The urban boundary reductions would significantly reduce the surplus in Townsend bringing it down to approximately 8 hectares.

As noted above, all of the urban areas (with the exception of Townsend), have a minor shortfall of non-residential community lands (i.e. commercial, institutional). The shortfall ranges from (high end) 11 hectares (27 acres) in Caledonia to (low end) 2 hectares (5 acres) in Jarvis. Through the detailed work that is to follow in the growth strategy portion of the Official Plan update, staff will be assessing potential designation changes and/or enhancements within each of these communities that would allow for these shortfalls to be addressed.

The updated population projections and the land needs assessment completed by Watson has served to provide the analytical basis to adjust and rationalize the County’s long term land supply relative to expected growth in consideration of Provincial Policy, market trends, servicing infrastructure and other strategic objectives such as the County’s Economic Development Strategy. Overall, the intent of the Growth Strategy is ensure any urban expansion is generally off-set by contractions in the areas with low demand to meet Provincial policy requirements. Overall, the strategy will reduce the amount of over-supply which is in line with Provincial Policy. More specifically, the plan presented herein would see an (approximate) reduction in total urban area in the County of 65 hectares (160 acres).

### **Next Steps:**

Subject to Council’s endorsement of both the Watson report and subject staff report (including the growth strategy), work will commence on developing the implementing Official Plan Amendment that includes required public and stakeholder engagement programs for adoption by the County and approval by the Province. It is anticipated that this work including the required technical assessments (i.e. master servicing) will take place through the fall months so that the amendment will be completed and submitted to the Province for approval early in 2020 consistent with the approved Term of Council Priorities. Updates to Council, including public input received on the strategy, will take place throughout these stages of the process.

## **FINANCIAL/LEGAL IMPLICATIONS:**

The Council approved 2018 Tax Supported Capital Budget includes \$30,600 for consulting fees to prepare the detailed Population, Housing and Employment Forecasts Update & Land Needs Assessment. A project scope and budget increase was approved by Council in April 2019 to increase the total project budget to \$55,600. The project is in line with the new project budget.

## **STAKEHOLDER IMPACTS:**

Staff in Finance and Engineering Services have been involved in the review of the forecasts, in particular as part of the Development Charges Background Study.

### Public Consultation

Stakeholder consultation is not required for the forecasts and land needs assessment. Notwithstanding, consistent with previous practice, staff has ensured all parties on the development industry distribution list have received notification of availability of the final report and when it will be presented to Council. Notice also directed interested parties to the County's website, where they could view a draft copy of the report produced by Watson. A public consultation strategy will be developed for the growth strategy in the near future with that work planned to advance in the later part of this year.

## **REPORT IMPACTS:**

Agreement: No

By-law: No

Budget Amendment: No

Policy: No

## **ATTACHMENTS:**

1. Draft Watson Report.
2. Caledonia Growth Strategy.
3. Dunnville Growth Strategy.
4. Hagersville Growth Strategy.
5. Jarvis Growth Strategy.
6. Townsend Growth Strategy.