



Report to: Development Services Committee

Report Date: May 9, 2016

SUBJECT: York Region Growth Scenarios to 2041 – Report on Public Consultation

PREPARED BY: Marg Wouters MCIP, RPP, Senior Manager, Policy & Research
(ext. 2909)

RECOMMENDATIONS:

- 1) That the report entitled “York Region Growth Scenarios to 2041 – Report on Public Consultation” dated May 9, 2016 be received;
- 2) That the report entitled “York Region Growth Scenarios to 2041 – Report on Public Consultation” dated May 9, 2016, including Appendices, be forwarded to York Region as input in the development of a Preferred Growth Scenario to accommodate growth to 2041;
- 3) That the comments in Appendices ‘A’ and ‘B’ to the report entitled “York Region Growth Scenarios to 2041 – Report on Public Consultation” dated May 9, 2016 be supplemented as follows:
 - a) that a similar level of intensification (between 1,300 and 1,700 units per year over the forecast period) continue to be assumed in Markham under the anticipated 40% Preferred Scenario subject to delivery of the infrastructure, particularly transit, required to support this growth;
 - b) that the yield within the already designated lands outside the Built Boundary (i.e., within the Designated Greenfield Area) be maximized to the extent possible, to make the most efficient use of the lands; and
 - c) that a limited urban boundary expansion be considered if necessary to provide an ongoing balance of ground-oriented and apartment housing types in Markham, subject to an appropriate phasing program for any required expansion lands.
- 4) And that staff be authorized and directed to do all things necessary to give effect to this resolution.

PURPOSE:

This report provides a summary of public input received on York Region’s draft scenarios for managing growth to 2041. The report is supplemental to the October 5, 2015 staff report which provided comments on the Region’s three draft growth scenarios, and an October 19, 2015 memorandum which provided supplementary information regarding sustainability analysis.

BACKGROUND:

The Region has initiated a municipal comprehensive review to determine how growth to 2041, as assigned through Amendment 2 to the Growth Plan, will be accommodated Region-wide. Three draft growth scenarios were released in April 2015, based on Region-wide residential intensification targets of 40%, 50% and ‘no urban boundary expansion’. On October 5, 2015 and October 19, 2015, Development Services Committee considered a staff report and memorandum,

respectively, outlining recommended comments to the Region on the three draft growth scenarios. These reports are attached as Appendix 'A' and 'B' to this report.

At the October 19, 2015 DSC meeting, Committee deferred the staff report and directed staff to undertake public consultation to inform Markham residents of the draft growth scenarios, staff's comments, and other options, and report back to Council on input received.

In addition to directing staff to undertake public consultation, Committee also directed staff to report on:

- a) the capital and operating financial implications of all growth scenarios being considered; and
- b) the recommendations of the Advisory (Crombie) Panel on the Coordinated Review of the four Provincial Plans (Greenbelt Plan, Oak Ridges Moraine Conservation Plan, Growth Plan and Niagara Escarpment Plan) and any amendments to the Growth Plan that may arise.

On March 7, 2016 staff reported on the December 2015 Advisory Panel Report (see Appendix 'C'). The Province has not yet released draft amendments to any of the four Provincial Plans.

A public information meeting was held on April 11, 2016. An overview of comments heard at the meeting, are provided below. Also provided below is an overview of the Region's initial Preferred Growth Scenario, released in November 2015 which was also referred to at the public information meeting.

OPTIONS/DISCUSSION:

Regional staff released initial Preferred Growth Scenario based on a Region-wide 45% intensification target in November 2015

Shortly after the October 2015 Markham staff reports regarding the Region's three draft growth scenarios were considered by Development Services Committee, Regional staff released an initial Preferred Growth Scenario based on a Region-wide 45% residential intensification target (see Appendix 'D'). Rather than endorsing the Preferred Growth Scenario, Regional Council directed Regional staff to, among other things, analyze a minimum 40% intensification target consistent with the Provincial Growth Plan in comparison with Regional staff's recommended 45% intensification target. In February 2016, prior to further staff analysis, Regional Council confirmed a minimum intensification target of 40% Region-wide for the purposes of the current municipal comprehensive review.

Although Regional staff have not yet reported on a Preferred Scenario based on the Region-wide 40% intensification target confirmed by Regional Council in February, the detailed analysis in the November 2015 45% Preferred Scenario provides some indication of what a Region-wide 40% Scenario could mean for Markham with respect to unit counts and unit types, intensification targets and urban expansion area requirements.

The 45% Region-wide intensification target translated into approximately 55% residential intensification (i.e., percentage of units within the Built Boundary) for Markham. Based on a preliminary analysis by Markham staff, the assumptions underlying Markham's share of

population and employment growth under the 45% Scenario appear achievable in terms of annual population and employment growth, number of intensification units assumed, and housing mix. The number of intensification units (i.e., those within the provincially-defined Built Boundary), assumed for Markham under this Scenario appear to be comparable to the number assumed under Markham's 60% intensification target for the 2006-2031 period (see Table 1). The number of intensification units assumed annually in Markham over the 30 year forecast period under the 45% Scenario is approximately 1,400 per year, which falls within the range of approximately 1,300 to 1,700 intensification units per year assumed by the Region and Markham under the previous growth strategy for 2031. York Region estimates that approximately 7,900 units were built within Markham's Built Boundary between 2006 and 2014, representing an average of just under 1,000 units per year, and an intensification rate of 57%.

Table 1. Region's Preferred Scenario (45% Intensification)			
Residential Growth Forecast for Markham (Units)			
2011-2041			
Growth Category	Units	%	Units/Yr
Built Boundary	43,000	55%	1,433
Designated Greenfield Area	23,000	29%	767
Urban Expansion	13,000	16%	433
Total Unit Growth	79,000	100%	2,633
* Source: Region of York staff recommendation (Nov 2015).			
2010 Growth Strategy			
2006-2031			
Built Boundary	Units	%	Units/Yr
Unit Growth (Region target)	32,000	52%	1,280
Unit Growth (Markham target)	43,000	60%	1,720

The 45% Scenario also assumed an additional residential urban expansion of approximately 650 hectares (1,600 acres) accommodating 13,000 units in Markham, which is comparable to the quantities assumed for the expansion lands to 2031 in the last growth management exercise (i.e., the Neighbourhood Area portion of the 2031 Future Urban Area in north Markham). The number of units to be accommodated in the proposed additional expansion area represents about 16% of the total unit growth in Markham to 2041 under the 45% Scenario. No expansion lands were assumed for employment land purposes in Markham in the 45% Preferred Scenario.

One of the Markham staff recommended comments to the Region in the October 5, 2015 staff report was that the Region's Preferred Growth Scenario should be consistent with Markham's current residential intensification target of 60%. As mentioned, the number of units assumed within Markham's Built Boundary in the 2011-2041 period under the 45% Region-wide Scenario appear to be comparable with Markham's adopted 60% target, even though mathematically the resulting intensification target for Markham is now lower (55%). Staff recommend that a similar level of intensification (between 1,300 and 1,700 units per year over the forecast period) continue to be assumed for Markham under the upcoming Region-wide 40% Preferred Scenario endorsed

by Regional Council subject to delivery of the infrastructure, particularly transit, required to support this growth.

City staff will work with the Region to quantify the anticipated yield within the already designated lands outside the Built Boundary (i.e., within the Designated Greenfield Area). The objective should be to maximize the efficient use of these lands within each applicable density category, in order to minimize the amount of urban expansion required to meet growth targets. Further, a limited urban boundary expansion should be considered if necessary to provide an ongoing balance of ground-oriented and apartment housing types in Markham. The Region should be requested to work with Markham to develop an appropriate phasing program for any required urban expansion lands.

The revised Regional Preferred Growth Scenario based on 40% intensification (as directed by Regional Council) is anticipated to be considered by Regional Council in June 2016. A lower Region-wide intensification target is likely to result in the need for more urban expansion lands to accommodate the same 2041 population and employment forecasts. As Markham is one of only three local municipalities (the others being Vaughan and East Gwillimbury) with potential for urban expansion, and has comparatively fewer servicing constraints, Markham staff anticipate that the area of expansion lands identified by the Region for Markham under a 40% Scenario may be greater than that assumed under the initial 45% Scenario.

Public input received through consultation

The April 11, 2016 public information meeting was attended by approximately 30 people. Notice of the meeting was provided through the City's standard practices, including the Markham Economist & Sun and Thornhill Liberal (for two consecutive weeks), all City facility public boards (paper and electronic), City webpage events calendar, and through social media. Notices were also sent by email to ratepayers associations, City advisory committees and to members of Council for further distribution.

The format of the meeting included a staff presentation (attached as Appendix 'E') followed by discussion. The presentation touched on:

- Provincial and Regional growth management requirements;
- A review of Markham's strategy for accommodating 2031 growth;
- The Region's three draft scenarios for accommodating 2041 growth (40%, 50% and no urban boundary expansion); and comparison of the implications of each scenario for Markham with Council's decisions regarding 2031 growth;
- Regional staff's initial Preferred Draft Scenario based on 45% intensification; and
- An overview of the Advisory Panel Report on the Coordinated Provincial Plan Review.

The comments heard at the public information meeting, and through written and verbal submissions, included:

- Concern with the ability of Thornhill to absorb any more intensification, without substantial additional infrastructure such as the Yonge Subway extension, road capacity, and schools; need for Markham to be more vocal in pressing the Province for the subway extension
- Need for 'food hubs' within the Region to distribute locally grown foods, at least one of which should be in Markham; planning for growth to 2041 should include allowance for

local food production within the urban boundary ('urban intensified food production business clusters') to ensure greater food security and reduction in energy and greenhouse gas emissions associated with long distance food transportation

- Concern with growth ('over-development') in Markham resulting in pressures on house prices (speculators bidding up cost of housing, and holding empty units; young families not being able to afford to live in Markham) and infrastructure not keeping up (e.g., transit and road network, hospitals, etc); also concern with increased congestion being a deterrent for potential employers
- Need to consider opportunities arising from Province's RER (Regional Express Rail) initiative (i.e., intensification around rail stations)
- The Region's draft 45% scenario, which focuses growth within the current urban area but allows for some urban expansion, makes sense for Markham
- Concern about the environmental impact of urban expansion – e.g., reduction in farmland and open space; increase in traffic, greenhouse gas emissions, runoff, downstream flooding, erosion and pollution
- Request for Council to support a 'no expansion' scenario, or at minimum defer further expansion until at least 50% of the 2031 expansion lands have been developed;
- Need to accelerate implementation of watershed plans and commence a study to Grow the Greenbelt in Markham;
- Requests to defer consideration of a preferred growth scenario until the Province has completed their Provincial Plan Review.

Insufficient data available to undertake financial analysis of Draft Growth Scenarios at this time

In October, 2015 when Committee directed staff to report on the financial implications of the growth scenarios being considered, only the April 2015 analysis of three draft scenarios had been released by the Region. The April 2015 Regional analysis provided only high level population and employment forecasts for the nine local municipalities, including Markham. Detailed information about unit counts, intensification targets or urban expansion requirements - which would be required for detailed financial analysis, together with information regarding associated servicing, transportation and other service improvements - were not provided at the local municipal level.

Given the lack of detailed information, Markham staff comments at the time were based on conclusions reached in Markham's previous growth management exercise in 2009/2010 for 2031 growth, which formed the basis of the 2014 Official Plan. In the October 19, 2015 supplementary memorandum, staff indicated that preliminary infrastructure and financial analysis undertaken for the three scenarios being considered by Markham at the time, indicated that the differences in a 'no expansion' versus other intensification alternatives (including the 60% intensification alternative) were not significant enough to warrant these being the deciding factor in selecting an alternative.

Further, although a 'no expansion' alternative was anticipated to result in lower capital and operating costs than other alternatives that anticipated some urban expansion, an unrealistically high intensification target could result in an increased burden on the City tax rate to fund

infrastructure if the development charges related to anticipated growth did not materialize. That is, there is risk of over-investment in infrastructure for intensification areas if the level of development of apartment buildings (the main form of intensification in Markham's Centres and Corridors) anticipated in the intensification target cannot be absorbed by the market within the planning horizon.

The Region, in releasing the initial Preferred Draft Scenario based on 45% intensification in November 2015, provided the following information with respect to financial analysis:

- Early stage fiscal analysis indicates that the capital requirements for the scenarios are reasonably similar, although the 'no urban expansion' scenario is the lowest cost.
- Master planning work, expected to be completed in early 2016, will provide a better understanding of growth infrastructure needs, and will form the main inputs for a robust fiscal impact analysis on the recommended growth scenario to be presented in Q2 2016.
- Under all scenarios, an increase in Regional development charge rates will be needed to pay for the infrastructure to support future growth.
- There are risks and uncertainties associated with an intensification level of 50% or higher. The risks relate to whether the level of apartment development needed to accommodate population growth under higher intensification scenarios is realistic from a market perspective – that is, people may choose ground-related housing locations outside York Region rather than apartment living in York Region.

In light of insufficient information to undertake a fiscal analysis on the three draft scenarios, Markham staff recommend that, if warranted, a financial analysis regarding the capital and operating financial implications to Markham of the preferred growth scenario identified by York Region Council, be undertaken at the time of Markham's own municipal comprehensive review.

FINANCIAL CONSIDERATIONS:

Not applicable.

HUMAN RESOURCES CONSIDERATIONS:

Not applicable.

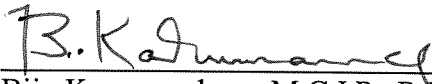
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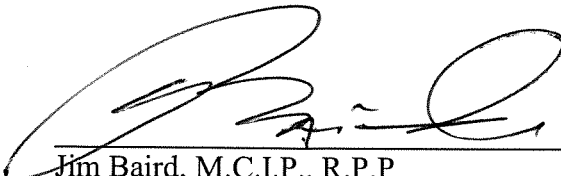
This report relates to all strategic priorities of Building Markham's Future Together, and specifically addresses the Growth Management priority.

BUSINESS UNITS CONSULTED AND AFFECTED:

Appropriate business units have been consulted.

RECOMMENDED BY:


Biju Karumanchery, M.C.I.P., R.P.P.
Director of Planning and Urban Design


Jim Baird, M.C.I.P., R.P.P.
Commissioner of Development Services

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APPENDICES:

Appendix 'A': October 5, 2015 staff report entitled "City of Markham Comments on York Region Draft Growth Scenarios to 2041"

Appendix 'B': October 19, 2015 Memorandum entitled "Sustainability analysis supplementary to the October 5, 2015 staff report entitled 'City of Markham Comments on York Region Draft Growth Scenarios to 2041'"

Appendix 'C': March 7, 2016 staff report entitled "Consideration of York Region Growth Scenarios to 2041 – Update"

Appendix 'D': November 5, 2015 York Region staff report entitled "York Region 2041 Preferred Growth Scenario"

Appendix 'E': April 11, 2016 Public Information Meeting Presentation, Managing Growth to 2041



Report to: Development Services Committee

Report Date: October 5, 2015

SUBJECT: City of Markham Comments on York Region Draft Growth Scenarios to 2041

PREPARED BY: Marg Wouters M.C.I.P., R.P.P., Senior Manager, Policy & Research
(ext. 2909)

RECOMMENDATIONS:

- 1) That the report entitled "City of Markham Comments on York Region Draft Growth Scenarios to 2041" dated October 5, 2015 be received;
- 2) That the report entitled "City of Markham Comments on York Region Draft Growth Scenarios to 2041" dated October 5, 2015 be forwarded to York Region as input into determination of a preferred growth scenario to accommodate growth to 2041;
- 3) And that staff be authorized and directed to do all things necessary to give effect to this resolution.

EXECUTIVE SUMMARY:

This report provides comments on three draft growth scenarios to 2041 released by York Region in April 2015. The draft growth scenarios were prepared as part of a Regional Municipal Comprehensive Review (MCR) and Regional Official Plan Review. The draft growth scenarios are based on 40% residential intensification, 50% intensification, and no urban expansion (approximated at 65% intensification) on a Region wide basis. The intensification targets for individual local municipalities will vary (with Markham having a higher intensification target than the Region wide average).

Based on the limited information in the Regional staff report, supplemented by additional information provided by Regional staff in a presentation to Committee, the following comments are offered as input prior to release of a preferred growth scenario:

- Employment growth and particularly population growth assigned to Markham appear to be achievable given recent experience and remaining land supply;
- staff have a concern with the ability of the market to deliver the higher share of apartments required to achieve the 'no urban expansion' scenario;
- the Region wide 40% scenario, and to a greater extent 50% scenario (translating into approximately 50% and 60% for Markham), best reflect Markham's preferred local intensification target (60%) in the last growth strategy exercise;
- if additional urban expansion lands are required in Markham, the lands should be contiguous to the existing urban area, and in proximity to planned higher order transit and road network; and
- further direction is needed from the Region regarding the phasing of possible expansion lands to 2036 or 2041, relative to the 2031 Future Urban Area boundary identified in Markham's 2014 Official Plan.

A preferred growth scenario is expected to be brought to Regional Council in late 2015, with a draft Regional Official Plan Amendment incorporating the growth scenario targeted for mid 2016. Regional Council adoption of the amendment is targeted for late 2016. Once the Regional OP is amended, Markham's Official Plan will need to be amended to conform with the new forecasts. Markham staff do not anticipate initiating a City municipal comprehensive review until late 2016/2017, but will continue to monitor the Region's municipal comprehensive review/Official Plan Review process and update Council as appropriate.

It is recommended that this report be forwarded to York Region as Markham Council input to the Region's Municipal Comprehensive Review.

PURPOSE:

This report provides City of Markham comments on the Region's three draft growth scenarios for 2041, as released in April, 2015.

BACKGROUND:

At the May 19, 2015 meeting, Development Services Committee considered a staff report outlining the Region's three draft growth scenarios for accommodating growth to 2041 (attached as Appendix 'A'). The draft growth scenarios are part of the Regional Municipal Comprehensive Review (MCR) and Official Plan Review being undertaken by York Region, which will implement population and employment forecasts to 2041. Updated population and employment forecasts for 2031 and new forecasts for 2036 and 2041 were assigned to the Region by the Province through Amendment 2 to the Growth Plan for the Greater Golden Horseshoe. Amendment 2 came into effect in 2013, and the Region's Official Plan must be brought into conformity with Amendment 2 by June 2018.

This report provides City of Markham comments on the draft growth scenarios as input into the Region's selection of a preferred growth scenario expected to be released later this year. At the May 2015 DSC meeting, Committee also received a presentation by Regional staff on the draft growth scenarios and requested a workshop be held for further discussion. The workshop, in the form of a Special Meeting of Development Services Committee was held on September 11, 2015. A summary of the discussion at the workshop is included in this report.

OPTIONS/DISCUSSION:**Overview of draft growth scenarios**

The three draft growth scenarios for population growth are based on varying levels of residential intensification on a Region wide basis: 40% intensification; 50% intensification; and 'no urban expansion'. Intensification measures the proportion of new residential development located within the 'built boundary' established by the Province for municipalities in 2006. The 'no urban expansion' scenario assumes a combination of approximately 65% of residential growth being accommodated within the Provincially defined built boundary, and the remainder being accommodated on lands outside the built boundary but still within the 2031 urban area. Markham's Provincial Built Boundary and Urban Area Boundary are identified on Map 12 in the Markham Official Plan 2014 (see Appendix 'A'). The 40% intensification scenario meets the

minimum requirements of the Provincial Growth Plan, and is the basis for accommodating growth to 2031 in the Region's current Official Plan (ROP 2010). The 50% intensification and 'no urban expansion' options assume even higher levels of intensification on a Region wide basis than minimum Provincial requirements.

For the 2041 growth scenarios, staff estimate that the effective intensification target for Markham is approximately 10% higher than the Region-wide target. Intensification targets in the southern municipalities in York Region are by necessity much higher than the Region-wide target, given the relatively few opportunities for intensification in the northern municipalities. Markham staff estimate that under the Region's 40% scenario, the residential intensification target for Markham would be approximately 50%; under the 50% scenario, the intensification target for Markham would be approximately 60%; and under the 'no urban expansion' scenario, the intensification target for Markham would be approximately 75%. For comparison purposes, the Region-wide intensification target of 40% in the ROP 2010 translates into a Regional intensification target of approximately 52% for Markham, and Markham Council through the 2014 Official Plan establishes an even higher 60% residential intensification target.

Table 1 below summarizes the Region's three draft growth scenarios and the implications for Markham. Details about the assumptions underlying the scenarios are provided in the May 2015 staff report attached as Appendix 'A'.

TABLE 1: SUMMARY OF REGION'S DRAFT GROWTH SCENARIOS – IMPLICATIONS FOR MARKHAM			
	Region's Growth Scenarios		
	40%	50%	No Expansion
Markham			
Population in 2041	541,800 (same as 50%)	541,900 (same as 40%)	536,600 (marginally lower)
Employment in 2041	230,000 (same as 50%)	230,100 (same as 40%)	224,800 (marginally lower)
% of Region-wide Growth: Population	32%	32%	32%
Employment	31%	31%	31%
Residential intensification assumed for Markham (est.)	50%	60%	75%
Population Growth (average annual)	7,700 persons/yr	7,700 persons/yr	7,600 person/yr
Employment Growth (average annual)	4,000 jobs/yr	4,000 jobs/yr	4,000 jobs/yr
Housing Mix	Higher apartment share, but lowest of 3 scenarios	Higher apartment share than 40% scenario	Very high apartment share
Urban Expansion Required	Yes	Yes	No

The implications of the three scenarios for Markham are as follows:

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- The amount of population and employment growth assigned to Markham does not differ significantly among the three scenarios (growth of approximately 225,000 to 230,000 people and 121,000 jobs for the 30-year period between 2011 and 2041);
 - Population growth per year for Markham is approximately 7,700 persons per year
 - Employment growth per year for Markham is approximately 4,000 jobs per year
 - Markham's share of Region-wide population and employment growth is similar under all three scenarios (32% of the Region-wide population growth, and 31% of Region-wide employment growth)
 - A larger share of apartments is anticipated in the higher intensification scenarios; the 'no expansion' scenario assumes a very high reliance on apartments to meet the growth target; and
 - Urban expansion is required in the 40% and 50% scenarios, and a portion of that can be expected in Markham.

Population and employment growth assigned to Markham appear to be achievable given recent growth experience and remaining land supply, but more data and analysis needed to confirm

As indicated in the May 19, 2015 Markham staff report, the population and employment assigned to Markham under the three draft scenarios appears achievable given growth in recent years and the availability of sites for greenfield development and intensification.

The population growth between 2011 and 2041 assigned to Markham translates into approximately 7,500 to 7,700 persons per year over the 30-year period, compared with overall average growth of approximately 8,600 persons per year experienced over the 10-year period between 2004 and 2014. In comparison, the population assigned to Markham in the 2010 ROP for the 25-year forecast period between 2006 and 2031 translates into average annual growth of approximately 5,900 persons per year.

Employment growth between 2011 and 2041 assigned to Markham translates into approximately 4,000 jobs per year over the 30-year period, which is only slightly higher than the overall average growth of approximately 3,800 jobs per year assumed in the 25-year forecast period between 2006 and 2031. The forecast is higher than the approximate 3,000 jobs per year experienced over the 10-year period between 2004 and 2014, but may be achievable if Markham remains competitive in the office and retail markets over the forecast period to 2041. As the employment forecasts by employment type (Major Office, Employment Land, and Population-Related) for each local municipality have not been provided, Markham staff are unable to comment on how the different employment types might be accommodated in Markham under each scenario.

Markham continues to have a broad range of potential residential land supply in the form of greenfields and intensification:

- identified Regional Centres (Markham Centre, Langstaff Gateway) and Key Development Areas and Local Centres and Corridors such as Cornell Centre, Markville, Yonge St Corridor, Milliken, etc
- other intensification/infill areas such as Buttonville Airport lands, York Downs and lands in southeast Markham;

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- designated greenfield areas such as the Future Urban Areas in north Markham and southeast Markham; and
 - 'whitebelt' lands (lands not in the Greenbelt and not in the urban area).

However more analysis by Markham staff would be needed to confirm whether the mix of housing types assumed under each Regional scenario is achievable given the land supply.

The supply of employment lands is less certain. Additional employment lands may be needed to meet 2041 forecasts in the growth scenarios depending on the mix of employment types assigned to Markham.

Markham's assigned share of population and employment growth is comparable to Markham's current share of Region-wide totals

Markham is assigned the largest share of the Regional population growth under all three growth scenarios - about 32% of the total York Region growth projected between 2011 and 2041. This is only slightly higher than Markham's current 30% share of York Region population. The York Region report indicates that residential land supply and planned servicing capacity were key considerations in developing the draft scenarios.

Similarly, Markham has been assigned the second largest share of employment growth, accommodating 31% of total employment growth in York Region between 2011 and 2041. Markham's current share of Region-wide employment is about 30%. The York Region staff report indicates that Vaughan has been assigned the largest share of Employment Land. Employment growth in the Region, mainly due to its large vacant land supply. Major Office Employment is expected to continue to increase in the major office concentrations within Centres and Corridors in Markham, Richmond Hill, Vaughan, Aurora and Newmarket, as well as in business parks.

There is concern with the ability of market to deliver the higher percentage of apartments required to achieve the 'no urban expansion' scenario

In the presentation to Committee in May, Regional staff indicated that the total Region-wide population growth of 724,500 to 2041 will require approximately 262,000 to 301,000 housing units. The York Region staff report indicates that in order to support development of more complete communities with a range of housing types that are more compact and offer greater affordable housing options, and that can support public transit and mixed use, all three growth scenarios project an increased share of housing growth towards higher density forms.

Region-wide, the share of apartments ranges from 34% apartments under the 40% intensification scenario, 40% apartments in the 50% scenario, and as much as 47% apartments under the 'no expansion' scenario. In comparison, the previous 2031 forecasts assume about 35% of the growth to 2031 being accommodated by apartments Region-wide. The Region estimates that between 2005 and 2014 approximately 21% of the housing stock growth was in apartment form.

In Markham's recent growth management exercise for 2031 population forecasts, one of the key considerations in recommending against a 'no expansion' scenario was the concern with the high share of apartments that a 'no expansion' scenario needed to achieve, and the ability of the

market to deliver such a high number of apartment units/buildings over the forecast period. Although detailed housing unit estimates and housing type breakdowns for the each local municipality were not released by the Region as part of their April 2015 report, given the reliance on the southern municipalities to achieve higher intensification which is typically in the form of apartments, Markham staff estimate that a large share of this apartment growth is anticipated to occur in Markham. The City's 60% intensification target in the 2014 Official Plan assumed about half of the housing unit growth to 2031 to be in the form of apartments.

40% scenario and, to a greater extent, the 50% scenario best reflect Markham's preferences in last growth strategy exercise

Three growth scenarios were explored in Markham's growth management exercise between 2007 and 2010, leading up to the 2014 Official Plan:

- A 52% residential intensification alternative, which represented the Region's proposed 40% intensification alternative;
- A 60% residential intensification alternative; and
- A 'no expansion' alternative in which all the growth to 2031 would be located within the urban boundary at the time (roughly south of Major Mackenzie Drive)

These three 'low', 'medium' and 'high' scenarios are not unlike the Region's three draft growth scenarios to 2041. The 'medium' intensification (60% intensification) was endorsed by Council as the preferred alternative as it represented the most balanced option in support for intensification and mixed use development, while at the same time providing for a range of housing options, including both high density and ground-related housing types.

In light of Council's recent adoption of the 2014 Official Plan based on a 60% residential intensification target, and recent Regional and local commitment to, and investment in, infrastructure required to support intensification, staff recommend that the City continue to pursue an intensification target equivalent to the 60% intensification target adopted for the 2031 forecasts. All else being equal, the Regional scenario that appears to be closest to this target is the 50% Region-wide intensification scenario (on the assumption that the effective target for Markham is approximately 10% higher than the Region-wide target).

However, given that the definition of 'intensification' is related to the provincially-defined built boundary, and that the built boundary is not expected to change, additional analysis needs to be undertaken in order to confirm that the housing mix that would result in Markham under the 50% scenario is still achievable compared to the housing mix assumed under Markham's 60% intensification scenario for 2031 population. Until this analysis is completed, staff are able to determine only that the 40% scenario, and perhaps to a greater extent the 50% scenario, best reflect Markham's preferences in the last growth strategy exercise.

With respect to servicing and transportation considerations, previous analysis undertaken by Markham staff for the 2010 recommended growth alternative indicated that transportation and servicing infrastructure could be designed to support all of the intensification options proposed. It also noted that delivery of required infrastructure was dependent on improvements to Regional systems. The analysis concluded that infrastructure should be used to support the City's vision for managed growth, rather than determine the vision.

If additional urban expansion lands are required in Markham, the lands should be contiguous to the existing urban area, and in proximity to planned higher order transit and road network

The York Region staff report indicates that approximately 2,300 hectares of urban expansion lands would be required Region-wide to accommodate population growth from 2031 to 2041 under the 40% intensification scenario, and approximately 1,100 hectares would be required under the 50% intensification scenario. Under both scenarios, approximately 160 hectares of expansion lands would be required to accommodate employment growth.

Although the Region has not yet identified expansion land requirements for any of the local municipalities, it can be expected that some of the urban expansion land required for the 40% and 50% scenarios will be assigned to Markham, as one of the few municipalities in the Region, along with Vaughan and East Gwillimbury, that still have so-called 'whitebelt' lands available with potential for urban development. There are approximately 4,500 developable hectares of 'whitebelt' lands Region-wide. Markham has approximately 1,600 hectares of 'whitebelt' lands designated as 'Countryside' on Map 3 – Land Use in the 2014 Official Plan (see as Appendix 'A').

