

ECONOMIC DEVELOPMENT STRATEGY



Municipality of Grey Highlands
April 2018



Municipality of Grey Highlands **Economic Development** **Strategy**

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1. INTRODUCTION

With a growing population of more than 9,500, the Municipality of Grey Highlands is a "*community of communities*" with a shared economic base, marketplace, workforce and history. Grey Highlands was formed when the townships of Artemesia (previously amalgamated with the village of Flesherton), Euphrasia, Osprey and the Village of Markdale were amalgamated in 2001.

The Municipality of Grey Highlands is situated in one of the most beautiful areas of Grey County. The area's natural landscape includes waterfalls, the Bruce Trail, the Osprey Bluffs, the Saugeen, Boyne and Beaver Rivers and Lake Eugenia, with the Niagara Escarpment World Bio Reserve running through the area. Grey Highlands offers a variety of landscapes from agricultural flat lands, to rolling hills, river ecosystems, lakes and wetlands and is dotted with villages, hamlets and rural communities.

Outdoor enthusiasts enjoy the natural the area with recreational cross-country trails and downhill ski hills, the Bruce Trail hiking system, conservation areas, waterfalls and public waterfronts.

Agriculture represents the industry with the largest number of businesses in Grey Highlands. Farms range from small family-owned to large and highly automated. Mennonite families from the Waterloo Region have migrated to Grey Highlands and contribute to the success and prosperity of the rural agricultural lifestyle.

The top three business located in Grey Highlands are Chapman's Ice Cream, Ice River Springs Water Co., and Medike Leather Products.



1.1. Purpose/Call to Action

The Municipality of Grey Highlands, in partnership with the Grey County Economic Development department and the Grey Highlands Chamber of Commerce, took on a collaborative effort to improve the economic outlook of the Municipality by proposing the need for a Grey Highlands Economic Development Strategy. The ultimate purpose of the strategy is to develop a coordinated approach to the promotion of sustainable long-term economic growth for the Municipality, and to identify opportunities for the Municipality and its community partners in order to build a strong economic community. The Strategy is intended to direct future economic development initiatives that support the Municipality's current base and will incorporate new opportunities for growth.

The Top 10 Priority Action Items are listed in Section 2.

A more comprehensive list of action items, categorized by themes, can be found in Section 6. These themes are based on two separate, yet connected, streams:

- **Community Development** (Theme #1 - Community Development and Theme #2 - Main Streets and Village Cores);
- **Economic Development/Investment Readiness** (Theme #3 - Economic Development/Investment Readiness and Theme #4 - Tourism).

TOP
10

2. GREY HIGHLANDS TOP 10 PRIORITY ACTIONS & TIMELINES

The **Top 10 Priority Actions** are focused on providing initiatives which are necessary to be carried out first and are the underlying actions required for preparing the Municipality for investment. These initiatives are aimed at strengthening both the community and economy.

ACTION	SUGGESTED TIMING	LEAD / SUPPORT
1. Identify full time resources (staff) to guide and implement both the economic development and community development actions and initiatives.	Immediate	CAO
2. Create a priority setting and action-oriented plan to roll out broadband across the Municipality.	Immediate	CAO Grey County staff
3. Engage residents and business to create a Community Vision for Grey Highlands (including individual separate visions for villages and settlements). Growth is ongoing to happen in Grey Highlands – now is the ideal timing for residents/businesses to determine what important and what kind of community they want Grey Highlands to be in the future.	Immediate	CAO Community & Economic Development Staff
4. Create a Grey Highlands community visual identity and use the new identity on all community communications and marketing pieces.	Immediate	CAO Community & Economic Development Staff
5. Undertake a visioning exercise to craft Individual main streets and village design guidelines (buildings and road cross sections). Use these visions as the starting points for Community Improvement Plans.	Immediate	CAO Community & Economic Development Staff

Economic Development Strategy

Municipality of Grey Highlands

ACTION	SUGGESTED TIMING	LEAD / SUPPORT
6. Complete an Official Plan Review including new or updated secondary plans for Markdale and Flesherton.	Immediate	CAO, Planning Staff, Community & Economic Development Staff
7. Develop a set of economic development pages or an entire new website to be included on Grey Highlands new municipal website.	Immediate	CAO Community & Economic Development Staff
8. Undertake an investment readiness training/coaching exercise as well as and assessment to create an investment ready action plan.	Immediate	Mayor, Council, CAO Community & Economic Development Staff
9. Compile a market-ready Industrial and Commercial Land Inventory. Use the inventory as the first step in creating an industrial land strategy.	Short term	Economic Development Staff
10. Complete a review and update of Grey Highlands homebased business and on-site agricultural industries policies.	Short term	Community & Economic Development Staff Grey County staff

**Aligns with the Grey County Economic Development Plan*

Immediate = 2018- 2019

Short term = before the end of 2020

Long term = before the end of 2022



3. PROCESS FOLLOWED

The process followed to create the 2018 Municipality of Grey Highlands Economic Development Strategy focused primarily on document review, statistical analysis and community consultation.

