



TO:	GENERAL COMMITTEE
SUBJECT:	BARRIE EMPLOYMENT LANDS STRATEGY AND CONSIDERATIONS
WARDS:	6, 7 AND 8
PREPARED BY AND KEY CONTACT:	M. BANFIELD, RPP, DIRECTOR OF DEVELOPMENT SERVICES, EXT. 5466 S. SCHLICHTER, DIRECTOR OF ECONOMIC AND CREATIVE DEVELOPMENT, EXT. 5036
SUBMITTED BY:	A. MILLER, RPP, GENERAL MANAGER OF INFRASTRUCTURE AND GROWTH MANAGEMENT
GENERAL MANAGER APPROVAL:	A. MILLER, RPP, GENERAL MANAGER OF INFRASTRUCTURE AND GROWTH MANAGEMENT
CHIEF ADMINISTRATIVE OFFICER APPROVAL:	M. PROWSE, CHIEF ADMINISTRATIVE OFFICER

RECOMMENDED MOTION

1. That the City of Barrie Employment Lands Strategy attached as Appendix "A" to Staff Report DEV007-21, which includes the five scenarios with the greatest potential for accelerating the availability of serviced, shovel-ready larger parcels of employment land to the marketplace, be received and approved in principle.

PURPOSE & BACKGROUND

Purpose

2. On September 21, 2020, Council adopted motion 20-G-141, directing staff to explore fiscal tools and strategies within the municipal framework to increase the City's competitiveness in attracting business and investment to employment lands within the City's boundary and to report back with an analysis, recommendations and associated fiscal implications.
3. The purpose of this Staff Report is to provide Council with an Employment Lands Strategy that will inform on the City's current employment land availability and the opportunity for making larger parcels of employment land shovel-ready, including a servicing assessment and associated fiscal implications, to the extent known at this time.
4. Through the Employment Lands Strategy, five scenarios encompassing larger parcels of employment lands have been identified. Pursuing any number of these scenarios will better allow the City of Barrie to meet the wider market demand for larger, municipally-serviced employment land parcels.
5. Scenarios and strategies identified in the Employment Lands Strategy are not currently reflected in the City's 2021 Capital Plan based on the City's capital prioritization practices and affordability. As such, Staff have provided a set of alternative scenarios that could be implemented based on technical and financial considerations and overall contribution to achieving the goal of accelerating serviced, shovel-ready employment lands to the market and associated capital impacts, should Council choose to act on the strategy.

Executive Summary

6. To meet the City of Barrie's employment targets of 150,000 jobs by 2051 (nearly one job for every two residents) and wider growth management vision, it is important the City of Barrie ensures there is available employment land ranging in size for a variety of commercial and industrial uses.
7. The Greater Toronto Area is the third largest industrial market in North America. The strength of the market places a premium on the price of available employment lands. This is compounded in Barrie where there are very few larger shovel-ready parcels of employment lands available for purchase, resulting in sky-rocketing industrial land values.
8. In recent years, there have been several requests made to the Economic and Creative Development Department for support in identifying shovel-ready employment lands to be used for industrial or commercial purposes.
9. The types of inquiries received by the Economic and Creative Development Department occur across varying stages of the real estate sales life cycle and some have been from businesses and site selectors that are simply assessing prospects, whereas other requests have been from those ready to buy. Requests have been for a range of sizes including some as high as 100 acres.
10. Inquiries for larger (10+ acres) of serviced, shovel-ready parcels of employment lands readily available for sale often remain unfulfilled in Barrie as there is a lack of available supply on the market. This means that businesses in Barrie looking to expand are forced to look outside of Barrie, new investors/businesses are bypassing Barrie as the home for their business, and the City is developing a reputation in the site selector/real estate community as having a lack of supply and not bringing new prospects to the market.
11. To address this issue, City staff across the Economic and Creative Development, Corporate Asset Management, Infrastructure and Development Services Departments worked together to assess the City's current employment areas and to determine the most feasible scenarios for larger employment sites that could be made shovel-ready, understanding that municipal capital projects have been assessed with consideration for both pre-construction (property acquisition/utilities) and actual project construction.
12. After outlining the status and feasibility of each, the five employment land scenarios with the greatest potential were selected to pursue further, which formed the basis for the Employment Lands Strategy attached as Appendix "A".
13. Each of the five scenarios is an option for meeting the interest in shovel-ready larger employment land sites. Given the scope and financial impacts of Scenarios 1 and 2, they have been divided into a Scenario 1a and 1b option, and a Scenario 2a and 2b option, thereby creating a total of seven scenario options.
14. It is critical to keep in mind that within the context of this report there is no guarantee of how and when the parcels of land outlined in each scenario would be developed, because the City cannot control land in private ownership. Moving forward with any number of the scenarios is intended to support market conditions that would allow Barrie to promote employment land opportunities in the city more actively and become more competitive within this market segment. It would open the City up to attract new businesses and developers to facilitate the growth of its existing business base.

15. Municipal servicing infrastructure (primarily water and wastewater) for development areas in the City would normally be funded largely by the City's Capital Plan and would bring municipal servicing infrastructure along key corridors (roadways, etc.). Local services are paid directly by the developer and assumed by the City once complete, per the City's local servicing policy and in-line with industry standards. Local servicing costs are those associated with servicing the actual individual parcels at the time of development and cannot be funded through Development Charges.
16. As such, a comprehensive approach to advancing employment land development is intended to address both the municipal servicing infrastructure through the City's Capital Plan and local servicing costs.
17. To become more competitive, staff identified the opportunity to explore a modified approach to the local servicing costs. Given limitations under the Ontario Municipal Act related to incentives, the use of a Community Improvement Plan (CIP) is one option that could be explored and would open up the possibility for the selected scenarios to be expedited and the Employment Lands Strategy to move forward.
18. A CIP approach could be designed to have the City front-end these local servicing costs, with the potential to recover a portion over time and could be achieved through additional funding to the CIP. Funding sources, while ultimately supported by the tax base, could be additional debt financing, transfers from reserves or another mechanism directed by Council.

Background

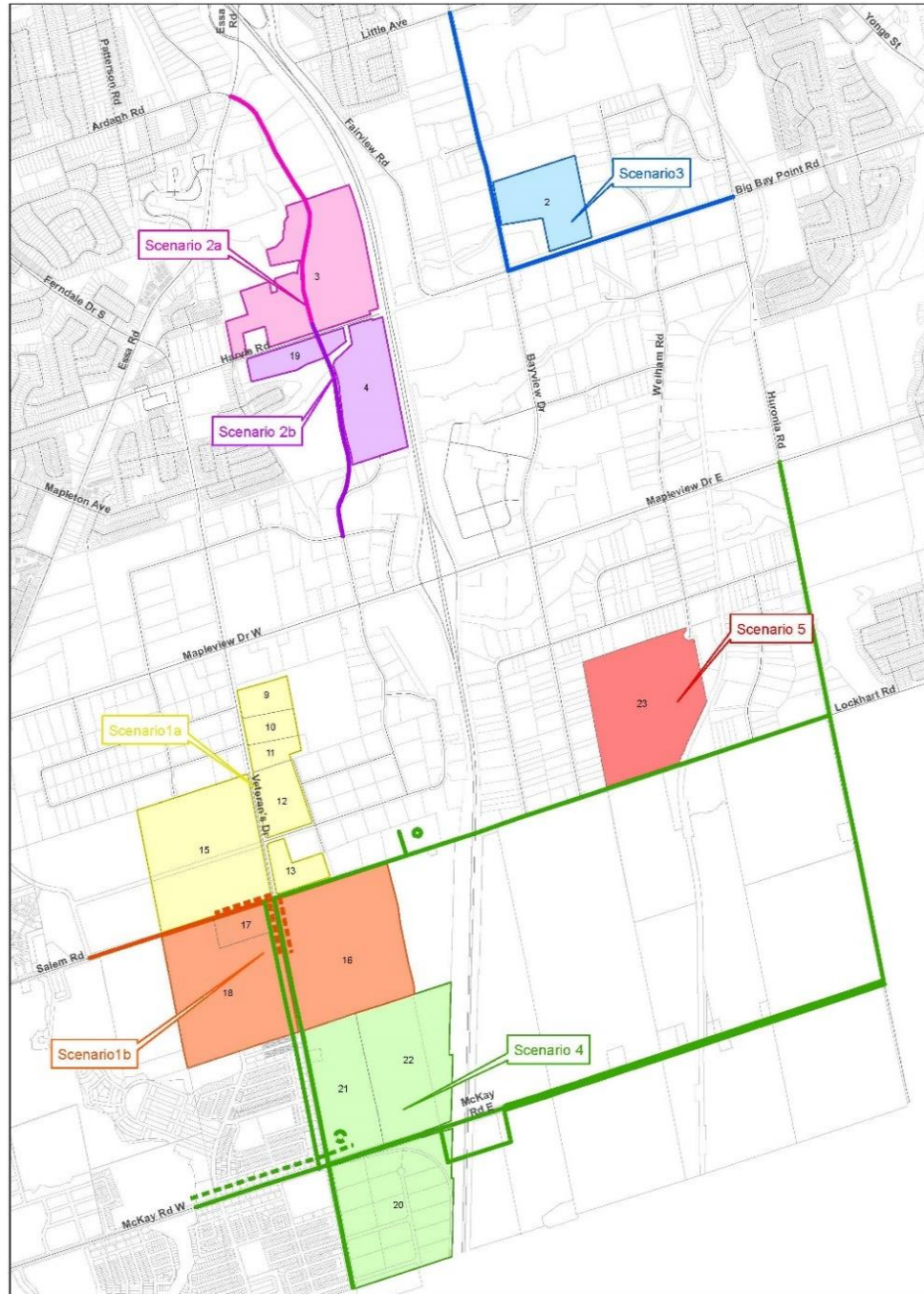
Identifying Strategic Employment Land Opportunities: Steps Taken

19. To prepare recommendations for making larger parcels of employment land ready for development and servicing, Economic and Creative Development staff and Development Services staff identified vacant employment lands that were predominantly more than 20 acres in size, with some potential sites of more than 10 acres.
20. Staff then outlined the status of each potential site through mapping, identifying zoning and summarizing the general status of each site according to various planning policies and guidelines.
21. Once the status was outlined, Planning staff then worked with the Infrastructure and Corporate Asset Management Departments to identify where water and sanitary infrastructure was located in proximity to each site.
22. Staff across the Economic and Creative Development, Corporate Asset Management, Infrastructure and Development Services Departments then discussed the servicing requirements for each site. Discussions revolved around: access to servicing, responsibility for servicing and each parcel's relationship to servicing for Capital Plan projects.

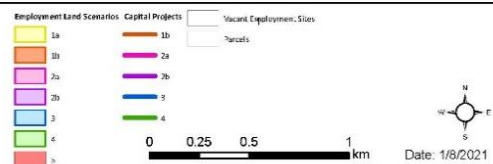
Employment Land Scenarios

23. Based on staff discussions, the employment land scenarios with the greatest potential were identified. The detailed maps for each of the five scenarios are provided in Appendix "B" as part of the Employment Lands Strategy and further identify infrastructure and servicing requirements, parcel sizes, timing, costs and alignment with the Capital Plan.

24. An overview map of scenarios is provided below:



Infrastructure needed to support
Employment Lands
Various Scenarios



Scenario 1 – 1a, 1b – Veteran’s Drive, North and South of Salem Road

25. Scenario 1a consists of employment lands in the built boundary north of Salem Road and east and west of Veteran’s Drive as shown in the Scenario Map. Infrastructure, capital investment and local servicing needs are identified in the chart below:

Infrastructure Required:	<ul style="list-style-type: none"> Development can proceed with existing water/sanitary infrastructure Development of parcel 15 requires traffic signal improvements on the west leg of the existing Commerce Park and Veteran’s intersection
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> High-level estimate is \$150,000
Local Servicing Component:	<ul style="list-style-type: none"> Servicing parcel 15 requires local water, wastewater, local and collector roads
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> \$5 million
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> Not in Capital Plan

26. The estimated local servicing cost is \$5 million. As these are local servicing costs and borne by the developer, they would need to be considered as part of the CIP approach identified in paragraphs 16-18 of this report, which highlight the preferred approach for upfronting these costs. Further details on local servicing costs would need to be determined once the development concept is known.

27. Based upon the infrastructure requirements, these lands could be advanced immediately.

28. Scenario 1b includes employment lands south of Salem Road along Veteran’s Drive. Infrastructure, capital investment and local servicing needs are identified in the chart below:

Infrastructure Required:	<ul style="list-style-type: none"> Extension of existing transmission watermain, south on Veteran’s and looping onto Salem Addition of left-turn lanes at Salem and Veteran’s
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> High-level estimate is \$2.4 million for watermain, including looping
Local Servicing Component:	<ul style="list-style-type: none"> Servicing parcels 16, 17 and 18 require local water, wastewater and roads.
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> \$7 million
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> Included as a portion of EN1258 (2021-22) and EN1340 (post-2030)

29. For these parcels to advance, the immediate high level capital infrastructure investment is \$2.4 million for the watermain, including looping. This area is included in the 2021 Capital Plan as a portion of EN1258 (2021-22) and EN1340 (post-2030), and parcels could be serviced by phased construction of the capital projects identified as early as 2024.

30. Further, the order of magnitude estimated local servicing cost is \$7 million; this would need to be contemplated in a CIP approach for upfronting these costs.

31. More details on infrastructure, servicing and build-out requirements for Scenarios 1a and 1b can be found in the “Recommendations: New Employment Land Scenarios” section of the Employment Lands Strategy (Appendix “A”) and on the “Infrastructure Needed to Support Employment Lands Scenario 1a and 1b” maps (Appendix “B”).