The Region has indicated that urban expansion locations will be tested in the next phase of analysis, once a preferred scenario is identified. Without the benefit of undertaking a detailed local municipal comprehensive review, Markham staff recommend that in keeping with previous Council decisions on growth management, if urban expansion lands are required in Markham they should be contiguous to the existing urban area (including the Future Urban Area), and in proximity to the high order road and transit network. With respect to employment lands, based on previous studies undertaken, Markham staff recommend that lands closest to 400-series highways, particularly contiguous to the Future Employment Lands in north Markham, be considered for any additional employment land needs.

Recognizing that the Region's 40% and 50% scenarios involve urban expansion, further direction is needed from the Region on how any additional urban expansion lands to 2036 or 2041 in Markham would be phased with the current Future Urban Area lands in north Markham. The first phases of development in the Future Urban Area are anticipated to begin in 2017/2018, well after the Regional Official Plan Amendment to implement the 2041 forecasts is scheduled to be adopted by Regional Council.

Special Meeting of Development Services Committee – September 2015

At the Special Meeting of Development Services Committee held on September 11, 2015 staff provided additional background information on the growth management requirements of the Growth Plan as well as York Region's three draft scenarios and what they might mean for Markham. Information was also presented on the factors considered during Markham's previous growth management exercise for 2031 as reflected in the 2014 Official Plan.

The following comments were heard from Committee members:

- the importance of protecting agricultural lands - the City should be managing growth as if there is no longer the urban expansion land available;
- need for public transportation to accommodate the future growth;

-
- the importance of not converting employment lands to residential uses;
 - the implications of not meeting the growth forecasts;
 - the need for some growth to ensure a healthy city;
 - the need to ensure there are suitable housing options, including affordable housing; and
 - sustainability should be a priority when expanding the urban boundary (e.g. ensuring growth is transit supportive, sustainable site development, energy & water efficiency).

Summary

Based on Markham's recent growth management exercise, Markham staff analysis provided above, and comments from Committee, the Region should consider a regional growth scenario to accommodate 2041 population and employment forecasts that best reflects the following:

- protects Markham's Greenway System;
- is consistent with Markham's current residential intensification target of 60%;
- provides for a range of employment growth and accommodation, ensuring Markham remains economically competitive;
- provides for a diverse housing stock, including affordable housing forms;
- is supportive of increased travel options and ongoing investment in a multi-modal transportation system;
- facilitates mixed use development at appropriate locations, particularly the integration of retail and service uses with primary residential and office development; and
- is supported by servicing, transportation and community infrastructure planning and financing that ensures timely delivery and operation of facilities to serve future growth.

NEXT STEPS:

The Region's timeline for moving forward with the Regional Municipal Comprehensive Review is as follows:

- November 2015 – target date for Regional Council to release a Preferred Growth Scenario; it is recognized that the preferred growth scenario may be different than the three draft scenarios now under consideration.
- Early 2016 – target date for Regional Council to release a Draft Regional Official Plan Amendment (ROPA) to incorporate 2041 forecasts into the Regional Official Plan
- Late 2016 – target date for Regional Council adoption of Regional Official Plan Amendment

Once the Regional Official Plan is amended to incorporate the 2036 and 2041 forecasts, the Markham Official Plan will have to be updated to include the respective forecasts for Markham.

Regional timelines a concern for providing substantive comments

Given the relatively short timelines between the next phases of the Regional Municipal Comprehensive Review and the Fall 2016 targeted adoption date of a Regional Official Plan Amendment, Markham staff are concerned with our ability to respond with substantive comments. Markham staff priorities over the next two years include resolving appeals of the 2014 Markham Official Plan through the Ontario Municipal Board, advancing the detailed

planning and approvals for the 2031 Future Urban Area, and updating Secondary Plans to conform with the new Official Plan.

Although Markham staff will continue to monitor the Region's MCR/Official Plan Review process and update Council as appropriate, given the City's other priorities, a conformity exercise is not anticipated to be initiated until late 2016/2017.

Recommendation that this report be forwarded to York Region

It is recommended that this report be forwarded to York Region as Markham Council input to the Region's Municipal Comprehensive Review.

FINANCIAL CONSIDERATIONS:

Not applicable.

HUMAN RESOURCES CONSIDERATIONS:

Not applicable.

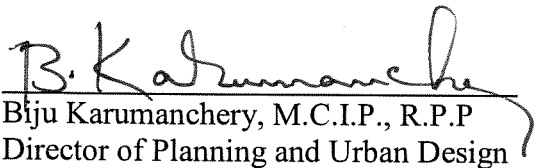
ALIGNMENT WITH STRATEGIC PRIORITIES:

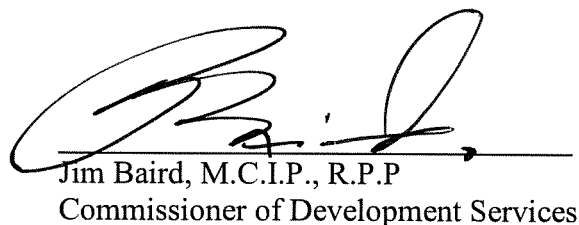
This report relates to all strategic priorities of Building Markham's Future Together, and specifically addresses the Growth Management priority.

BUSINESS UNITS CONSULTED AND AFFECTED:

Appropriate business units will be consulted during the review process for the Regional Draft Growth Scenarios.

RECOMMENDED BY:


Biju Karumanchery, M.C.I.P., R.P.P.
Director of Planning and Urban Design


Jim Baird, M.C.I.P., R.P.P.
Commissioner of Development Services

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APPENDICES:

Appendix 'A' – City of Markham staff report entitled 'York Region Draft Growth Scenarios to 2041 – Regional Municipal Comprehensive Review' dated May 19, 2015



Report to: Development Services Committee

Report Date: May 19, 2015

SUBJECT: York Region Draft Growth Scenarios to 2041 – Regional Municipal Comprehensive Review

PREPARED BY: Marg Wouters M.C.I.P., R.P.P., Senior Manager, Policy & Research
(ext. 2909)

RECOMMENDATIONS:

- 1) That the report entitled “York Region Draft Growth Scenarios to 2041 - Regional Municipal Comprehensive Review” dated May 19, 2015 be received.

EXECUTIVE SUMMARY:

York Region is undertaking a Regional Municipal Comprehensive Review (MCR) and Official Plan Review which will implement population and employment forecasts to 2041. On April 23, 2015, Regional Council endorsed three draft growth scenarios as the basis for further consultation and input into the Regional MCR and the Regional Official Plan Review. The draft growth scenarios are based on 40% residential intensification, 50% intensification, and no expansion (approximated at 65% intensification).

Markham staff will be reviewing the draft growth scenarios and reporting back to Committee in the early fall with comments on the draft growth scenarios.

PURPOSE:

This report provides an overview of York Region draft growth scenarios for 2041 and the implications for Markham.

BACKGROUND:

York Region is undertaking a Regional Municipal Comprehensive Review (MCR) and Official Plan Review which will implement population and employment forecasts to 2041. Updated population and employment forecasts for 2031 and new forecasts for 2036 and 2041 were assigned to the Region by the Province in 2013 through Amendment 2 to the Growth Plan for the Greater Golden Horseshoe. The Regional Official Plan must be brought into conformity with Amendment 2 by June 2018.

On April 23, 2015, Regional Council endorsed three draft growth scenarios incorporating population and employment forecasts as the basis for further consultation and input into the Regional MCR and the Regional Official Plan Review.

A recommended growth scenario is expected to be brought to Regional Council in late 2015, with a draft Regional Official Plan Amendment incorporating the growth scenario targeted for mid 2016. Regional Council adoption of the amendment is targeted for late 2016. Once the forecasts

are approved, Markham's Official Plan will need to be amended to conform with the new forecasts.

OPTIONS/DISCUSSION:

Overview of Regional staff report and draft growth scenarios

The following is an overview of the Regional draft growth scenarios as outlined in the April 9, 2015 Regional staff report attached as Appendix 'A' to this report.

Population Forecasts

The three draft growth scenarios for population growth are based on varying levels of residential intensification: 40% intensification; 50% intensification; and 'no expansion'. Intensification measures the proportion of new residential development located within the 'built boundary' established by the Province for municipalities in 2006. The 'no expansion' scenario assumes a combination of approximately 65% of growth being accommodated within the Provincially defined built boundary, and the remainder being accommodated on lands outside the built boundary but still within the 2031 urban area. Markham's Provincial Built Boundary and Urban Area Boundary are identified on Map 12 in the Markham Official Plan 2014, attached as Appendix 'B' to this report.

For comparison purposes, the 40% intensification scenario meets the requirements of the Provincial Growth Plan, and is the basis of the 2010 Regional Official Plan (ROP 2010). The 2010 Regional intensification target of 40% assumes an intensification target of approximately 52% for Markham. Markham's 2014 Official Plan (2014 OP) targets 60% intensification.

The report notes the following:

- The Region's population is expected to grow to 1.79 million by 2041 (compared with 1.13 million population in mid 2014)
- The rate of growth required from 2015 to 2041 on a Region-wide basis is 24,300 people per year, compared to a historical annual growth rate of 26,500 persons from 1981 to 2014
- Residential land supply in each municipality was considered in the draft scenarios and servicing capacity was a key consideration in the development of the growth scenarios
- Under the 40% intensification scenario, municipalities with the largest amount of available land for potential urban expansion show the highest levels of growth
- All nine local municipalities are projected to experience population growth under each scenario with Markham, Vaughan, and Richmond Hill continuing to accommodate the largest shares of the Region's population growth
- For Markham, the draft scenarios generate a forecast population of between 536,600 and 541,900 by 2041
- Markham is assigned the largest share of the Regional population growth (about 32% of the total York Region growth projected between 2011 and 2041)
- The updated forecasts incorporate new assumptions about household size, measured as average persons per unit (that is, the number of people in a household who live in a dwelling unit). Household size or persons per unit (ppu) have tended to decrease over time, but they have been found to not be decreasing to the extent assumed in the original

2031 population forecasts. Larger household size means that fewer households/dwellings (new or existing) are required to accommodate the same population

- With respect to dwelling types, all of the growth scenarios project an increased share of higher density housing forms, with the 'no expansion' scenario proposing the largest increase in this share.

The methodology underlying the population forecasts is provided on pages 4-5 of the Regional report.

Employment Forecasts

The Regional staff report notes the following for employment forecasts:

- Employment in the Region is expected to grow to 900,000 jobs by 2041 (compared with 564,600 jobs in 2014)
- Employment was forecast for three major types: major office, employment land employment (manufacturing, warehousing, etc) and population-related employment (retail, service, institutional)
- The forecast takes into account that employment growth in York Region is expected to continue to shift from goods producing to service producing sectors, which is reflected in a greater share of employment growth being forecast in the major office and population-related employment categories
- For Markham, the draft scenarios generate forecast employment of between 274,800 and 275,700 jobs by 2041
- The forecast takes into account a number of Markham's employment land conversion applications that Regional staff recommended for approval (discussed in further detail below)
- All nine local municipalities are forecast to experience employment growth. Vaughan has been assigned the largest share of employment land growth in the Region, mainly due to its large vacant land supply
- Major office employment is expected to continue to increase in the major office concentrations in Markham, Richmond Hill, Vaughan, Aurora and Newmarket in Centres and Corridors, as well as in business parks
- Large increases in population-related employment growth are forecast for those municipalities that are anticipated to experience a relatively high amount of growth.

The methodology underlying the employment forecasts is provided on pages 11-12 of the Regional report.

Urban expansion required for 40% and 50% Intensification Scenarios

Under the 40% intensification scenario, approximately 2,300 hectares would be required Region-wide to accommodate population growth from 2031 to 2041. Under the 50% intensification scenario, 1,100 hectares would be required Region-wide. Under both scenarios approximately 160 hectares would be required to accommodate employment growth. There are approximately 4,500 developable hectares of 'whitebelt' lands Region-wide (i.e., lands outside the urban boundary and outside the Greenbelt). In the Markham 2014 OP, the 'whitebelt' lands are designated 'Countryside' on Map 3 – Land Use (attached as Appendix 'C' to this report).

Further evaluation in Phase 2 of the MCR

The Regional staff report notes that there may be significant refinements to the three draft growth scenarios as a result of further evaluation in the coming months. The report notes a number of matters to be considered in the evaluation, such as meeting minimum density requirements of the Growth Plan, protection of the Greenbelt, Oak Ridges Moraine and agricultural, rural and resource areas, job creation to match labour force growth, housing diversity and affordable housing, options for different locations for urban expansion, and required infrastructure (transportation, water and wastewater) investment. The report also notes that the cost of infrastructure will be a key consideration in the identification of the preferred growth scenario, and that a fiscal impact analysis will be undertaken.

Comparison of Draft Growth Scenarios with Population and Employment Growth to Date

In response to a previous request from Committee, and to provide context for considering each of the draft growth scenarios for Markham, population and employment data from 2004 to 2014 for Markham are provided in Appendix 'D' to this report. Comparisons are provided below.

Population Growth

- Under the 2010 Regional Official Plan, Markham was assigned population growth of 148,600 persons between 2006 and 2031; this growth translates into average growth of approximately 5,900 persons per year over the 25-year forecast period.
- Population growth between 2011 and 2041 assigned to Markham in the draft growth scenarios ranges from 224,800 to 230,100; this growth translates into approximately 7,500 to 7,700 persons per year over the 30-year period
- Between 2004 and 2014, Markham experienced population growth ranging from a low of approximately 3,400 persons per year to a high of approximately 11,500 persons per year, at an overall average rate of approximately 8,600 persons per year for the 10-year period

Employment Growth

- Under the 2010 Regional Official Plan, Markham was assigned employment growth of 95,600 jobs between 2006 and 2031; this growth translates into an average of approximately 3,800 jobs per year over the 25-year forecasting period
- Employment growth between 2011 and 2041 assigned to Markham in the draft growth scenarios ranges from 120,000 to 120,900 jobs; this growth translates into approximately 4,000 jobs per year over the 30-year period
- Between 2004 and 2014, Markham experienced annual employment growth ranging from a low of a net loss of approximately 400 jobs to a high of approximately 6,300 jobs per year, at an overall average of approximately 2,900 jobs per year for the 10-year period. These annual employment estimates are based on surveyed employment which captures the majority (roughly 90 percent) of total employment in Markham. Growth based on total employment is expected to be slightly higher than growth based on surveyed employment.

Implications of Updated 2031 Population and Employment Projections

Amendment 2 to the Growth Plan establishes updated 2031 population and employment forecasts for York Region (1,590,000 population rather than 1,500,000 population, and 790,000 jobs rather than 780,000 jobs) as well as new forecasts for 2036 and 2041.

The Region's 2041 forecast allocates growth over the 2011-2041 planning horizon using the updated population and employment forecasts as well as updated forecasting parameters such as new persons per unit assumptions, secondary plan targets and servicing infrastructure capacity and timing. The ROP 2010 forecasts for 2031 (reflected in the Markham OP 2014) will be superseded with a new 2031 forecast as part of this MCR. Direct comparison of the new 2036 and 2041 forecasts in the draft growth scenarios against the 2031 forecast in the ROP 2010 or Markham OP 2014 is not meaningful as the underlying parameters have changed. The 2036 and 2041 forecasts should instead be reviewed within the context of the new 2011-2041 forecast, which includes new population and employment forecasts for 2031.

The updated 2031 forecasts will not affect planning for 2031 in the ROP 2010 or the Markham OP 2014. In enacting Amendment 2 to the Growth Plan the Province made it clear that the original 2031 forecasts would continue to be applied to all upper or lower tier official plans that were commenced before June 17, 2013, which includes both the Region's Official Plan 2010 and Markham's Official Plan 2014. The updated 2031 forecasts can only be applied through the next Regional MCR, which is currently underway, and the next Markham MCR which has not yet been initiated. The new forecasts to 2041 will be implemented through amendments to the Regional Official Plan and Markham Official Plan.

Regional Council approved a number of employment land conversion applications

As mentioned, the 2041 employment forecasts for Markham take into account a number of employment land conversion applications that Regional staff had recommended for approval. In approving Markham's OP in June 2014, the Region deferred making a decision on the land use designations of a number of properties subject to employment land conversion applications, until their impact on meeting employment forecasts could be considered comprehensively as part of the next Regional MCR.

Four applications were subsequently recommended by Regional staff for approval and included in the draft growth scenario analysis. In April 2015, Regional Council approved or approved in principle these applications and an additional four applications which were not included in the analysis (the applications are identified in Appendix 'E' to this report). The impact of the approval of the additional applications will need to be taken into account in the analysis prior to selecting a preferred growth scenario. Required changes to the Markham 2014 OP arising from the Regional approval of the applications will be identified in a separate upcoming Markham staff report related to the status of appeals of the Markham 2014 OP.

NEXT STEPS:

Markham staff will be reviewing the draft growth scenarios and reporting back to Committee in the early fall with comments. Because of the relatively short timelines for commenting, Markham Planning and Engineering staff will focus on reviewing the assumptions underlying the

scenarios, particularly with respect to land supply. As previously requested by Committee, staff will review the assumptions regarding timing of development in Langstaff Gateway. Relevant and still applicable analysis undertaken for the previous Growth Management Strategy, such as housing market, transportation and servicing analyses, may also be reviewed as the basis for comments.

FINANCIAL CONSIDERATIONS:

Not applicable.

HUMAN RESOURCES CONSIDERATIONS:

Not applicable.

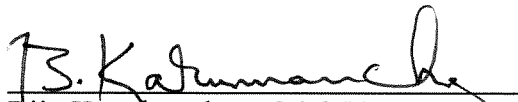
ALIGNMENT WITH STRATEGIC PRIORITIES:

This report relates to all strategic priorities of Building Markham's Future Together, and specifically addresses the Growth Management priority.

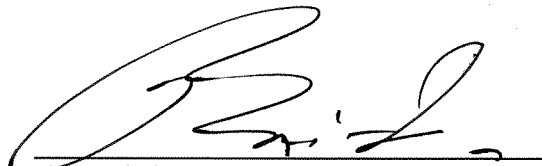
BUSINESS UNITS CONSULTED AND AFFECTED:

Appropriate business units will be consulted during the review process for the Regional Draft Growth Scenarios.

RECOMMENDED BY:



Biju Karumanchery, M.C.I.P., R.P.P.
Acting Director of Planning and Urban Design



Jim Baird, M.C.I.P., R.P.P.
Commissioner of Development Services

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APPENDICES:

Appendix 'A' - April 9, 2015 Region of York report entitled '2014 York Region Draft Growth Scenarios and Land Budget'

Appendix 'B' - Map 12 – Urban Area and Built-Up Area, Markham Official Plan 2014

Appendix 'C' - Map 3 – Land Use, Markham Official Plan 2014

Appendix 'D' - Population and Employment in Markham – Forecast and Actual

Appendix 'E' - Employment Conversion Application Decisions by Regional Council



Clause 6 in Report No. 7 of Committee of the Whole was adopted, without amendment, by the Council of The Regional Municipality of York at its meeting held on April 23, 2015.

6

2041 York Region Draft Growth Scenarios and Land Budget

Committee of the Whole recommends:

1. Receipt of the presentation by Valerie Shuttleworth, Chief Planner.
2. Receipt of the following deputations:
 1. Patricia Foran, Aird & Berlis LLP on behalf of Lindvest Properties (Cornell) Limited.
 2. Don Given, Malone Given Parsons Ltd. on behalf of Box Grove Hill Developments Inc.
3. Receipt of the communication from Ryan Mino-Leahan, KLM Partners Inc. on behalf of Melrose Properties Inc., Ironrose Investments Inc., MCN (Pinevalley) Inc., Mel-Terra Investments Inc., Azure Woods Home Corp., and Lazio Farms Holdings Inc., the owners of approximately 191.16 hectares of land located within Block 42 in the City of Vaughan, dated April 8, 2015.
4. Adoption of the following recommendations, as amended, in the report dated March 26, 2015 from the Commissioner of Corporate Services and Chief Planner:
 1. Council endorse *in principle* the three draft growth scenarios outlined in this report as the basis for further consultation *with local municipalities* and input to the Regional Municipal Comprehensive Review and Regional Official Plan Review.
 2. The Regional Clerk circulate this report to local municipalities, Building Industry and Land Development Association and the Ontario Ministry of Municipal Affairs and Housing.

1. Recommendations

It is recommended that:

1. Council endorse the three draft growth scenarios outlined in this report as the basis for further consultation and input to the Regional Municipal Comprehensive Review and Regional Official Plan Review.
2. The Regional Clerk circulate this report to local municipalities, Building Industry and Land Development Association and the Ontario Ministry of Municipal Affairs and Housing.

2. Purpose

This report presents population and employment forecasts to the year 2041 for three draft growth scenarios and a land budget. The information is to be used as the basis for further consultation and analysis through the next phase of the Regional Municipal Comprehensive Review (MCR) and for the current water and wastewater and transportation master plan updates.

3. Background

Amendment 2 to the *Growth Plan for the Greater Golden Horseshoe* requires the Region to update its population and employment forecasts

Amendment 2 to the *Growth Plan for the Greater Golden Horseshoe* (the *Growth Plan*), which came into effect in June 2013, provides updated forecasts of population and employment for 2031 and introduces new population and employment forecasts for 2036 and 2041 for York Region and the rest of the Greater Golden Horseshoe (GGH). These forecasts are to be used for planning and managing growth in the GGH. York Region is forecast to grow to a population of 1.79 million and employment of 900,000 by 2041 (see Table 1). The Regional Official Plan must be brought into conformity with Amendment 2 by June 17, 2018.

Table 1
Growth Plan Schedule 3 Forecasts

York Region	2014*	2031	2036	2041
Population	1,133,900	1,590,000	1,700,000	1,790,000
Employment	564,600	790,000	840,000	900,000

Source: Growth Plan for the Greater Golden Horseshoe, 2006, Office Consolidation, June 2013

*Note: 2014 figures are a York Region Long Range Planning Division estimate.

Update of the Region's forecasts is part of the Regional Municipal Comprehensive Review and 5 year Regional Official Plan update

Committee and Regional Council received the "Regional Municipal Comprehensive Review Work Plan" staff report in May 2014, which outlined the work plan components and anticipated timing. The purpose of the work is to update the *York Region Official Plan, 2010 (YROP-2010)* to be consistent with Amendment 2 to the *Growth Plan* and the updated *Provincial Policy Statement, 2014* and also to review *YROP-2010* policies. The MCR is a primary component of the mandatory five-year review and update of the *YROP-2010*, a requirement under the *Planning Act*.

The Regional Municipal Comprehensive Review consists of a number of studies and projects

The MCR involves undertaking a number of separate studies, some of which have been completed or are in progress while others are to follow. The review consists of the following key components.

- Residential unit supply inventory
- Employment land supply and major office inventories
- Regional land budget and associated studies including the Retail Trends Study, Employment Trends Analysis and Cemetery Land Needs Study
- *YROP-2010* policy review
- Long-term fiscal impact analysis
- Population and employment forecasts

The Region last undertook an MCR updating the existing *YROP-2010*. The updated MCR that incorporates Amendment 2 to the *Growth Plan* is following a similar methodology and approach in completing the forecasting and land budget work, relevant background studies, and policy review and consultation.

The new forecasts will provide the foundation for infrastructure master plans and development charges background study

Updates to the Regional Water and Wastewater Master Plan and the Transportation Master Plan are currently in progress and are planned to be completed in 2016. This work will be based on updated York Region population and employment forecasts in order to properly assess and plan for the Region's long-term infrastructure requirements. In addition, background work for the next development charges by-law will commence in 2016 and will be based on updated growth forecasts.

Draft growth scenarios will be the basis for iterative work in Phase 2 of the MCR

The population and employment draft growth scenarios presented in this report will be reviewed and evaluated through Phase 2 of the MCR process. They will be evaluated as part of the water and wastewater and transportation master plan process and will also be subject to a fiscal impact assessment and land use planning assessment. Based on this analysis along with consultation with the public, stakeholders and local municipalities, a preferred growth scenario is planned to be presented to Council in Q4 2015.

The draft growth scenarios were prepared within the context of provincial plans and the Provincial Policy Statement

The draft growth scenarios were prepared within the context of the *Provincial Policy Statement, 2014 (PPS)*, and a number of provincial planning documents including the *Growth Plan*, the *Greenbelt Plan*, the *Oak Ridges Moraine Conservation Plan* and the *Lake Simcoe Protection Plan*.

The *PPS* provides policy direction on land use matters that are of Provincial interest. All planning decisions must be consistent with *PPS* policies. Within York Region there is significant overlap between the requirements of the *PPS*, the *Growth Plan* and other plans. All draft growth scenarios considered the fundamental guiding principles contained in both the *PPS* and the *Growth Plan*:

- The building of strong, healthy, complete communities for people of all ages,
- Supporting a strong and competitive economy,
- Making wise use and management of natural resources to protect and enhance a clean, healthy environment, and
- Optimizing and making efficient use of infrastructure to support the planning of growth in a compact and efficient manner.

4. Analysis and Options

Three draft growth scenarios were developed

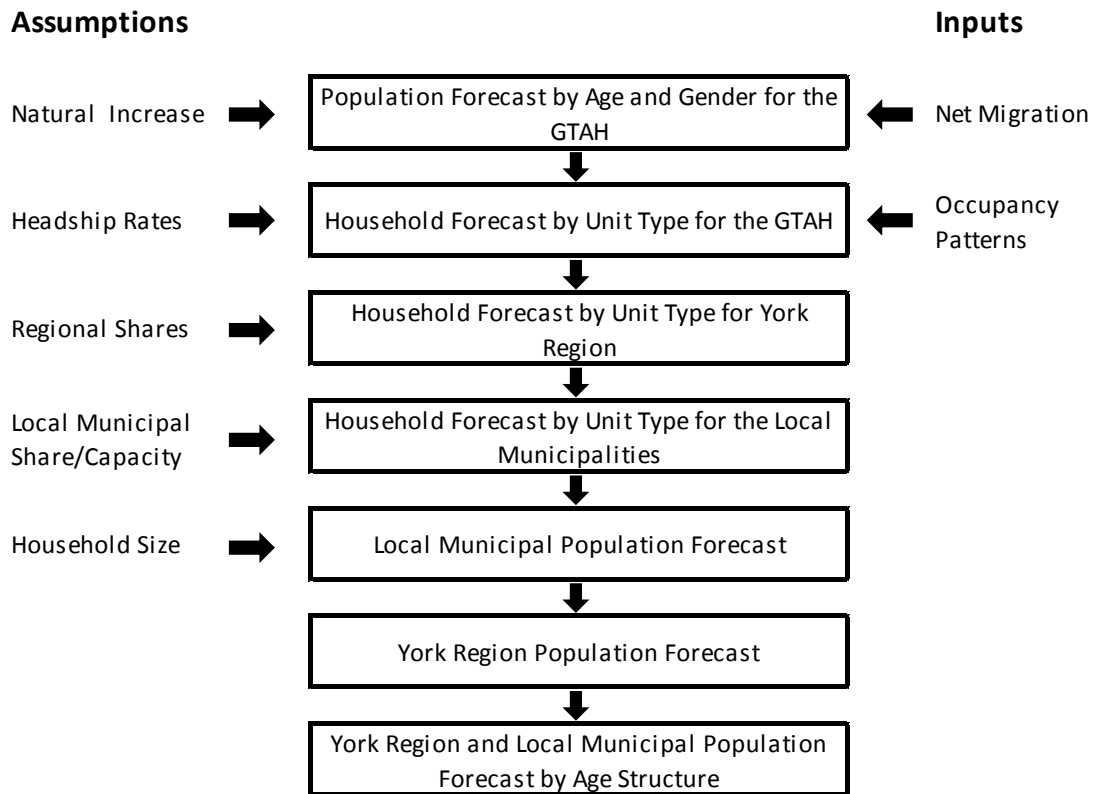
Three growth scenarios were developed by York Region staff based on varying levels of residential intensification. The three scenarios are: 40% intensification, 50% intensification and a no urban expansion scenario. The intensification percentages refer to the share of housing growth occurring annually within the provincially defined Built Boundary. The 40% scenario is the minimum standard for intensification set by the Growth Plan. Both the 40% and 50% intensification scenarios require an urban expansion to accommodate the 2041 population and employment. The no urban expansion scenario constitutes the highest level of intensification possible. Under this scenario there would be no urban expansion in the Region beyond ROPA's 1, 2 and 3. This scenario equates to an intensification level of approximately 65%. Finally, the 50% scenario is an intermediate scenario which lies in between the minimum and maximum intensification scenarios.

The draft growth scenarios incorporate a range of demographic, economic, land use planning policy and infrastructure factors

Regional staff maintain an in-house population, household and employment forecast model. The model uses the cohort (age group) survival method modified by migration factors that ages the population and calculates future growth based on assumptions on fertility rates, mortality rates and net migration.

The model forecasts population and households for the GTHA and then distributes this growth to York Region and its local municipalities based on a share analysis of the housing market. This top down approach is used in conjunction with land use planning policy targets, vacant land inventories and infrastructure capacity, location and timing factors and local municipal growth management work. Figure 1 below summarizes the population and household forecast method.

Figure 1
Population and Household Forecast Methodology



The residential inventory work discussed in the report “Residential Unit Supply Inventory” endorsed by Council in March 2015 was an input to the housing unit forecast for the Region and local municipalities. Servicing capacity was a key consideration in the development of the draft growth scenarios. All three draft growth scenarios assume that the water and wastewater projects in the approved 2015 ten year capital plan will be maintained, in order to provide the required servicing capacity to accommodate growth within the planned time frame.

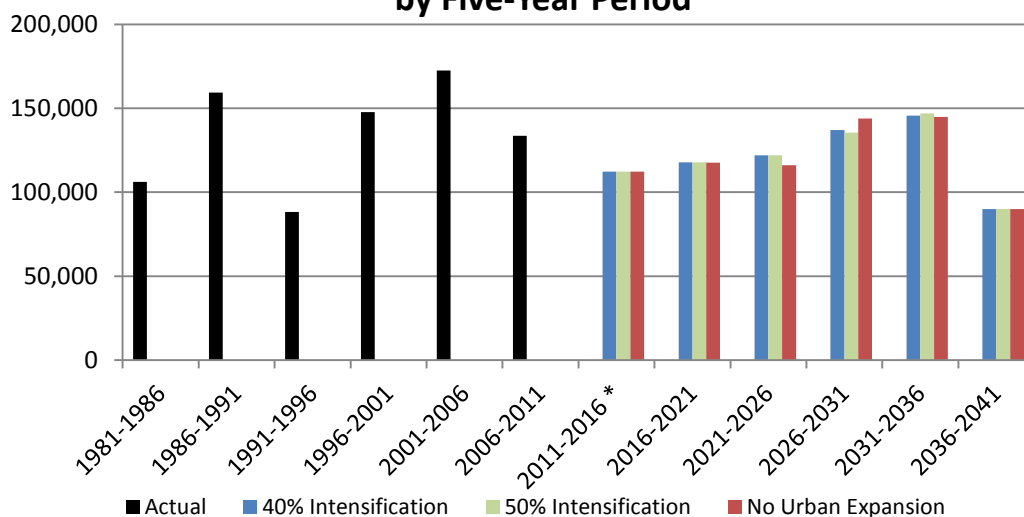
Growth of approximately 645,000 in population by 2041 is required to meet *Growth Plan* forecast

The *Growth Plan* forecast requires York Region to grow from a 2014 year-end population base of approximately 1.14 million to 1.79 million by 2041. This requires population growth of about 645,000 or an average annual growth level of about 24,300 people from 2015 to 2041. This compares to average annual historical growth of 26,500 people from 1981 to 2014.

Consistent population and housing growth is maintained for most of the forecast period to 2041 for all three draft growth scenarios

The 40% and 50% draft growth scenarios maintain relatively similar levels of annual population growth through the forecast period (see Figure 2) and are similar to recent levels of growth in the Region. The no urban expansion scenario shows slightly higher levels of population growth in the 2026 to 2031 period. The rate of growth declines towards the end of the forecast period as a result of the overall slowing of growth in the GTHA due to demographic trends and the ageing of society.

Figure 2
York Region Population Growth
by Five-Year Period



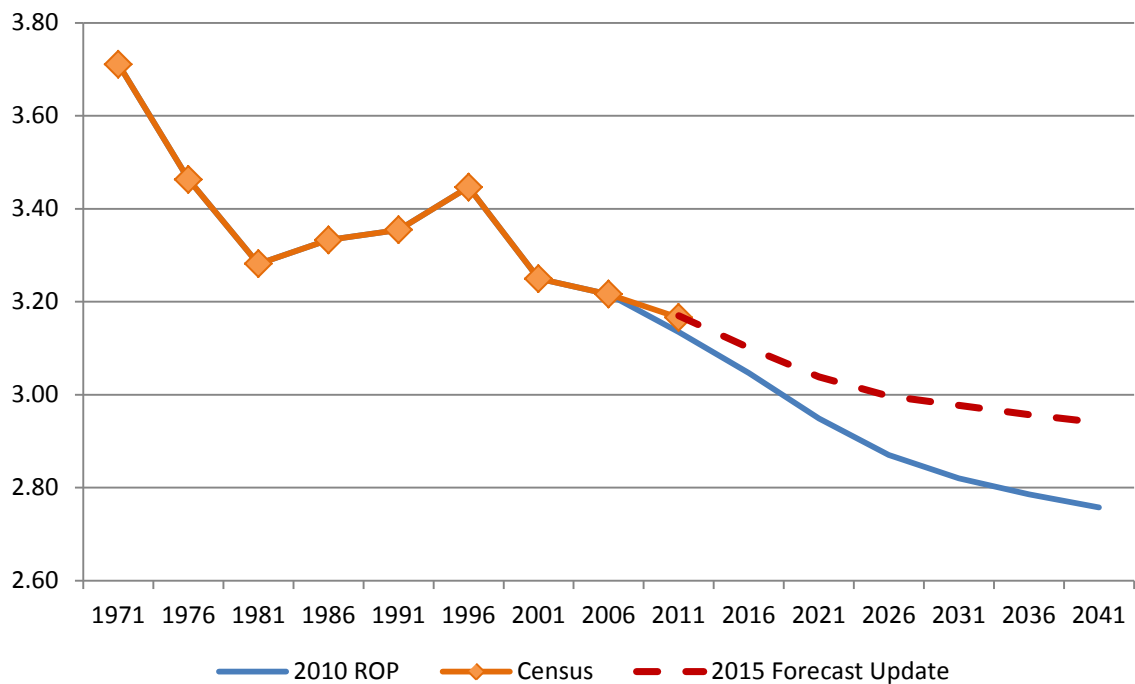
* Note: 2011-2016 – York Region Long Range Planning Division estimate based on CMHC housing completion data to 2014 and forecast to 2016.

Persons per unit forecast to decline at a slower rate than anticipated in forecast for the York Region Official Plan 2010

Persons per unit is calculated by dividing the total household population by the number of households. Changes in average persons per unit over time are important in planning for housing growth to reach target population forecasts. Over time, average household size has tended to decrease. This is a common trend in the western world and is related to a fertility rate below replacement level, an aging population and an increase in empty nesters, childless and single person households. Figure 3 shows historical and projected average persons per unit for York Region. Data from the 2011 Census as well as the background work done in support of the *Growth Plan* Amendment 2 forecasts indicate that the rate of decline is not as steep as was previously forecast in the work done for the *YROP-2010* due primarily to higher fertility and life expectancy. A slower rate of

decline in the average persons per unit means that fewer households will be required to accommodate the forecasted population.

Figure 3
York Region Persons per Household 1971 to 2041



Draft growth scenarios result in varying levels of household growth and housing unit mixes

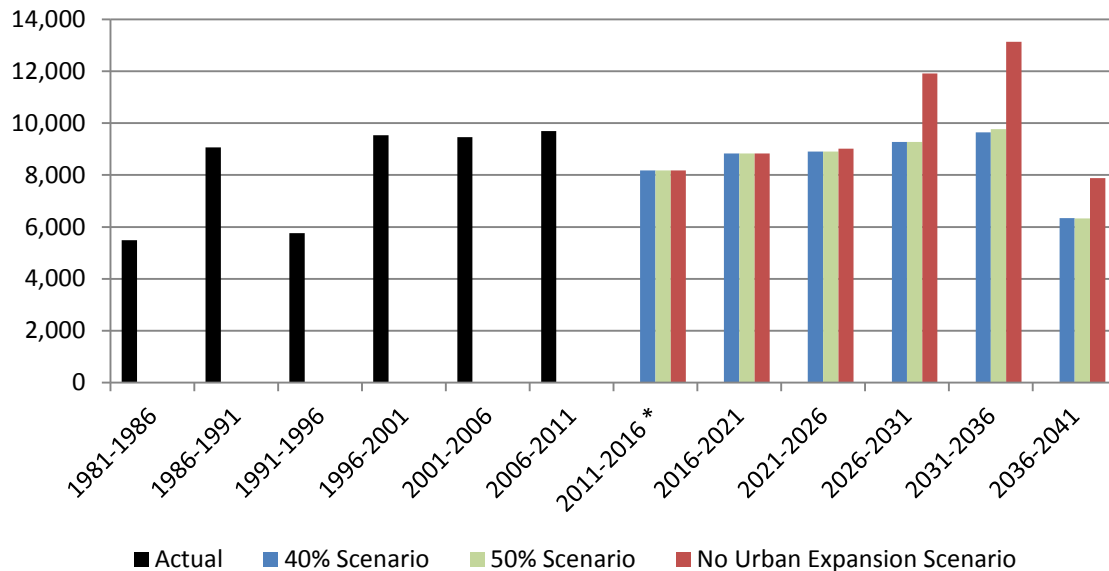
All three draft growth scenarios reach the *Growth Plan* target population of 1.79 million but each achieves this through different means in terms of housing growth and housing type mix. Table 2 compares the share of housing growth through ground-related units (single detached, semi-detached and row houses) and apartments for the last 10 years, the current *YROP-2010* forecast and the three growth scenarios.

Table 2
Housing Mix Comparison – Share of Housing Growth By Unit Type

Scenario	Ground-Related Units	Apartments	Total	Total Stock Ground-Related / Apartments
2005 to 2014 Actual	79.2%	20.8%	100.0%	87% / 13%
YROP-2010 Forecast: 2006 to 2031	64.4%	35.6%	100.0%	78% / 22%
40% Intensification: 2011 to 2041	66.3%	33.7%	100.0%	79% / 21%
50% Intensification: 2011 to 2041	59.3%	40.7%	100.0%	75% / 25%
No Urban Expansion: 2011 to 2041	52.8%	47.2%	100.0%	71% / 29%

Historically, York Region's housing growth has been largely oriented to ground-related housing but there has been a shift in recent years to increasing shares of growth in medium and higher density forms of housing. In order to support the development of more complete communities with a range of housing types that are more compact, provide more affordable housing options and can support public transit and mixed use, all of the growth scenarios project an increased share of housing growth towards higher density forms. The no urban expansion scenario proposes the largest shift in housing type, with just under half of the housing growth from 2011 to 2041 in apartments. Attachment 1 provides detailed graphs on housing growth by type for each scenario, by 5-year period. Figure 4 shows average annual total housing growth for the three draft growth scenarios. The no urban expansion scenario necessitates high levels of apartment growth from 2026 onwards to meet the *Growth Plan* forecast for 2041.

Figure 4
York Region Average Annual Housing Unit Growth by Five
Year Period



*Note: 2011-2016 – York Region Long Range Planning Division estimate based on CMHC housing completion data to 2014 and forecast to 2016.

Draft growth scenarios vary distributions of population growth among the Region's local municipalities

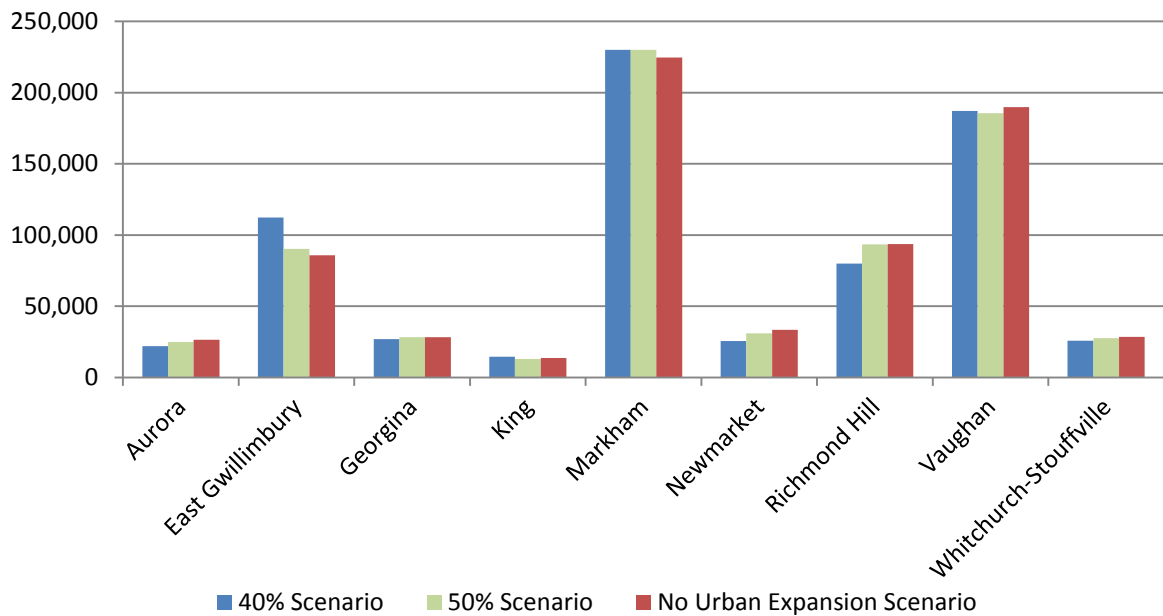
All nine local municipalities are projected to experience population growth under each scenario. Table 3 shows the forecast 2041 population by local municipality along with the current *YROP-2010* 2031 forecasts. However, since the three growth scenarios are based on varying levels of intensification, the distribution of growth to the Region's local municipalities varies with each scenario. Under the 40% scenario, the municipalities with the largest amount of available land for potential urban expansion show the highest levels of growth. Attachment 2 shows the full local municipal forecast by 5-year period for each growth scenario.

Table 3
YROP-2010 and Draft Growth Scenarios Population Forecast

Municipality	YROP-2010: 2031 Population	40% Intensification: 2041 Population	50% Intensification: 2041 Population	No Urban Expansion: 2041 Population
Aurora	70,200	76,700	79,500	81,000
East Gwillimbury	86,500	135,300	113,400	108,700
Georgina	70,300	71,900	73,300	73,400
King	34,900	35,100	33,600	34,200
Markham	421,600	541,800	541,900	536,600
Newmarket	97,100	107,000	112,400	114,900
Richmond Hill	242,200	270,900	284,400	284,700
Vaughan	416,600	486,100	484,500	488,600
Whitchurch-Stouffville	60,600	65,200	67,000	67,900
York Region	1,500,000	1,790,000	1,790,000	1,790,000

Figure 5 displays the distribution of population growth among the nine local municipalities from 2011 to 2041. Markham, Vaughan and Richmond Hill are forecast to continue to accommodate the largest shares of the Region's residential growth. In addition, the Town of East Gwillimbury is anticipated to play a more significant role in the next 25 years in accommodating population growth in the Region with the extension of servicing capacity to allow for the full development of Holland landing, Sharon, Queensville, ROPA 1 lands and potentially additional urban expansion lands.

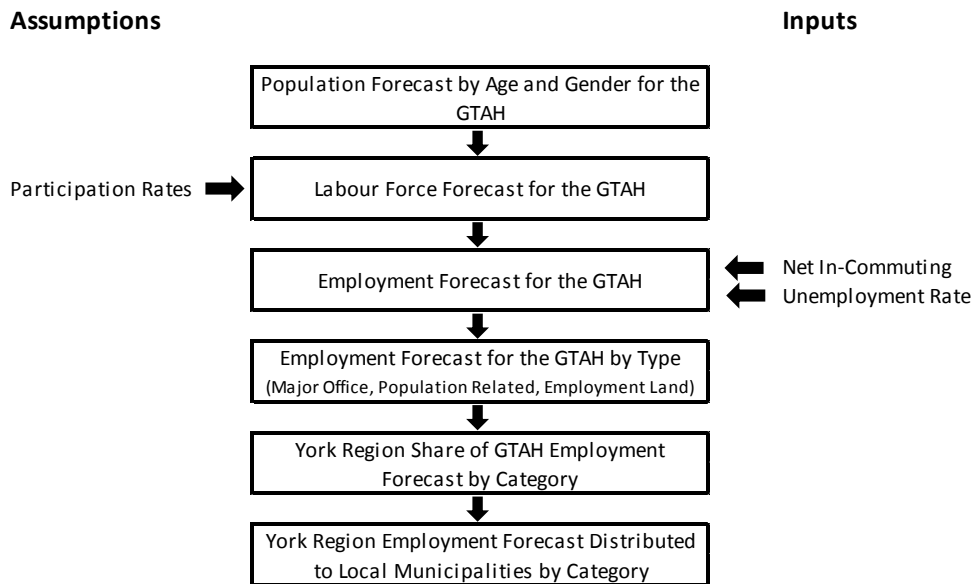
Figure 5
2011 - 2041 Population Growth by Local Municipality



Employment growth is forecast by three employment types

Similar to the population forecast model, the employment forecast model projects York Region employment by a share analysis of GTHA employment taking into account labour force participation rates, net in-commuting and unemployment rates. Figure 6 summarizes the employment forecast method used for the draft growth scenarios.

Figure 6
Employment Forecast Methodology



Employment is forecast by three types: major office employment, population-related employment and employment land employment. Definitions of each type are provided in Attachment 3. The following points summarize the key forecast assumptions for each employment type.

Major Office Employment: Major office employment growth is forecast through a market share analysis of the major office forecast for the entire GTHA. All three growth scenarios anticipate that York Region will increase its market share of GTHA office growth and that the Region’s Centres and Corridors will attract increased levels of office development.

Population-Related Employment: Population-related employment is employment serving the local population (e.g. retail, services, education, government). Population-related employment is forecast as a ratio in relation to population growth since it tends to grow in response to population.

Employment Land Employment: Employment land employment is forecast by applying projected employment densities against vacant land supply in the Region’s employment land areas. A factor was also applied to account for a portion of the employment growth occurring within existing vacant space and buildings. The Region’s vacant employment land supply is based on the work contained in the report that Council considered in June 2014, titled “York Region Vacant Employment Land Inventory”.

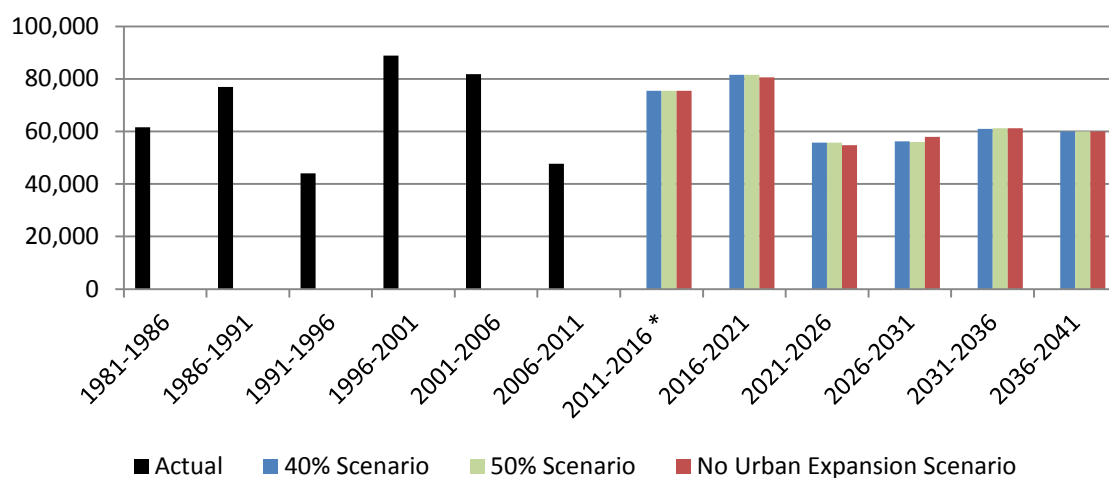
Draft growth scenarios account for employment land conversions proposed to be supported by the Region

The employment land forecast takes account of employment land conversions in the City of Markham that are proposed to be supported by York Region staff. An accompanying staff report entitled “Proposed Employment Land Conversions, City of Markham” is being presented to Committee on the same April 9 2015 agenda. That report provides recommendations on 10 Markham site-specific employment land conversion requests within the context of the MCR and applicable policy framework. That report also provides recommendations on site-specific Official Plan amendments for three of the 10 properties adopted by Markham Council and sent to the Region for approval.

Employment growth in York Region is forecast to continue to shift to service producing sectors

York Region, along with the rest of the GTHA and Ontario continues to experience a shift from goods producing to a service producing economy. Since recovering from the 2008/2009 economic recession, employment in York Region has been growing steadily at an average annual growth of about 15,000 jobs per year over the past five years. While it is anticipated that manufacturing and related industries will remain key parts of York Region’s economy, its share of future employment growth is anticipated to decline. Figure 7 shows historical and forecast employment growth under the three growth scenarios.

Figure 7
York Region Employment Growth
by Five-Year Period



* Note: 2011-2016 – York Region Long Range Planning Division estimate based on York Region 2014 employment survey and forecast to 2016.

Table 4 displays the forecast employment by type for York Region in 2041 in comparison to the forecast for 2031 in the current *YROP-2010*. The new growth scenarios anticipate a greater share of employment growth occurring in the major office and population-related employment categories reflecting the shift to the service-producing sectors. The no urban expansion scenario results in a slightly lower share of employment land employment in 2041 in comparison to the other two scenarios.

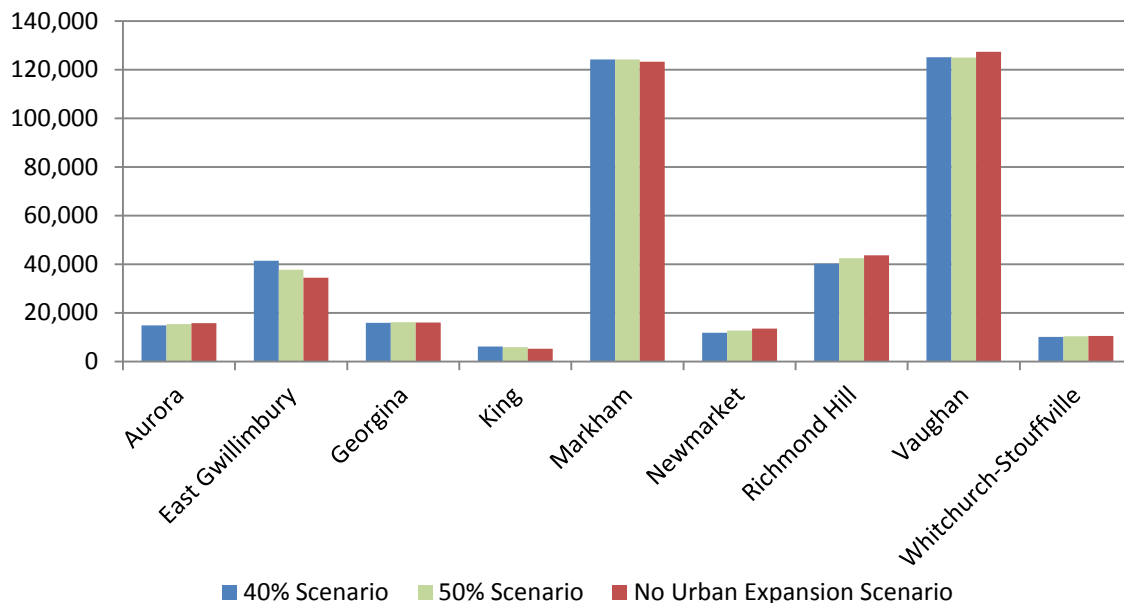
Table 4
York Region Employment Forecast By Type Comparison

Scenario	Major Office	Employment Land	Population- Related	Total
<i>YROP-2010</i> : 2031	15.4%	47.4%	37.2%	100%
40% and 50%: 2041 Intensification	18.0%	41.5%	40.5%	100%
No Urban Expansion: 2041	18.7%	40.7%	40.6%	100%

Each local municipality in the Region is forecast to continue to accommodate growth in employment

Forecast employment at the York Region level was distributed to the local municipalities based on available and potential employment land supply, ability to attract major office development and in relation to population growth. All nine local municipalities are projected to experience employment growth over the forecast period. Figure 8 shows total employment growth by local municipality for 2011 to 2041 by draft growth scenario. Attachment 4 shows the full employment forecast by 5 year period for each scenario by local municipality.

Figure 8
2011-2041 Employment Growth by Local Municipality



Vaughan has the largest share of employment land employment growth in the Region owing to its large vacant land supply, located mainly in West Vaughan. Major office employment is forecast to continue to increase in the Region's existing major office concentrations in Markham, Richmond Hill, Vaughan, Aurora and Newmarket in both Centres and Corridors and employment areas and business parks. Large increases in population-related employment growth are forecast for those local municipalities anticipated to experience a relatively higher amount of population growth.

40% and 50% intensification draft growth scenarios require urban expansion for residential and employment lands

A land demand/supply analysis (land budget) was undertaken to determine the ability of the existing Urban Area in York Region to accommodate the forecast population and employment growth. Both the 40% and 50% intensification growth scenarios require additional urban lands to accommodate the population and employment forecast to 2041. The area remaining outside of the existing Urban Area and also outside of the Greenbelt Plan boundary, an area commonly referred to as the "Whitebelt Lands", could potentially be used for urban expansion if required (see map in Attachment 5). These remaining areas in York Region are in East Gwillimbury, King, Markham, Vaughan and Whitchurch-Stouffville, totalling approximately 4,500 developable hectares.

Table 5 summarizes the approximate urban expansion requirements for the 40% and 50% intensification scenarios based on a preliminary review and analysis. A more fulsome analysis of land requirements and locations within the Region for urban expansion will be assessed and options proposed through Phase 2 of the MCR. This would also include the release of a comprehensive and detailed forecasting and land budget report outlining methodology and assumptions.

Table 5
Draft Growth Scenario Whitebelt Land Requirements (hectares) to 2041

Scenario	Community Lands	Employment Lands	Total
40% Intensification Scenario	2,300	160	2,460
50% Intensification Scenario	1,100	160	1,260

Preferred growth scenarios must meet *Growth Plan* requirements

The following are key *Growth Plan* policy requirements that must be met by the preferred growth scenario:

- Population and employment forecasts in Schedule 3 are to be used for planning and managing growth.
- By 2015 and for each year thereafter, a minimum of 40% of all residential development occurring annually will be within the built-up area.
- Urban growth centres are planned to achieve by 2031 or earlier, a gross density target of 200 people and jobs per hectare.
- The designated greenfield area will be planned to achieve a minimum density target that is not less than 50 residents and jobs combined per hectare.

All three draft growth scenarios meet the Schedule 3 forecast of 1.79 million population and 900,000 jobs by 2041. In addition, all three also meet the minimum 40% intensification requirement. Density targets for the Region's urban growth centres are maintained in all scenarios. Regional staff have undertaken preliminary work on the 50 people and jobs density analysis which will be completed as part of the Phase 2 land use planning evaluation of the draft growth scenarios.

Draft growth scenarios will be subject to review and consultation in Phase 2 of the MCR

The three draft growth scenarios were developed in consultation with regional departments and the local municipalities, and are the product of a number of assumptions based on the most recent social, demographic and economic trends and on provincial, regional and local policy. As part of MCR Phase 2 consultation and evaluation work, there may be significant refinements to the draft growth scenarios in deriving the preferred scenario.

The three draft growth scenarios will be discussed, reviewed and evaluated based on a number of factors including:

- The planned urban structure of centres and corridors that provide a focus for intensification, mixed use development and live/work opportunities,
- Transit supportive and pedestrian oriented new, complete communities,
- Protection of the Greenbelt and Oak Ridges Moraine and agricultural, rural and resource areas,
- Transit investment to support intensification,
- The pace of growth and required infrastructure investment for water and wastewater and roads and cycling,
- The long-term financial impact of growth and fiscal responsibility,
- Job creation to match labour force growth that requires the identification and protection of employment lands,
- Housing diversity and affordable housing to offer regional residents housing choices and for attracting a more diverse and skilled labour force and
- A land use planning analysis that will include an assessment of options for different locations for urban expansion, should this be required as part of the preferred scenario.

Regional Council, local municipal councils and staff, the development industry and other stakeholders will be consulted on the draft growth scenarios in this next phase of the MCR. Phase 2 will be an extensive, iterative process involving multiple rounds of scenario evaluation and refinement. The cost of infrastructure will be a key consideration in the identification of the preferred growth scenario and the associated distribution of growth at the local municipal level.

The Province is currently embarking on a review of the *Greenbelt* and *Oak Ridges Moraine Plans* as well as the *Growth Plan*. If required, the draft growth scenario forecasts and land budget will take into account any policy changes in these plans which may affect the forecasts and land budget.

Preferred growth scenario is expected to be presented to Council in Q4 2015

Based on the analysis described above in Phase 2, a recommended growth scenario is anticipated to be presented to Council in Q4 2015. The recommended growth scenario could be a refined version of one of the three scenarios presented in this report or it could be a modified version combining different elements of these scenarios. A draft Official Plan Amendment incorporating the preferred growth scenario is anticipated to be brought forward in mid-2016.

Link to key Council-approved plans

The MCR will result in an amendment to the *YROP-2010* to update the Regional and local municipal population and employment forecasts and associated policies. The MCR also supports a number of the *2015 to 2019 Strategic Plan* Priority Areas including – Managing Environmentally Sustainable Growth, Strengthening the Region’s Economy and Supporting Community Health and Well-being. The MCR work will also support *Vision 2051*’s goal area of Creating Liveable Cities and Complete Communities through the preparation of updated growth forecasts and land budget that will provide the framework for the future growth and development of communities in the Region.

5. Financial Implications

The forecast and land budget work was undertaken in-house by existing staff in the Planning and Economic Development branch, with support from staff in other Regional branches and departments.

A comprehensive fiscal impact analysis will be undertaken during Phase 2 to assist in the evaluation and development of a recommended scenario. The recommended growth scenario will form the basis for the growth forecast for the next development charge by-law update which is required to be adopted in 2017.