Scenarios 2a and 2b: Along Bryne Drive, North and South of Harvie Road

32. Scenario 2a consists of employment lands in the built boundary north of Harvie Road, identified as Parcel '3' in the Scenario Map. Infrastructure, capital investment and local servicing needs are identified in the chart below:

Infrastructure Required:	<ul style="list-style-type: none"> Construction of 5-lane Bryne Drive, including storm sewer, sidewalk, streetlights, water main and sanitary sewer (within the ROW)
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> Total cost: \$18.6 million
Local Servicing Component:	<ul style="list-style-type: none"> Subject to internal servicing (local benefit roads, sewer and water; details to be determined and are development dependent) 250 mm sanitary to connect main within ROW to Harvie Road for outlet
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> Details for servicing costs are to be determined once development takes place
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> Aligned with project EN1278 (2027-29 Project Construction)

33. For these parcels to advance, the high-level cost estimate for immediate capital infrastructure investment is \$18.6 million. This area is included in the 2021 Capital Plan as aligned with project EN1278 (2025-29). The project could be advanced to a 2023 construction start, provided that the City is able to obtain the necessary property dedications from Bell Media in a timely manner.
34. Local servicing costs that would need to be contemplated as part of a CIP approach are currently indeterminable. Further work on the estimated local servicing cost would be determined once the development concept is known.
35. Scenario 2b consists of employment lands in the built boundary south of Harvie Road, identified as Parcels '19' and '4' on the Scenario Map. Infrastructure, capital investment and local servicing needs are identified in the chart below:

Infrastructure Required:	<ul style="list-style-type: none"> Construction of 5-lane Bryne Drive, including storm sewer, sidewalk, streetlights, watermain and sanitary sewer (within the ROW)
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> \$11.8 million (construction costs)
Local Servicing Component:	<ul style="list-style-type: none"> Subject to internal servicing (local benefit roads, sewer and water; details to be determined and are development dependent)
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> Details for servicing costs are to be determined once development takes place
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> Aligned with project EN1277 (2022-24 Project Construction)

36. For Scenario 2b, the estimated high level cost estimate for immediate capital infrastructure investment is \$11.8 million. This area is included in the 2021 Capital Plan as aligned with project EN1277 (2021-24). The Bryne Drive south area is scheduled for construction start in 2022 subject to SmartCentres conveying the necessary property dedications and while pre-construction activity can commence in 2021, project construction cannot be advanced.

37. Local servicing costs that would need to be contemplated as part of a CIP approach are currently indeterminable. Further work on the estimated local servicing cost would be determined once the development concept is known.
38. More details on infrastructure, servicing and build-out requirements for Scenarios 2a and 2b can be found in the “Recommendations: New Employment Land Scenarios” section of the Employment Lands Strategy (Appendix “A”) and on the “Infrastructure Needed to Support Employment Lands Scenario 2a and 2b” maps (Appendix “B”).

Scenario 3: Big Bay Point Road, East of Bayview Drive

39. Scenario 3 consists of employment lands in the built boundary north of Big Bay Point Road, identified as Parcel ‘2’ on the Scenario Map. Infrastructure, capital investment and local servicing needs are identified in the chart below:

Infrastructure Required:	<ul style="list-style-type: none"> Development can proceed now as water and sanitary mains are in place. These will also be upgraded as part of EN1286 (Big Bay Point Road improvements from Bayview Drive to Huronia Road) and EN1288 (Bayview Drive improvements from Big Bay Point Road to Little Avenue)
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> N/A
Local Servicing Component:	<ul style="list-style-type: none"> Service connections for water and sanitary These services will be installed as part of the construction for City Projects along Big Bay Point and Bayview
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> Local servicing costs are no longer applicable as the construction start for Big Bay Point Road is scheduled for June 2021 and utilities are currently being relocated.
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> Aligned with project EN1286 (2021-22 Project Construction) and EN1288 (2024-27 Project Construction)

40. For Scenario 3, there are no immediate additional capital infrastructure investments needed, beyond what is already programmed as part of EN1286 and EN1288. As such, development can proceed in the area as soon as local servicing work is complete.
41. Projects on Bayview Drive and Big Bay Point Road are included in the Capital Plan, as EN1288 (Bayview Drive, construction forecast for 2024-27) and EN1286 (Big Bay Point Road – construction request for 2021-22).

Scenario 4: McKay Road West, East of Veteran’s Drive

42. Scenario 4 consists of employment lands on the east side of Veteran’s Drive, north and south of McKay Road West, identified as Parcels ‘20’, ‘21’ and ‘22’ on the Scenario Map. Infrastructure, capital investment and local servicing needs are identified in the chart below:

Infrastructure Required:	<ul style="list-style-type: none"> Construction of road improvements (McKay Road West, Veteran’s Drive, McKay Road Interchange at Highway 400) Construction of 500mm Tx watermain
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	<ul style="list-style-type: none"> Construction of 400mm local watermain Addition of McKay and Huronia trunk sanitary sewer
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> Total cost: \$97.4 million (\$37.4M roads and watermain, \$60M McKay and Huronia Sewer)
Local Servicing Component:	<ul style="list-style-type: none"> Local watermain (400mm) on Veteran's from Salem to McKay Local roads Local sewers
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> Watermain: \$6 million Roads: \$16.8 million Local sewers: \$5-7 million Total cost: \$27.8-29.8 million The cost estimate is high-level and was prepared without knowledge of the proposed development concept
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> Timing aligns with the following projects: <ul style="list-style-type: none"> EN1255 (2024-27) EN1256 (2023-26) EN1258 (2021-22) EN1257 (2021-26) EN1251 (2029-32)

43. For these parcels to advance, the estimated high-level cost (for immediate capital infrastructure investment is \$97.4 million (not including the interchange) and aligns with the following Capital Plan projects: EN1255 (2024-27), EN1256 (2023-26), EN1258 (2021-22) and EN1257 (2021-26), and the earliest possible start of construction would be in 2023.
44. While more investigation is needed to validate costs at the development phase, estimated local servicing costs are approximately \$28-30 million; these costs would need to be contemplated in a CIP approach for upfronting these costs.
45. In the 2021 Capital Plan, the McKay and Huronia Sewers (EN1255 and EN1256) are scheduled to start construction in 2024 with funding from Wastewater Capital Reserves and developer front-ending. If construction is to be advanced, then some or all of the funding from the Wastewater Capital Reserve would have to be replaced by debentures or developer front-ending.
46. More details on infrastructure, servicing and build-out requirements for Scenario 4 can be found in the "Recommendations: New Employment Land Scenarios" section of the Employment Lands Strategy (Appendix "A") and on the "Infrastructure Needed to Support Employment Lands Scenario 4" map (Appendix "B").

Scenario 5: West of Bayview Drive, North of Lockhart Road

47. Scenario 5 consists of employment lands in the built bound boundary east of Bayview Drive and north of Lockhart Road, identified as Parcel '23' on the Scenario Map. Infrastructure, capital investment and local servicing needs are identified in the chart below:

Infrastructure Required:	<ul style="list-style-type: none"> Extension of Welham Road Extension of sanitary sewer on Lockhart from Welham to the existing sewer (east of the rail corridor)
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> Welham Road: \$7.2 million Lockhart sewer: \$2.0 million



	<ul style="list-style-type: none">• Total cost: \$9.2 million
Local Servicing Component:	<ul style="list-style-type: none">• 250mm sanitary sewer• 300mm watermain
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none">• \$1.2 million• This cost estimation is high-level and was prepared without knowledge of the proposed development concept
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none">• Welham Road not in Capital Plan• Lockhart Road currently listed as a post-2031 project in Capital Plan

48. For Scenario 5, the estimated high-level cost estimate for immediate capital infrastructure investment is \$9.2 million. While Welham Road is not currently identified in the Capital Plan, Lockhart Road is currently listed as a post-2031 project.
49. While more investigation is needed to validate costs at the development phase, estimated local servicing costs are approximately \$1.2 million; these costs would need to be contemplated in a CIP approach for upfronted these costs.
50. The advancement of local servicing for Scenario 5 is subject to the developer's schedule, though the work on Lockhart Road could be advanced to a 2025 construction start.
51. More details on infrastructure, servicing and build-out requirements for Scenario 5 can be found in the "Recommendations: New Employment Land Scenarios" section of the Employment Lands Strategy (Appendix "A") and on the "Infrastructure Needed to Support Employment Lands Scenario 5" map (Appendix "B")

Scenario Summary

52. A summary of each of the scenarios, including total capital infrastructure investment, dollar impacts on the proposed current 2021 Capital Plan and total local servicing investment estimated is outlined in the chart below:

Scenario	Total Capital	Capital Dollars to Advance 2021	Capital Dollars to Advance 2022	Capital Dollars to Advance 2023	Total Local Servicing
1a	\$150,000	\$150,000 (<i>new project</i>)			\$5.0M
1b	\$2.4M	(EN-1258) and (EN-1340). Project could not be advanced until 2024			\$7.0M
2a	\$18.6M	\$7.9M (EN-1278)	\$514k	\$2.04M	TBD
2b	\$11.8M	(EN-1277) Project construction is currently budgeted for 2022 and cannot be advanced			TBD
3	N/A	No capital infrastructure is required to advance this scenario			N/A
4	\$97.4M*	(EN-1257) Project is currently budgeted for 2021 start			\$27.8M-
		(EN-1256)	\$1.78M	\$6.6M	\$29.8M
		(EN-1255)	\$2.67M	\$7.5M	
		(EN-1258)	\$913K	\$3.23M	
5	\$9.2M**	\$1.0M (Est.)	\$2.0M (Est.)	\$6.2M(Est.)	\$1.2M

*Note that Scenario 4 would require all capital projects to start in 2023 to advance the projects. McKay Road Interchange costs not included

**Note that Scenario 5 is not currently contemplated in the capital plan and capital dollars are high level estimates. Should this scenario be advanced, a detailed workplan would be developed.

53. Based upon market considerations, estimated costs, alignment with the Capital Plan and overall timing for making the sites serviced, and shovel-ready, Scenarios 1a, 2b and 3 are the preferred scenarios. Scenario 2a would be the second most preferred scenario.
54. Given that Scenario 2b is scheduled in the current 2021 Capital Plan for a 2022 construction start and cannot be advanced, it would be more appropriate for Scenario 2a to be included in the preferred scenarios to be advanced.

ANALYSIS

Justification of Preferred Scenarios to Advance

55. Scenario 1a is essentially ready for development and will make available a significant area of shovel-ready employment land at nearly 65 hectares. A minimal municipal capital investment of \$150,000 would be required to be advanced for traffic signaling. Local servicing costs are estimated at \$5.0 million.
56. Scenario 3 offers a smaller site in comparison to other scenarios, but provides for a variation in lot size at 15.52 hectares. Development for this scenario can proceed after local servicing work is complete, without capital contribution.

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57. Scenario 2a provides substantial acreage with a mix of both commercial employment and industrial employment zones. While construction of the site cannot commence until 2023, associated design works could be advanced to 2021 should the property required for the Bryne Drive road extension be dedicated to the City.

Capital Plan Considerations

58. The need to build, maintain, rehabilitate and acquire infrastructure is part of how the City delivers services like transportation, drinking water and sewage disposal. The City's Capital Plan presents the infrastructure requirements across the municipality, including those needed to allow development of lands designated for employment.
59. The City's financial constraints impact all projects and, as such, staff undertook a rigorous review of individual project cost and schedules, overall sequencing, as well as available human resources (City staff, contract staff and consultants) to deliver the Plan and align with Council's priorities.
60. Serviced employment lands are an identified Council Strategic priority for the next two years. The 2021 Capital Plan, notwithstanding extensive review and rework to defer projects to better reflect actual growth cycle needs, will still not render all employment lands serviced and shovel-ready.
61. In order to accelerate serviced, shovel-ready employment lands to market, the Capital Plan must either inject additional funding or defer other projects to deliver on Council's employment lands priority.

Local Servicing Costs

62. The City's Capital Plan does not include any costs for installations of local servicing.
63. The City's local servicing policy identifies the services that are paid directly by developers and assumed by the City.
64. The extent of local servicing costs is often difficult to confirm until a detailed plan for developing the site is put in place; one that also outlines the needs related to the development's use (e.g., the kind of employment, the number of parcels).
65. Should the City proceed with the development of a CIP program to support the upfront local servicing costs, it would be advisable that project planning funding be provided as part of the fiscal program allocation to complete additional investigations to validate the estimates and scope work for the local servicing required in any of the employment land scenarios. The cost estimates included within the scenario analysis are a high-level order of magnitude cost estimate where staff had at least some knowledge of the parcels. Other sites have no estimates available currently.

Possibilities for Incentivization

66. There is a longstanding economic development discussion in Ontario about how to best use incentives to attract investment and make a municipality more competitive. The Government of Ontario prohibits municipalities from using bonuses to attract business, creating a level playing field across the province.

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67. When it comes to investment attraction for development (specifically for building industrial/commercial developments, multi-residential developments, etc.), the only incentive opportunities are through the use of Community Improvement Plans or Development Charges. To operate successfully, both of these programs rely on taxpayer funding in the form of a grant or a supplement.
 68. The Development Charges By-law, which came into effect June 2019, will not be subject to a full review for a five-year period. However, with the recent legislative changes to the Development Charges Act, staff have engaged Watson & Associates to update the City DC by-law to reflect the specific legislative changes. A public meeting regarding Development Charges is to be held in May 2021.
 69. Community Improvement Plans (CIPs) tend to be directed mainly toward the downtown or key areas of a city targeted for economic revitalization. There is an opportunity to further explore options through a CIP program in relation to employment land and economic growth, noting that a consistent funding source for the existing program has not yet been identified.
 70. The Employment Land Strategy attached as Appendix "A" to this report identifies the funding of a grant program within a CIP framework to front-end the local servicing costs in priority employment land areas. The City's local servicing policy identifies that local servicing is to be paid directly by developers. The CIP grant approach will provide an incentive to overcome a financial barrier to bringing employment lands on-line. CIP incentives for employment lands could be achieved through additional funding to the CIP. The funding source could be additional debt financing, transfers from reserves or another mechanism directed by Council.
 71. Should the Employment Land Strategy be endorsed by Council, and direction received to develop a CIP program for priority employment areas, staff would develop a program and criteria in consultation with the development community and the Finance Department to ensure the program achieves the outcome of advancing serviced, shovel-ready employment lands to the marketplace, while managing the City's fiscal obligations.

Alignment with Policies and Guidelines

72. Both the Province and the City of Barrie recognize the importance of proper planning to support economic prosperity and projected employment growth in Barrie; ensuring an inventory of right-sized properties that are not only available for prospective businesses, but are ready for utilities and servicing, is an important part of this planning.
73. The Employment Lands Strategy is in alignment with both Provincial and City of Barrie policies and guidelines; a more detailed assessment of this is provided in the "Policies and Guidelines for Barrie's Employment Lands" section of the Strategy document (Appendix "A").
74. Ontario's Growth Plan, A Place to Grow: Growth Plan for the Greater Golden Horseshoe (2019), and the Provincial Policy Statement (2020) emphasize the centrality of employment land availability and effective land-use patterns for economic well-being (A Place to Grow [2.2.5.1]; Provincial Policy Statement [1.1.1.a]).
75. The City of Barrie's current Official Plan (2010) and draft Official Plan (2020) address the importance of adequate employment land availability to meet the changing needs of industry (Official Plan [3.1.1.b]; draft Official Plan [2.3.4.h]).