6. Local Municipal Impact

Local municipal staff are part of the MCR Technical Advisory Committee which met on December 8, 2014 and February 10, 2015 to discuss the MCR process, residential land supply, review of Regional Official Plan policies and the draft

growth scenarios. In addition, regional staff met with staff from each local municipality individually in December 2014, January and February 2015 to discuss the residential land supply that feeds into the draft growth scenarios. Local municipal staff will continue to be consulted through the next phase of the MCR involving the evaluation of the three growth scenarios. The new forecasts generated through the MCR, once approved, will be the new forecasts to which local official plans will need to conform and form the basis for local municipal infrastructure and service delivery planning.

7. Conclusion

York Region is required to update its forecasts to be consistent with Amendment 2 to the *Growth Plan* which forecasts the Region to grow to 1.79 million people and 900,000 jobs by 2041. In mid-2014, Regional staff commenced a Regional Municipal Comprehensive Review to update the Region's forecasts and review policies in the Regional Official Plan. New forecasts are required as input to the water and wastewater and transportation master plan updates as well as the forthcoming development charges by-law update.

This report has presented three draft growth scenarios for population and employment forecasts to 2041 by local municipality. These scenarios are to be evaluated and refined through Phase 2 of the MCR from the perspective of water/wastewater and transportation infrastructure, financial and land use planning impacts as well as local municipal and stakeholder input. A recommended growth scenario will be presented to Council in Q4 2015.

For more information on this report, please contact Paul Bottomley, Manager, Policy, Research and Forecasting at 905-830-4444 ext.71530.

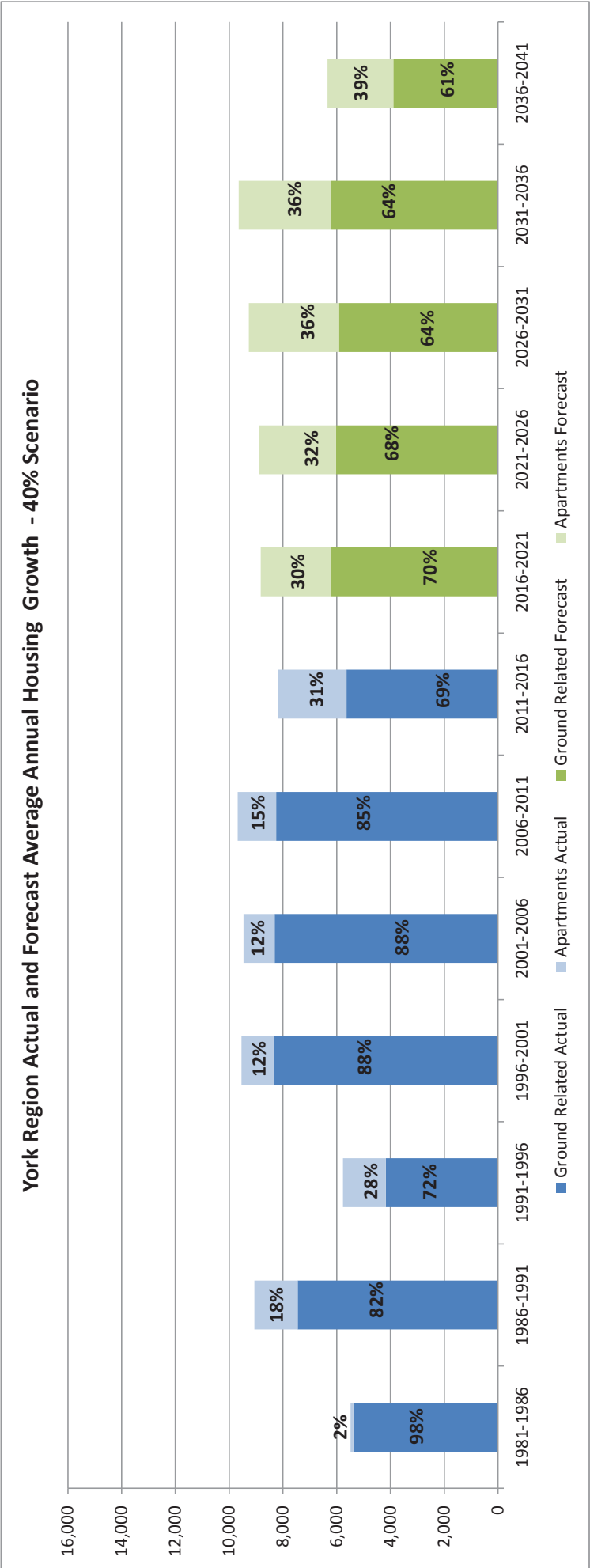
The Senior Management Group has reviewed this report.

Attachments (5)

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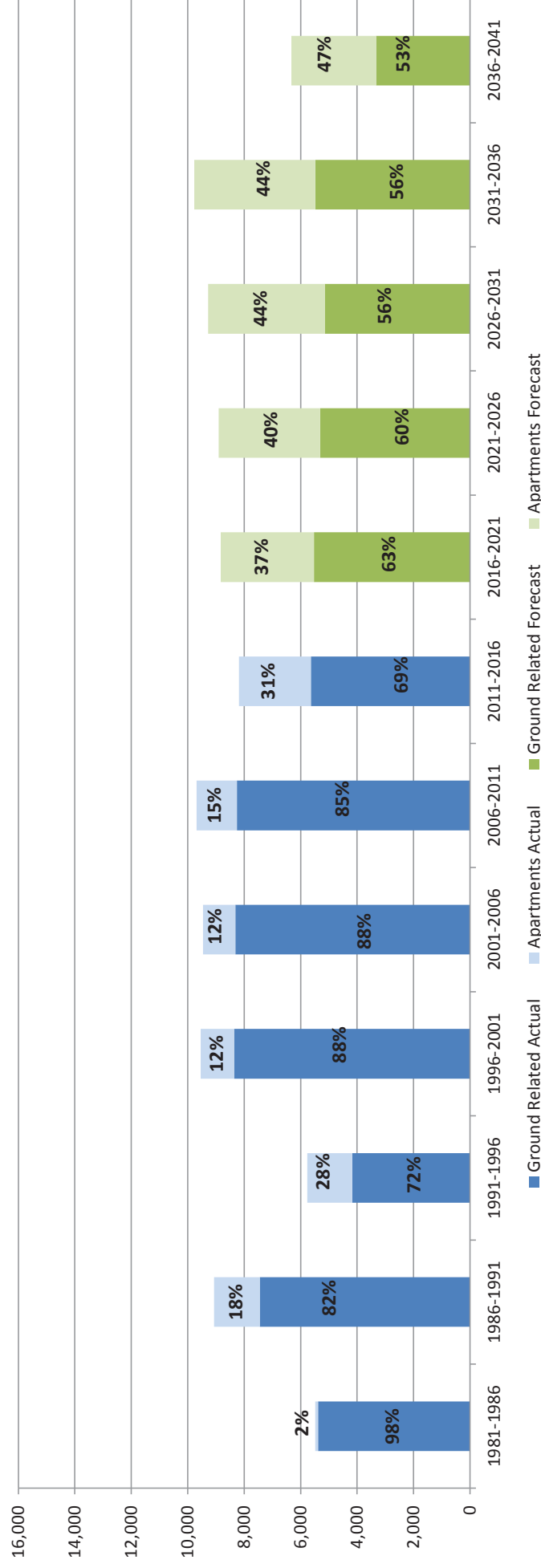
Accessible formats or communication supports are available upon request

Attachment 1: York Region Actual and Forecast Average Annual Housing Growth for Ground Related and Apartment Unit Types



Notes: 40% Scenario refers to 40% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.
2011-2016 - York Region Long Range Planning Division estimate based on CMHC housing completion data to 2014 and forecast to 2016.

York Region Actual and Forecast Average Annual Housing Unit Growth - 50% Scenario



Notes: 50% Scenario refers to 50% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.
 2011-2016 - York Region Long Range Planning Division estimate based on CMHC housing completion data to 2014 and forecast to 2016.

York Region Actual and Forecast Average Annual Housing Unit Growth - No Urban Expansion



Notes: No Urban Expansion Scenario assumes no urban expansion in the Region beyond existing designations (including ROPA's 1,2 and 3). This scenario equates to an intensification level of approximately 65%.
 2011-2016 - York Region Long Range Planning Division estimate based on CMHC housing completion data to 2014 and forecast to 2016.

Attachment 2: Population Forecasts by Five-Year Period for Draft Growth Scenarios

Population Forecast by 5-year period - 40% Intensification Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	54,600	58,200	63,700	69,600	72,700	75,000	76,700
East Gwillimbury	23,000	25,600	38,200	49,500	85,200	115,100	135,300
Georgina	45,000	47,400	50,400	53,800	58,300	65,400	71,900
King	20,500	25,300	28,800	31,300	32,100	34,300	35,100
Markham	311,800	355,200	392,200	434,300	456,700	509,800	541,800
Newmarket	81,500	87,400	92,100	97,100	100,300	104,200	107,000
Richmond Hill	190,900	209,800	227,500	244,700	255,900	265,000	270,900
Vaughan	298,800	323,100	349,600	377,200	431,000	467,200	486,100
Whitchurch-Stouffville	39,400	45,600	52,900	59,900	62,200	64,000	65,200
York Region	1,065,500	1,177,600	1,295,400	1,417,400	1,554,400	1,700,000	1,790,000

Notes: 40% Scenario refers to 40% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.

2011 data is a York Region Long Range Planning Division estimate adjusted for the Census undercount.

Population Forecast by 5-year period - 50% Intensification Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	54,600	58,200	63,300	68,600	73,100	77,100	79,500
East Gwillimbury	23,000	25,600	36,100	45,500	66,300	94,400	113,400
Georgina	45,000	47,400	50,000	52,900	57,200	66,000	73,300
King	20,500	25,300	28,200	30,200	31,800	33,100	33,600
Markham	311,800	355,200	394,100	437,600	474,800	515,700	541,900
Newmarket	81,500	87,400	92,700	98,300	103,200	108,500	112,400
Richmond Hill	190,900	209,800	229,400	248,200	263,800	276,700	284,400
Vaughan	298,800	323,100	349,700	378,100	420,700	463,200	484,500
Whitchurch-Stouffville	39,400	45,600	52,000	58,100	62,200	65,300	67,000
York Region	1,065,500	1,177,600	1,295,500	1,417,500	1,553,100	1,700,000	1,790,000

Notes: 50% Scenario refers to 50% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.

2011 data is a York Region Long Range Planning Division estimate adjusted for the Census undercount.

Population Forecast by 5-year period - No Urban Expansion Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	54,600	58,200	64,300	70,500	72,800	77,700	81,000
East Gwillimbury	23,000	25,600	37,500	50,500	101,600	105,500	108,700
Georgina	45,000	47,400	50,400	54,400	69,200	71,700	73,400
King	20,500	25,300	28,800	31,600	32,100	33,400	34,200
Markham	311,800	355,200	392,200	429,200	453,200	504,900	536,600
Newmarket	81,500	87,400	92,100	96,300	101,100	109,900	114,900
Richmond Hill	190,900	209,800	227,500	242,100	254,400	273,100	284,700
Vaughan	298,800	323,100	349,600	376,900	408,100	457,900	488,600
Whitchurch-Stouffville	39,400	45,600	52,900	59,800	62,700	65,900	67,900
York Region	1,065,500	1,177,600	1,295,300	1,411,300	1,555,200	1,700,000	1,790,000

Notes: No Urban Expansion Scenario assumes no urban expansion in the Region beyond ROPA's 1, 2 and 3.

2011 data is a York Region Long Range Planning Division estimate adjusted for the Census undercount.

Population Forecast by 5-year period - ROP 2010

	2011	2016	2021	2026	2031
Aurora	54,600	63,700	68,100	69,600	70,200
East Gwillimbury	23,000	34,700	48,100	66,300	86,500
Georgina	45,000	52,800	57,900	63,900	70,300
King	20,500	27,000	29,900	32,500	34,900
Markham	311,800	337,800	370,300	398,300	421,600
Newmarket	81,500	88,700	91,900	94,500	97,100
Richmond Hill	190,900	216,900	231,400	239,100	242,200
Vaughan	298,800	329,100	360,400	388,800	416,600
Whitchurch-Stouffville	39,400	49,400	55,800	59,100	60,600
York Region	1,065,500	1,200,100	1,313,800	1,412,100	1,500,000

Notes: 2011 data is a York Region Long Range Planning Division estimate adjusted for the Census undercount.

2016 to 2031 forecasts derived from YROP 2010.

Attachment 3: Employment Type Definitions

Major Office Employment: Employment occurring in office building of 1,860 square metres (20,000 square feet) or larger (does not include city or town halls, hospitals or school board offices). Major office employment forms a key part of the Region's strategy for maintaining and attracting high quality jobs. Growth in office development is also a key component of the Region's Centres and Corridors strategy and is needed to support the Region's major transit infrastructure investments.

Population-Related Employment: Employment serving the local population such as retail, services, education, municipal government, institutions and community services. This type of employment tends to grow mainly in response to population growth..

Employment Land Employment: Refers to employment within the Region's employment lands, excluding major office employment. This employment category typically includes business activities such as manufacturing, research and development, warehousing and also includes ancillary retail and service uses.

Attachment 4: Employment Forecasts by Five-Year Period for Draft Growth Scenarios

Employment Forecast by 5-year period - 40% Intensification Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	21,900	25,500	29,400	31,700	33,400	35,200	37,000
East Gwillimbury	7,400	9,100	13,800	17,800	27,000	37,500	48,900
Georgina	7,700	9,000	11,600	13,400	16,100	19,600	23,600
King	8,200	9,700	10,900	11,500	12,000	13,100	14,300
Markham	154,800	176,300	200,100	219,400	234,900	255,500	275,700
Newmarket	42,800	45,400	47,900	49,800	51,500	53,300	55,000
Richmond Hill	69,300	79,500	88,800	95,400	100,500	105,600	110,400
Vaughan	185,100	215,500	246,500	263,700	282,400	298,000	312,100
Whitchurch-Stouffville	12,800	15,300	18,100	20,000	21,200	22,200	23,000
York Region	510,000	585,300	667,100	722,700	779,000	840,000	900,000

Notes: 40% Scenario refers to 40% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.

2011 based on the York Region 2011 employment survey.

Employment Forecast by 5-year period - 50% Intensification Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	21,900	25,500	29,300	31,500	33,500	35,500	37,400
East Gwillimbury	7,400	9,100	13,400	17,000	23,800	34,000	45,200
Georgina	7,700	9,000	11,500	13,300	15,900	19,700	23,900
King	8,200	9,700	10,800	11,300	12,000	12,900	14,100
Markham	154,800	176,300	200,500	220,100	237,900	256,600	275,600
Newmarket	42,800	45,400	48,000	50,000	52,000	54,000	55,900
Richmond Hill	69,300	79,500	89,200	96,100	101,900	107,600	112,700
Vaughan	185,100	215,500	246,500	263,800	280,700	297,400	312,000
Whitchurch-Stouffville	12,800	15,300	17,900	19,700	21,100	22,300	23,200
York Region	510,000	585,300	667,100	722,800	778,800	840,000	900,000

Notes: 50% Scenario refers to 50% of all housing unit growth occurring annually within the Provincially defined built boundary from 2015 to 2041.

2011 based on the York Region 2011 employment survey.

Employment Forecast by 5-year period - No Urban Expansion Scenario

	2011	2016	2021	2026	2031	2036	2041
Aurora	21,900	25,500	29,400	32,000	33,600	35,800	38,000
East Gwillimbury	7,400	9,100	13,600	17,800	29,500	35,800	41,900
Georgina	7,700	9,000	11,600	13,500	17,800	20,900	23,700
King	8,200	9,700	10,900	11,600	12,000	12,700	13,400
Markham	154,800	176,300	199,400	217,600	233,000	253,300	274,800
Newmarket	42,800	45,400	47,900	49,600	51,600	54,200	56,600
Richmond Hill	69,300	79,500	88,700	94,900	100,500	107,200	113,800
Vaughan	185,100	215,500	246,400	263,800	279,400	297,600	314,400
Whitchurch-Stouffville	12,800	15,300	18,000	20,000	21,200	22,500	23,400
York Region	510,000	585,300	665,900	720,800	778,600	840,000	900,000

Notes: No Urban Expansion Scenario assumes no urban expansion in the Region beyond ROPA's 1, 2 and 3.

2011 based on the York Region 2011 employment survey.

Employment Forecast by 5-year period - ROP 2010

	2011	2016	2021	2026	2031
Aurora	22,100	29,000	32,400	33,500	34,200
East Gwillimbury	7,400	11,600	18,700	26,700	34,400
Georgina	7,700	11,000	13,900	17,400	21,200
King	8,200	9,700	11,000	11,400	11,900
Markham	151,600	200,300	221,500	231,200	240,400
Newmarket	43,100	47,600	48,700	49,000	49,400
Richmond Hill	70,100	86,100	94,300	97,400	99,400
Vaughan	187,000	226,000	248,900	257,600	266,100
Whitchurch-Stouffville	12,800	19,200	21,900	22,700	23,000
York Region	510,000	640,500	711,200	746,900	780,000

Notes: 2011 based on the York Region 2011 employment survey. 2016 to 2031 forecasts derived from YROP 2010.

York Region Land Use Categories

Attachment 5

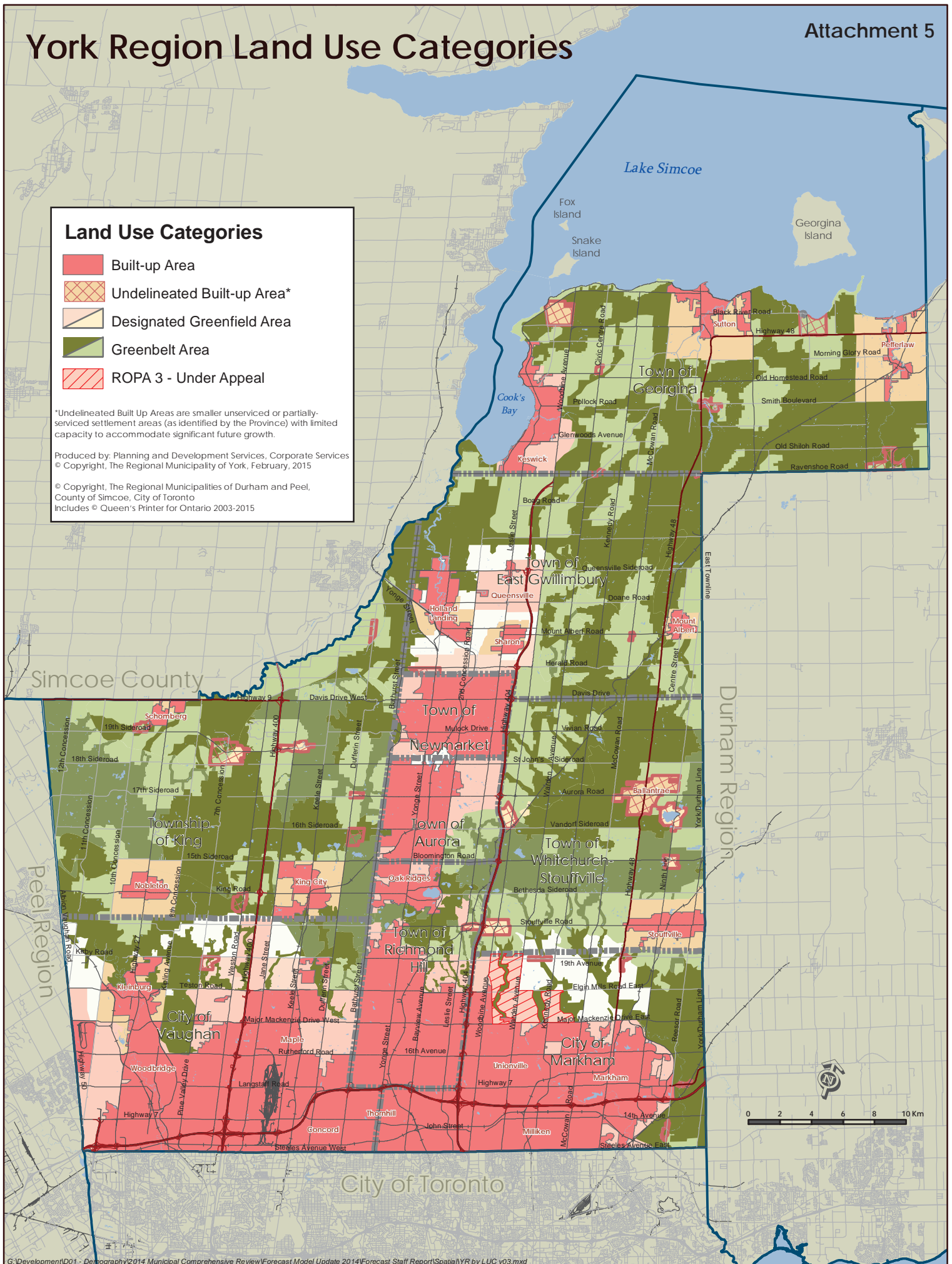
Land Use Categories

- Built-up Area
- Undelineated Built-up Area*
- Designated Greenfield Area
- Greenbelt Area
- ROPA 3 - Under Appeal

*Undelineated Built Up Areas are smaller unserviced or partially-serviced settlement areas (as identified by the Province) with limited capacity to accommodate significant future growth.

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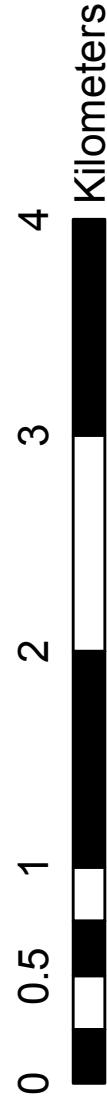
MAP 12 - URBAN AREA AND BUILT-UP AREA

as modified and approved by York Region June 12/14

JUNE 2014

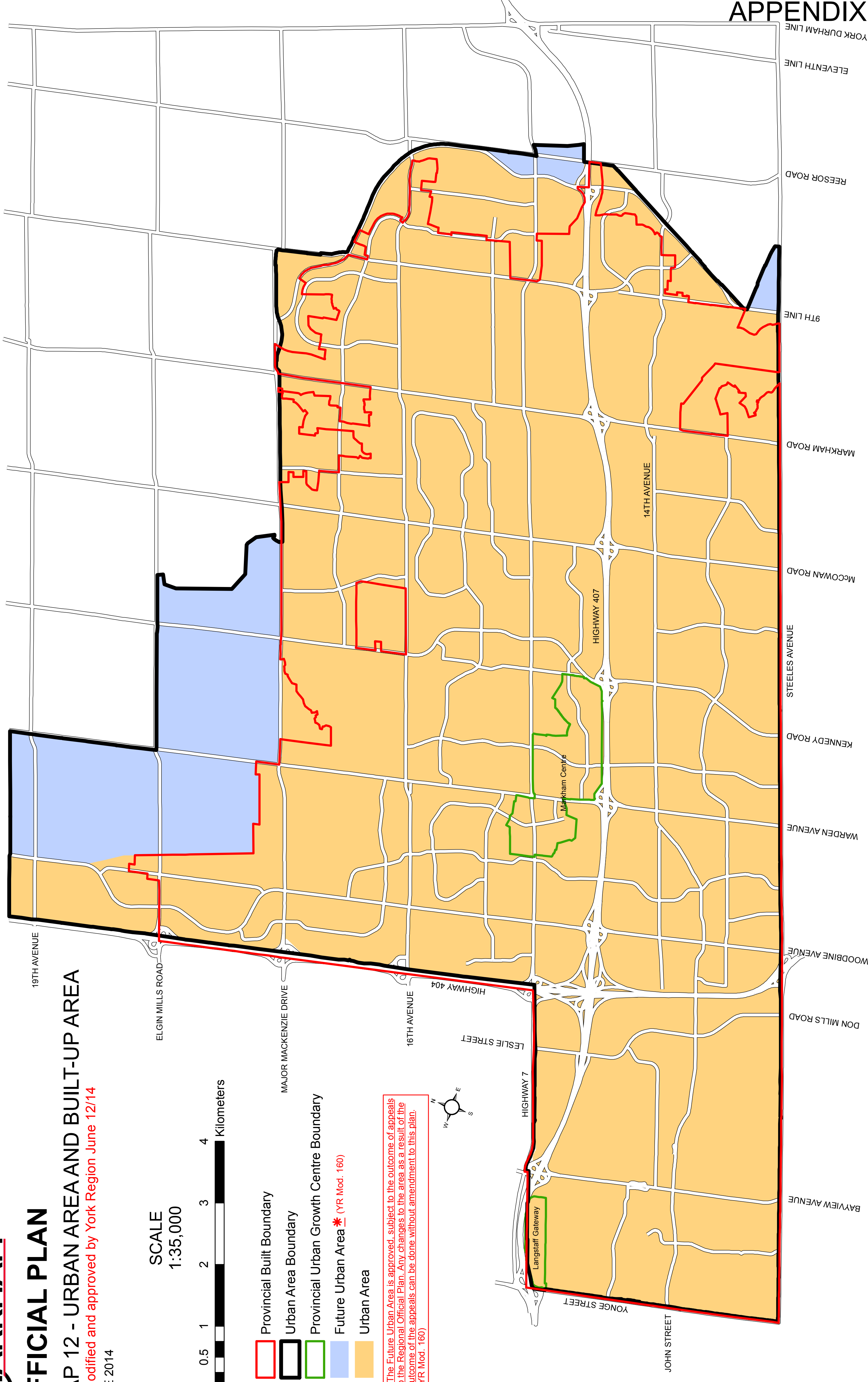
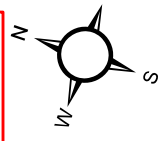
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- Provincial Built Boundary
- Urban Area Boundary
- Provincial Urban Growth Centre Boundary
- Future Urban Area * (YR Mod. 160)
- Urban Area

* - The Future Urban Area is approved, subject to the outcome of appeals to the Regional Official Plan. Any changes to the area as a result of the outcome of the appeals can be done without amendment to this plan. (YR Mod. 160)



APPENDIX 'D': POPULATION AND EMPLOYMENT IN MARKHAM – FORECAST AND ACTUAL

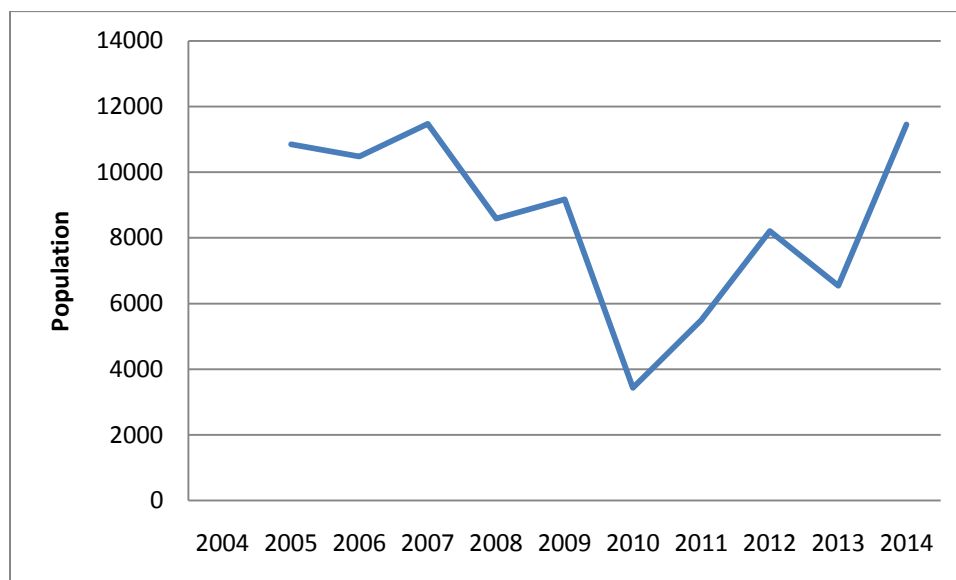
Population and Employment Forecasts for Markham (2006-2031)				
Markham	2006	2014	2031	Growth (2006-2031)
Population	273,000	338,000	421,600	148,600
Employment	144,800	170,000	240,400	95,600
Source: Regional Official Plan 2010 and Markham Official Plan for 2006 and 2031 Forecasts. York Region estimate for mid 2014.				

POPULATION

Population and Employment Forecasts for Markham and York Region (2011-2041)				
Population	2011	2014	2041	Growth (2011-2041)
Markham				
40% Intensification	311,800	338,000	541,800	230,000
50% Intensification	311,800	338,000	541,900	230,100
No Expansion	311,800	338,000	536,600	224,800
York Region	1,065,500	1,113,900	1,790,000	724,500
Employment				
40% Intensification	154,800	170,000	275,700	120,900
50% Intensification	154,800	170,000	275,600	120,800
No Expansion	154,800	170,000	274,800	120,000
York Region	510,000	564,300	900,000	390,000
Source: Regional Draft Growth Scenarios 2011 and 2041 Forecasts. York Region estimate for mid 2014.				

Actual Population for Markham (2004-2014)			
Year	Population (mid year)	Year over Year Increase (pop)	Year over Year Increase (%)
2004	252,321		
2005	263,168	10,847	4.3
2006	273,642	10,474	4.0
2007	285,115	11,473	4.2
2008	293,700	8,585	3.0
2009	302,870	9,170	3.1
2010	306,303	3,433	1.1
2011	311,798	5,495	1.8
2012	320,009	8,211	2.6
2013	326,554	6,545	2.0
2014	338,011	11,457	3.5
Source: York Region.			

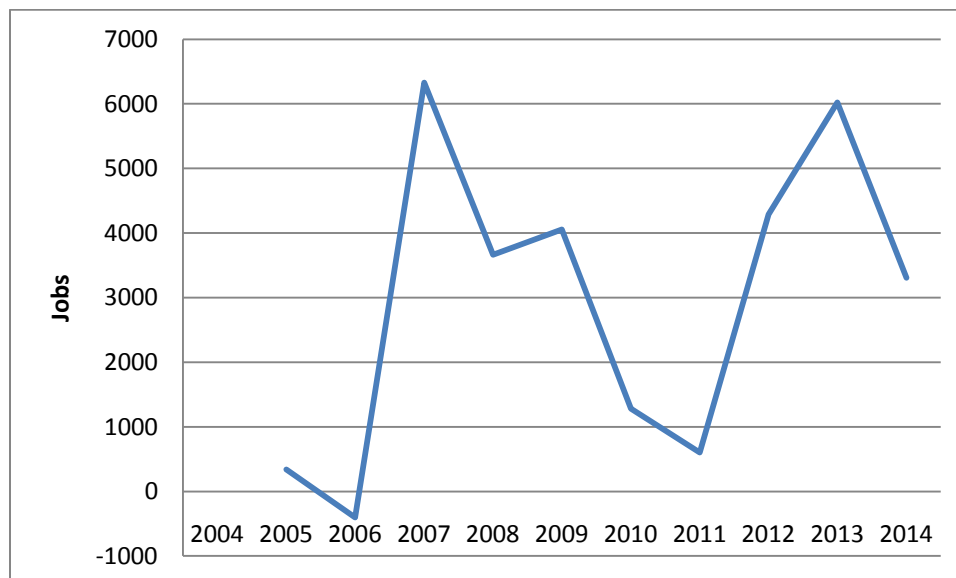
Figure 1: Year-to-Year Population Growth in Markham between 2004 and 2014



EMPLOYMENT

Actual Employment for Markham (2004-2014)			
Year	Surveyed Employment (approx 90% of Total Employment)	Year over Year Increase (pop)	Year over Year Increase (%)
2004	125,976		
2005	126,315	339	0.3
2006*	125,913	-402	-0.3
2007	132,241	6,328	5.0
2008	135,903	3,662	2.8
2009	139,957	4,054	3.0
2010	141,239	1,282	0.9
2011	141,841	602	0.4
2012	146,130	4,289	3.0
2013	152,150	6,020	4.1
2014*	155,455	3,305	2.1
*Total employment for 2006 is 144,800. Total employment for 2014 is 170,000. Source: York Region.			

Figure 2: Year-to-Year Employment Growth in Markham between 2004 and 2014*



*Surveyed employment

APPENDIX 'E'

Regional Council Decisions on Employment Conversion Applications, April 2015		
Applicant	OPA Application	Decision 1987 OPA/2014 OPA
Neamsby Investments Inc	OP 13-108448	OPA 222/OPA 2 Approved
Times Group Corporation	OP 13-131100	Approved in principle
Kings Square Ltd	OP 10-116651	Approved in principle
Jolis Investments	OP 13-114950	Approved in principle
Holborn Properties	OP 13-116651	Approved in principle
Wemat One Limited	OP 13-113480	Approved in principle
Box Grove Hill Developments	OP 13-108173	OPA 223/OPA 3 Approved
Lindvest Properties (Cornell) Ltd	OP 12-132870	OPA 224/OPA 1 Approved
Flato/Auriga	OP 14-128934	Deferred at request of applicant
Cornell Rouge Development Corp	OP 14-137282	Deferred at request of applicant



MEMORANDUM


To: Chair and Members of Development Services Committee

From: Jim Baird, Commissioner of Development Services

Prepared By: Marg Wouters, MCIP, RPP, Senior Manager, Policy and Research

Date: October 19, 2015

Re: **Sustainability analysis supplementary to the October 5, 2015 staff report entitled City of Markham Comments on York Region Draft Growth Scenarios to 2041**



RECOMMENDATION:

- 1) That the Memorandum dated October 19, 2015 entitled "Sustainability analysis supplementary to the October 5, 2015 staff report entitled City of Markham Comments on York Region Draft Growth Scenarios to 2041" be received.

PURPOSE:

On October 5, 2015, Committee considered a staff report recommending comments to York Region regarding their three draft growth scenarios to accommodate population and employment growth to 2041. The draft growth scenarios were released in April 2015 as part of a Regional Municipal Comprehensive Review (MCR) and Regional Official Plan Review. The draft growth scenarios are based on 40% residential intensification, 50% intensification, and no urban expansion (approximated at 65% intensification), on a Region-wide basis.

At the October 5, 2015 meeting, Committee deferred the report pending additional analysis regarding the sustainability of the growth scenarios, particularly the scenarios which assumed further urban expansion.

The supplementary analysis is provided below in two parts: the analysis undertaken as part of the City's 2031 growth management exercise; and comparison with the direction of Markham's Greenprint Community Sustainability Plan.

Sustainability analysis undertaken as part of the 2031 growth management exercise supported a focus on intensification while accommodating some growth through urban expansion

The Council endorsed 2031 growth alternative reflected in the 2014 Official Plan, which includes limited urban boundary expansion, was considered by staff and Council to be a sustainable approach to accommodating growth. Although the Greenprint had not yet been finalized at the time Council endorsed the preferred alternative of targeting 60% residential intensification over a 'no expansion' alternative, work on the Greenprint was well underway. The April 20, 2010 and November 17, 2009 staff reports recommending the preferred growth alternative document how various environmental, economic and social/cultural factors were taken into account in arriving at the recommended growth alternative. The reports specifically reference the draft Greenprint goals/priorities, and identify that the various

background studies undertaken as part of the Growth Strategy exercise (natural environment, agriculture, municipal servicing, transportation and transit, cycling and pedestrian networks, housing and employment, economic development etc), contributed to the development of the draft Greenprint goals at the time.

Specifically, the staff reports note the following with respect to environmental, economic and social/cultural sustainability:

- The 60% intensification alternative represents a balanced approach to managing sustainable growth;
- A 'no expansion' alternative was not considered to be as socially or economically sustainable as it relied too heavily on housing and employment forms that were not expected to be delivered or accepted by the market (i.e., reliance on delivery of a high number of apartments units and intensified forms of employment to meet population and employment forecasts), and did not adequately recognize the need for ground-oriented family housing and land-intensive forms of employment; the reports stressed the importance of working within a market context to ensure that growth, and the management of growth, remain viable;
- The 60% intensification alternative provided a realistic mix of an increased reliance on higher density apartment development to accommodate population growth, but also provided for some additional family-oriented housing in a limited expansion area (60% of growth accommodated through intensification within the built boundary; 20% growth accommodated through completion of OPA 5 communities; 20% growth accommodated through urban expansion);
- Infrastructure and financial studies undertaken indicated that the differences in a 'no expansion' versus other intensification alternatives under consideration at the time (including the 60% intensification alternative) were not significant enough to warrant these being the deciding factor in selecting an alternative; although a 'no expansion' alternative was anticipated to result in lower capital and operating costs than other alternatives that anticipated some urban expansion, the amount of intensification growth assumed under this scenario was not considered realistic, and therefore concern was expressed that selecting a 'no expansion' alternative could result in an increased burden on the City tax rate to fund infrastructure if the development charges related to anticipated growth did not materialize; and
- Preliminary results from a greenhouse gas emissions (GHG) analysis undertaken by the consultants retained to prepare the Greenprint indicated that there was not a significant variation in the modeled future GHG emissions of the growth alternatives being considered at the time (including the 60% and 'no expansion' alternatives).

The Greenprint Community Sustainability Plan does not preclude consideration of urban expansion in accommodating growth

The Greenprint was approved by Council in June 2011. Although all of the 12 priorities and respective recommendations identified in the Greenprint contribute to a sustainable community, the recommendations that align closest with growth management include the following:

- Reinforce Markham's commitment to creating compact and complete communities through the Official Plan and guidelines. Development should include work, live, play opportunities for all neighbourhoods. (#23)

- Help create 10,000 new jobs, at all levels, in partnership with other organizations through local economic development opportunities aimed at reducing poverty. (#25)
- Continue to shift community planning and development to place a greater emphasis on optimizing land use and public realm design to increase the viability of multi-modal transportation. (#132)
- Strategically identify underutilized areas such as brownfields, greyfields (auto-oriented retail places, strip malls, large format retail sites) and undeveloped sites in and around existing neighbourhoods to serve as neighbourhood centres and to increase residential densities to support transit. (#161)
- Continue to prioritize intense mixed-use development for new neighbourhoods. (#164)
- Adopt housing targets for new development according to the Markham Preferred Growth Alternative with 27% singles/semis, 19% townhouse, and 54% apartments for new residential units to 2031. This target helps to accommodate households experiencing increased affordability challenges including singles, youth, seniors and new immigrants. (#173)
- Work with builders and developers to construct a range of built forms including small lot singles, stacked townhouses, linked homes, apartment buildings and other innovative housing options. (#175)
- Continue to protect, enhance and maintain healthy streams, rivers, lakes and wetlands to support wildlife. (#191)
- Implement an interconnected Natural Heritage Network, working towards connectivity between existing green spaces and ensure they are of sufficient quality and size to support wildlife. (#215)
- Define a physical urban/rural boundary that preserves green spaces and agriculture by utilizing strong land use and design tools. (#218)

These recommendations focus on the protection of the natural environment and agricultural lands, and more efficient use of land and resources. They also speak to ensuring that a broad range of housing types and jobs are available to meet the needs of all residents. Planning staff maintain that all of these recommendations are consistent with the approach taken in the new Official Plan to accommodate 2031 growth, and that they do not preclude consideration of further limited urban expansion (only onto lands outside the defined Greenway System) to accommodate 2041 growth. Staff's position continues to be that Markham should consider growth alternatives that assign a high priority to intensification but that also provide a defensible balance between environmental, economic and social considerations.

Corrected Table 1 – October 5th report, corrected at Development Services Committee on October 19, 2015

Table 1 below summarizes the Region's three draft growth scenarios and the implications for Markham. Details about the assumptions underlying the scenarios are provided in the May 2015 staff report attached as Appendix 'A'.

TABLE 1: SUMMARY OF REGION'S DRAFT GROWTH SCENARIOS – IMPLICATIONS FOR MARKHAM			
	Region's Growth Scenarios		
	40%	50%	No Expansion
Markham			
Population in 2041	541,800 (same as 50%)	541,900 (same as 40%)	536,600 (marginally lower)
Employment in 2041	275,700 (same as 50%)	275,600 (same as 40%)	274,800 (marginally lower)
% of Region-wide Growth: Population Employment	32% 31%	32% 31%	32% 31%
Residential intensification assumed for Markham (est.)	50%	60%	75%
Population Growth (average annual)	7,700 persons/yr	7,700 persons/yr	7,600 person/yr
Employment Growth (average annual)	4,000 jobs/yr	4,000 jobs/yr	4,000 jobs/yr
Housing Mix	Higher apartment share, but lowest of 3 scenarios	Higher apartment share than 40% scenario	Very high apartment share
Urban Expansion Required	Yes	Yes	No



Report to: Development Services Committee

Report Date: March 7, 2016

SUBJECT: Consideration of York Region Growth Scenarios to 2041 – Update

PREPARED BY: Marg Wouters MCIP, RPP, Senior Manager, Policy & Research
(ext. 2909)

RECOMMENDATIONS:

- 1) That the report entitled “Consideration of York Region Growth Scenarios to 2041 – Update” dated March 7, 2016 be received;
- 2) That given recent Regional Council decisions regarding a preferred growth scenario, further direction be provided on the timing of consultation with the Markham public as discussed in this report;
- 3) And that staff be authorized and directed to do all things necessary to give effect to this resolution.

PURPOSE:

This report provides an update of information released and decisions made subsequent to Committee’s direction to City staff to consult with the public regarding managing growth to 2041, and requests additional direction on the timing of the public consultation based on the three options outlined in the report.

BACKGROUND:

On October 5, 2015 and October 19, 2015, Development Services Committee considered a staff report outlining Markham comments on York Region’s three draft growth scenarios to accommodate growth to 2041. The Region has initiated a municipal comprehensive review to determine how growth to 2041, as assigned through Amendment 2 to the Growth Plan, will be accommodated Region-wide, and had released three draft growth scenarios. The three scenarios were based on Region-wide residential intensification targets of 40%, 50% and ‘no expansion’.

At the October 19, 2015 DSC meeting, Committee deferred the staff report and directed staff to undertake public consultation to inform Markham residents about the draft growth scenarios, staff’s comments, and other options, and report back to Council on input received.

In addition, Committee directed staff to report on:

- a) the capital and operating financial implications of all growth scenarios being considered; and
- b) recommendations of the Advisory Panel on the Coordinated Review of the Growth Plan for the Greater Golden Horseshoe, the Greenbelt Plan, the Oak Ridges Moraine Conservation Plan and the Niagara Escarpment Plan (Crombie Panel) and Provincial Amendments to the Growth Plan that may arise.

Recent Regional Council decisions re: draft growth scenarios

Subsequent to the DSC meeting, Regional Council in November 2015 considered a Regional staff report recommending a preferred growth scenario of 45% intensification to accommodate growth to 2041. Regional Council referred the report back to Regional staff for further analysis of scenarios with lower density targets (40% intensification, and 50 residents and jobs per hectare for new communities versus 70 residents and jobs per hectare).

In February 2016, Regional staff reported back to Regional Council on a revised timeline for bringing forward the requested analysis (anticipated in June 2016), and a recommended growth scenario for accommodating growth to 2041 (anticipated in November 2016). In considering the Regional staff report, Regional Council confirmed a minimum intensification target of 40% to accommodate 2041 growth (see resolution in Appendix 'A'). The implications of this direction on the reporting timelines and public consultation identified in the Regional staff report are yet to be determined.

Release of the (Crombie) Advisory Panel Report on the Coordinated Review of Provincial Plans

The Advisory Panel Report was released in December 2015. The recommendations of the report are summarized below.

The discussion below provides an overview of the recommendations of the Provincial Advisory Panel Report, and outlines possible options for the proposed City consultation with Markham residents to gain input on how Markham should accommodate growth to 2041.

OPTIONS/DISCUSSION:**Recommendations of the Advisory Panel on the Coordinated Review of Provincial Plans (Crombie Panel)**

The Advisory Panel on the Coordinated Review of the Growth Plan for the Greater Golden Horseshoe, the Greenbelt Plan, the Oak Ridges Moraine Conservation Plan and the Niagara Escarpment Plan released their report in early December, 2015 (Executive Summary and link to full report provided in Appendix 'B'). The report, entitled Planning for Health, Prosperity and Growth in the Golden Horseshoe: 2015-2041, provides recommendations to the Province on ways to amend and improve the four Provincial Plans now undergoing their 10-year reviews, taking into account public input gained through consultation held in the spring of 2015. Markham Council provided a written submission to the Province in May, 2015.

The Advisory Panel report supports the intent and policy direction of the four Provincial Plans, and provides 87 recommendations meant to build on and strengthen the existing goals and objectives of the plans. The recommendations are grouped according to six strategic directions, and summarized in the Executive Summary of the report as follows:

1. Building complete communities

The recommendations focus on strengthening the plans by:

- Directing more new development to existing urban areas through intensification, and less to new greenfield areas

-
- Increasing the density of housing and job opportunities in new development to create well-designed, healthy and transit-supportive communities
 - Establishing stronger criteria to control settlement area expansion
 - Encouraging a greater mix of housing types, including affordable housing
 - Protecting employment areas and supporting evolving economic activities

2. Supporting agriculture

The recommendations recognize the fundamental importance of agriculture in the GGH and focus on:

- Promoting the identification, mapping and protection of an agricultural system throughout the region
- Implementing stronger criteria to limit the loss and fragmentation of prime agricultural lands, particularly in the outer-ring municipalities beyond the Greenbelt
- Supporting productive agriculture
- Recognize the importance of locally sourced food and urban agriculture
- Integrating the needs of agriculture throughout the plans, for example when considering settlement area expansion, the rural economy, management of natural resources, infrastructure development, climate change and plan implementation
- Applying an agriculture lens to other provincial policies and programs (such as climate change, transportation and infrastructure, financial tools, community improvement plans and education) to address the unique needs of agriculture in the GGH

3. Protecting natural and cultural heritage

The recommendations focus on:

- Requiring integrated watershed and subwatershed planning as a prerequisite for settlement area expansion, and major new developments and infrastructure projects
- Improving the mapping, identification, protection and enhancement of natural heritage systems throughout the region
- Growing the Greenbelt by adding areas of critical hydrological significance, such as headwaters of major rivers, moraines, groundwater recharge areas, important surface water features and urban river valleys
- Improving the management of excess soil from development sites
- Developing a long-term strategy for ensuring the wise use, conservation, availability and management of aggregate resources
- Strengthening the protection of cultural heritage

4. Providing infrastructure

The recommendations focus on upgrading existing infrastructure, meeting the demands of growth, increasing resilience to climate change, and keeping the region's economy strong and globally competitive by:

- Requiring greater integration of infrastructure planning with land use planning
- Designating and protecting corridors for provincial and municipal infrastructure
- Requiring upper- and single-tier municipalities to undertake climate change vulnerability risk assessments to guide the design of resilient infrastructure
- Providing policy direction to support green infrastructure

-
- Improving coordination among the Growth Plan, the Province's Multi-modal Transportation Plan for the Greater Golden Horseshoe, and Metrolinx's regional transportation plan, The Big Move
 - Identifying strategic areas within the region's planned and existing transit network for focused intensification
 - Increased focused investment in transit initiatives to support complete communities
 - Increasing efforts on transportation demand management, active transportation and transit integration

5. Mainstreaming climate change

The recommendations demonstrate how climate change can be mainstreamed throughout the four plans by:

- Applying more aggressive intensification and density targets to achieve compact, low-carbon communities
- Improving alignment of transportation planning and investment with growth forecasting and allocation
- Accelerating progress to improve and extend transit and active transportation infrastructure
- Promoting stronger protection and enhancement of natural systems and agricultural lands
- Directing upper- and single-tier municipalities to prepare climate change plans or incorporate policies into official plans to advance climate change mitigation and adaptation goals

6. Implementing the plans

Recommendations to improve implementation of the plans include:

- Addressing designation and boundary concerns associated with the existing plans by applying policy changes recommended in the report related to such matters as: settlement area expansion; complete communities; strategic employment lands; infrastructure and servicing; agricultural viability; protection of farmland; natural heritage systems; water resources; climate change; and enhancing plan implementation
- Increasing efficiency and reducing duplication of approval processes for the Niagara Escarpment Plan area
- Streamlining the policy framework, terminology and timelines of the four plans
- Extending the timelines for municipalities to conform with Growth Plan Amendment 2 to 2021 (currently 2018)
- Developing a comprehensive monitoring program
- Ensuring there is a secretariat within the provincial government with the capacity and resources to ensure effective coordination of actions by provincial ministries, the Niagara Escarpment Commission, municipalities, conservation authorities, and other local bodies that will facilitate implementation of the four plans and address the recommendations in the report
- Creating an oversight forum to monitor and report on implementation and deliver public education about the four plans.

The report notes that the recommendations will be implemented over varying timelines, with many being implemented through the plan amendment processes, but others taking longer to be implemented.

The Panel report also notes that the Province has indicated their intention to have amendments to the Provincial Plans in place by summer of 2016. Given this timeline, draft amendments to the Plans can be expected to be released for consultation within the next few weeks. Staff will report back to Council with comments once the proposed amendments are released.

Further Direction Required regarding Timing of Public Consultation on Accommodating 2041 Growth in Markham

In response to Committee direction in October 2015, staff propose a public information meeting be held to gain input on how growth to 2041 should be accommodated in Markham. The meeting would be conducted in an 'open house' format with a staff presentation.

Prior to recent Regional Council decisions, City staff were anticipating that the information in the October 5 and 19, 2015 City staff reports would be presented at the meeting, including:

- Overview of Provincial Growth Plan requirements and York Region growth management practices;
- Review of Markham's strategy for accommodating 2031 growth and underlying planning rationale;
- Region's draft scenarios for accommodating 2041 growth (40%, 50% and no expansion); and comparison of the implications of each scenario for Markham with Council's decisions regarding 2031 growth;
- As well as any additional City staff analysis of the implications of the Region's draft scenarios for Markham available at the time of the meeting (e.g., housing mix, financial implications).

In addition, an overview of the Coordinated Review of the Provincial Plans, recommendations of the Advisory Panel, and proposed amendments to Provincial Plans (if available), relating directly to growth management could also be provided.

Given the Regional Council decision in February 2016 to endorse a 40% intensification target Region-wide, further direction is requested from Committee on whether a public information meeting should be scheduled before or after a Regional Council decision on a preferred growth scenario, which is anticipated in June 2016. Options and implications are as follows:

- Early April 2016, before Regional Council decision on preferred scenario:
A Region-wide 40% intensification scenario could be delivered in a number of ways, depending on underlying assumptions of how the regional population and employment forecasts are distributed amongst the nine local municipalities within the region (i.e., varying levels of intensification and urban expansion are possible in Markham, Vaughan and East Gwillimbury, in particular). The earlier input is provided to the Region (late March/early April), the more likely the input can be taken into consideration in the Region's analysis. However, the Region's evaluation criteria for determining a preferred scenario (including, among other things, land and servicing availability) suggests that the

distribution of population and employment amongst the local municipalities can be expected to be very similar, albeit with lower overall intensification assumptions, to Regional staff's November 2015 recommended preferred 45% scenario. Based on the Region's 2031 growth management exercise (also based on a 40% intensification target) and given that Markham still has considerable lands available for both intensification and urban expansion, a 40% Region-wide target could be expected to require a 50-55% intensification target in Markham.

- Meeting after Regional Council decision in June 2016

If Markham's public information meeting is held after Regional Council considers a preferred scenario based on 40% intensification in June 2016, the public would be responding to more specific information about the implications of the preferred scenario for Markham in terms of housing mix, urban expansion lands etc, and the consultation could potentially coincide with Regional consultation anticipated between June and September 2016.

- Consultation during Markham municipal comprehensive review for 2041

A third option with respect to timing is to defer consultation meetings until Markham initiates our own municipal comprehensive review/Official Plan Review for 2041. Markham can choose a marginally higher intensification rate than the Region as the Growth Plan intensification target requirements are minimums rather than maximums. The Region however, is the approval authority for Markham's growth management conformity exercise, and will need to be satisfied that the intensification target adopted in Markham is consistent with the overall Regional preferred growth scenario. Staff do not anticipate initiating a municipal comprehensive review for 2041 growth until 2017 at earliest.

In summary, the options for timing of public consultation are:

- 1) early April 2016 - based on the information in the October 2015 Markham staff reports regarding the Region's three draft scenarios, and any available information related to the subsequent Regional Council decisions
- 2) June to September 2016 – after Regional Council endorses a preferred scenario (based on 40% intensification), and at the same time as Regional consultation on the scenario
- 3) 2017 – once Markham has initiated our own municipal comprehensive review/Official plan Review to manage growth to 2041.

After the public information meeting, staff will report back to Committee on the public comments received and analysis of financial implications as directed in the October 19, 2015 resolution. Council endorsed comments will then be forwarded to the Region as input into their 2041 growth management exercise.

FINANCIAL CONSIDERATIONS:

Not applicable.

HUMAN RESOURCES CONSIDERATIONS:

Not applicable.

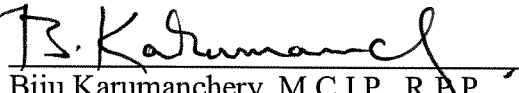
ALIGNMENT WITH STRATEGIC PRIORITIES:

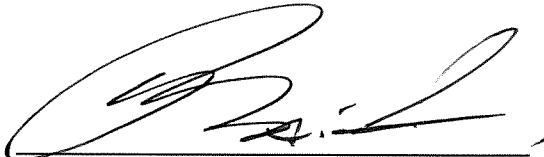
This report relates to all strategic priorities of Building Markham's Future Together, and specifically addresses the Growth Management priority.

BUSINESS UNITS CONSULTED AND AFFECTED:

Appropriate business units have been consulted.

RECOMMENDED BY:


Biju Karumanchery, M.C.I.P., R.P.P.
Director of Planning and Urban Design


Jim Baird, M.C.I.P., R.P.P.
Commissioner of Development Services

Q:\Development\Planning\MISC\MIS72 2041 MCR\DSC 7mar16 Public Consultation for 2041 Growth

APPENDICES:

Appendix 'A' Regional Council resolution of February 18, 2016.

Appendix 'B' Executive Summary, 'Planning for Health, Prosperity and Growth in the Greater Golden Horseshoe: 2015-2041: Recommendations of the Advisory Panel on the Coordinated Review of the Growth Plan for the Greater Golden Horseshoe, the Greenbelt Plan, the Oak Ridges Moraine Conservation Plan and the Niagara Escarpment Plan.

Clause 1 in Report No. 3 of Committee of the Whole was adopted by the Council of The Regional Municipality of York at its meeting held on February 18, 2016 as amended to include the following:

Whereas Amendment 2 to the provincial growth plan forecasts population and employment expectations through 2041 and requires that York Region amend its Official Plan to conform with these forecasts by 2018.

And Whereas a Regional Official Plan update is being coordinated through a Municipal Comprehensive Review which, in York Region, is integrated with infrastructure master plan updates that will inform the Development Charges necessary to fund the required infrastructure.

And Whereas the provincial growth plan includes an intensification target stipulating that by 2015, and every year thereafter, a minimum of 40% of all residential growth will be accommodated within the 2006 built boundary.

And Whereas since growth in York Region has exceeded this target over the last decade, planning scenarios with more than 40% intensification have been considered by Council.

And Whereas Regional Council has continually sought, as recently as May 2015, provincial assistance in providing the necessary infrastructure to support the targeted levels of growth and intensification – in particular, in the area of rapid transit.

And Whereas intensification within the built boundary is heavily reliant upon rapid transit investments including:

- a. the Spadina and Yonge North subway extensions
- b. bus rapid transit on Hwy 7, Yonge Street and Davis Drive
- c. improving GO rail service, to levels comparable to those currently available on the Lakeshore routes, through the Regional Express Rail project

And Whereas interregional rapid transit investments are expected to be advanced through an agency of the province, Metrolinx, created for that purpose and funded by provincial and federal levels of government through their considerably larger tax base.

And Whereas to date, the bus rapid transit projects are being advanced while only one of the critical subway projects (Spadina) has been substantially advanced, at considerable cost to York Region.

Regional Municipal Comprehensive Review Work Plan Update

And Whereas Provincial investment in critical, inter-regional transit initiatives to support higher than minimum levels of intensification is yet to be confirmed.

And Whereas the *Planning Act* requires that the Official Plan be reviewed every 5 years – providing a future opportunity to increase targeted intensification commensurate with the availability of rapid transit options.

Therefore be it resolved:

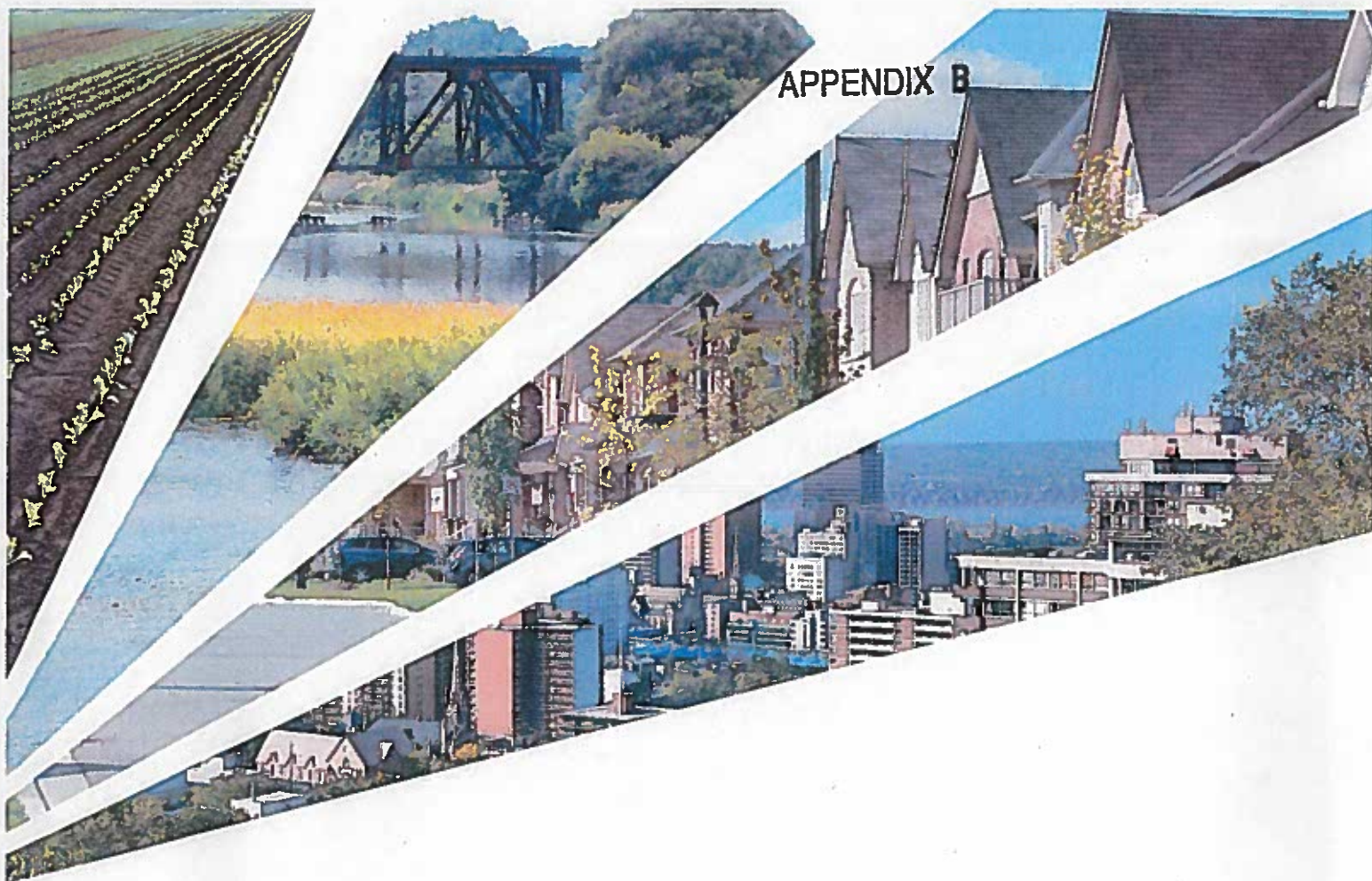
1. For the purposes of the current Municipal Comprehensive Review, Council confirm a minimum intensification target of 40%, consistent with the provincial growth plan.