Market Validation

76. As explored more deeply in the “Meeting Market Demand” section of the Employment Lands Strategy (Appendix “A”), there is a current lack of serviced, shovel-ready employment land in Barrie.
77. The holding of lands for future development, in combination with the lack of serviced employment lands more generally, has contributed to skyrocketing real estate prices. Some lands may be available through a lease agreement, however those prospective business owners who have expressed a preference for owning land are being met with a limited supply of options.
78. More recently, according to Cushman & Wakefield, market demand has additionally been driven by the e-commerce sector and there is a greater demand for warehousing facilities over brick-and-mortar businesses. This trend has only strengthened during COVID-19, as the rise in online shopping has put a premium on warehousing real estate. CBRE calls industrial “the big winner in 2020 as e-commerce took off as people stayed in and shops closed.”
79. According to Avison Young, the industrial sector has “quickly established itself as the GTA’s best performing commercial real estate sector” during COVID-19. Avison Young further notes that the GTA North industrial market “continues to command the highest premium on rents in the GTA.”
80. Moreover, employment rates by industry also confirm this trend; according to Statistics Canada, the amount of Barrie residents employed in transportation and warehousing has more than doubled between November 2019 and November 2020. CBRE forecasts that demand for Canadian industrial lands will increase 35 per cent by 2023, with interest focused across distribution and logistics (e.g., regional distribution hubs and last-mile warehouses) – this forecast aligns with the Barrie transportation and warehousing trends revealed through the Statistics Canada data.
81. Statistics Canada data also identifies that the number of Barrie residents employed in other industries located on employment lands have largely remained steady between November 2019 and November 2020 (e.g. employees in manufacturing), denoting the continued underlying strength of industrial businesses in Barrie.
82. Deloitte does note that most industries did cut back their investment spending in 2020, but also forecasts a rebound in 2021 and into future years.
83. While the calls received by staff regarding available serviced employment lands have reduced recently, staff conclude this is likely due to a more widespread understanding of the lack of availability in Barrie and the lack of ‘for sale’ signs posted on parcels of employment land. Anecdotal comments suggest that, because of the lack of available shovel-ready employment land in Barrie, industrial business owners are now looking at sites outside of Barrie.
84. Ultimately, business interest in the recommended employment lands outlined in each scenario within the Employment Lands Strategy cannot be confirmed until these sites – if pursued – are serviced and ready for sale and development. However, wider market demands (especially for industrial lands) suggest that these designated areas will be attractive options for businesses looking to expand or locate in Barrie.
85. Staff also note there may be an opportunity to leverage the Provincial interest in tracts of employment land that are shovel-ready to help attract new international and domestic investors.
86. Taking a more aggressive and proactive approach to fostering the availability of employment lands in the city provides the opportunity for the Barrie to position itself more competitively in the marketplace and stand out amongst other Ontario municipalities who all generally rely on similar investment tools to attract development and investment.

ENVIRONMENTAL AND CLIMATE CHANGE IMPACT MATTERS

87. The following environmental and climate change impact matters have been considered in the development of the recommendation:
- i) The Lake Simcoe Phosphorous Offset Program and the Ecological Offsetting Plan (both policies established by the Lake Simcoe Region Conservation Authority).
 - There are significant phosphorous and ecological costs associated with these policies (in the hundreds of thousands to millions of dollars range), which may impact the viability of a development project.
 - The City is aware of these policies, which aim to avoid, mitigate and, as a final option, compensate. Phosphorous loads will be controlled to the maximum extent possible; ecological offsetting will help improve watershed health (compensation is the responsibility of property developers).

ALTERNATIVES

88. The following alternatives are available for consideration by General Committee:

Alternative #1

General Committee could choose to advance Scenarios 1a and 2a in the 2021 Capital Plan as the preferred scenarios. The following motion would be required to provide the associated direction to Staff for amendments to the City's Capital budget and funding source.

That Scenarios 1a and 2a be endorsed for advancement in the City's capital investment priorities with the following amendments to be incorporated in the 2021 Capital Plan:

- i. *That to advance Scenario 1a of the Employment Land Strategy, a new Capital Project in the amount of \$150,000 be created for 2021 to be funded 1/3 from the tax capital reserve, 1/3 from the water capital reserve, and 1/3 from the wastewater reserve.*
- ii. *That to advance Scenario 2a of the Employment Land Strategy, Capital Project EN1278 be advanced four years to start in 2021, with a corresponding impact of \$7.9M (2021), \$513K (2022), \$2M (2023), \$4.1M (2024) and \$4.1M (2025), and that the funding be changed from Tax Capital Reserve and DC Reserves to corresponding Debenture Proceeds.*

Alternative #2

General Committee could choose to support the development of a CIP program to support the upfront local servicing costs of the strategic employment parcels outlined in Scenarios 1 through 5.

Council strategic priorities identify “Growing our Economy” and the City has seen great success with the use of the recently revised CIP to advance other identified priorities for Council (affordable housing, redevelopment and heritage conservation). Exploring the use of a CIP, with appropriate and required public, industry and Council input can align the program with meaningful tools to advance this Council strategic priority.

The following motion would be required to provide the associated direction to staff:

That Staff in Development Services and Economic Creative Development report back to General Committee with proposed framework, criteria and options for utilizing the Reinvestment Reserves to develop an additional program to the Community Improvement Plan (CIP), for up to \$2.0 million dollars, to incentivize strategic economic development on employment lands that includes grants and other financial incentives permitted under the CIP framework to advance local servicing costs to be incurred within the next 5 years for lands identified in the Barrie Employment Lands Strategy.

Alternative #3

General Committee could choose to advance other Scenarios 1b, 4 and/or 5 either in addition to, or to the exclusion of, those preferred scenarios listed in Alternative 1.

Based on the analysis of the scenarios, the infrastructure, servicing and 2041 build-out requirement costs would be much more significant, and/or the timeline to completion would be longer, which does not support the goals of accelerating employment lands to market.

Alternative #4

General Committee could choose not to endorse the Employment Land Strategy and not advance any of the identified scenarios (1a, 1b, 2a, 2b, 3, 4 and 5).

Not advancing any of the scenarios will keep capital investment at current recommended status. The City of Barrie will continue to be challenged with available market inventory for larger, serviced shovel-ready employment lands to support existing employer growth and attract new investment.

FINANCIAL

89. The 2021 Business Plan and Budget does not contemplate advancing these projects or funding local servicing costs. The table below from the 2021 Business Plan and Budget (see P.40 of the 2021 Operating Business Plan Binder) forecasts the Development Charge Reserve will be over committed by \$112 million in 2023. This includes using up to \$22 million of Development Charges annually to service debt payments. If Development Charge reserves do not materialize as planned, the Capital Plan will need to be further revised or additional debt required to fund needed infrastructure, which may have a negative impact on the City's Credit Rating.

Development Charge Reserves Committed and Forecasted Draws

DC Reserves	2021	2022	2023	2024	2025
Beginning Balance	\$ (29,510,939)	\$ (83,617,776)	\$ (103,876,848)	\$ (111,669,559)	\$ (63,872,762)
Draws: Previous Commitments	\$ (61,840,138)				
Draws: 2021 Business Plan	\$ (22,282,042)	\$ (46,795,310)	\$ (47,069,967)	\$ (52,608,229)	\$ (84,415,949)
Draws: Debt Servicing Cost	\$ (20,004,658)	\$ (21,063,763)	\$ (21,712,744)	\$ (23,434,974)	\$ (23,434,974)
Contributions: 2021 Business Plan	\$ 50,020,000	\$ 47,600,000	\$ 60,990,000	\$ 123,840,000	\$ 132,370,000
Uncommitted / (Overcommitted) Reserve Balance	\$ (83,617,776)	\$ (103,876,848)	\$ (111,669,559)	\$ (63,872,762)	\$ (39,353,684)

90. Should Council make the decision to advance Scenarios 1a and 2a (see 'Alternative 1' above), the financial implications as it pertains to the 2021 Capital Plan are outlined below. The first table shows EN1278 as it currently exists in the 2021 Capital Budget. The table directly below that shows the impact to the 2021 Capital Plan as it relates to the Motions provided in 'Alternative 1' in staff report DEV007-21.

2021 Draft Budget											
Project	Prior Years	2021	2022	2023	2024	2025	2026	2027	2028	2029	Total
EN1278	Expenditures										
	Property	-	-	-	-	7,901,100	-	-	-	-	7,901,100
	Utilities	-	-	-	-	-	513,600	-	-	-	513,600
	Design/Construction	1,869,820	-	-	-	-	-	2,041,652	4,083,303	4,083,303	12,078,078
	Total Expenditures	1,869,820	-	-	-	7,901,100	513,600	2,041,652	4,083,303	4,083,303	20,492,778
	Revenues										
	Tax Capital	846,191	-	-	-	2,765,385	179,760	670,926	1,341,852	1,341,852	7,145,966
	DC	659,269	-	-	-	5,135,715	333,840	1,370,726	2,741,451	2,741,451	12,982,452
	FGT	364,360	-	-	-	-	-	-	-	-	364,360
	Total Revenues	1,869,820	-	-	-	7,901,100	513,600	2,041,652	4,083,303	4,083,303	20,492,778
Changes from Motion 2a and 2b in Staff Report DEV001-21											
Project	Approved Budget	2021	2022	2023	2024	2025	2026	2027	2028	2029	Total
EN1278 (Scenario 2a)	Expenditures										
	Property	-	7,901,100	-	-	-	-	-	-	-	7,901,100
	Utilities	-	-	513,600	-	-	-	-	-	-	513,600
	Design/Construction	1,869,820	-	-	2,041,652	4,083,303	4,083,303	-	-	-	12,078,078
	Total Expenditures	1,869,820	7,901,100	513,600	2,041,652	4,083,303	4,083,303	-	-	-	20,492,778
	Revenues										
	Tax Capital	846,191	-	-	-	-	-	-	-	-	846,191
	DC	659,269	-	-	-	-	-	-	-	-	659,269
	FGT	364,360	-	-	-	-	-	-	-	-	364,360
NEW PROJECT (Scenario 1a)	Expenditures										
	Design/Construction	-	150,000	-	-	-	-	-	-	-	150,000
	Total Expenditures	-	150,000	-	-	-	-	-	-	-	150,000
	Revenues										
	Tax Capital	-	50,000	-	-	-	-	-	-	-	50,000
	Water Capital	-	50,000	-	-	-	-	-	-	-	50,000
	Wastewater Capital	-	50,000	-	-	-	-	-	-	-	50,000
	Total Revenues	-	150,000	-	-	-	-	-	-	-	150,000

91. The financial implications of incorporating a Community Improvement Plan related to employment lands will need to be considered, should incentives for local servicing be pursued.

LINKAGE TO 2018–2022 STRATEGIC PLAN

92. The recommendation(s) included in this Staff Report support the following goals identified in the 2018-2022 Strategic Plan:

☒ Growing Our Economy

APPENDICES:

Appendix "A" – City of Barrie Employment Lands Strategy
Appendix "B" – Employment Lands Strategy Maps

APPENDIX “A”

City of Barrie Employment Lands Strategy, October 2020

Meeting Barrie’s Employment Growth Vision

To properly manage growth, meeting both population and employment needs is essential.

The City of Barrie is forecast to grow 150,000 jobs by 2051, which will be about one job for every two local residents. To ensure that Barrie continues to grow as a safe and healthy city built on strong neighbourhoods, the City must also focus on growing the economy; that means creating complete communities where locals not only enjoy living, but where they can also find great places to shop and relax, as well as good jobs. In order to meet the City of Barrie’s employment targets and wider growth management vision, we need to make sure that we’re creating the best possible environment for businesses to open up, grow and thrive. This includes ensuring that the City has available serviced, shovel-ready parcels of employment land that are ready for development and thus meet the needs and timelines of prospective businesses.

This *Employment Lands Strategy* is about doing just that. The goal of the Strategy is to provide the City of Barrie with feasible options for getting appropriately sized, serviced, shovel-ready employment land ready for business investment sooner rather than later, which will improve Barrie’s economic competitiveness overall. Ultimately, five different scenarios are presented. By revisiting the servicing and infrastructure requirements needed for larger parcels of employment land, and ensuring these requirements are met sooner, the City of Barrie can position itself as a premiere place for larger businesses to grow and create jobs.

Meeting Market Demand

The Economic and Creative Development Department regularly receives land and development inquiries from site selectors, real estate agents and businesses. For several years, there have been numerous requests for shovel-ready employment lands to be used for industrial or commercial purposes. On average, each request for land has been in the 3-10 acre-range, with some land requests as high as 100 acres. Added up, these requests are in excess of 800 acres.

Employment land for sale in the 3-10 acre-range that is ready for development and servicing is very difficult to come by, as there is nearly no supply. This issue is not just Barrie-specific – there is a current lack of servicing-ready employment land across the GTA, which currently houses one of the most constrained markets in terms of available industrial lands, despite being the third largest industrial market in North America. Thus, prospective buyers are looking further and further away from the GTA for the purchase of available industrial lands.

According to current forecasted trends, this issue will only become compounded by the rise of the e-commerce sector, which, according to Cushman & Wakefield, has created greater demand for warehousing facilities over brick-and-mortar businesses. According to Cushman & Wakefield, over the past five years e-commerce companies have been absorbing GTA employment land at an average rate of 9 million square feet/year. This trend has only strengthened during COVID-19, as the rise in online shopping has put a premium on warehousing real estate. A current development application for a major distribution centre is under construction in Barrie’s south end, plays into this trend.

In fact, CBRE¹ calls industrial “the big winner in 2020 as e-commerce took off as people stayed in and shops closed.” Similarly, according to Avison Young², the industrial sector has “quickly established itself as

¹ CBRE [Top Takeaways for 2021](#) – January 12, 2021

² Avison Young [GTA Industrial Market Report \(Q4 2020\)](#) – February 1, 2021

the GTA's best performing commercial real estate sector" during COVID-19. Avison Young also notes that the GTA North market in particular "continues to command the highest premium on rents in the GTA."