A recorded vote on the adoption of the amendment was as follows:

For: Altmann, Armstrong, Barrow, Bevilacqua, Di Biase, Ferri, Hackson, Jones, Li, Rosati, Scarpitti, Spatafora (12)

Against: Dawe, Heath, Hogg, Pellegrini, Quirk, Taylor, Van Bynen (7)

Carried



APPENDIX B

Executive Summary

Planning for Health, Prosperity and Growth

**in the Greater Golden
Horseshoe: 2015-2041**

Recommendations of the Advisory Panel on the Coordinated Review of the Growth Plan for the Greater Golden Horseshoe, the Greenbelt Plan, the Oak Ridges Moraine Conservation Plan and the Niagara Escarpment Plan

Executive Summary



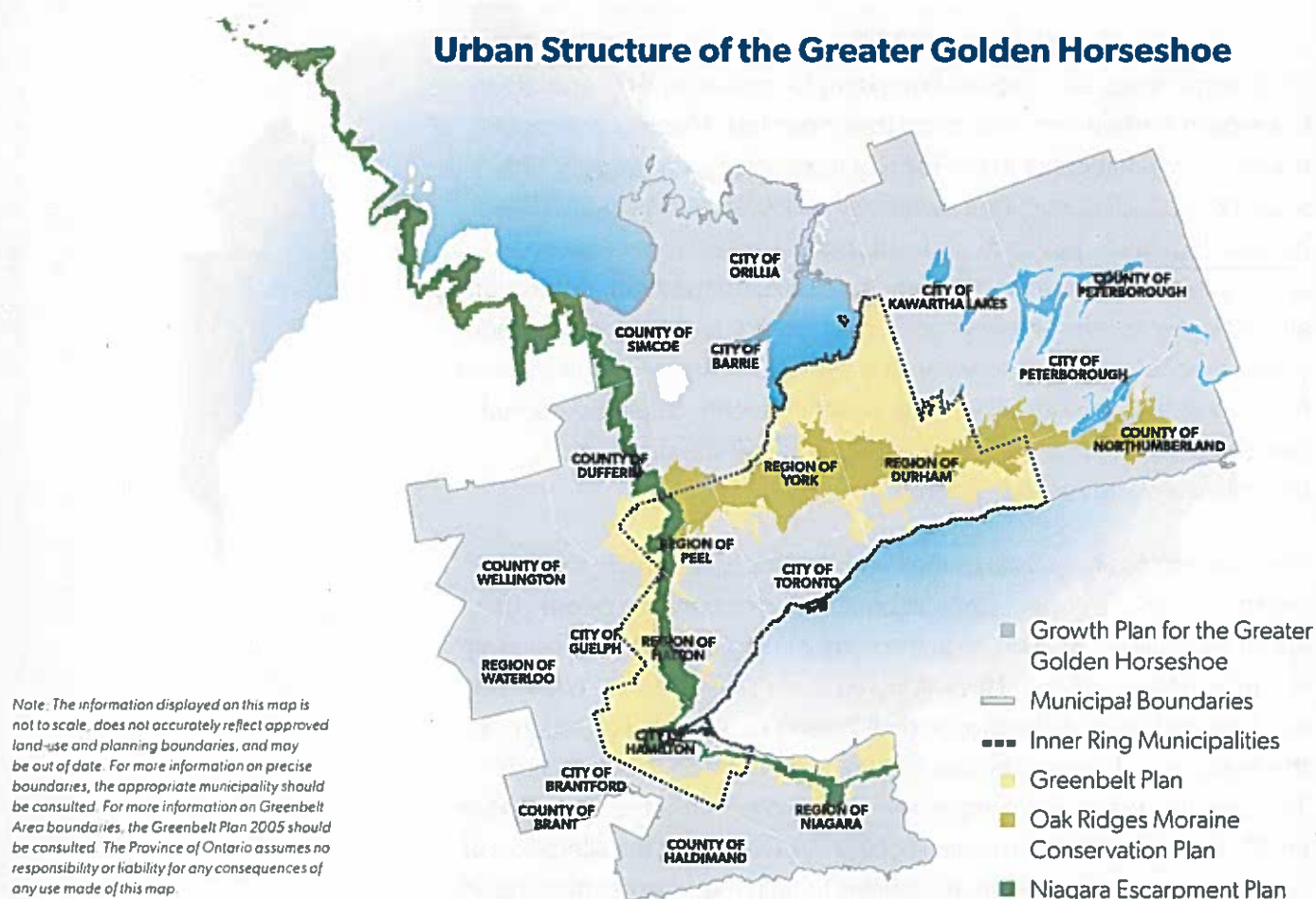
The Greater Golden Horseshoe (GGH) is one of the fastest growing regions in North America. In recent decades, it has experienced tremendous pressure from population growth and the urban and suburban development that accompanies it.

The Province has put in place legislation and plans to accommodate growth while protecting valuable farmland, water resources and natural heritage. In 1985, it established the Niagara Escarpment Plan (revised in 1994 and 2005), followed by the Oak Ridges Moraine Conservation Plan in 2002. The Province then embarked on a landmark initiative for the region, creating the Greenbelt Plan in 2005, followed by the Growth Plan for the Greater Golden Horseshoe in 2006. These four plans provide a framework to accommodate population and employment growth in a more sustainable manner while protecting vital assets such as high-quality farmland, water resources and natural areas. In the last decade, the plans' policies have begun to reduce urban sprawl, encourage the development of more complete communities, and provide increased focus on the region's agricultural resources and natural heritage.

The Province is undertaking a simultaneous review of all four plans, recognizing their common geography and the interconnected nature of their policies. This Coordinated Review of the four plans provides an opportunity to assess progress to date, address challenges and make improvements to strengthen the plans and ensure a vibrant, healthy region for current and future generations.

The Government created an Advisory Panel to provide recommendations that would inform this review. Our role is to develop consensus-based recommendations to the Ministers of Municipal Affairs and Housing, and Natural Resources and Forestry on ways to amend and improve the plans. Our analysis and the recommendations contained in this report are based on careful consideration of the advice provided during 17 Town Hall Meetings held across the GGH; submissions and briefings by the public, stakeholders and municipalities; site visits to places of interest in the region; and background papers prepared by staff of the Ministries of Municipal

Urban Structure of the Greater Golden Horseshoe



Affairs and Housing, and Natural Resources and Forestry, in collaboration with partner ministries (Ministries of Agriculture, Food and Rural Affairs, Environment and Climate Change, and Transportation). The Province will seek further input on any subsequent amendments to the four plans.

The Greater Golden Horseshoe – a Region Under Pressure

The GGH is blessed with abundant fresh water, significant natural features, excellent farmland and a moderate climate. These assets support a high quality of life and diverse economic opportunities for the residents of the region, which in turn continue to attract ongoing population growth. The GGH has seen rapid rates of growth since the end of World War II, especially since the 1990s when the population

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began to grow by 100,000 to 120,000 people every year. The extent of settlement has also grown. For example, between 1971 and 2006, the region's urban footprint more than doubled. Much of the recent urban growth has been in the form of low-density, car-dependent suburbs, providing many residents with affordable, single-detached homes. However, this form of development, often known as urban sprawl, has resulted in loss of farmland, traffic congestion, deteriorating air and water quality, impacts on human health, and the loss of green space, habitats and biodiversity. The changing climate and increasing frequency and severity of extreme weather events create additional pressures on the region's communities, agricultural production, infrastructure and natural systems.

The Province has forecast that the number of people living in the GGH will grow from the current population of about nine million people to about 13.5 million by 2041, with the number of jobs forecast to rise from 4.5 million to 6.3 million. This will increase our population by nearly 50 per cent and the number of jobs by 40 per cent. A central question for the region is "where and how will future growth be accommodated?" This question was a major imperative for the creation of the Growth Plan and Greenbelt plans. At the heart of the Growth Plan is the allocation of growth forecasts to GGH municipalities to help them assess the amount of land required to accommodate new development. As of 2013, approximately 107,000 hectares were available as "designated greenfield areas" to accommodate forecast growth to 2031, the first time horizon of the Growth Plan. Amendment 2 to the Growth Plan provided additional forecasts for the GGH to accommodate two million more people by 2041, and some municipalities are now working on analysis to assess land needs to accommodate this additional growth.

Ultimately, the amount of land needed to accommodate expected growth to 2041 will depend on the rate of intensification (infill in existing urban areas) and the density of new development in each municipality. Fortunately, land consumption rates are decreasing, reflecting a trend towards building more compact communities. For example, between 1991 and 2001, the population of the Greater Toronto and Hamilton Area (GTHA) grew by 19 per cent, while the urban area expanded by

26 per cent. Between 2001 and 2011, the population of the GTHA grew by 18 per cent, but the urban area expanded by only 10 per cent. If the trend for decreasing land consumption continues, it is likely that much of the land that has been designated to accommodate forecasted growth by 2031 will not actually be developed by that date, providing flexibility to accommodate some or all of the expected needs to meet 2041 forecasts within existing designated greenfield areas.

The Greenbelt contains almost 800,000 hectares (two million acres) of protected land, including the Niagara Escarpment, Oak Ridges Moraine and the land known as "Protected Countryside" that lies at the centre of the GGH. The Greenbelt protects important ecological and hydrological systems, as well as an agricultural system composed of prime agricultural lands, rural areas and specialty crop areas. In addition, the three Greenbelt plans are an essential component of the provincial strategy to contain urban sprawl. There is evidence to show that they are important tools to contribute to protection of natural and agricultural assets, and control of urban expansion. However, they need to be strengthened to fully reach their objectives. We also heard concerns that speculative investments pose a risk of "leapfrog" development in areas beyond the Greenbelt, such as Simcoe and Brant Counties.

Towards a Better Future

The four plans are designed to address the challenges associated with growth and development, and we fully support their goals and objectives. This review provides a timely opportunity to pause, reflect and adjust these land use policies to shape future growth more effectively. With the benefit of past experience with plan implementation and input from stakeholders, the general public and experts in many disciplines, we have identified six strategic directions and provided 87 recommendations that build on the existing goals and objectives of the four plans in order to fully realize their potential to contribute to greater economic prosperity, more efficient transportation, more productive agriculture, healthier communities and more resilient natural systems.

Our strategic directions encompass many inter-related ideas that work together to achieve the objectives of the four plans. For example, we must curb sprawl and build more compact communities in order to

support transit, reduce greenhouse gas emissions and protect valuable farmland. Protection of farmland alone is not enough unless it is also productive and supports a strong agricultural economy. Our sense of place in this beautiful part of the Great Lakes Basin relies on the care we invest in our natural and cultural heritage. Natural features and functions, including water resources and biodiversity, are essential to support healthy, prosperous communities that are resilient to climate change. Many forms of infrastructure – from water supply, stormwater and wastewater to transit, cycling, walking and roads – provide an essential foundation for human health and economic activities. Drastic reductions in greenhouse gas emissions are essential to reduce our contribution to climate change. Decreased vehicle emissions will also pay huge dividends in improved air quality throughout the region. Finally, implementing the four plans more effectively and efficiently depends on a more collaborative and coordinated effort involving different levels of government, civil society and the private sector.

Building Complete Communities

During the consultation phase of this review, it was clear that there is widespread support for the overall intent of the four plans – to use land more efficiently, create livable communities, reduce commute times, protect valued resources and support a strong and competitive economy. We heard that people value a diverse mix of land uses and housing types, a range of employment opportunities, high-quality public open space, a variety of transportation choices, and easy access to stores and services. We call these places “complete communities”.

Existing urban settlements in the GGH range from historic villages to downtown centres and low-density suburbs. There are many opportunities within these areas for rejuvenation to create more complete communities with vibrant mixed uses, transit-supportive densities and infrastructure for walking and cycling. New developments in greenfield areas can also be designed as complete communities that provide jobs, housing, transit and recreation opportunities, while supporting individual and community health. Infrastructure costs are lower for compact communities. They can also help to decrease greenhouse gas emissions and energy use, thereby working towards becoming a net-zero or low-carbon community.

Our recommendations on building complete communities focus on strengthening the plans by:

- Directing more new development to existing urban areas through intensification, and less to new greenfield areas
- Increasing the density of housing and job opportunities in new development to create well-designed, healthy and transit-supportive communities
- Establishing stronger criteria to control settlement area expansion
- Encouraging a greater mix of housing types, including affordable housing
- Protecting employment areas and supporting evolving economic activities

Supporting Agriculture

The GGH has high-quality soils and climatic conditions that make it ideally suited for a wide range of crops and livestock, including the specialty crop areas in Niagara Region and Holland Marsh. These same qualities have also made this region a highly desirable place to live, from the original Aboriginal land users to the early settlers from Europe and the more recent immigrants from around the world. Agriculture today is a major contributor to Ontario's economy, identity and way of life.

During the consultations for this review, many associations and individuals in the farming sector emphasized that farmland is a finite resource and the planning regime in the GGH needs strengthening to stem the ongoing loss of agricultural land to other land uses. We also heard concerns about threats to the viability of agriculture from speculative land investments, land use conflicts in near-urban areas, complex regulations and deficiencies in rural infrastructure.

Recognizing the fundamental importance of agriculture in the GGH, our recommendations focus on:

- Promoting the identification, mapping and protection of an agricultural system throughout the region
- Implementing stronger criteria to limit the loss and fragmentation of prime agricultural lands, particularly in the outer-ring municipalities beyond the Greenbelt

- Supporting productive agriculture
- Recognizing the importance of locally sourced food and urban agriculture
- Integrating the needs of agriculture throughout the plans, for example when considering settlement area expansion, the rural economy, management of natural resources, infrastructure development, climate change and plan implementation
- Applying an agriculture lens to other provincial policies and programs (such as climate change, transportation and infrastructure, financial tools, community improvement plans and education) to address the unique needs of agriculture in the GGH

Protecting Natural and Cultural Heritage

The GGH is defined by the Great Lakes and the rivers that flow into them, combined with the rolling landscapes of the Oak Ridges Moraine and the dramatic cliffs of the Niagara Escarpment. The natural systems in the region provide a range of ecosystem services that support human life, biodiversity and economic activities. During the consultations, we heard that many groups and individuals are concerned about ongoing environmental degradation in the region and its effects on our health, as well as on the sustainability of natural systems and wildlife.

Aggregates contained in geological formations represent another natural resource that is essential for continued growth and development. We heard during the consultations that we need to find a better balance between supplying essential aggregate materials for buildings and infrastructure, while minimizing the immediate and long-term cumulative effects of extraction and transportation on natural systems, agriculture and rural communities.

Cultural heritage embodies, protects and sustains our sense of identity and meaning and helps to make communities vital and special places. Heritage resources provide important visual landmarks, enhance community appeal and convey a sense of place. They also create opportunities for recreation and tourism, and help attract investment based on cultural amenities. In many communities in the GGH, built heritage, cultural heritage landscapes and archeological resources are under pressure from development and site alteration.

Our recommendations to improve protection and management of natural and cultural heritage focus on:

- Requiring integrated watershed and sub-watershed planning as a prerequisite for settlement area expansion, and major new developments and infrastructure projects
- Improving the mapping, identification, protection and enhancement of natural heritage systems throughout the region
- Growing the Greenbelt by adding areas of critical hydrological significance, such as headwaters of major rivers, moraines, groundwater recharge areas, important surface water features and urban river valleys
- Improving the management of excess soil from development sites
- Developing a long-term strategy for ensuring the wise use, conservation, availability and management of aggregate resources
- Strengthening the protection of cultural heritage

Providing Infrastructure

Daily life in the GGH depends on a wide range of infrastructure –ranging from roads and transit to communications, water supply, wastewater treatment, stormwater management, and energy generation and transmission. Much of our existing infrastructure is aging and requires maintenance and upgrading. The pace of growth in the region requires massive investments in infrastructure to support new homes, businesses and transportation requirements. Meanwhile, the changing climate is bringing about increases in extreme weather events and forcing us to re-think many existing standards and expectations for infrastructure design and management.

During the consultations, we heard from many stakeholders and individuals that traffic gridlock is one of the greatest issues affecting individual health and wellbeing, business efficiency and economic competitiveness. People told us that water and sewer services need to be provided more efficiently, and that inadequate stormwater management is affecting groundwater resources, water quality, flooding and erosion. Stakeholders also emphasized that green infrastructure is just as important as the more traditional forms of built infrastructure and encouraged us to integrate the use of multi-functional green systems throughout urban and rural areas.

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Our recommendations focus on upgrading existing infrastructure, meeting the demands of growth, increasing resilience to climate change, and keeping the region's economy strong and globally competitive by:

- Requiring greater integration of infrastructure planning with land use planning
- Designating and protecting corridors for provincial and municipal infrastructure
- Requiring upper- and single-tier municipalities to undertake climate change vulnerability risk assessments to guide the design of resilient infrastructure
- Providing policy direction to support green infrastructure
- Improving coordination among the Growth Plan, the Province's Multi-modal Transportation Plan for the Greater Golden Horseshoe, and Metrolinx's regional transportation plan, The Big Move
- Identifying strategic areas within the region's planned and existing transit network for focused intensification
- Increasing focused investment in transit initiatives to support complete communities
- Increasing efforts on transportation demand management, active transportation and transit integration

Mainstreaming Climate Change

Climate change is one of the most pressing issues facing the GGH, and the Province as a whole. By 2050, we can expect an increase in average summer temperatures ranging from 2.5 to 3.5 degrees Celsius in southern Ontario and 1 to 4.5 degrees Celsius in Northern Ontario, depending on location. The projected change in winter temperatures is even more dramatic, increasing by 3 to 6 degrees Celsius in southern Ontario and 6 to 10 degrees Celsius in Northern Ontario, depending upon location. This will have significant impacts on our environment, economy, health and quality of life.

We heard from stakeholders and the public that climate change mitigation and adaptation must be explicitly addressed in the four plans in order to reduce Ontario's greenhouse gas emissions while also preparing to manage the risks of a changing climate to our health, safety, economy,

ecosystems and infrastructure. We view climate change as a critical driver for many of the policies in the four plans, one that needs to be brought into the mainstream of all our planning and development activities.

Our recommendations demonstrate how we can mainstream climate change throughout the four plans by:

- Applying more aggressive intensification and density targets to achieve compact, low-carbon communities
- Improving alignment of transportation planning and investment with growth forecasting and allocation
- Accelerating progress to improve and extend transit and active transportation infrastructure
- Promoting stronger protection and enhancement of natural systems and agricultural lands
- Directing upper- and single-tier municipalities to prepare climate change plans or incorporate policies into official plans to advance climate change mitigation and adaptation goals

Implementing the Plans

Although the four plans share many goals and intentions, there is no question that having multiple plans with overlapping geographies and diverse implementation mechanisms has created challenges for landowners, developers, municipalities, provincial ministries, and many other organizations and stakeholders. During the consultations we heard concerns that terminology and policies in the plans are inconsistent and sometimes conflicting. Municipalities emphasized the need for more technical and financial support to comply with the requirements of the plans. We heard concerns about the amount of time and expense involved in Ontario Municipal Board (OMB) hearings, and some of the procedures of the Niagara Escarpment Commission. Many environmental groups and some municipalities called for expansions of the Greenbelt while some landowners and other stakeholders raised concerns about Greenbelt boundaries and designations.

Our recommendations to improve implementation of the plans include:

- Addressing designation and boundary concerns associated with the existing plans by applying policy changes

recommended in this report related to such matters as: settlement area expansion; complete communities; strategic employment lands; infrastructure and servicing; agricultural viability; protection of farmland; natural heritage systems; water resources; climate change; and enhancing plan implementation

- Increasing efficiency and reducing duplication of approval processes for the Niagara Escarpment Plan area
- Streamlining the policy framework, terminology and timelines of the four plans
- Extending the timeframe for municipalities to conform with Growth Plan Amendment 2 to 2021
- Developing a comprehensive monitoring program
- Ensuring there is a secretariat within the provincial government with the capacity and resources to ensure effective coordination of actions by provincial ministries, the Niagara Escarpment Commission, municipalities, conservation authorities, and other local bodies that will facilitate implementation of the four plans and address the recommendations in this report
- Creating an oversight forum to monitor and report on implementation and deliver public education about the four plans

Towards Timely Action

This review is a snapshot in time. We recognize that ten years is a relatively short period to measure the effects of land use planning initiatives, but some clear trends and needs are already emerging. We have concluded that there are signs of progress towards more effective growth management, and there is support for agriculture and environmental protection in the GGH, but there are also signs that the current policy framework needs to be strengthened in order to ensure that the vision and goals of the plan are fully achieved. We heard a sense of urgency from the many stakeholder submissions and participants in the Town Hall Meetings and agree that we must seize this opportunity to strengthen the framework, address the mistakes of the past and create a better future for the region.

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We recognize that our recommendations will be implemented over varying timeframes. For example, some policy amendments can be made relatively quickly during the time period of this review, whereas it may take several years to develop guidance material, prepare new maps or undertake environmental monitoring to support new or amended policies. The Ministries have stated that they hope to conclude the Coordinated Review and have amended plans in place by summer 2016. We support that aggressive timeline and believe that many of our recommendations can and should be implemented through the amendment process. We emphasize that it will be important to ensure that work needed to inform conformity with the Growth Plan is available when needed by municipalities. Finally, it may take longer to implement other recommendations, but we stress that it is essential to act on them as quickly as possible (within five years) in order to achieve a better future for the region in a comprehensive, efficient and effective manner.

In Conclusion

We sincerely hope that the Province will act on our recommendations in a comprehensive and timely fashion. Our deliberations during this review, combined with the input from many stakeholders and members of the public, revealed an urgent need to strengthen the four plans and to support them with a wide range of complementary actions. The plans provide a strong foundation but we must step up our efforts to curb sprawl, build complete communities, grow the Greenbelt, support agriculture and address traffic congestion. We owe it to current and future generations to ensure that the GGH supports healthy lifestyles, a high quality of life, a sustainable environment and a prosperous economy.



Clause 12 in Report No. 17 of Committee of the Whole was adopted, without amendment, by the Council of The Regional Municipality of York at its meeting held on November 19, 2015.

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York Region 2041 Preferred Growth Scenario

Committee of the Whole recommends:

1. Receipt of the presentation by Valerie Shuttleworth, Chief Planner and Paul Bottomley, Manager of Policy, Research and Forecasting.
2. Receipt of the following deputations:
 1. Eric Mark, Dillon Consulting Limited on behalf of the owner of the lands at 12441 Woodbine Ave. regarding extending the urban boundary of the Town of Whitchurch-Stouffville.
 2. David Stewart, TACC Developments Inc. regarding limiting growth intensification targets in York Region.
 3. Don Given, Malone Given Parsons Ltd. on behalf of landowners in the Town of East Gwillimbury and the City of Markham regarding limiting growth intensification targets.
 4. Jim Robb, Friends of the Rouge Watershed regarding limiting urban expansion and protecting greenspace in York Region.
 5. Daniel Belli, Trinistar Corporation regarding the lands at 12470 Weston Road regarding extending the urban boundary of the Township of King.
3. Receipt of the following communications:
 1. Michael Bissett, Bousfields Inc. on behalf of Lesa Cozzi dated November 4, 2015 regarding extending the urban boundary in the City of Vaughan.
 2. Rosemarie Humphries, Humphries Planning Group Inc. on behalf of Western Point Builders Inc. dated November 4, 2015 regarding 11421 Weston Road.
 3. Rosemarie Humphries, Humphries Planning Group Inc. on behalf of Crisdan Holdings Inc. and Star Westview Inc. dated November 4, 2015 regarding 13580 and 13500 Highway 27.

4. Cam Milani, Milani Group dated November 4, 2015 regarding limiting growth intensification targets in York Region.
5. David Riley, SGL Planning on behalf of Westlin Farms Inc., dated November 4, 2015 regarding lands located at 12470 and 12480 Weston Road.
4. Adoption of the following recommendations:
 1. Receipt of the report dated November 5, 2015 from the Commissioner of Corporate Services and the Chief Planner.
 2. That Regional staff be instructed to analyse the provincially mandated 40% growth intensification target (as per the Growth Plan) compared to the staff recommended 45% growth intensification scenario, to provide a detailed analysis of the impacts and risks of both scenarios and also demonstrate where growth can be accommodated.
 3. That Regional staff complete a comparative analysis of the provincially mandated 40% intensification target relative to the 45% intensification target for the four local municipalities undergoing urban expansions (Town of East Gwillimbury, Township of King, City of Markham and City of Vaughan) and this analysis shall also compare the provincially mandated 50 persons and jobs per hectare and the Region's 70 persons and jobs per hectare for the Whitebelt area.
 4. That development in new communities should be consistent with the provincially mandated standard of 50 persons and jobs per hectare.
 5. That opportunities for intensification be concentrated along Regional transit corridors and nodes (Bus Rapid Transit and subways, etc.).
 6. Whereas the selection of a 2041 preferred growth scenario as part of York Region's Municipal Comprehensive Review, based on a 45% intensification target and a projected population of 497,000 and 321,000 jobs for the City of Vaughan will result in the need for an expansion of the City's 2031 urban boundary;

Whereas the City of Vaughan is working with landowners to advance the New Community Secondary Plans in Blocks 27 and 41 and in the review of block plans for the 400 North Employment lands;

Whereas the Region has indicated that servicing for north Vaughan for the New Community Secondary Plans, the 400 Employment Areas, and potential lands that could be added as a result of the Region's Municipal Comprehensive Review is not scheduled to be completed until 2028;

Whereas the Region is targeting Q2 2016 for a report back on the Infrastructure Master Plan updates;

Therefore be it resolved that Regional staff continue to meet with landowners within the New Communities Areas, the Highway 400 Employment Areas, and on lands identified by the Region and City of Vaughan for potential expansion of the settlement areas (Blocks 28, 42, 66) to determine options for accelerating the delivery of services for north Vaughan including partnership approaches and interim servicing arrangements, and report back on options and a preferred strategy so that this can be considered concurrently with amendments to the York Region Official Plan resulting from the Regional Comprehensive Review and reporting on the updates to the Infrastructure Master Plans.

7. Whereas the City of Vaughan Economic Development Department continues to receive strong market interest in the acquisition of large available lots in the West Vaughan Employment Area;

Whereas significant growth is underway in West Vaughan due to various factors including planned construction of Highway 427, the existing CP Intermodal Yard and other locational factors;

Whereas the Region's Municipal Comprehensive Review is contemplating a modest proposed expansion of the settlement area in West Vaughan for employment uses in Block 66;

Whereas the inclusion of additional land into the settlement area in West Vaughan for employment purposes may help create conditions for cost sharing and earlier delivery of infrastructure that will in turn support additional investment;

Therefore be it resolved that staff be directed to study and report back on the merits of including remaining vacant lands in Northwest Vaughan outside of the Greenbelt, the proposed Natural Heritage Network, and lands required for infrastructure for employment purposes including Blocks 66 and 67 as part of the Municipal Comprehensive Review.

8. The Regional Clerk circulate this report to the local municipalities, the Building Industry and Land Development Association and the Ministry of Municipal Affairs and Housing.

Report dated November 5, 2015 from the Commissioner of Corporate Services and the Chief Planner now follows:

1. Recommendations

It is recommended that:

1. Council endorse the preferred growth scenario as outlined in this report and the following Attachment reports as the basis for further discussion, analysis and refinement:
 - a. Attachment 1 – 2041 Draft Growth Scenarios Evaluation
 - b. Attachment 2 – York Region 2041 Population and Employment Forecasts
 - c. Attachment 3 – York Region 2041 Intensification Strategy
 - d. Attachment 4 – York Region Land Budget
 - e. Attachment 5 – Consistency and Conformity with Provincial Policy
2. The Regional Clerk circulate this report to the local municipalities, the Building Industry and Land Development Association and the Ministry of Municipal Affairs and Housing.

2. Purpose

This report seeks Council's endorsement of the preferred growth scenario as part of the Region's Municipal Comprehensive Review (MCR) to conform with Amendment 2 to the *Growth Plan for the Greater Golden Horseshoe (Growth Plan)*. Attachment reports with supporting background material for the preferred growth scenario are also presented.

3. Background

The *Growth Plan* forecasts a population of 1.79 million and 900,000 jobs for York Region by 2041

Amendment 2 to the *Growth Plan* came into effect in June 2013 and provides updated population and employment forecasts for 2031 and introduces new population and employment forecasts for 2036 and 2041 for municipalities in the Greater Golden Horseshoe (GGH), including York Region.