Moreover, employment rates by industry also confirm this trend; while Statistics Canada records there were 3,300 Barrie residents employed in transportation and warehousing in November 2019, that number in November 2020, according to Statistics Canada, is now 6,900 (employee numbers have more than doubled). Meanwhile, the number of Barrie residents employed in other industries located on employment lands have largely remained steady (e.g., employees in manufacturing).

Deloitte³ does note that most industries cut back their investment spending in 2020, but forecasts a substantial rebound in 2021 and into future years. Similarly, while CBRE⁴ does forecast a slowdown in the pace of growth for e-commerce, it does predict that rebounding activity in other economic areas will maintain a healthy demand for industrial space throughout 2021. In fact, CBRE⁵ has forecasted that demand for Canadian industrial lands will increase 35 per cent by 2023, with interest focused across distribution and logistics (e.g. regional distribution hubs and last-mile warehouses). The Canadian industrial market, according to CBRE, is expected to see 35.7 million square feet of net absorption by 2023. This is 9.3 million square feet more than the amount forecasted before COVID-19. CBRE also states that while industrial development is at a record level in Toronto, pent-up demand in the market remains, which will continue to drive up prices. This pent-up demand will likely have a ripple effect on surrounding areas, including in the Barrie area.

Additionally, market demand has indicated that businesses prefer to own property, seeing ownership as a long-term investment. Barrie's overall lack of shovel-ready vacant industrial land for purchase has driven prices up, which has negatively affected the City's market competitiveness. The inability to identify property for sale that has already met utilities and transportation servicing requirements, and that can satisfy the demand by businesses for land they can start building on, risks the long-term retention of these businesses and their associated employment in Barrie. That is why City of Barrie staff have been working with local realtors and businesses for the past 18–24 months to identify suitable employment land in the 10–15 acre-range for purchase that can be made shovel-ready.

While these asks to ECD for employment lands range in level of urgency (timelines, financial commitment and the stage in the decision-making process vary), they do identify a need for the City to make sure that larger, development-ready employment land sites are available to meet interest. This *Employment Lands Strategy* addresses the need for larger commercial and industrial employment sites that already have servicing needs covered by exploring the relevant policy context, surveying Barrie's current employment land situation and outlining the main challenges and opportunities attached to meeting this need. These considerations, each addressed in a separate section, ultimately build toward the core section of this *Employment Lands Strategy*: five land scenario recommendations, which are outlined below and are followed by a summary of the preferred scenarios.

Policies and Guidelines for Barrie's Employment Lands

Meeting business needs through the availability of employment land is mandated for Barrie by both the municipality and the Government of Ontario.

The Province's Growth Plan, *A Place to Grow: Growth Plan for the Greater Golden Horseshoe* (2019), defines employment lands as "areas designated in an official plan for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities" (section 7). *A Place to Grow* provides the City of Barrie with guidelines and targets for growth and highlights the importance of promoting economic development and competitiveness through the availability of employment lands (2.2.5.1).

³ Deloitte [Economic Outlook \(Quarterly Update\)](#) – January 2021

⁴ CBRE [Top Takeaways for 2021](#) – January 12, 2021

⁵ CBRE Canada [MarketFlash](#) – July 30, 2020

Ontario's Provincial Policy Statement (PPS) (2020) also provides planning direction for provincial municipalities and states that "healthy, livable and safe communities are sustained by... promoting efficient development and land use patterns which sustain the financial well-being of the Province and municipalities over the long term" (1.1.1.a). Both the Growth Plan and the PPS emphasize the importance of meeting economic needs through appropriate employment land designations.

Moreover, the Government of Ontario recently opened the Open for Business office, which strives to make it easier and quicker to do business in the province. There have been several Provincial announcements aligned with this initiative, including the 2020 Job Sites Challenge. As part of this challenge, the Ontario government asked for help in creating an inventory of mega-sites: large-scale parcels of land zoned in advance for manufacturing use and that are ready for servicing; these mega-sites were to be included in a campaign to attract new international and domestic investors to Ontario. The initiative signifies the Province's new focus on large tracts of employment land that are shovel-ready; by working to identify and create larger employment land sites in Barrie that are ready for development, the City of Barrie may also find additional opportunities to leverage the Province to help with promotion.

The City of Barrie also prioritizes meeting employment land needs. The City of Barrie's Official Plan (2010) states that one of the main goals for growth management is to "encourage and accommodate the continued expansion and diversification of the City's economic base with regard to the industrial, commercial, tourism and institutional sectors in order to strengthen the City's role as the area's principal employment centre and to achieve an appropriate balance between employment and residential land uses" (3.1.1.b).

The Official Plan also states, as a general policy, that "the City may undertake a secondary plan, community improvement plan, or special study for all or part of an industrial planning area in order to review and assess the suitability of current land use designations and policies in relation to the changing needs of industry" (4.4.2.1.g).

Currently, the City also has a draft version of a new Official Plan (2020) under review. Key objectives in this draft plan for the City include:

- Transforming Barrie into a premiere destination for business investment (7.2.a);
- Strengthening Barrie as a regional employment hub (7.2.b); and
- Planning for an appropriate range of employment uses and maintaining an adequate supply of *Employment Land* areas (7.2.c).

The new draft Official Plan also supports the "expansion of existing *Employment Areas* to support long-term economic prosperity" (2.3.4.h) and recommends providing "a range of parcel sizes and street patterns to maintain the flexibility needed to attract a variety of businesses" (2.3.5.m).

Both the Province and the City of Barrie recognize the importance of proper planning to support economic prosperity and projected employment growth in Barrie; ensuring we have the right-sized properties that are not only available for prospective businesses, but are already ready for utilities and transportation servicing by utilities, is an important part of this planning.

Survey of Current Employment Lands

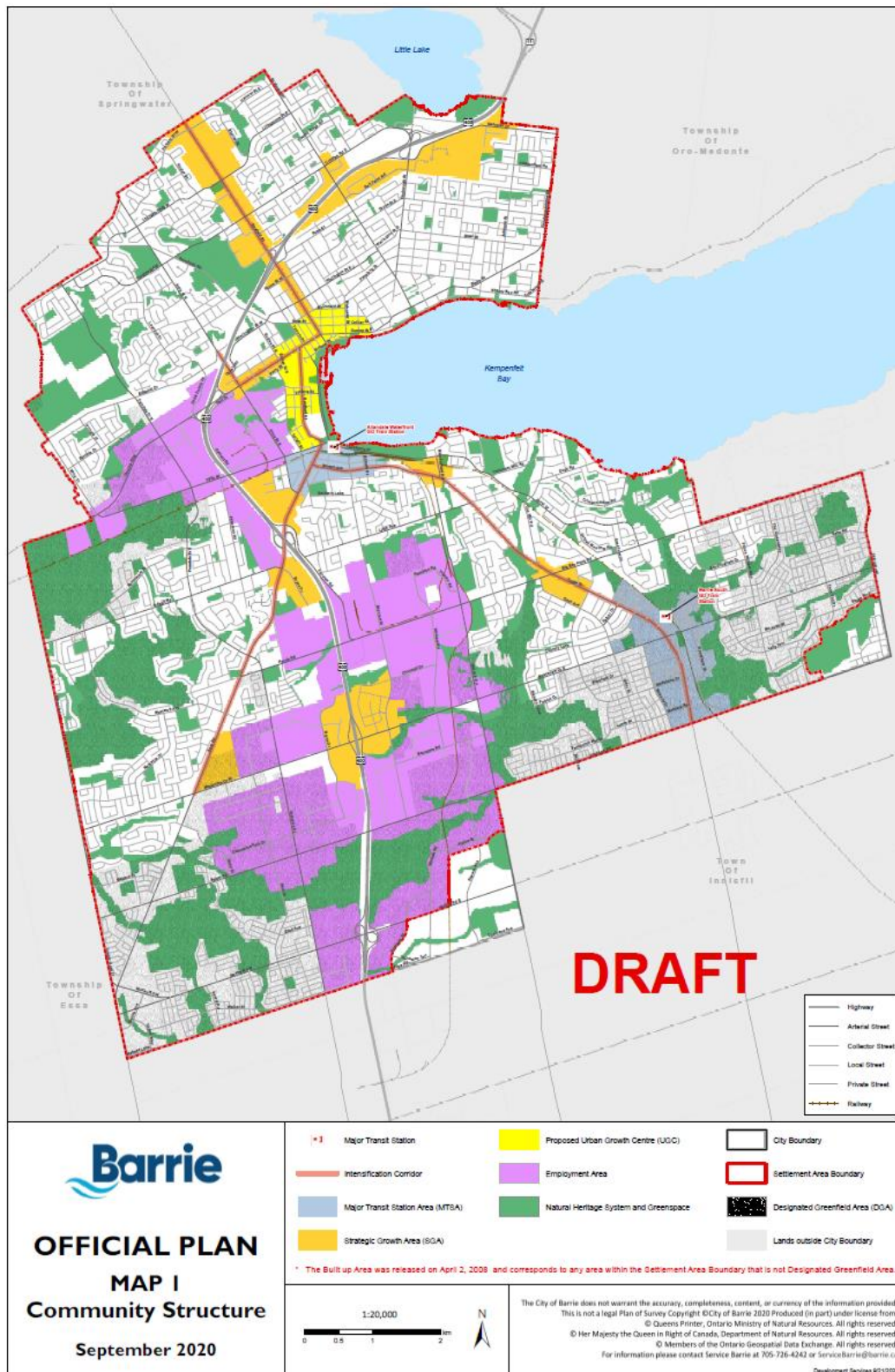
The following section provides a survey of the City's current employment areas and highlights the methodology taken by planning staff to determine recommended scenarios for larger employment sites that are shovel-ready. It provides some of the necessary background for making informed decisions about the City of Barrie's employment lands.

Official Plan Employment Areas

There are approximately 526 hectares of vacant employment land in the City of Barrie, however more is needed to properly support employment growth for our communities into 2051. There have been an additional 170 hectares of employment land proposed through the employment land conversion process earlier this year, as well as the Municipal Comprehensive Review, to support future jobs. These additional 170 hectares of employment land are earmarked for the Salem Secondary Plan Area as part of a settlement boundary expansion in the new Official Plan.

The chart and map provided below give a more detailed picture of the City of Barrie's current employment land.

Employment Area Land Summary in Gross Hectares	
Occupied (1)	1013
Vacant (2)	<u>526</u>
<i>Gross Total Existing</i>	1539
Conversion Adjustment (3)	<u>-57</u>
<i>Net Total Existing</i>	1482
New Employment Area Lands (4)	<u>170</u>
Grand Total	1652
1 - See Figure 19b of Watson & Associates Economists LTD. June 12, 2019 Memo Re: City of Barrie M.C.R. Land Needs Assessment.	
2 - See Figure 5-17a of Municipal Comprehensive Review Long-Term Urban Land Need Study (Watson and Associates Economists LTD.).	
3 - Sum of all existing Employment Area land proposed to be converted to non-employment uses.	
4 - Employment Area land needs to 2041 adjusted to account for conversions.	



The purple represents the lands in Barrie proposed to be designated as employment areas.

Methodology: Steps Taken by Staff to Prepare Scenarios

In order to prepare scenarios for making available larger portions of employment land ready for development and servicing, staff took the following steps:

1. Staff in the Development Services and Economic and Creative Development Departments identified vacant employment lands that were more than 20 acres in size (while also identifying a couple of potential sites more than 10 acres in size).
2. Staff then outlined the status of each potential site through mapping, identifying zoning and summarizing the general status of each site according to various planning policies and guidelines.
3. Once the status was outlined, staff then worked with the Infrastructure and Corporate Asset Management Department to identify where water and sanitary infrastructure is located in proximity to each site.
4. Staff across the Economic and Creative Development, Corporate Asset Management and Development Services Departments then met to discuss the servicing requirements for each identified land site to be brought to market. Discussions revolved around: access to servicing, responsibility for servicing and each parcel's relationship to servicing for Capital Plan projects.

Opportunities and Challenges

Based on the discussions that occurred as staff took steps to identify viable employment land sites of a larger size that can be made ready for servicing and development, a number of opportunities and challenges were presented. This section outlines a variety of necessary factors for consideration, including servicing, questions pertaining to land ownership, the opportunities and restrictions associated with incentivization, conservation authority guidelines and budgeting through the Capital Plan.

Servicing

Employment lands need local servicing. Local servicing costs are those associated with servicing actual individual parcels at the time of development and cannot be funded through Development Charges. Servicing of those identified parcels of employment land within the built boundary would normally be at the developer's cost. Generally, local services are paid directly by the developer and assumed by the City once complete, as per the City's local servicing policy and as aligned with industry standards. Additionally, local servicing costs charged to the developer help pay for trunk infrastructure.

In the case of the priority employment land sites outlined in the Strategy, the City would need an alternative approach to costing. A comprehensive approach to advancing employment land development would need to address both the municipal servicing infrastructure through the City's Capital Plan and local servicing costs. For some of the land parcels outlined in the recommended scenarios, there is servicing already within their proximity or trunk infrastructure work has already taken place.

The City would need to support upfront servicing costs in order to advance making these sites shovel-ready. While some high-level estimations have been determined for select prioritized employment land sites, the extent of local servicing costs is often difficult to confirm until a detailed plan for developing the site is put in place; one that also outlines the needs related to the development's use (e.g., industrial). The cost estimations for servicing provided in the Recommendations section of this strategy are high-level and were prepared without knowledge of what the development might look like.

A Community Improvement Plan (CIP) is one option that could be explored to open up the possibility for the selected scenarios to be expedited in terms of servicing, and for the Employment Lands Strategy to move forward. Staff would need to develop a program and criteria in consultation with the development community and the Finance Department to ensure any new CIP program achieves the outcome of advancing serviced, shovel-ready employment lands to the marketplace, while managing the City's fiscal obligations.

In order to provide adequate servicing, the land parcels in each recommended scenario are additionally subject to the Capital Plan. Each scenario's current status, in relation to project numbers and costs associated with the 2021-2030 Capital Plan, is discussed further in the Recommendations section of this strategy. It is important to note that the Capital Plan is currently overcommitted due to the high growth phase that the City is in.

Competitiveness/Incentives

The issue of using incentives to attract investment is a long-standing economic development discussion in Ontario as it relates to competitiveness. The Government of Ontario has a policy of not providing grants or subsidies to any business to locate in Ontario. Furthermore, Ontario municipalities are prohibited from using bonuses to attract business. There are many articles that argue for either side of the incentive issue. The general argument against incentives is that companies are often not committed to the community over the long-term and that the return on investment to a community, particularly in terms of employment, is not always achievable when property tax breaks and the provision of 'free land' are used.

As a result, Ontario municipalities are overall on a level playing field and generally rely on the same tools to attract investment. Key competitive advantages that Barrie has for business attraction are a talent pool and pipeline through Lakehead University and Georgian College, proximity to the GTA without the comparably high land costs, and a range of development facilitation services.

Brampton is likely the closest municipality to Barrie in approach; the City of Brampton provides messaging and servicing similar to what Invest Barrie offers, as well as similar development facilitation supports through pre-meetings with developers, development application tracking, etc.

When it comes to investment attraction for development (specifically for building industrial/commercial developments, multi-residential developments, etc.), the only incentive opportunities are the Community Improvement Plans or Development Charges. However, to operate successfully, both of these programs rely on additional municipal funding in the form of a grant or a supplement.

Development Charges

The Development Charges By-law came into effect June 2019 and will not be subject to a full review for a five-year period. An extensive and costly background study informs our Development Charges By-law. With the recent legislative changes to the Development Charges Act, staff have engaged Watson & Associates to update the City DC by-law to reflect specific legislative changes, but is not a comprehensive review.

Council did include a 40 per cent discounted rate for the first 1.5 million square feet of development intended for office/industrial uses as defined by the City's Zoning By-law (the discounted rate will only remain active throughout the life of the By-law).

Community Improvement Plans

Community Improvement Plans (CIPs) traditionally are primarily directed toward the downtown or key areas of a city targeted for economic revitalization. They are regulated through the Planning Act and allow the City to provide grants or loans in the form of tax increments or equivalent financing programs to help reduce development costs.

The City of Barrie's current CIP has the following Council-endorsed objectives:

- Facilitate the development of a mix of land uses within the Urban Growth Centre (UGC);
- Support built heritage preservation; and
- Support the provision of a variety of affordable housing units by offering financial support based on a continuum of housing options.

The intent of the current CIP is to intensify the UGC and other strategic growth areas by encouraging a mix of land uses and an increase in the number of residential units. The following are the specific intentions of the CIP:

- Make use of existing municipal services and infrastructure;
- Create a mix of unit types across the continuum of affordable housing options, geared towards the low and low to moderate income households;
- Increase the number of affordable housing units within the City; and
- Facilitate renovation, restoration and adaptive reuse of existing buildings in the UGC and buildings included on the Municipal Heritage Register.

As such, there is an opportunity to further explore options through a CIP program, noting that a 2021 funding source for the existing program has not yet been identified.

As part of the *Employment Lands Strategy*, a grant program within the CIP could be funded to support the front-ending of local servicing costs in priority employment land areas. This approach is advised, as neither the City's existing, nor forecast Capital Plan includes any costs for installations of local servicing costs. Neither are costs eligible to be funded from Development Charges. According to the City's local servicing policy, developers are currently responsible for covering the costs of local servicing. However, this complicates the ability of the City to expedite making employment land areas serviced and shovel-ready.

A CIP grant would provide an incentive to overcome this barrier by enabling the City to be able to support front-ending of local servicing costs in order to bring employment lands on-line. CIP incentives for employment lands could be achieved through additional funding to the CIP. The funding source – while ultimately supported by the tax base – could be additional debt financing, transfers from reserves or another mechanism directed by Council.

Capital Plan

The City of Barrie's Capital Plan outlines the financial commitments that allow the City to acquire, operate, maintain and renew its assets. It allows the City to reliably provide services like transportation, drinking water and sewage disposal. The Capital Plan addresses infrastructure requirements across Barrie, including for the development of lands designated for employment. The servicing for all employment land in Barrie is subject to the projects included in the approved Capital Plan. The 2021-2030 Capital Plan was developed in accordance with the following principles:

- Address critical infrastructure renewal needs and mitigate flooding;
- Support growth in the secondary plan areas and intensification within the built boundary;
- Cost and schedule certainty; and
- Affordability.

The Capital Plan is based on the 2020-2029 Capital Plan, but with some significant changes. The infrastructure projects were reviewed in detail based on project scope and cost; cost estimates were updated and realistic cash flows developed. In addition, some projects have been deferred to ensure that the proposed plan is achievable using existing resources.

Project deferrals in the first five years have resulted in gross costs significantly lower in the 2021-2030 plan than in the 2020-2029 plan. In the remaining years of the 2021-2030 plan, gross costs are higher than in the 2020-2029 plan. Large projects such as the Wastewater Treatment Facility (WwTF), and the McKay sewer and interchange, have higher costs in the latter five years, contributing to greater affordability challenges in those years.

Additionally, a number of projects have been deferred to the extent that they will happen beyond the timeframe of the 2021-2030 Capital Plan. The needs associated with these more greatly deferred projects still exist and there is a need to continue to build healthy reserves to address those needs in the future. Barrie can expect to incur some additional risks and reduced service levels as a result of these deferrals.

Serviced employment lands are an identified Council Strategic priority for the next two years. The 2021 Capital Plan, notwithstanding extensive review and rework to defer projects to better reflect actual growth cycle needs, will still not render all employment lands serviced and shovel-ready.

Willingness to Sell Parcels

Some landowners have indicated a desire to "hold" their lands for future development or flip their property, which means that servicing requirements have not yet often been met and these lands are not available for development. Other lands may be available for development, but only through a lease agreement and not through the transfer of land to the business owner. This is inconsistent with the needs of some prospective business owners who want to locate in the area and would prefer to own the land on which they build a business, but are seeing market demand exceed current supply. Those prospective business owners who have expressed a preference for owning the land on which they build a business are being met with a limited supply of options – their needs are not being satisfied by the market. This is the case in Barrie, as well as in other municipalities.

Lake Simcoe Region Conservation Authority (LSRCA) Studies and Costs

In instances where employment land development in the City of Barrie is not in the regulated area, some property owners are experiencing challenges tied either to the Lake Simcoe Phosphorous Offset Program (LSPOP) or the Ecological Offsetting plan. Both policies, established by the LSRCA in 2017, are designed to improve the health of Lake Simcoe and its overall watershed in support of the objectives of the Province's Lake Simcoe Protection Plan. The LSPOP and Ecological Offsetting plan are applicable throughout the watershed of the LSRCA. The policies are designed to avoid, minimize, mitigate and – as a final option – compensate. The City is aware of significant phosphorus and ecological offsetting costs associated with both of these policies (hundreds of thousands to millions of dollars); these costs significantly impact the viability of a development project.

Phosphorus Offsetting

As new urban growth occurs, phosphorus loads will be controlled to the maximum extent possible. Any remaining stormwater phosphorus that cannot be controlled would require an "offset" to achieve a net zero target. The offset measure could include reductions in phosphorus elsewhere (through the use of Low Impact Development techniques) or retrofitting existing stormwater discharges elsewhere (preferably within the same sub-watershed or in an adjacent watershed).

Ecological Offsetting

Implementing the ecological offsetting is one of the ways to improve health of the watershed in order to respond to the impacts on the landscape as a result of development. The Policy requires property developers to compensate for the negative environmental consequences of their activities on the land.

Recommendations: New Employment Land Scenarios

After weighing all opportunities and considerations, five employment land scenarios were prepared. Each scenario is a potential choice for meeting the interest of shovel-ready larger employment land sites expressed to the Economic and Creative Development Department. Additionally, given the scope and financial impacts of Scenarios 1 and 2, Scenario 1 has been divided into a Scenario 1a and a Scenario 1b option, while Scenario 2 has been divided into a Scenario 2a and a Scenario 2b option. The seven options, in total, are presented below.

Within each of the following sections, a detailed assessment of what is needed to make each scenario site shovel ready is provided. This assessment is broken down by immediate infrastructure and servicing requirements, as well as 2041 build-out requirements. In other words, the needs that must be met for each site to be made shovel ready in the short term are listed; and the infrastructure construction required longer-term to meet the City's 2041 plan is also listed. Estimated costs, where applicable, are also given for each scenario, as well as any alignments with the Capital Plan. Finally, for each scenario, an estimated timeline is given for making the site development ready.

Maps for all scenarios are provided in the following appendix (Appendix "B"). Please see maps to further identify any specific parcels or servicing requirements referenced below.

Scenario 1a: Veteran's Drive, North of Salem Road and Commerce Park Drive

This scenario site, which is located on both sides of Veteran's Drive, is 64.68 hectares in size. An assessment of what is needed in the short-term to make the site shovel ready is provided below, as well as the 2041 build-out requirements:

Immediate Requirements

Infrastructure Required:	<ul style="list-style-type: none">• Development can proceed with existing water/sanitary infrastructure• Development of parcel 15 requires traffic signal improvements on west leg of existing Commerce Park and Veteran's intersection
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none">• High-level estimate is \$150,000
Local Servicing Component:	<ul style="list-style-type: none">• Servicing parcel 15 requires local water, wastewater, local and collector roads
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none">• \$5 million• Local servicing costs could be covered via the CIP and using a front-ending approach
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none">• Not in Capital Plan
When Scenario Could be Advanced:	<ul style="list-style-type: none">• The costs and level of servicing effort are minor; the parcel of land could be constructed by the City or by a developer as part of a development proceeding

2041 Build-Out Requirements

Infrastructure Required:	<ul style="list-style-type: none">• None
Estimated Costs:	<ul style="list-style-type: none">• N/A

Scenario 1b: Veteran's Drive, South of Salem Road

This scenario site, which is located on both sides of Veteran's Drive, is 85.73 hectares in size. An assessment of what is needed in the short-term to make the site shovel ready is provided below, as well as the 2041 build-out requirements:

Immediate Requirements

Infrastructure Required:	<ul style="list-style-type: none"> Extension of existing transmission watermain, south on Veteran's and looping onto Salem Addition of left-turn lanes at Salem and Veteran's
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> High-level estimate is \$2.4 million for watermain, including looping
Local Servicing Component:	<ul style="list-style-type: none"> Servicing parcels 16, 17 and 18 requires local water, wastewater and roads As per the City's local servicing policy, developers currently cover servicing costs while the City assumes the assets; funding for these local servicing costs are not included in the City's forecasted Capital Plan and are not eligible to be funded from Development Charges
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> \$7 million
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> Included as a portion of EN1258 (2021) and EN1340 (post-2030)
When Scenario Could be Advanced:	<ul style="list-style-type: none"> Parcels could be serviced by phased construction of capital projects EN1258 and EN1340 as early as 2024

2041 Build-Out Requirements

Infrastructure Required:	<ul style="list-style-type: none"> Full build-out of the area will require a number of projects: <ul style="list-style-type: none"> EN1257 - McKay Road ROW Expansion: Reid Drive to East of Highway 400 (developer responsible for costs) EN1256 - McKay Road New Trunk Sanitary Sewer - Highway 400 to Huronia Road (developer responsible for costs) EN1258 – Veteran's Drive New Trunk Watermain and Road Expansion – Salem Road to McKay Road (developer responsible for costs) EN1255 - Huronia Road New Trunk Sanitary Sewer and Road Replacement – Lockhart Road to McKay Road (developer responsible for costs) EN1457 – Veterans Drive Road Expansion – Salem to McKay (Developer)
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Estimated Costs:	<ul style="list-style-type: none"> • EN1258: \$8 million • EN1257: \$44.1 million • EN1457: \$24.8 million • EN1255: \$29.2 million • EN1256: \$37.7 million • Total cost: \$143.8 million
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Scenario 2a: Bryne Drive North, Along Harvie Road

This scenario site, which will be located along a to-be-built portion of Bryne Drive, north of Harvie Road, is 38.04 hectares in size. An assessment of what is needed in the short-term to make the site shovel ready is provided below, as well as the 2041 build-out requirements:

Immediate Requirements

Infrastructure Required:	<ul style="list-style-type: none"> • Construction of 5-lane Bryne Drive, including storm sewer, sidewalk, streetlights, water main and sanitary sewer (within ROW)
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> • Total cost: \$18.6 million
Local Servicing Component:	<ul style="list-style-type: none"> • Subject to internal servicing (local benefit roads, sewer and water; details to be determined and are development dependent) • 250 mm sanitary to connect main within ROW to Harvie Road for outlet
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> • Details for servicing costs are to be determined once development takes place
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> • Aligned with project EN1278 (2027-29, for project construction)
When Scenario Could be Advanced:	Able to advance to 2023 construction start for Bryne north, provided that the City is able to obtain the necessary property dedications from Bell Media in a timely manner.

2041 Build-Out Requirements

Infrastructure Required:	<ul style="list-style-type: none"> • None
Estimated Costs:	<ul style="list-style-type: none"> • N/A

Scenario 2b: Bryne Drive South, Along Harvie Road

This scenario site, which will be located along a to-be-built portion of Bryne Drive, south of Harvie Road, is 25.93 hectares in size. An assessment of what is needed in the short-term to make the site shovel ready is provided below, as well as the 2041 build-out requirements:

Immediate Requirements

Infrastructure Required:	<ul style="list-style-type: none"> Construction of 5-lane Bryne Drive, including storm sewer, sidewalk, streetlights, watermain and sanitary sewer (within ROW)
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> \$11.8 million (construction costs)
Local Servicing Component:	<ul style="list-style-type: none"> Subject to internal servicing (local benefit roads, sewer and water; details to be determined and are development dependent)
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> Details for servicing costs are to be determined once development takes place
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> Aligned with project EN1277 (2022-24, for project construction)
When Scenario Could be Advanced:	<ul style="list-style-type: none"> The Bryne south area is scheduled for construction in 2022 subject to SmartCentres conveying the necessary property dedications, and while pre-construction activity can commence, project construction cannot be advanced

2041 Build-Out Requirements

Infrastructure Required:	<ul style="list-style-type: none"> None
Estimated Costs:	<ul style="list-style-type: none"> N/A

Scenario 3: Big Bay Point Road, East of Bayview Drive

This scenario site, which is located on the north-east corner of Big Bay Point Road and Bayview Drive, is 15.52 hectares in size. An assessment of what is needed in the short-term to make the site shovel ready is provided below, as well as the 2041 build-out requirements:

Immediate Requirements

Infrastructure Required:	<ul style="list-style-type: none"> Development can proceed now as water and sanitary mains are in place
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> N/A

Local Servicing Component:	<ul style="list-style-type: none"> • Service connections for water and sanitary • These services will be installed as part of the construction for City Projects along Big Bay Point and Bayview
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> • Local servicing costs are no longer applicable as the construction start for Big Bay Point Road is scheduled for June 2021 and utilities are currently being relocated.
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> • N/A (though projects on Bayview and Big Bay Point are included in the Capital Plan, as EN1288 [Bayview construction forecast for 2024-27] and EN1286 [Big Bay Point construction request is for 2021-22])
When Scenario Could be Advanced:	<ul style="list-style-type: none"> • When local servicing work is complete.