These forecasts are to be used for planning and managing growth in the GGH. York Region is forecast to grow to a population of 1.79 million and employment of

900,000 by 2041 (see Table 1), representing growth of approximately 656,000 residents and 335,000 jobs over the 2014 year-end base. York Region Official Plan-2010 (YROP-2010) must be brought into conformity with Amendment 2 by June 17, 2018.

Table 1
Growth Plan Schedule 3 Forecasts

York Region	2014*	2031	2036	2041
Population	1,133,900	1,590,000	1,700,000	1,790,000
Employment	564,600	790,000	840,000	900,000

Source: Growth Plan for the Greater Golden Horseshoe, 2006, Office Consolidation, June 2013

*Note: 2014 figures are York Region Long Range Planning Division estimate.

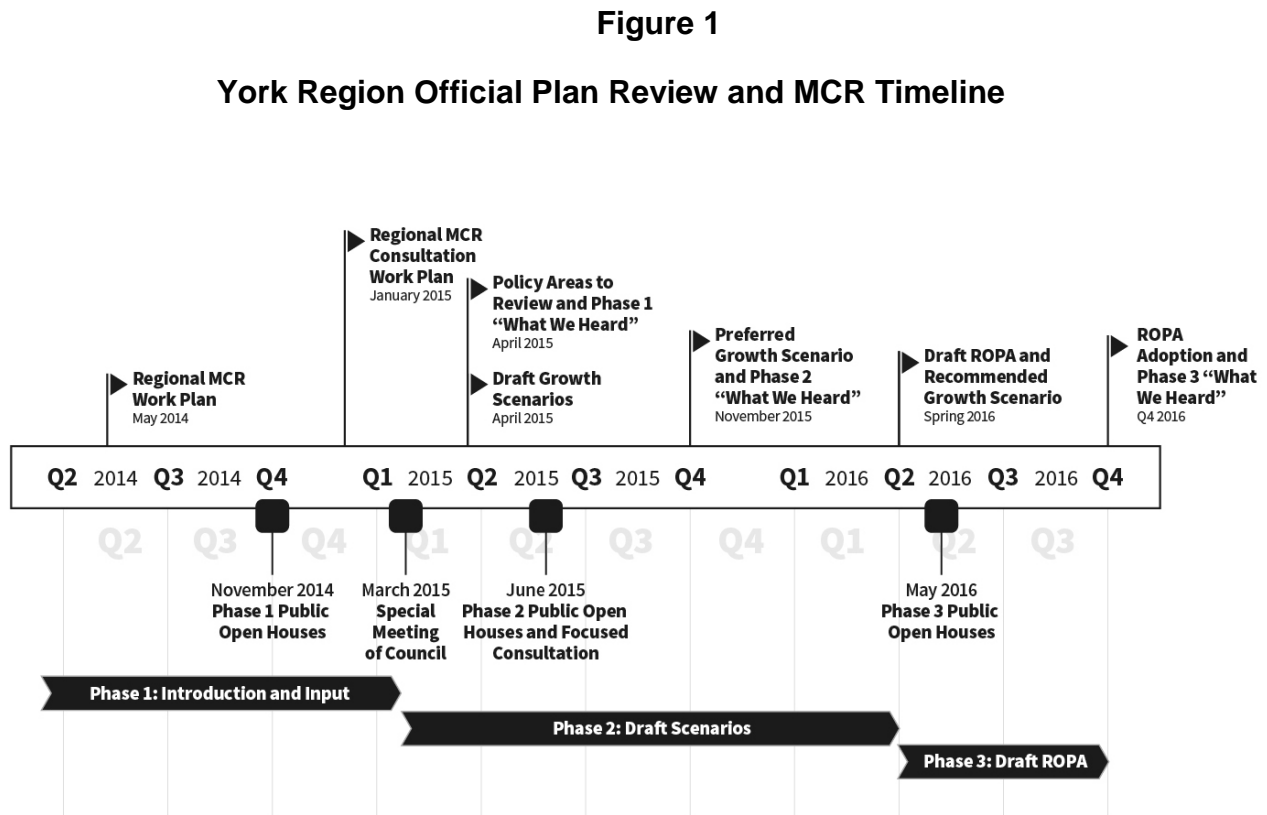
Council endorsed the work plan for undertaking a Regional Municipal Comprehensive Review in May 2014

In early 2014, regional staff initiated an MCR to address the updated *Growth Plan* forecasts to 2041. The MCR is a primary component of the mandatory five year review and update of the YROP-2010, a requirement under the *Planning Act*. The MCR is being coordinated with the Transportation and Water and Wastewater Master Plan updates and consists of the following components:

- Employment land and major office inventories (completed June 2014)
- Residential inventory and intensification analysis (completed March 2015)
- Three draft growth scenario forecasts for York Region and the nine local municipalities (completed April 2015)
- An evaluation of the three draft growth scenarios (see Attachment 1)
- Development of a preferred growth scenario (see Attachment 2)
- A York Region 2041 Intensification Strategy (see Attachment 3)
- A Regional land budget (see Attachment 4) exercise to determine land required to accommodate future population and employment growth. This work also includes a number of associated studies:
 - A retail trends study (completed March 2015),
 - An employment trends study (completed October 2015), and
 - A Cemetery Needs analysis (being undertaken through this MCR in response to matters arising through the YROP-2010 Ontario Municipal Board process)

- YROP-2010 policy review and update
- A provincial conformity report (see Attachment 5)
- An extensive public consultation program (see Attachment 6)

Figure 1 below shows the timeline for the YROP-2010 review and MCR.



Three draft growth scenarios (40% intensification, 50% intensification and a "no urban expansion" scenario) were endorsed in principle by Council in April 2015

Three draft growth scenarios were prepared based on varying levels of intensification: a 40% intensification scenario, a 50% intensification scenario, and a "no urban expansion" scenario. These three draft growth scenarios were endorsed in principle by Council in April 2015 (Clause 6 of Committee of the Whole Report No. 7) for use in an evaluation to determine a preferred growth scenario.

The three draft growth scenarios differ with respect to the share of residential growth expected to occur annually within the provincially defined Built Boundary (2006), and consequently the amount of urban expansion lands that would be

necessary to accommodate future growth to 2041. Table 2 below provides a summary of the three draft growth scenarios. See Appendix A of Attachment 3 for an illustration of the Built-up Area, Designated Urban Area and Whitebelt Area. The Built-up Area is defined by the Built Boundary.

Table 2
Draft Growth Scenario Comparison

	40% Intensification Scenario	50% Intensification Scenario	"No Urban Expansion" Scenario
New Ground-Related Units	66%	59%	53%
New Apartment Units	34%	41%	47%
Total New Units (2011-2041)	100%	100%	100%
Total 2041 Stock Ground-Related/Apartments	79% / 21%	75% / 25%	71% / 29%
Whitebelt Land Requirements (hectares)	2,460	1,260	0
Community Lands	2,300	1,100	0
Employment Lands (hectares)	160	160	0

In September 2015 (Clause 10 of Committee of the Whole Report No. 13), Council endorsed a number of factors and inputs used to evaluate the three draft growth scenarios based on a wide range of land use planning, infrastructure master planning and financial considerations (See Attachment 1).

Provincial plans and the Provincial Policy Statement provided context for the preparation of the preferred growth scenario

The preferred growth scenario has been prepared within the context of the *Provincial Policy Statement, 2014 (PPS)*, and a number of provincial planning documents including the *Growth Plan*, the *Greenbelt Plan*, the *Oak Ridges Moraine Conservation Plan* and the *Lake Simcoe Protection Plan*.

The *PPS* provides policy direction on land use matters that are of Provincial interest. All planning decisions must be consistent with *PPS* policies. Within York Region there is significant overlap between the requirements of the *PPS*, the *Growth Plan* and other plans. The preferred growth scenario considered the fundamental guiding principles contained in both the *PPS* and the *Growth Plan*, including the building of strong, healthy, complete communities, supporting a

strong and competitive economy, making wise use and management of natural resources and optimizing and making efficient use of infrastructure.

Attachment 5 provides an overview of the consistency and conformity between the preferred growth scenario and relevant Provincial policy.

4. Analysis and Options

A variety of stakeholders were consulted on the three draft growth scenarios and YROP-2010 policy areas

York Region staff continue to reach out to the public and stakeholders through three phases of public consultation. Phase 1, which concluded in April 2015, provided information on the Official Plan Review process and sought input on growth management considerations and policy areas to be reviewed.

Phase 2, which is currently underway and includes the development of a preferred growth scenario, is scheduled to be completed in the spring of 2016 with Council endorsement of a recommended growth scenario and draft official plan policies and a draft ROPA. Phase 2 consultations have included input on the three draft growth scenarios and the policy areas identified for review during Phase 1.

Attachment 6 to this report summarizes the Phase 2 consultation process to date and provides commentary on submissions received. The consultation process has been extensive:

Table 3
Phase 2 Consultation Activities

Activities	
Council Reports	2
Public Open Houses	4
On-line Survey (Metroquest)	1
Local Municipal Council Presentations	9
Local Municipal Staff Meetings	14
Technical Advisory Committee Meetings	1
Stakeholder/Landowner Meetings	18
Meeting with Provincial Ministries	2
Focused Internal Meetings	13

Stakeholders consulted also included First Nations, the agricultural community, development industry, conservation authorities, school boards and York Region police.

Comments received covered a wide range of topics, although a number of recurring themes emerged: Providing transportation choice remains a key issue for the public and local councils and concern was expressed regarding population growth preceding the delivery of infrastructure.

The building industry expressed support for the 40% intensification scenario, while the public indicated support for higher intensification, including strong support for the “no urban expansion” alternative.

Written submissions were received from landowners, the conservation authorities, the police and a number of local municipalities

A number of written submissions were received from landowners, conservation authorities, York Region police and local municipalities. Attachment 6 provides a commentary on these submissions. Thirty-two site-specific requests for urban designation or employment land conversion were also received. Staff anticipate additional landowner submissions before the recommended growth scenario is finalized in Q2 of 2016. Scheduling permitting, additional submissions received will be considered when developing the recommended growth scenario.

YROP-2010 review will include policy, technical and mapping updates and alignment of Regional policy with Provincial Plan policy

Input received from Phase 2 consultation confirms support for existing policy direction. Most policy modifications will be minor amendments to update references, language and improve clarity. The *YROP-2010* review will include mapping updates and a number of technical updates to ensure consistency in terminology and definitions throughout the document. Staff are considering the appropriateness of the ‘Towns and Villages’ designation for some areas in the Region and potential modifications may be proposed through the draft ROPA in 2016, following discussions with local municipal staff.

The workplan also includes the alignment of Regional policy with Provincial Plan policy. Regional staff have begun the exercise of ensuring conformity with Provincial Plans including the *PPS* and Source Water Protection Plans and are monitoring the Provincial Plan review process. Transportation related issues are being evaluated through the Transportation Master Plan update. *YROP-2010* transportation policy updates will be co-ordinated with policy direction determined through the Transportation Master Plan.

Phase 2 consultation also confirmed that the protection of employment lands remains important. Recent changes to the *PPS* permit municipalities to plan for the long term protection of employment areas. Approaches under consideration include a Regional Official Plan designation and only considering conversions, in consultation with local municipalities and stakeholders, at the time of a Regional MCR.

Draft Growth Scenario Evaluation

Land use and infrastructure planning, market feasibility and financial implications were considered in the evaluation of the three draft growth scenarios

The three draft growth scenarios were evaluated based on a number of factors within the context of land use planning, infrastructure master planning, housing market feasibility and financial considerations. These factors included:

- The planned urban structure of centres and corridors that provides a focus for intensification, mixed use development and live/work opportunities
- Transit supportive and pedestrian oriented, complete communities
- Protection of the Greenbelt and Oak Ridges Moraine and agricultural and rural areas
- Transit investment to support intensification
- The pace of growth and timing of required infrastructure investment for water and wastewater and transportation
- The capital investment of water & wastewater services and transportation services
- The long-term financial impact of growth and fiscal responsibility
- Job creation to match labour force growth that requires the identification and protection of employment lands
- Housing diversity and affordable housing to offer Regional residents housing choices and for attracting a more diverse and skilled labour force
- The assessment of options for accommodating urban expansion

Attachment 1 to this report provides a detailed commentary of the evaluation process, analysis and results. Landowner submissions were also considered in

the development of the preferred growth scenario. A list of landowner submissions is included in Appendix C of Attachment 6.

The land use and infrastructure planning component of the evaluation indicated a preference for the “no urban expansion” option

Each of the six main goals areas of YROP-2010 with supporting policies from Vision 2051, the *PPS* and the *Growth Plan* were examined as part of the land use policy component of the review. As outlined in Attachment 1, this included a discussion on protecting and enhancing the natural environment, the health and well-being of residents, a competitive economy, enhancing the Region’s urban structure, the provision of services, and the protection of agriculture and rural areas. The analysis indicated that the goals and objectives of the YROP-2010 and supporting documents are best supported by higher intensification levels.

Transportation and water and wastewater infrastructure required for the three draft growth scenarios were evaluated as part of the ongoing Master Plan updates. Key transportation considerations included a.m. peak period trips for transit and autos, total vehicle km and hours traveled per capita and greenhouse gas emissions. Environmental services’ considerations included energy consumption and greenhouse gas emissions related to additional pumping and treatment needs, managing risks associated with additional inflow and infiltration and per capita water use. Overall, roads, transit, water and wastewater interests are best provided for in the “no urban expansion” scenario. Attachment 1 provides more detail on the conclusions of the review.

Financial considerations were an important part of the draft growth scenario evaluation

Early stage fiscal analysis by Finance staff indicates that the capital requirements for the scenarios are reasonably similar, although the “no urban expansion” scenario is the lowest cost.

Master planning work is currently underway and is expected to be completed in early 2016. Departments are expected to have a much clearer understanding of growth infrastructure needs once these processes have been completed. In addition, the Development Charges By-Law review is scheduled to begin in 2016. These studies and analysis will form the main inputs for a robust fiscal impact analysis on the recommended growth scenario to be presented in Q2 2016.

Under all scenarios, it is likely that an increase in development charge rates will be needed to pay for the infrastructure to support future growth. Furthermore, development charges are not expected to cover the full capital cost of the necessary infrastructure.

Based on Hemson Consulting's market analysis, discussed later in the report, there are risks and uncertainties associated with selecting an intensification level of 50% or higher. The risks relate to whether the market will support the forecast increase in demand for apartments. This would likely result in a failure to accommodate planned population growth as people look outside York Region to locations that provide ground-related housing options. This would have fiscal implications as development charge collections and the investment and timing of capital infrastructure will be affected.

A policy and infrastructure planning approach to accommodating growth must be balanced with housing market analysis

The current planning policy regime in Ontario and York Region places an emphasis on sustainable growth through intensification. In this context, the land use and infrastructure planning evaluation clearly indicates higher support for the "no urban expansion" scenario. Financial analysis undertaken to date suggests that there are minimal differences between the capital and operating expenditures under each of the three draft growth scenarios.

It is of paramount importance to balance those components of the evaluation with consideration of the degree to which the forecasted housing type under each of the three draft growth scenarios can be absorbed over time.

Hemson Consulting was retained by the Region to study the housing market feasibility of the three draft growth scenarios. The analysis considered the overall reasonableness or likelihood of achieving each scenario comparing the types of housing that households want and need based on demographic, income and other market characteristics to policy directions that seek a different, typically denser form of development. This market analysis has also been undertaken in response to the building industry's concerns of what the market will likely absorb. Hemson Consulting's market feasibility analysis is included in Appendix B to Attachment 1.

The housing market evaluation indicates the "no urban expansion" scenario does not meet the test of being a reasonable outlook

The Hemson study indicates the "no urban expansion" scenario would require an unreasonably high level of apartment unit growth and an unrealistically high share of the total Greater Toronto and Hamilton Area (GTHA) apartment market over the forecast period. In essence it would mean accommodating all growth after 2031 in rows and apartments. This would most likely result in some of York Region's forecasted growth occurring outside York Region, where ground-related housing was available. This scenario would be reasonable only under a circumstance where a "no urban expansion" approach was applied consistently across the GTHA and surrounding municipalities.

The “no urban expansion” scenario would, therefore, likely result in a failure to accommodate planned population growth as people look outside York Region to locations that provide ground-related housing options. This would have financial implications as the Region’s return on capital investment in infrastructure would not be realized. In that regard, from a market analysis perspective, the “no urban expansion” scenario does not meet the test of being a reasonable outlook.

The study indicates that exceeding the minimum 40% intensification is a reasonable policy position. In determining the appropriate level of intensification, the key factor relates to the continued market shift required in housing demand to meet the scenario. Currently, most housing growth in York Region comes from family households. The degree to which families can be accommodated in row houses and apartments versus single and semi-detached housing, generally preferred by families, is a primary determinant in the level of intensification that is achievable.

Over the past 10 years, there has been an enormous shift in the new housing market in the GTHA, especially evident in Toronto where the condo boom is well documented. A significant market shift has also been observed in York Region, where apartments that comprised fewer than 10% of new unit completions in the 1980’s have reached a share of around 30% in the most recent five year period.

York Region is becoming more urban in character creating additional demand for a more varied housing mix

York Region is a maturing municipality with a population that is increasingly more diversified and more urban in character. Trends such as increases in the number of non-families, lone parent families and people living alone, the ageing of society, and millennials who prefer a more urban lifestyle are impacting the demand of housing type in York Region and across the GTHA. The planning that has been completed for the Region’s four urban growth centres and corridors as mixed-use and live/work environments served by rapid transit will act as a catalyst in creating additional demand for a more varied housing mix.

Although these trends will continue to influence housing type in York Region, future housing demand in the Region will still largely be based on accommodating family households who typically seek ground-related housing.

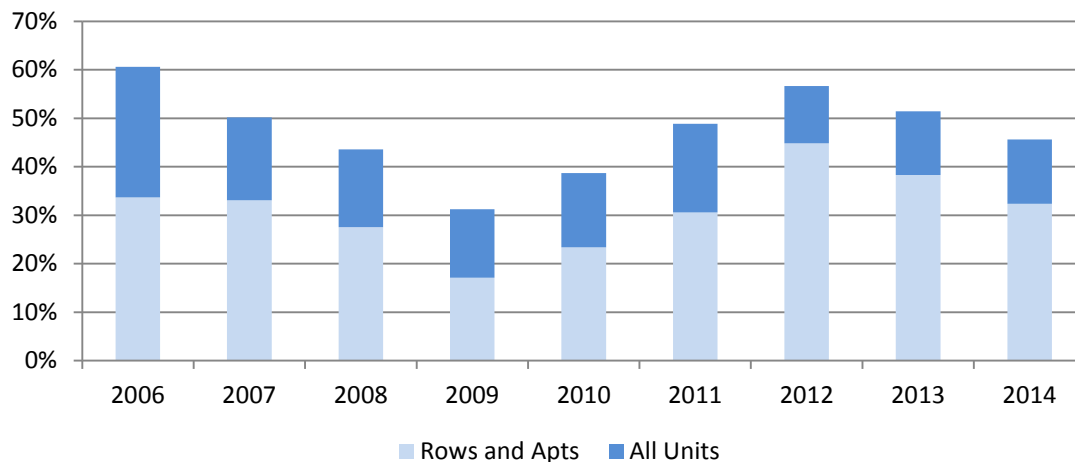
The study concludes that on a balance of policy and market, the most reasonable scenario from a market feasibility perspective likely lies between 40% and 50% intensification. Hemson indicates, “As is often the case in planning, policy needs to strike a balance between reaching for a result that is desirable from a social, economic or environmental perspective, while not overreaching to either fail in the policy objective or to create unintended undesirable consequences.”

The Region's intensification rate has fluctuated since the implementation of the Growth Plan in 2006

As York Region matures and becomes more urban, intensification levels are anticipated to increase. Figure 2 below shows the share of building permits within the Built-up Area for both rows and apartments and for all unit types from 2006 to 2014.

Figure 2

York Region Share of Units in the Built-Up Area



Row and apartments are the common unit types associated with intensification and were the basis for the Table 2 intensification targets in the YROP-2010. A portion of development since 2006 within the Built-up Area is related to the build-out of greenfield subdivisions on the edges of the Built-up Area. In future, a much larger share of the units developed in the Built-up Area will be in the Region's Centres and Corridors, where more rows and apartment units will be constructed.

As Figure 2 illustrates, intensification levels fluctuate on an annual basis. Since the YROP-2010 was approved by the Province in 2010, the level of intensification has ranged between 39 percent and 57 percent.

An intensification rate of 50% or higher would represent an aggressive policy option that risks forcing the market too far, too quickly

Regional staff are of the view that the 50% draft growth scenario places an overly optimistic expectation for York Region to absorb a higher share of the GTHA's apartment growth. This presents unwarranted risk associated with forcing a market shift too far, too quickly.

Support for a 50% scenario would require greater Provincial support for capital spending on infrastructure for transit, subway expansions, Regional Express Rail, and on other projects in a more aggressive time period than currently envisioned. Staff presented a report to Council in September 2015 (Clause 8 of Committee of the Whole Report No. 13) entitled “Report of the Regional Planning Commissioners, Regional Public Works Commissioners and Regional Single-Tier Treasurers on the Provincial *Growth Plan* Review” that confirmed that successful implementation of the *Growth Plan* requires a long-term Provincial Infrastructure Plan that conforms to the *Growth Plan* and a long term commitment by the Federal Government for transit funding.

Hemson Consulting, in evaluating the three draft growth scenarios, indicated that the 50% draft growth scenario was a “more aggressive policy option” that would likely undermine other planning goals including attracting the forecast population to York Region and providing affordable ground-related housing.

Preferred Growth Scenario

A growth scenario that balances the goals, objectives and policies of the YROP 2010 with the housing market lies somewhere between the 40% and 50% growth scenarios

The overall evaluation of the three draft growth scenarios finds that the scenario that best achieves the goals, objectives and policies of the Region and the Province, while ensuring fiscal responsibility, and best reflects the market’s ability to realize the forecasted growth, lies somewhere between the 40% and 50% growth scenarios. A mid-point between this 40% to 50% range strikes an appropriate balance between the YROP-2010’s social, economic and environmental objectives and what the housing market is likely to deliver.

Regional staff are recommending that the preferred growth scenario be based on a 45% intensification level in consideration of the following:

- Emerging trends such as demographic shifts, changing housing preferences, economics and market trends all point towards higher levels of intensification over the longer term
- Market analysis, historical completions and applications in process demonstrate 45% is achievable over the next ten year period and beyond
- The investment already made in transit and in the Region’s centres and corridors is completely aligned with higher intensification:
 - A total of \$1.1 billion is being invested to extend the Spadina Subway to the Vaughan Metropolitan Centre (VMC) and a further

investment of \$1.8 billion in the Region's Viva rapid transit system is being planned along Regional corridors

- York Region is soon to be the only 905 municipality with a subway connection (Spadina-York to Vaughan) and the only location with a proposed second subway connection to the TTC through the Yonge subway extension to the Richmond Hill/Langstaff Centre
- All day two-way Regional Express Rail is proposed into York Region
- Collectively, the four Regional centres are planned to accommodate approximately 120,000 people and 88,000 jobs
- A higher intensification level strengthens the Region's economy by creating more attractive and vibrant centres, improving live/work opportunities and facilitating employment growth, including major office employment
- Higher intensification provides more housing choice attracting a more diverse and skilled labour force

York Region's preferred growth scenario considered the *Growth Plan's* key policy directions and is consistent with the *PPS*

The updated 2041 population and employment forecasts for York Region and the local municipalities, based on the preferred growth scenario, are shown in Tables 4 and 5 below.

More detail on the method and background information used to prepare the forecasts is included in Attachment 2. The forecasts are the product of a number of assumptions based on current social, demographic and economic trends and on Regional and local policy. Regional staff have consulted extensively with local municipal staff throughout the preparation of the forecasts and made appropriate changes based on their feedback.

Regional forecasts are consistent with the *PPS* and incorporate the *Growth Plan's* key policy directions that aim to manage and help shape growth over the coming decades and create transit supportive compact communities by improving the efficiency of land development.

Table 4
York Region Population Forecast by Local Municipality

Municipality	2011	2021	2031	2036	2041
Aurora	54,900	64,500	74,900	77,200	79,000
East Gwillimbury	23,200	39,600	77,800	104,700	118,700
Georgina	44,700	51,700	62,200	67,900	71,300
King	20,500	29,000	34,800	37,400	37,900
Markham	311,400	386,700	458,800	511,500	535,100
Newmarket	82,600	92,600	100,800	105,100	108,200
Richmond Hill	191,500	224,800	258,500	269,800	277,900
Vaughan	297,600	351,700	427,900	463,000	497,400
Whitchurch-Stouffville	38,800	53,000	62,000	63,400	64,500
York Region	1,065,200	1,293,600	1,557,700	1,700,000	1,790,000

Table 5
York Region Employment Forecast by Local Municipality

Municipality	2011	2021	2031	2036	2041
Aurora	21,900	31,600	35,500	37,000	38,500
East Gwillimbury	7,400	14,600	23,900	34,400	45,100
Georgina	7,700	12,500	17,400	20,900	24,500
King	8,200	11,200	13,000	14,200	16,000
Markham	154,800	200,500	233,700	252,000	269,200
Newmarket	42,800	45,900	49,400	50,800	52,400
Richmond Hill	69,300	88,000	99,600	104,600	109,800
Vaughan	185,100	250,000	286,400	303,800	321,500
Whitchurch-Stouffville	12,800	17,800	21,100	22,300	23,000
York Region	510,000	672,100	780,000	840,000	900,000

York Region's preferred growth scenario anticipates growth of 656,000 people and 335,000 jobs to 2041

As illustrated in Attachment 2, key highlights related to the preferred growth scenario include:

- The majority of population growth (over 70%) and employment growth (approximately 75%) is anticipated to occur in Markham, Richmond Hill and Vaughan
- The average household size is anticipated to decline over the forecast period from 3.17 in 2011 to 2.95 in 2041
- A continued shift in the housing market towards row and apartment housing types will be required to accommodate 45% intensification
- Additional urban lands for both population and employment will be required to accommodate the growth forecast to 2041
- All local municipalities will be required to accommodate a share of their growth through intensification within existing built-up areas
- A number of municipalities have a diminishing supply of greenfield land (Newmarket, Aurora, Richmond Hill) and intensification will therefore play a more prominent role in accommodating their future growth
- The employment forecast has been prepared to support a strong and balanced relationship between residents (Table 4) and jobs (Table 5) for each local municipality and to improve the live/work relationship for York Region residents
- The forecasts have been co-ordinated with the current planned capacity and delivery timing of major Regional water and wastewater and transportation infrastructure in the Region's capital plan.

New intensification targets to 2041 have been established for the nine local municipalities

The York Region 2031 Intensification Strategy, adopted by Council in February, 2009 formed the basis for the intensification policies and local municipal targets in the YROP-2010. The 2031 Strategy included a Regional intensification target of 90,720 units to be accommodated within the Built-up Area between 2006 and 2031. This figure was then distributed to each of the nine local municipalities and included as Table 2 in the YROP-2010.

All local municipalities have completed, or are in the process of completing, their own intensification strategies as summarized in Attachment 3. This work provides the basis for the updated 2041 intensification targets and updated York Region 2041 Intensification Strategy.

The Region hired Meridian Planning Consulting to identify intensification potential as part of the vacant residential unit inventory exercise completed in 2014. As

discussed in Attachment 3, this work indicated a potential of 178,000 units (356,000 people) can be accommodated within intensification areas identified by local municipalities. Of this total, 43,880 residential units are under active development applications (subdivision, site plan or condominium). The 178,000 figure does not represent an ultimate intensification supply in the Region's Built-up Area, as there are other areas with future redevelopment potential that have not yet been identified with specific targets. The Region possesses the capacity to accommodate a variety of unit types and densities through intensification, infill and redevelopment plans in the future, up to and beyond the current planning horizon of 2041.

The Preferred 45% intensification Growth Scenario translates into a requirement of 98,590 new units constructed within the Built-up Area from 2016 to 2041. The Regional intensification target represents over half of the total planned build-out potential for the intensification areas identified by local municipalities.

Table 6
York Region Residential Intensification Targets by
Local Municipality, 2016-2041

Municipality	Intensification Units	% Intensification
Aurora	3,500	46%
East Gwillimbury	1,150	4%
Georgina	3,230	34%
King	1,420	30%
Markham	34,960	55%
Newmarket	8,060	86%
Richmond Hill	18,370	69%
Vaughan	26,250	42%
Whitchurch-Stouffville	1,650	22%
York Region	98,590	45%

Local municipalities will be required to update their intensification strategies to reflect the 2041 intensification targets in Table 6 above. These figures will be adopted as part of the YROP-2010 Review. The Region and each of the nine local municipalities will plan to meet and/or exceed the estimated 98,590 new units required to achieve the 45% intensification target.

Approximately 1600 hectares of urban land expansion is required to deliver the preferred growth scenario

York Region's forecast anticipates 1.79 million people, 583,550 households, and 900,000 jobs by 2041. This represents growth of 656,000 people, 229,400 households and 335,000 jobs from 2014 to 2041. An urban boundary expansion will be required to accommodate this growth.