2041 Build-Out Requirements

Infrastructure Required:	<ul style="list-style-type: none"> • Widening of Big Bay Point Road and Bayview Drive preferred and planned within the 2021-2030 Capital Plan
Estimated Costs:	<ul style="list-style-type: none"> • TBD

Scenario 4: McKay Road West, East of Veteran's Drive

This scenario site, which is located on the north and south side of McKay Road West and along Veteran's Drive, is 91.03 hectares in size. An assessment of what is needed in the short-term to make the site shovel ready is provided below, as well as the 2041 build-out requirements:

Immediate Requirements

Infrastructure Required:	<ul style="list-style-type: none"> • Construction of road improvements • Construction of 500mm Tx watermain • Construction of 400mm local watermain • Addition of McKay and Huronia trunk sanitary sewer
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> • Total cost: \$97.4 million (\$37.4 million for roads and watermain, \$60 million for McKay and Huronia sewer)
Local Servicing Component:	<ul style="list-style-type: none"> • Local watermain (400mm) on Veteran's from Salem to McKay • Local roads • Local sewers

Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> Watermain: \$6 million Roads: \$16.8 million Local Sewers: \$5-7 million Total cost: \$27.8-29.8 million The cost estimate is high-level and was prepared without knowledge of what the development might look like; the City would have to front-end these servicing costs and could do so via the CIP
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> Timing aligns with the following projects: <ul style="list-style-type: none"> EN1255 (2024-27) EN1256 (2023-26) EN1258 (2021-22) EN1257 (2021-26) EN1251 (2029-32)
When Scenario Could be Advanced:	<ul style="list-style-type: none"> The earliest possible start for construction would be in 2023.

2041 Build-Out Requirements

Infrastructure Required:	<ul style="list-style-type: none"> EN1258 - Veteran's Drive New Trunk Watermain - Salem to McKay EN1257 - McKay Road ROW Expansion - Reid Drive to East of Highway 400 EN1428 (000926) - Salem Reservoir and Pump Station EN1256 - McKay Road New Trunk Sanitary Sewer - Highway 400 to Huronia EN1338 - Veteran's Drive Road Expansion - McKay to City Limits EN1251 - McKay Road New Interchange - Highway 400 (City) EN1255* - Huronia Road New Trunk Sanitary Sewer and Road Replacement Lockhart to McKay EN1457 - Veteran's Drive Road Expansion - Salem to McKay 000293 - Transmission Watermain - Mapleview to Lockhart EN1345* - McKay Road - Road Improvements - Highway 400 Interchange to Huronia Road <p><i>*Project does not include ultimate transportation improvements to 2041</i></p>
Estimated Timing and Costs Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> EN 1258 (2021): \$8 million EN 1257 (2021): \$44.1 million EN 1428 / 000926 (Post 2031): \$30 million EN 1256 (2024): \$37.7 million EN 1338 (Post 2031): \$4.8 million EN 1251 (2028): \$78.6 million EN 1255 (2024): \$29.2 million EN 1457 (2027): \$24.8 million 000293 (2030): \$5.4 million EN 1345 (2030): \$4.9 million Total Cost: \$267.5 million

Scenario 5: Bayview Drive, North of Lockhart Road

This scenario site, which is located just east of Bayview Drive along Lockhart Road, is 37.05 hectares in size. An assessment of what is needed in the short-term to make the site shovel ready is provided below, as well as the 2041 build-out requirements:

Immediate Requirements

Infrastructure Required:	<ul style="list-style-type: none"> Extension of Welham Road Extension of sanitary sewer on Lockhart from Welham to the existing sewer (east of the rail corridor)
Estimated Infrastructure Cost(s):	<ul style="list-style-type: none"> Welham Road: \$7.2 million Lockhart sewer: \$2.0 million Total cost: \$9.2 million
Local Servicing Component:	<ul style="list-style-type: none"> 250mm sanitary sewer 300mm watermain
Estimated Local Servicing Cost(s):	<ul style="list-style-type: none"> \$1.2 million This cost estimation is high-level and was prepared without knowing what the development would look like; the City would have to front-end these servicing costs and could do so via the CIP
Current Timing Proposed in 2021 Capital Plan:	<ul style="list-style-type: none"> Welham not in Capital Plan Lockhart currently listed as a post-2031 project in Capital Plan
When Scenario Could be Advanced:	<ul style="list-style-type: none"> Advancement of local servicing is subject to the developer's schedule The works on Lockhart Rd could be advanced to 2025 construction start

2041 Build-Out Requirements

Infrastructure Required:	<ul style="list-style-type: none"> Road – Lockhart widening to 5 lanes west of Huronia to Veteran's (including the grade separated railway crossing and Highway 400 crossing) EN1272 – Salem/Lockhart - Veteran's to Saunders (post-2031), including Highway 400 Crossing EN1334 – Lockhart - Saunders to Huronia (2026 construction start). Includes grade separation with BCR EN1138 (post-2031) Sewer – decommission of PS4 EN1272 and EN1334 Water – 750mm transmission watermain on Lockhart connecting to the future Salem Reservoir
Estimated Costs:	<ul style="list-style-type: none"> EN1272: \$37.5 million EN1334: \$45 million EN1138: \$2 million Total cost: \$84.5 million

Preferred Scenarios

The preferred scenarios out of the above recommendations are Scenarios 1a, 2b and 3 at this time. These are the preferred scenarios based on market considerations, estimated costs, overall construction start timing and alignment with the Capital Plan. Scenario 2a would be the second most preferred scenario.

Scenario 1a is essentially ready for development and will make available a significant area of shovel-ready employment land at nearly 65 hectares. A minimal municipal capital investment of \$150,000 would be required to be advanced for traffic signaling. Local servicing costs are estimated at \$5 million.

Scenario 3 offers a smaller site in comparison to other scenarios, but provides for a variation in lot size at 15.52 hectares. Development for this scenario can proceed after local servicing work is complete, without capital contribution.

Given that Scenario 2b is scheduled in the current 2021 Capital Plan for a 2022 construction start and cannot be advanced, it would be more appropriate for Scenario 2a to be included in the preferred scenarios to be advanced.

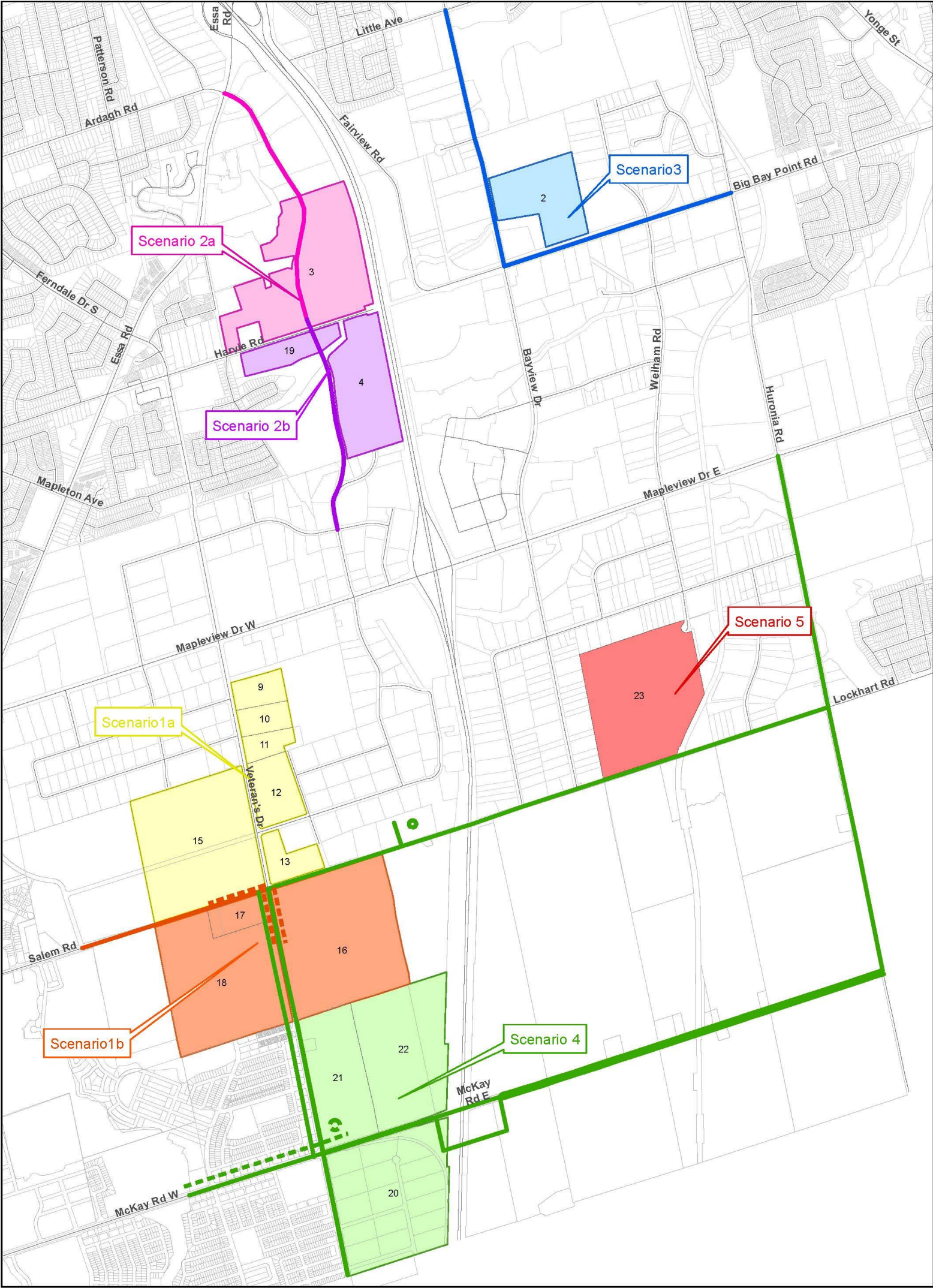
Scenario 2a provides substantial acreage with a mix of both commercial employment and industrial employment zones. While construction of the site cannot commence until 2023, associated design works could be advanced to 2021 should the property required for the Bryne Drive road extension be dedicated to the City.

Conclusion: Building on the *Employment Lands Strategy*

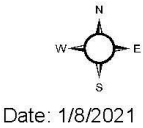
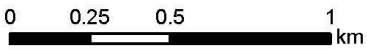
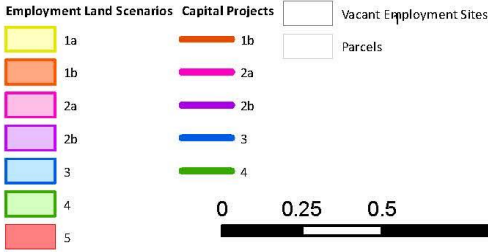
As the City of Barrie plans for growth, it is important to keep engaging the community to determine the best ways to secure Barrie's reputation as a premiere place to live, play and do business. It is important to keep fostering our partnerships, especially as landowners and/or property developers are responsible for bringing their properties to market and making them available for sale and/or development. Members of the business community have expressed to the Economic and Creative Development Department their desire to purchase larger employment land sites in Barrie that are ready for development; the recommended scenarios from this *Employment Land Strategy* provide the City with the necessary foundation for making an informed decision about advancing servicing requirements to meet this particular business need.

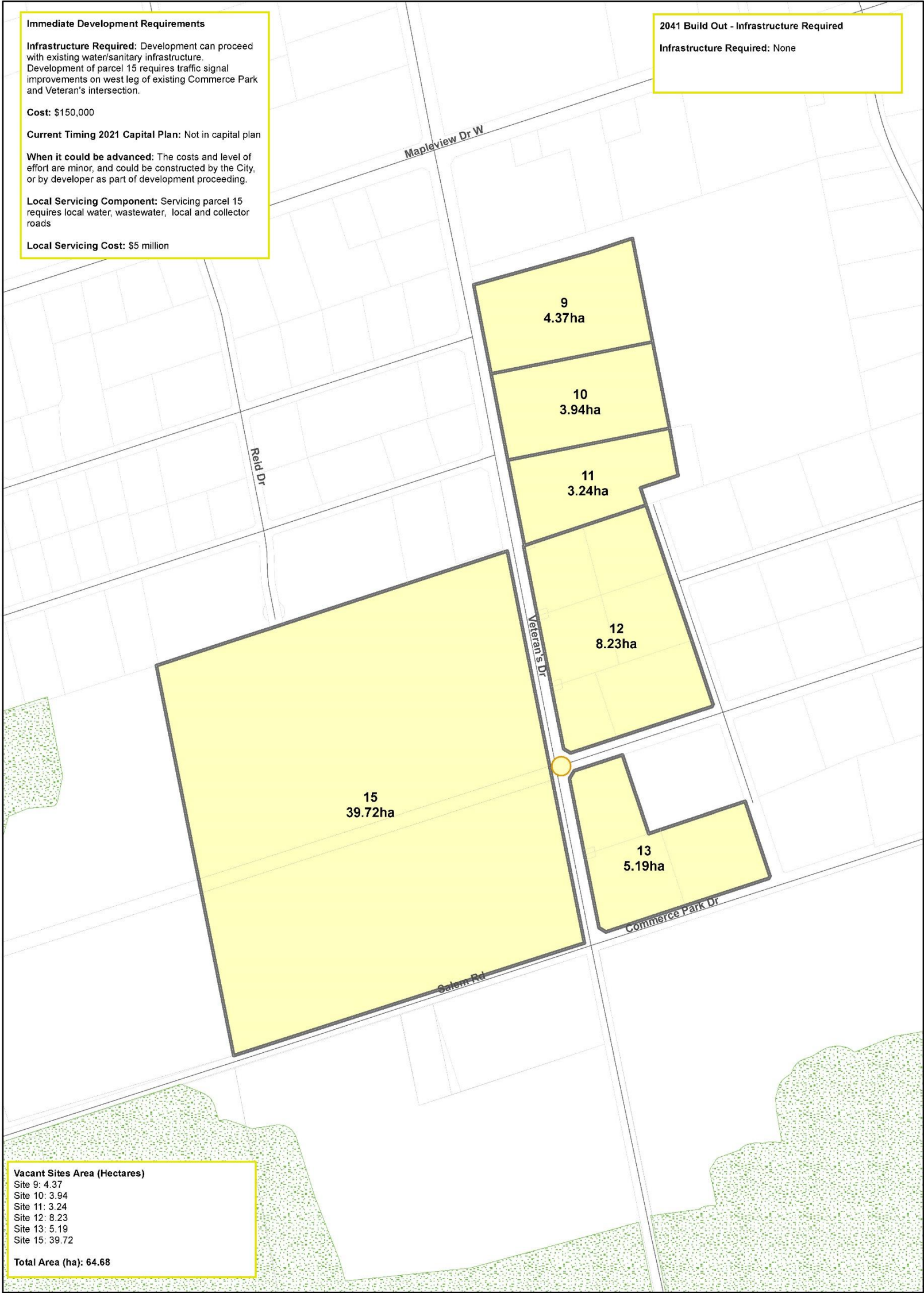
Managing growth does not just mean planning for new people; it also means planning for new jobs, businesses and diversifying and growing the economy. This *Employment Lands Strategy* is intended to help the City of Barrie stimulate economic growth and employment opportunities by ensuring we have the right type of land available, and in the right state, to meet business needs. By meeting servicing requirements sooner and ahead of development for larger parcels of employment land, the City of Barrie will not only be able to meet the local needs expressed by businesses, but will be able to better position itself as a key economic competitor for attracting new investment and creating new jobs.