The Region's MCR, as outlined in Attachment 4, complies with *Growth Plan* policies in considering the need for urban boundary expansions. The *Growth Plan* indicates that a municipality's MCR must include:

- Use of the *Growth Plan*'s forecasts
- The completion of an intensification strategy that identifies a minimum 40% residential intensification target, and plans for a significant portion of future population and employment growth within the Built-up Area
- An assessment of the residential and employment land supplies and demonstrated need for the proposed urban expansion
- A demonstration of how the *Growth Plan*'s minimum Designated Greenfield Area density target of 50 people and jobs per hectare is to be achieved
- An analysis of how a municipality's urban growth centres are planned to achieve a target of 200 people and jobs per hectare

The amount of additional urban land required and related observations are summarized below:

- A total of 1,618 developable hectares are required to accommodate residential and employment uses in order to achieve the 2041 forecast (1,458 ha community land, 160 ha employment land)
- Urban expansion requirements are distributed to four local municipalities (East Gwillimbury, King, Markham and Vaughan) based on the preferred growth scenario forecast
- Forty-five percent (45%) of residential growth and fifty-three percent (53%) of the Region's employment growth will be accommodated within the Region's Built-up Area
- The 2041 York Region Designated Greenfield Area density is 52 people and jobs per ha, slightly above the Growth Plan target

Regional staff have undertaken a review of the estimated 2016 supply of ground-related units in approved urban areas throughout the Region. This estimated supply of 92,700 units is adequate to accommodate demand to approximately 2031. The additional community land requirement of 1,458 hectares will satisfy overall household demand for all types of housing to the 2041 horizon.

Thirty-two site specific requests for urban designation or employment land conversion have been received to date. The preferred growth scenario does not propose any urban expansion onto Provincial Plan area lands. Some of the site specific requests fall within the proposed areas identified for urban expansion. Appendix C to Attachment 6 contains details on each of the site specific submissions received.

Regional staff are recommending a 2041 planning horizon for the proposed urban expansions

The Province recently produced a technical backgrounder to Amendment 2 to the *Growth Plan* stating that urban settlement area boundary expansions cannot address growth beyond 20 years. In September 2015, staff presented a report to Council (Clause 9 of Committee of the Whole Report No. 13) entitled "Technical Backgrounder - Implementation of Amendment 2 (2013) to the Growth Plan for the Greater Golden Horseshoe, 2006." Council endorsed staff's recommendation to supplement the Region's comments on the Co-ordinated Review of Provincial Plans. The recommendation proposes to amend *Growth Plan* policy 2.2.8.2(b) to allow for an urban expansion to accommodate but not exceed the forecasts provided in Schedule 3, allowing for a 25-year planning horizon.

The land budget in Attachment 4 includes analysis and relevant mapping (see Appendix I of Attachment 4) illustrating the proposed urban expansions for both a 20-year and a 25-year planning horizon to 2036 and 2041. Staff have included both options and can include the appropriate map in the proposed urban expansion amendment to the YROP-2010 once the Provincial response is known.

Proposed urban boundary expansions are based on good planning and logical boundaries

The proposed urban expansion areas have been assessed against Provincial Plans, including the *Growth Plan*, *Greenbelt Plan* and the *Oak Ridges Moraine Conservation Plan*, the *Lake Simcoe Protection Plan* and the *PPS*. All the policies of the YROP-2010 have also been reviewed in the evaluation. Attachment 5 provides a commentary on how the proposed urban expansions comply with the Provincial Plans and the *PPS*. An evaluation of the geographic locations for the proposed boundary locations forms part of the analysis included in Attachment 4 of the land budget work.

The proposed urban boundary expansions are based on good planning and logical boundaries consistent with YROP-2010 policy 5.1.12 that speaks to “clear and identifiable boundaries, such as concession streets, major natural features, rail or major utility corridors.” A portion of the lands proposed for urban expansion in the City of Vaughan are located within the proposed potential alignments for the GTA west corridor. These lands may be refined once additional information on a final alignment for the GTA west corridor is determined.

Path to the Recommended Scenario

The Preferred Growth Scenario will undergo further analysis and a recommended scenario will be presented to Council in Q2 2016

The preferred growth scenario for York Region, land budget and supporting background material is to be used as the basis for further discussion, analysis and refinement, leading to a recommended scenario to be presented to Council in Q2 2016. In finalizing the recommended scenario, staff anticipate additional landowner submissions. Scheduling permitting, those received will be considered when developing the recommended growth scenario.

Upcoming legislation from the Province could have direct implications on the Region’s MCR work

The Region’s MCR work is being undertaken while the Province has initiated its Co-ordinated Review of a number of significant Provincial Plans. In addition, the Province released proposed Bill 73 that deals with potential changes to the *Planning Act* and the *Development Charges Act*. It is anticipated that the Province will be releasing further material related to these reviews in the near future.

Upcoming legislation from the Province could have direct implications on the Region’s MCR work and the assumptions used in generating the preferred growth scenario and land budget. Staff will continue to monitor the Provincial review process and update Council when information becomes available. Based on the outcome of this provincial work, staff may review the workplan schedule for completion of the YROP-2010 update and MCR. It may be prudent to allow time for proposed changes to Provincial Plans and legislation to take effect.

An Amendment to YROP-2010 will be presented to Council for adoption in Q4 2016

The current workplan, if unadjusted as discussed above, targets the recommended growth scenario and a draft ROPA for Council consideration in Q2 2016. Subsequently, public open houses will be held to ensure further opportunities for all stakeholders to provide comments on the recommended

growth scenario are available. It is anticipated that a ROPA will be presented to Council for adoption in Q4 2016. The amendment will include:

- A revised Table 1 detailing the 2041 population and employment forecasts by local municipality
- A revised Table 2 detailing 2041 local municipal intensification targets
- Urban expansion areas required to accommodate growth to 2041 (or 2036, subject to a Provincial response on the planning horizon)
- Revised policy, mapping and technical updates for relevant sections of the YROP-2010

Forecasts, land budget and intensification will be carefully monitored

Regional population, household and employment forecasts provide a foundation for nearly all Regional initiatives and studies and play a vital role in the planning of future Regional services. They are a fundamental building block to virtually every major Regional study including the designation of settlement and land use boundaries, and the planning for infrastructure projects, housing needs, and various health and social programs such as new schools, hospitals and medical services, police and day care facilities. They also form the basis of Regional Development Charges By-Laws and are used by industry and business for investment decisions.

This staff report and attachments are the technical background information behind the forecasts that form the basis for infrastructure, human services and fiscal planning as well as detailed land use decisions and the potential defence of these decisions at the Ontario Municipal Board (OMB).

There is a level of uncertainty associated with any forecasting exercise. Consequently, long-term forecasts are to be used with caution. Unforeseen changes to the assumptions, such as a shift in current Federal immigration levels, could alter the outlook.

The preferred growth scenario has been co-ordinated with the Master Plan updates for Transportation and Water and Wastewater as well as the Region's capital plan. It is the Region's intention to continue to carefully monitor the forecasts. Careful and on-going monitoring and co-ordination of the timing of infrastructure delivery will be required in order to respond to potential changes in the market.

Link to key Council-approved plans

The MCR will result in an amendment to the YROP-2010 and include updates to the Regional and local municipal population and employment forecasts, intensification targets and associated policies.

The MCR supports all four of the *2015 to 2019 Strategic Plan* Priority Areas including – Managing Environmentally Sustainable Growth, Strengthening the Region's Economy, Supporting Community Health and Well-being and Providing Responsive and Efficient Public Service.

The MCR also supports Vision 2051's goal area of Creating Liveable Cities and Complete Communities through the preparation of the preferred growth scenario and proposed urban expansions that will provide the framework for future growth and the development of communities in the Region.

5. Financial Implications

The majority of the MCR work has been undertaken in-house by existing staff in the Planning and Economic Development branch with support from staff in other Regional branches and departments. Components of the MCR work such as the housing market feasibility analysis were completed by consultants within the existing Planning and Economic Development branch budget.

The preferred growth scenario has been co-ordinated with the Master Plans for Transportation and Water and Wastewater, as well as the Region's capital plan. The recommended growth scenario will form the basis for the growth forecast for the next Development Charge By-Law update which is required to be adopted in 2017. A more detailed fiscal impact analysis will be completed for the recommended growth scenario adopted by Council.

6. Local Municipal Impact

Local municipal staff are part of the MCR Technical Advisory Committee (TAC) and provided comments throughout the MCR process. The TAC has been meeting to discuss the MCR process, residential and employment land supply, the three draft growth scenarios, the preferred growth scenario, land budget, intensification, and the review of Regional Official plan policies. In addition, Regional staff have been meeting with each local municipality on an individual basis throughout the process. Staff also provided an MCR update to all nine local municipal councils in the spring and summer of 2015.

Appropriate adjustments to the forecasts and background material have been made based on local municipal feedback. Appendix B to Attachment 6 provides a

summary of the responses to local municipal input in the evaluation of the three draft growth scenarios. Seven of the nine local municipalities provided written submissions as part of the Phase 2 consultation.

Local municipal official plans will need to conform to the updated local municipal forecasts, proposed urban expansions, and local municipal intensification targets, once approved. The new forecasts will form the basis for local municipal infrastructure and service delivery planning.

7. Conclusion

The *Growth Plan* forecasts a population of 1.79 million and 900,000 jobs for York Region by 2041. A total of 1,617 additional developable hectares are required for residential and employment uses in order to achieve the 2041 forecast. In accommodating this level of growth, a preferred growth scenario based on 45% intensification, provides the best balance between the goals, objectives and policies of the YROP-2010 and the market.

This scenario and proposed areas for urban boundary expansions will be analyzed, discussed and refined over the coming months. A recommended growth scenario and a draft ROPA will be presented to Council for consideration in Q2 2016.

For more information on this report, please contact Paul Bottomley, Manager, Policy, Research and Forecasting at 905-830-4444 ext.71530.

The Senior Management Group has reviewed this report.

November 5 2015

Attachments (6) - Please visit our website at www.york.ca for online viewing

#6388679

Accessible formats or communication supports are available upon request



Managing Growth to 2041 - Public Consultation -

Public Information Meeting
(Council Chambers)
April 11, 2016



Agenda

1. Welcome
2. Purpose of Meeting
3. Presentation
4. Discussion
5. Next Steps



2. Purpose of Meeting

To hear from residents on how Markham should grow to 2041:

- Markham Council recently adopted a new Official Plan to manage growth to 2031
- York Region is now developing a Region-wide strategy for managing growth to 2041 (as required by the Province)
- Markham Council is providing comments to the Region on their 2041 strategy – requesting public input to inform these comments

3



3. Presentation

1. Background/Context
2. Overview of Region's (April 2015) Draft Growth Scenarios to 2041
3. Markham Staff Comments (October 2015 reports)
4. Additional information provided in Region's initial Preferred Scenario (November 2015)
5. Provincial Plan Review – Advisory Panel recommendations and status

4



Background

April/May 2015:

- Region released three draft growth scenarios for 2041 population and employment as part of their Regional Official Plan Review; public consultation held by Regional staff
- Markham staff reported to DSC on the three draft scenarios; Council workshop requested

Sept/Oct 2015:

- Workshop held in September to provide background/context for growth management
- Markham staff reported to DSC in October with comments on the draft scenarios to forward to the Region as input into their growth management exercise; report was deferred, and staff were asked to consult with the public before bringing the report back



Regional Council decisions/direction since October 2015

November 2015

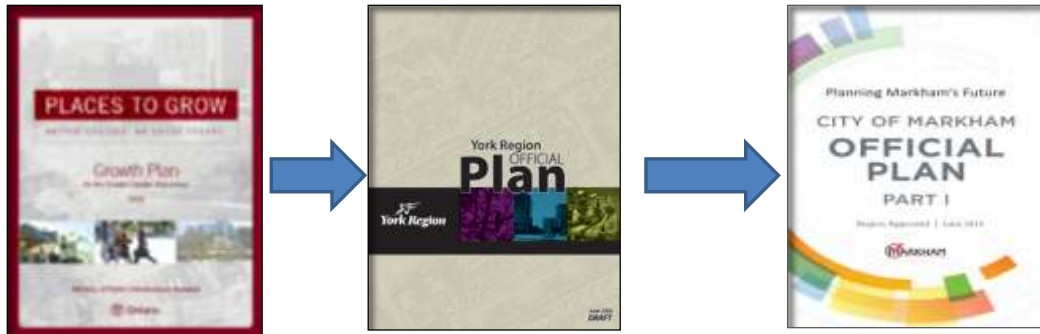
- Regional staff presented a Preferred Scenario based on a 45% intensification target (Region-wide) to Regional Council
- Regional Council deferred the report, and requested additional analysis based on lower density targets

February 2016

- Regional Council further directed staff to bring back a revised Preferred Scenario based on a 40% intensification target Region-wide

* Revised Preferred Scenario to be considered by Regional Council in June 2016; followed by Draft Regional Official Plan Amendment (incorporating the Preferred Scenario) in November 2016

Local (Markham)



Population and Employment Forecasts - minimum intensification - minimum densities

[illegible]

	2005	2010	2015	2019	2021
Aurora					
Population	49,770	52,764	58,400	66,660	70,410
Employment	18,810	19,000	21,400	23,250	24,000
East Gwillimbury					
Population	21,350	24,394	28,400	36,900	40,500
Employment	5,990	11,600	15,700	15,700	17,400
Georgina					
Population	46,650	50,000	57,500	65,900	70,400
Employment	8,990	11,000	12,900	12,400	14,300
King					
Population	20,300	21,000	19,900	21,500	21,500
Employment	7,700	3,700	11,000	11,400	11,900
Markham					
Population	173,000	187,800	210,300	238,300	251,600
Employment	144,000	160,300	201,000	221,200	231,200
Richmond Hill					
Population	71,600	80,700	91,900	94,500	97,100
Employment	37,000	42,500	45,700	46,900	46,400
ScARB					
Population	189,800	215,900	237,400	250,100	262,400
Employment	51,700	81,000	94,300	97,400	88,400
Vaughan					
Population	148,900	168,900	190,000	200,000	206,000
Employment	75,100	125,000	140,000	147,000	151,000
Whitchurch-Stouffville					
Population	45,900	49,400	55,800	55,100	56,000
Employment	17,000	18,000	17,000	18,000	18,000
York Region					
Population	691,900	740,000	813,800	910,000	958,000
Employment	464,300	540,300	700,000	740,000	780,000

Planning Markham's Future

CITY OF MARKHAM

OFFICIAL PLAN

PART I

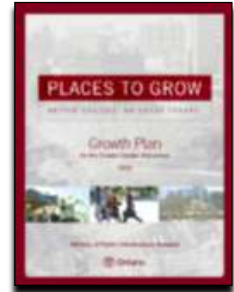
Regulation Approved | June 2016

 **MARKHAM**

Growth Plan Requirements

Growth Plan Goals:

1. Make better use of existing infrastructure
2. Limit expansion of urban boundaries
3. Address traffic congestion through investment and planning for transit
4. Protect employment lands for future economic opportunities

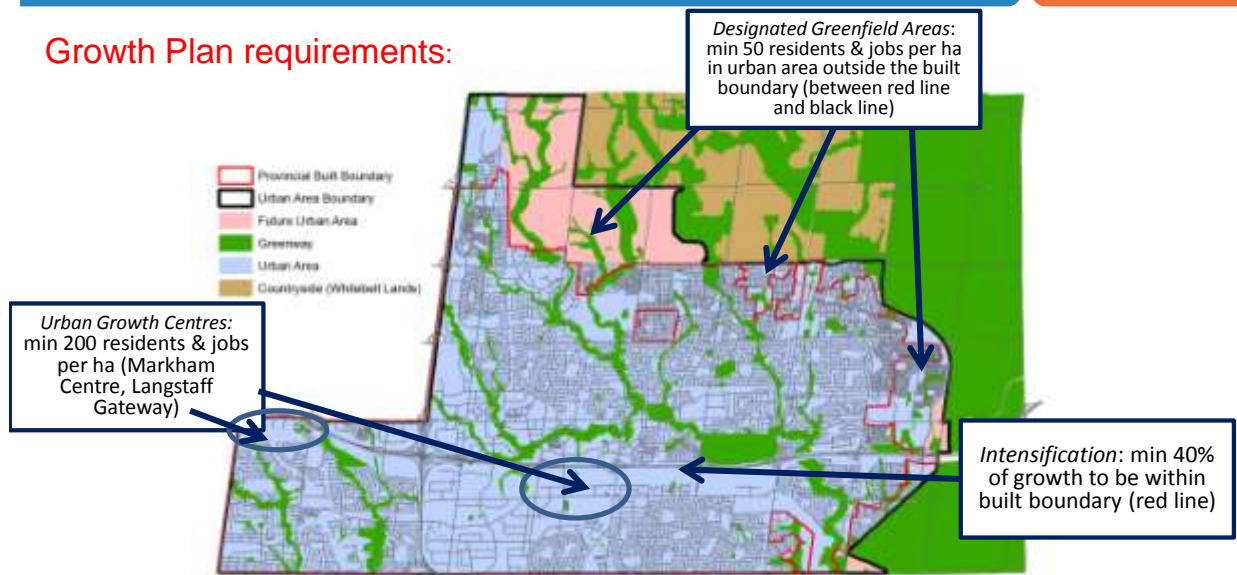


Growth Plan Minimum Requirements:

1. Accommodate growth through *intensification* - by the year 2015 and for each year thereafter, a **minimum of 40% of all residential development** occurring annually within each upper-tier or single-tier municipality will be within the *built-up area* (defined by a built boundary)
2. Within *urban growth centres*, plan to achieve minimum **200 residents and jobs** per hectare
3. Growth in *designated greenfield areas* (outside the built boundary) – plan to achieve a minimum density target not less than **50 residents and jobs** combined per developable hectare.

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Growth Plan requirements:



Regional Official Plan 2010 - Targets for 2031 Forecasts

Residential Intensification Target:

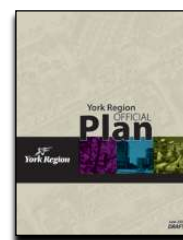
- Minimum **40%** Region-wide - as per Growth Plan
- Target varies among local municipalities – southern municipalities have greater potential for intensification, therefore higher intensification targets assumed than in northern municipalities
- Minimum **40%** intensification Region-wide = approximately **52%** for Markham*
(*Markham adopted a minimum **60%** intensification target in 2014 OP)

Designated Greenfield Area Targets:

- Minimum **50** residents and jobs per developable hectare - as per Growth Plan
- In *new communities* (i.e., Future Urban Area) – minimum **70** residents and jobs per developable hectare, and minimum **20** units per developable hectare

Urban Growth Centre and Key Development Area Targets:

- Within *urban growth centres*, plan to achieve minimum **200 residents and jobs** per hectare; minimum **2.5** floor space index (3.5 fsi near subway stations) – as per Growth Plan
- Within *key development areas*, plan to achieve a minimum density target of **2.5** floor space index.



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Region is now analyzing 2041 forecasts provided in Amendment 2 to Growth Plan

- Growth Plan Amendment 2 updated population and employment forecasts for 2031 and provided new forecasts for 2036 and 2041

York Region Forecasts in Amendment No. 2 to the Growth Plan, June 2013				
York Region	Original 2031	Updated 2031	2036	2041
Forecast Population	1,500,000	1,590,000	1,700,000	1,790,000
Forecast Employment	780,000	790,000	840,000	900,000

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Region's Draft Growth Scenarios to 2041 (April 2015)

3 draft scenarios: Region-wide targets of either **40% intensification**, **50% intensification**, or **no urban boundary expansion** (65% intensification)

- **40% intensification:**
 - ✓ Meets Growth Plan requirement; same as ROP 2010 target to accommodate 2031 growth
 - ✓ Greatest need for urban expansion lands (2,460 ha)
- **50% intensification:**
 - ✓ Exceeds Growth Plan and ROP 2010 targets to 2031
 - ✓ Less urban expansion land required than 40% scenario (1,260 ha)
- **No expansion** (65% intensification):
 - ✓ Substantially exceeds Growth Plan and ROP 2010 targets to 2031
 - ✓ No additional urban expansion lands required
 - ✓ Highest percentage of apartment development required

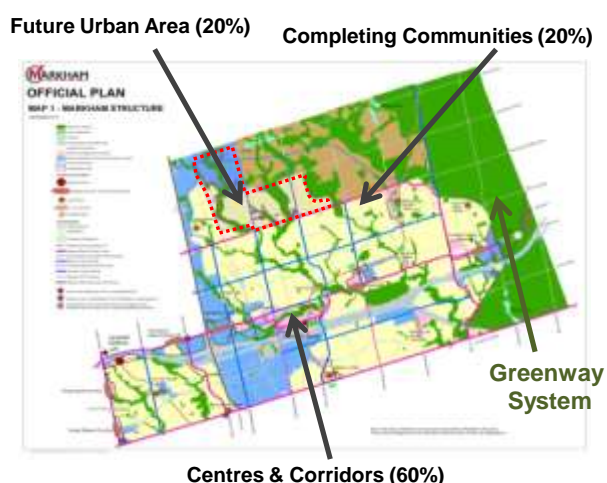
Current and planned servicing capacity and land supply were key considerations in developing the scenarios ¹³

SUMMARY OF REGION'S DRAFT GROWTH SCENARIOS – IMPLICATIONS FOR MARKHAM			
	Region's Growth Scenarios		
	40%	50%	No Expansion
Markham			
Population in 2041	541,800 (same as 50%)	541,900 (same as 40%)	536,600 (marginally lower)
Employment in 2041	275,700 (same as 50%)	275,600 (same as 40%)	274,800 (marginally lower)
% Intensification (est.)	50%	60%	75%
Population Growth Rate (average annual)	7,700 persons/yr	7,700 persons/yr	7,600 person/yr
Employment Growth Rate (average annual)	4,000 jobs/yr	4,000 jobs/yr	4,000 jobs/yr
Housing Mix	Higher apartment share, but lowest of 3 scenarios	Higher apartment share than 40% scenario	Very high apartment share
Urban Expansion required	Yes	Yes	No

Staff Comments on 3 Draft Scenarios (Oct 5 2015):

- Employment growth and particularly population growth assigned to Markham appear to be achievable given recent experience and remaining land supply;
- Staff have a concern with the ability of the market to deliver the higher share of apartments required to achieve the 'no urban expansion' scenario;
- The preferred growth scenario for 2041 should be consistent with Markham's current residential intensification target of 60%; given the limited data available, the 40% scenario, and to a greater extent 50% scenario, appear to best reflect this target;
- If additional urban expansion lands are required in Markham, the lands should be contiguous to the existing urban area, and in proximity to planned higher order transit and road network; and
- Further direction is needed from the Region regarding the phasing of possible expansion lands to 2036 or 2041, relative to the 2031 Future Urban Area boundary in Markham's 2014 OP.

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Council endorsed 60% intensification alternative:

- ✓ Ensured protection of the natural environment through an identified protected Greenway System
- ✓ Directed the majority of growth to Centres and Corridors along rapid transit routes within the built boundary (intensification) – **60%**
- ✓ Completed the existing urban area communities and employment districts – **20%**
- ✓ Allowed limited expansion of the urban area (Future Urban Area) – **20%**

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60% Intensification Alternative was Considered a Sustainable Option for Growth in 2010

- The 2010 Council endorsed growth alternative (60% intensification and limited urban expansion) represents a balanced, sustainable approach to accommodating growth
- The 2009/2010 staff reports recommending the 60% intensification growth alternative documented how various environmental, economic and social/cultural factors were taken into account
- The 'no expansion' alternative was not considered to be socially or economically sustainable as it relied too heavily on housing and employment forms that were not expected to be delivered or accepted by the market (i.e., reliance on delivery of high number of apartment units and intensification forms of employment to meet population and employment forecasts)
This alternative also did not recognize the need for ground-oriented family housing and land-intensive forms of employment
- Preliminary results from a greenhouse gas emissions (GHG) analysis indicated that emissions under a 'no expansion' scenario were only marginally less than under the 60% alternative
- Planning staff maintain that Markham's Greenprint (under development in 2010) does not preclude consideration of further limited expansion

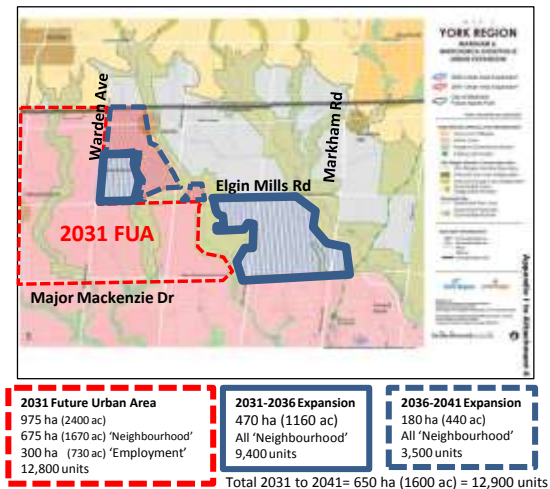
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November 2015 initial Preferred Growth Scenario (not endorsed by Regional Council)

SUMMARY OF REGION'S DRAFT GROWTH SCENARIOS – IMPLICATIONS FOR MARKHAM				
	Region's Draft Growth Scenarios (April 2015)			Draft Preferred Scenario
	40%	50%	No Expansion	45%
Markham				
Population in 2041	541,800 (same as 50%)	541,900 (same as 40%)	536,600 (marginally lower)	535,100 (lower than 40%/50%)
Employment in 2041	275,700 (same as 50%)	275,600 (same as 40%)	274,800 (marginally lower)	269,200 (lower than all)
% Intensification (est.)	50%	60%	75%	55%
Population Growth Rate (average annual)	7,700 persons/yr	7,700 persons/yr	7,600 persons/yr	7,400 person/yr
Employment Growth Rate (average annual)	4,000 jobs/yr	4,000 jobs/yr	4,000 jobs/yr	3,800 jobs/year
Housing Mix	Higher apartment share, but lowest of 3 scenarios	Higher apartment share than 40% scenario	Very high apartment share	Apartments = 43% of total unit growth
Urban Expansion required	Yes	Yes	No	468 ha 2031-2036 181 ha 2036-2041 649 ha 2031-2041 (all community lands) ¹⁸

45% Scenario - Urban Expansion Land Requirements, 2036 and 2041



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Staff Comments on November 2015 Preferred Growth Scenario (not endorsed by Regional Council)

- Assumptions for Markham underlying the 45% scenario appear achievable:
 - Population growth (7,400/year) is lower than last 10 year average
 - Employment growth (3,800 jobs/yr) is slightly higher than last 10 year average
 - Unit growth within Built Boundary (43,000) similar to current 60% Intensification target
 - Apartment unit share of growth (43%) and units/year comparable (or lower) than 2031 targets
 - Urban expansion 'Neighbourhood' area and units similar to 2031 Future Urban Area
 - Less Employment Land Employment growth for Markham; more Major Office growth – no additional employment lands contemplated

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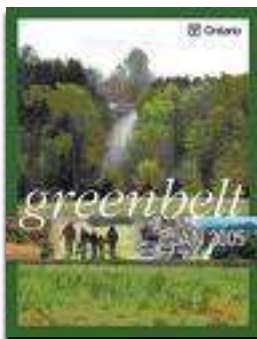
Anticipated Regional 40% Preferred Scenario – June 2016

- Markham has large potential supply of land for intensification and expansion and servicing capacity (relative to the other local municipalities); a 40% Preferred Scenario will likely require more 'Neighbourhood' expansion lands Region-wide (if not in Markham, then in Vaughan or East Gwillimbury)
- Markham may be able to adopt a marginally higher intensification target than the Region's target, but still needs to be consistent with Region-wide target; market absorption of apartments still a risk – i.e., risk of making infrastructure investments for apartment development that does not occur

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Ongoing Coordinated Review of Provincial Plans

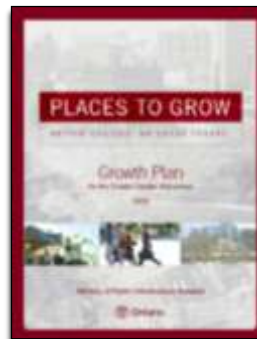
Greenbelt Plan



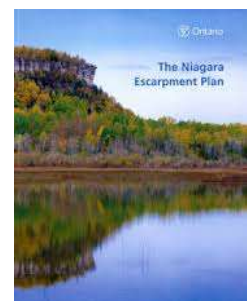
Oak Ridges Moraine Conservation Plan



Growth Plan



Niagara Escarpment Plan



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Ongoing Coordinated Review of Provincial Plans – Advisory Panel (Crombie) Report

- Panel fully supported the intent/policy direction of the 4 Plans; provided 87 recommendations to strengthen the Plans
- Few specific recommendations, but did recommend that more new development be directed to existing urban areas through intensification, and less to new greenfield areas
- Also recommended:
 - greater protection for strategic employment lands,
 - better tools to achieve affordable housing; and
 - better coordination with provincial transportation plans (Big Move) and other provincial initiatives
- Draft amendments to the Plans not yet released for consultation, but expected this spring 23



5. Next Steps

- **April/May 2016** - Bring deferred October 2015 Markham staff reports, as well as input received from public consultation, to DSC; Markham Council comments to be forwarded to Region as input to revised Preferred Growth Scenario
- **June 2016** – target date for Regional Council to endorse a revised Preferred Growth Scenario based on 40% intensification (as directed in February 2016)
- **November 2016** – release of Draft Regional Official Plan (ROP) Amendment reflecting revised Preferred Growth Scenario
- **Spring 2017** – target date for Regional Council adoption of ROP Amendment

*Markham will need to undertake growth management exercise and amend 2014 Official Plan to incorporate the 2041 forecasts assigned by the Region (not anticipated to begin until 2017) 25