APPENDIX “B”
Employment Lands Strategy Maps

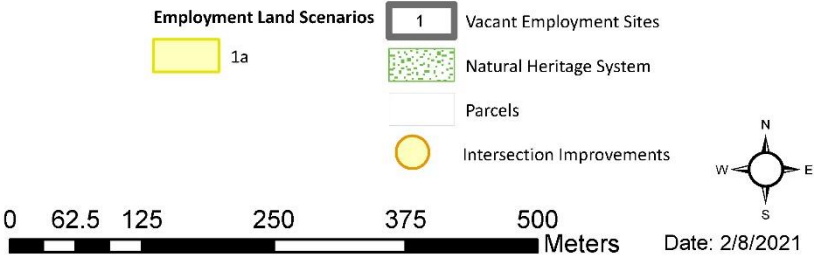


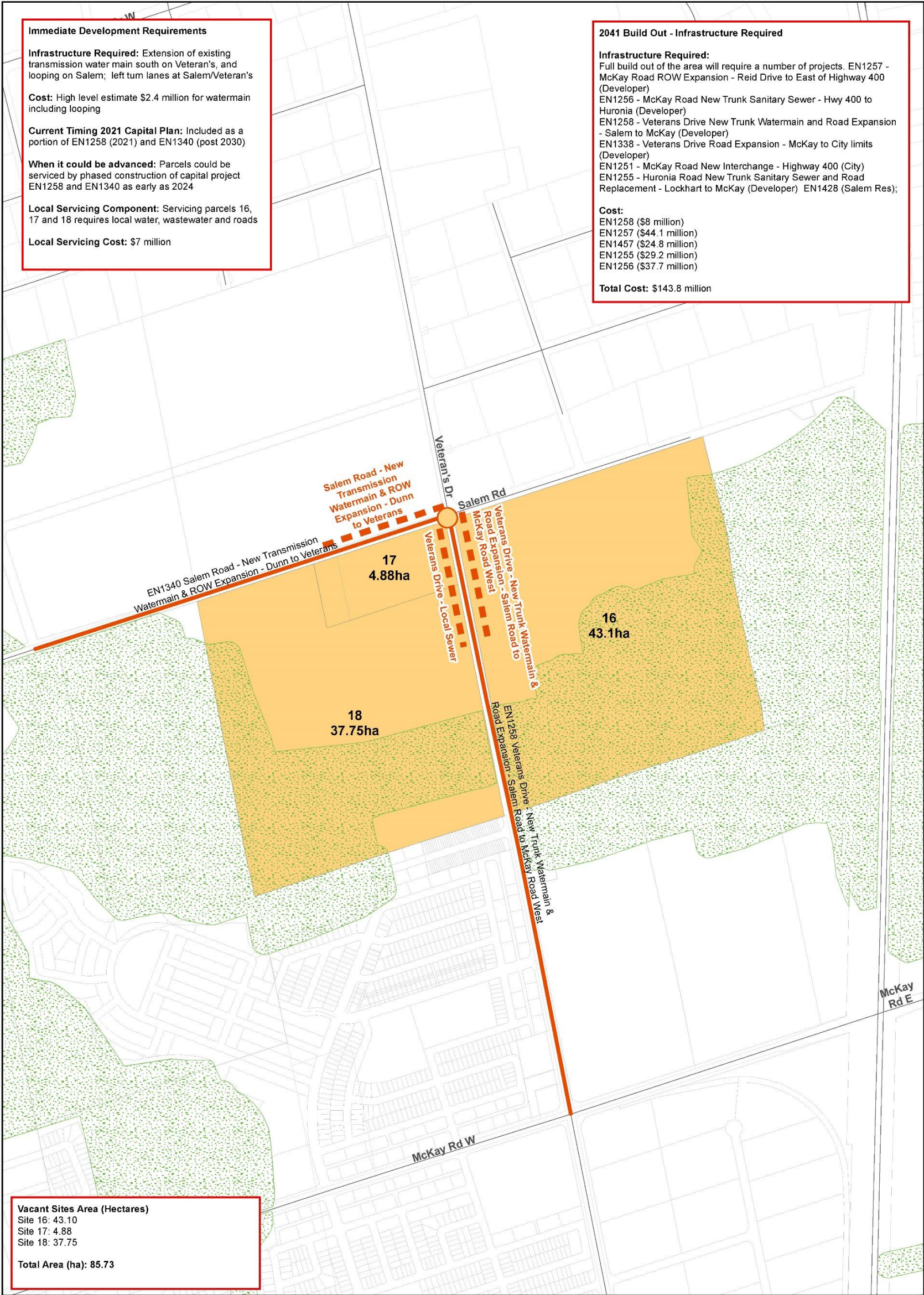
Infrastructure needed to support
Employment Lands
Various Scenarios



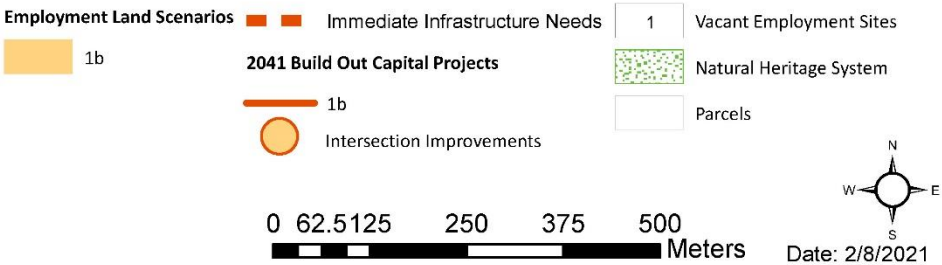


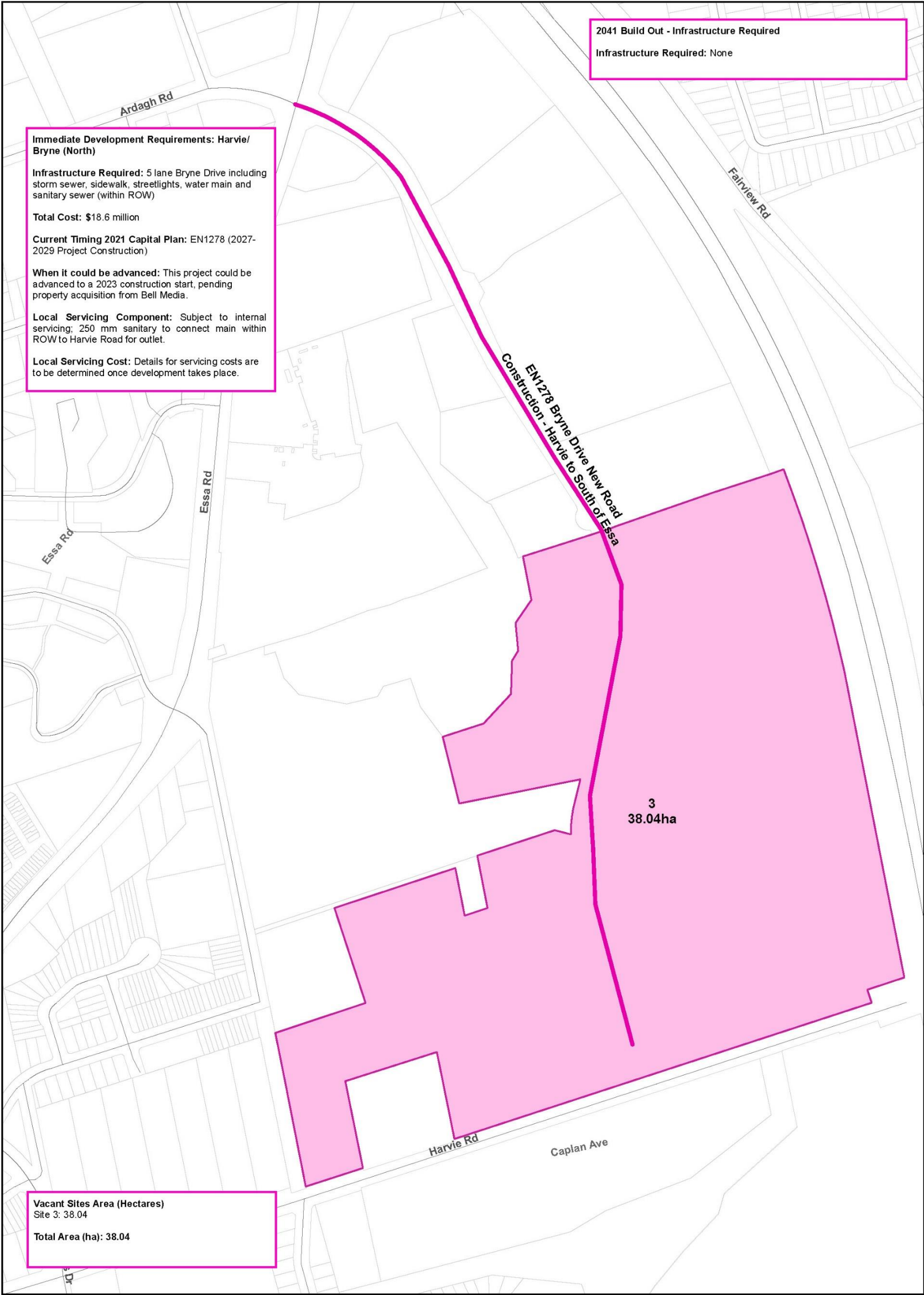
Infrastructure needed to support
Employment Lands
Scenario 1a



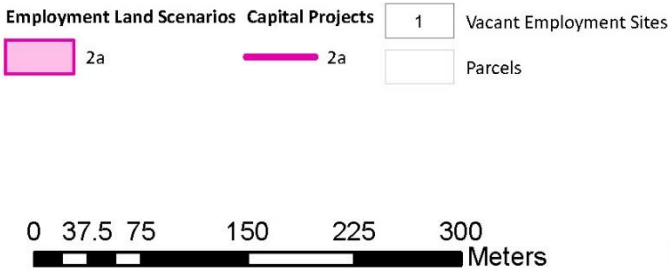


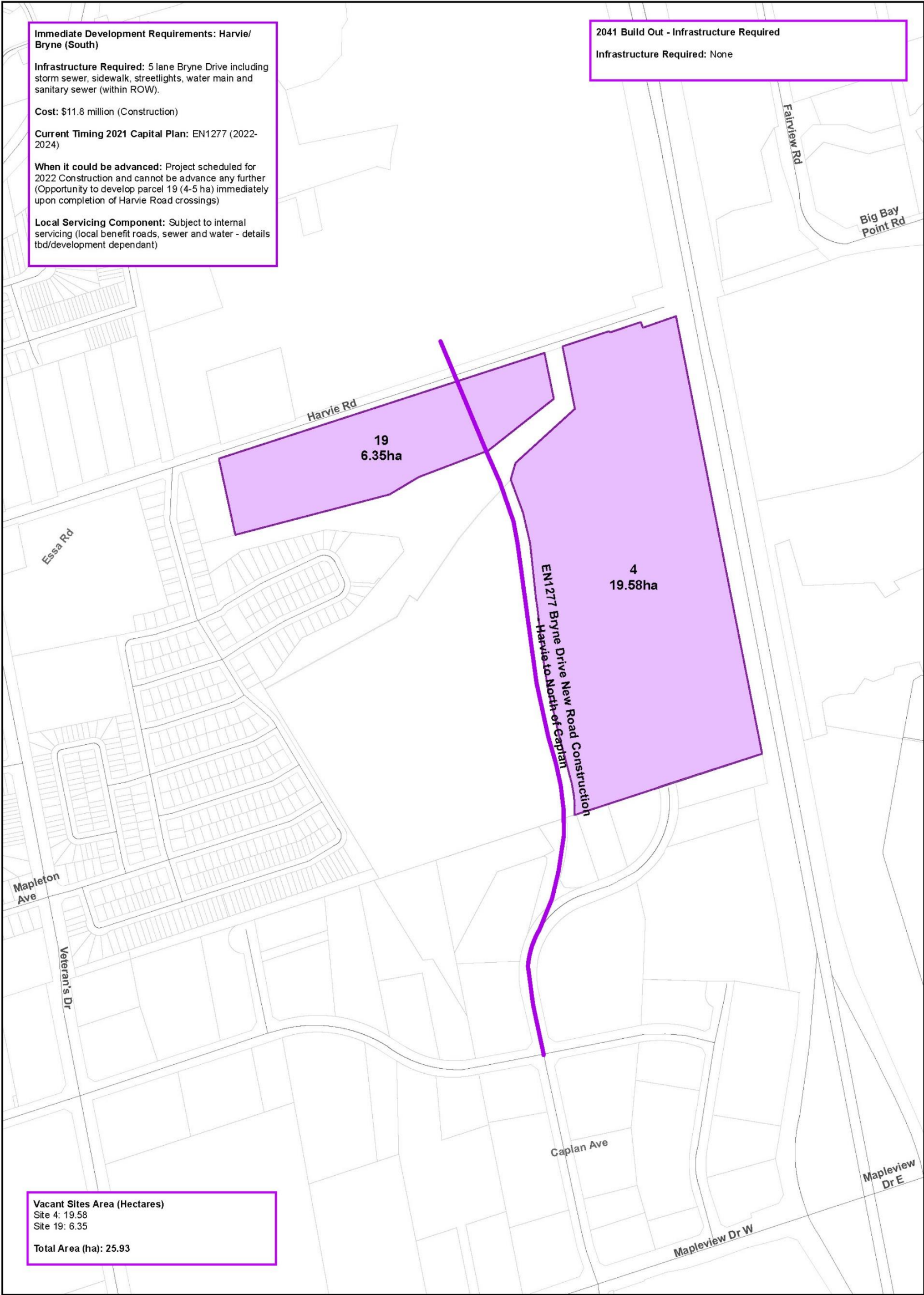
Infrastructure needed to support
Employment Lands
Scenario 1b



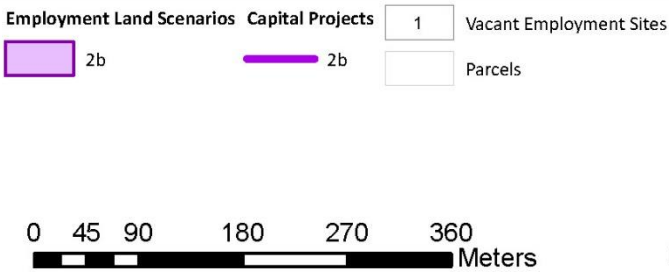


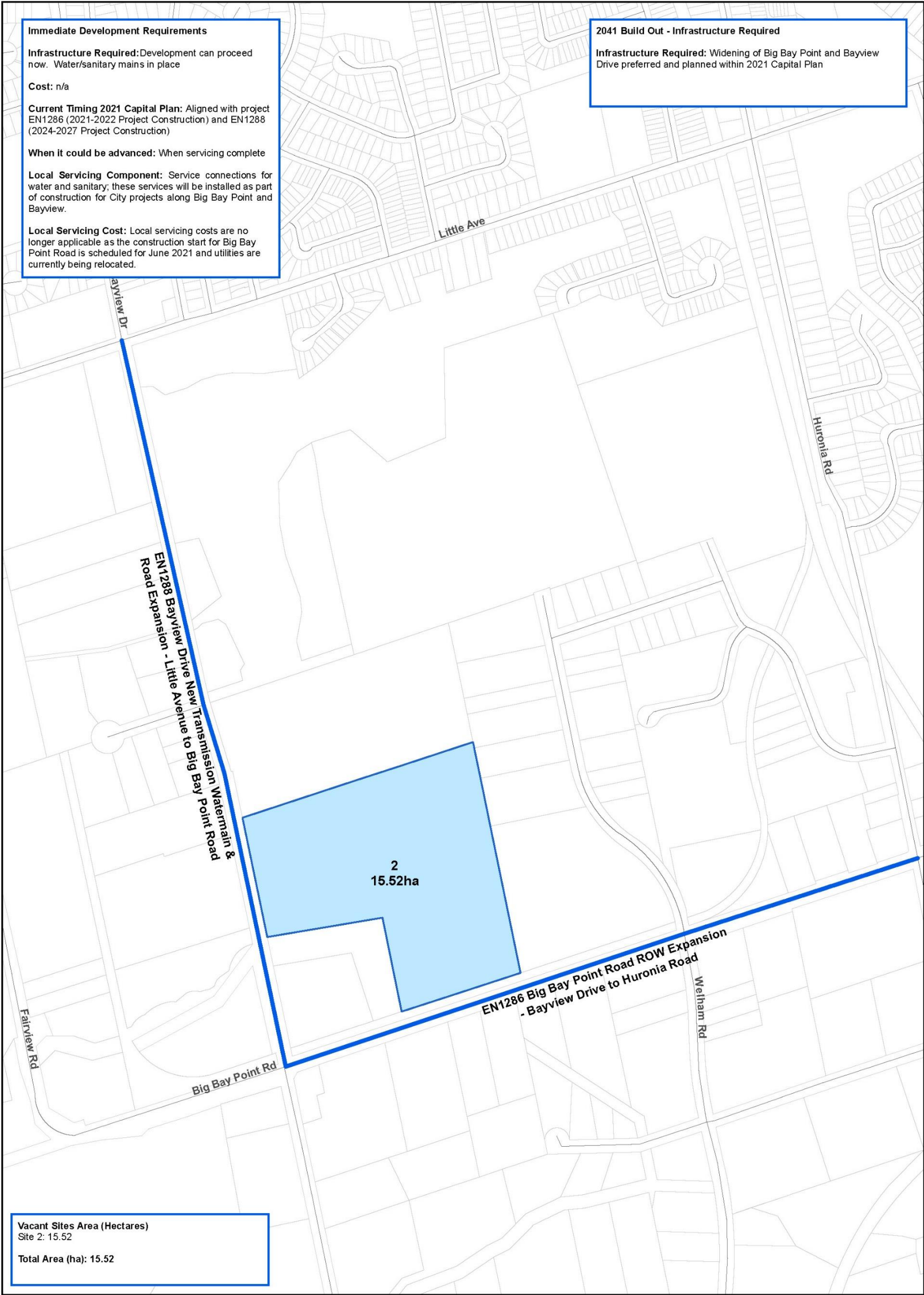
Infrastructure needed to support
Employment Lands
Scenario 2a



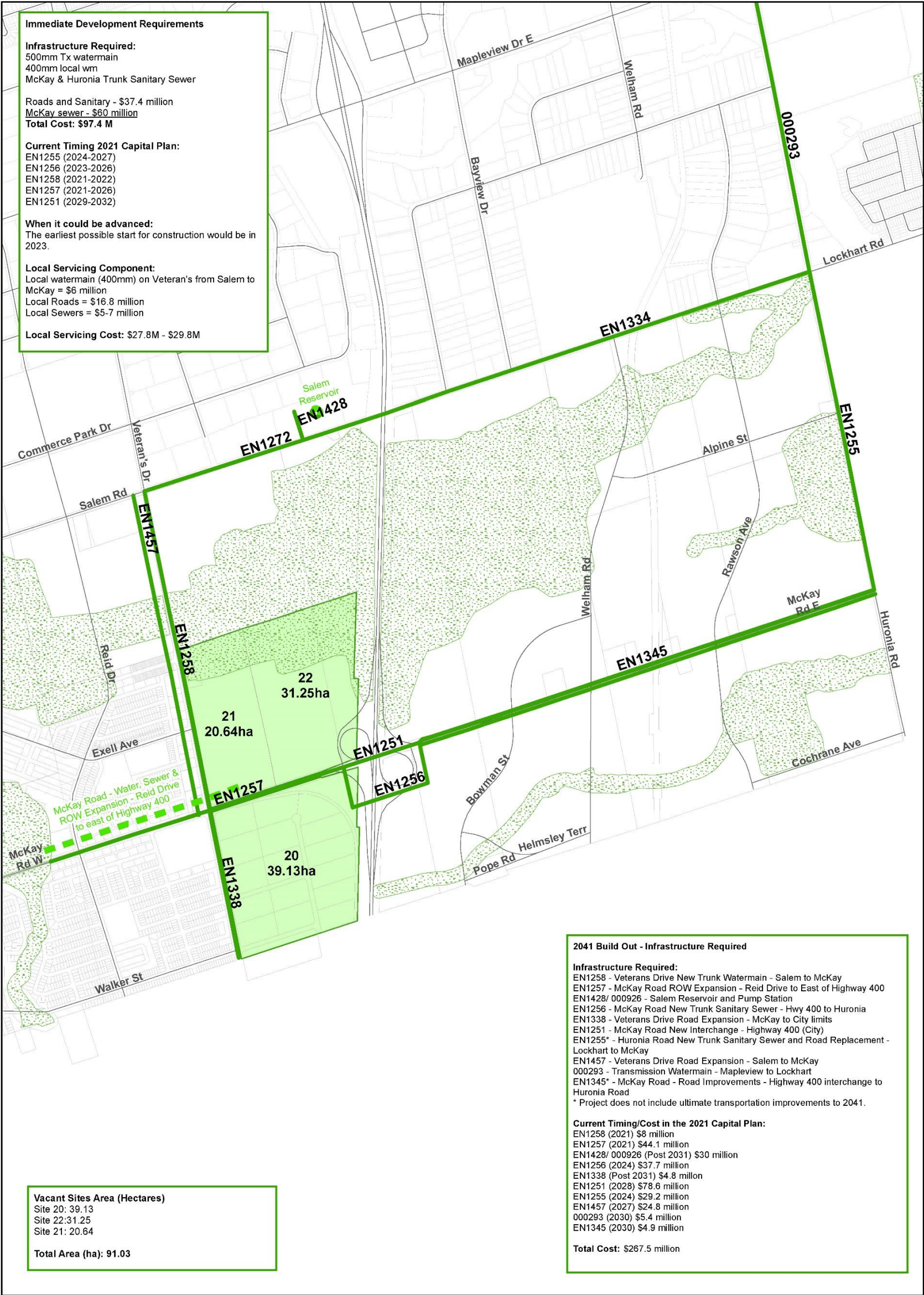


Infrastructure needed to support
Employment Lands
Scenario 2b

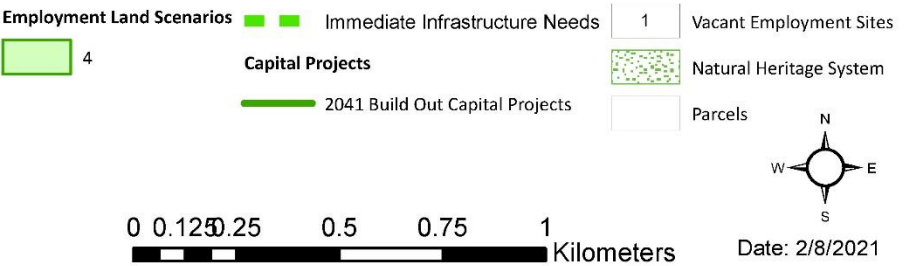


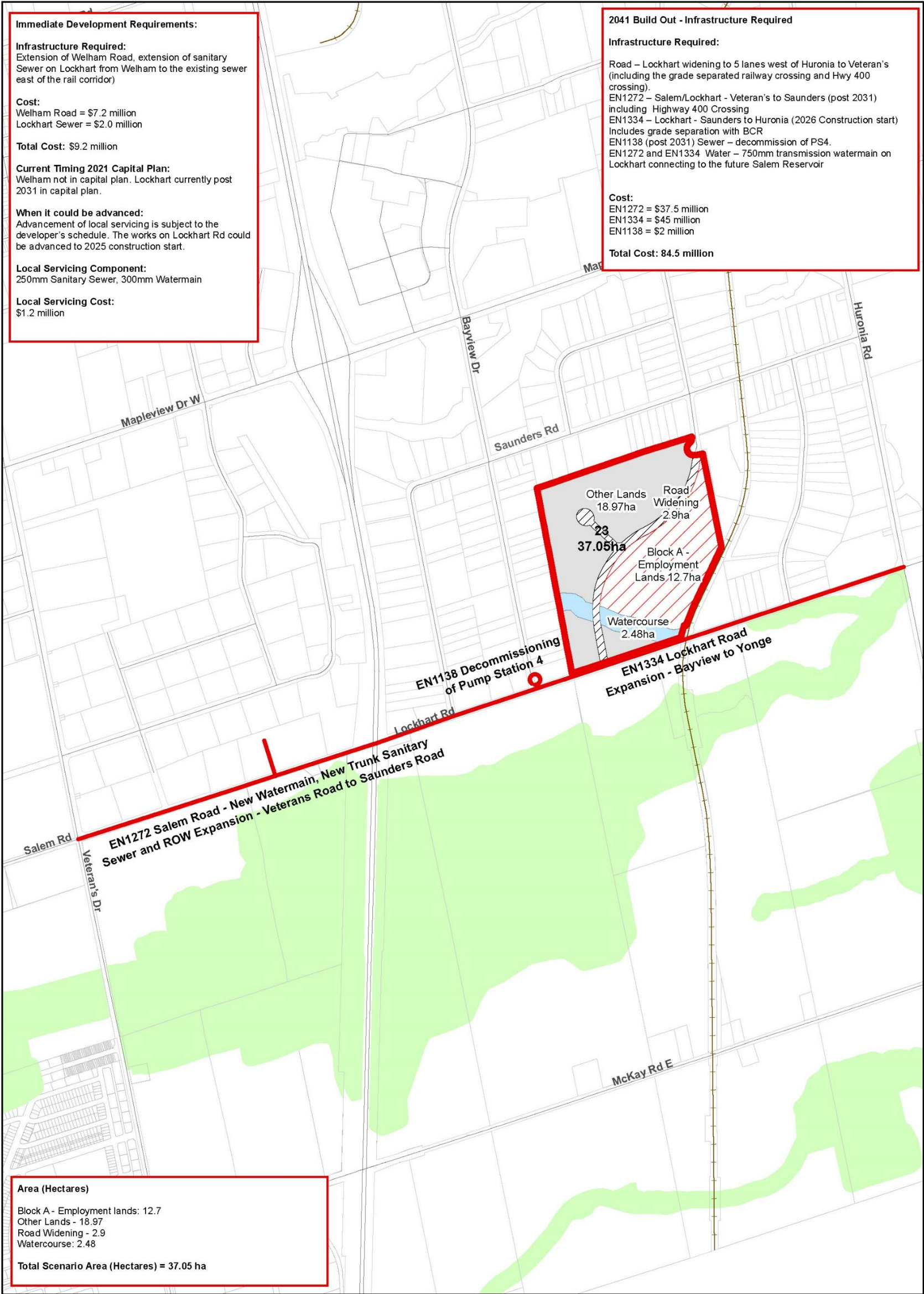


Infrastructure needed to support
Employment Lands
Scenario 3



Infrastructure needed to support
Employment Lands
Scenario 4





Infrastructure needed to support
Employment Lands
Scenario 5