Beginning with a statistical analysis of Grey Highland's economy and demographics and following with a thorough stakeholder consultation that included a series of one-on-one interviews, an online survey, and a Summit, the Economic Development Strategy was based on a comprehensive understanding of the Municipality.





**120 KEY
STAKEHOLDERS
WERE
CONSULTED**

4. STAKEHOLDER CONSULTATIONS

4.1. Strategic Plan Update Consultation Process

Approximately 120 stakeholders were consulted throughout this process. The consultations consisted of confidential one-on-one interviews, as well as an online survey open to the public and a Summit.

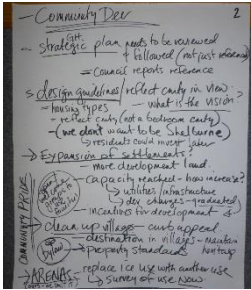
4.1.1. Interviews & Community On-Line Survey

Interviews were undertaken with various economic development stakeholders. The same seven open-ended questions were used to guide the interview and on-line survey. These questions probed into the major strengths and challenges of doing business in the Municipality and looked forward to defining future opportunities, aspirations and results. Approximately 90 stakeholders provided feedback on the questions.

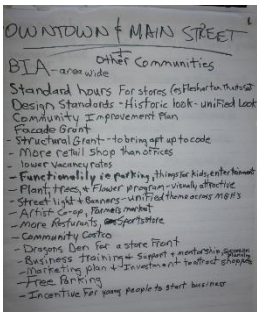


4.1.2. Summit

The Summit was held in April 2018 and was attended by approximately 30 key community stakeholders which included representation from council, the public, the business community, regional support agencies, the Grey Highlands Chamber of Commerce, Grey County staff, and Municipality of Grey Highlands staff.



The purpose of the Summit was to bring together economic development, community and business leaders to review the project findings to date, to get confirmation on the themes that were derived from the research, and to begin strategizing and crafting action items for each of those themes that were presented. The themes that were brought forward to the presentation and discussed included: Tourism; Investment Readiness; Main Streets and Village Cores; and, Community Development.



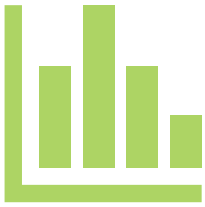
Informal Investment Readiness Review

McSweeney & Associates undertook an informal investment readiness assessment by reviewing the adequacy of the Municipality's tools and indicators including:

- Web Presence – Economic Development Site
- Economic/Community Profile
- Industrial and Commercial Land and Building Inventories
- Investment Marketing Tools
- Adequacy and Readiness of Employment Lands
- How Investment Inquiries/Requests are Handled

After assessing these basic elements required for investment readiness, it was determined that the Municipality of Grey Highlands is missing key elements that should be undertaken in order to prepare Grey Highlands for investment.

- Web Presence: require a comprehensive economic development page with all the essential information required by a site selector (regional and local maps, community profile, etc). Live links to pertinent economic development strategies and reports (community profile, etc.)
- Economic/Community Profile: Is available but the link isn't connecting. Needs to be updated annually (currently 2016 is the most recent available) especially now that there is 2016 census data available)
- Industrial and Commercial Land and Building Inventories: Require an inventory of available land and buildings and all property including information on servicing, zoning, maps, etc.
- Investment Marketing Tools: To be completed once everything is in place including a marketing plan and marketing collateral (determined by the marketing plan).
- Adequacy and Readiness of Employment Lands: Currently there is an inadequate supply of serviced employment land available in the Municipality.
- How Investment Inquiries/Requests are Handled: To date the inquiries are dealt with by the CAO on an individual basis.



5. STATISTICAL ANALYSIS

5.1. Data Sources

Please note that every effort has been made to use the most current data available. There are four major sources of information for this document:

- The 2006 and 2016 Census from Statistics Canada;
- SuperDemographics 2017 from Manifold Data Mining Inc.;
- EMSI Analyst Data; and
- Canadian Business Patterns from Statistics Canada.

Statistical analysis is partly based on 2017 data estimates of demographic variables. Estimates are different from data collected by Statistics Canada via Census every five years, which essentially counts the responses of those who answered the survey. The most recent Census was conducted in May 2016. There is normally one to two years' time lag between collecting and publishing Census data.

Manifold Projection Method

Manifold estimates demographic data annually, including population projections for 5 and 10 years in the future. Manifold methodologies are based on the following techniques:

- Enhanced cohort survival methods;
- Nearest neighborhood and regression techniques; and
- Structural coherence techniques.

Manifold Data Sources include:

- | | |
|---|---|
| ■ Statistics Canada | ■ Real Estate Boards/Companies |
| ■ Health Canada | ■ Canadian Bankers Association |
| ■ Regional Health Ministries | ■ Bank of Canada |
| ■ Citizenship and Immigration Canada | ■ Canada Post Corporation |
| ■ Regional School Boards | ■ Brisc International Inc. |
| ■ Consumer and business directories and books | ■ Publications of hospitals, CMHC, BBM and partners |
| ■ Flyer Distribution Association | ■ Proprietary survey and research |

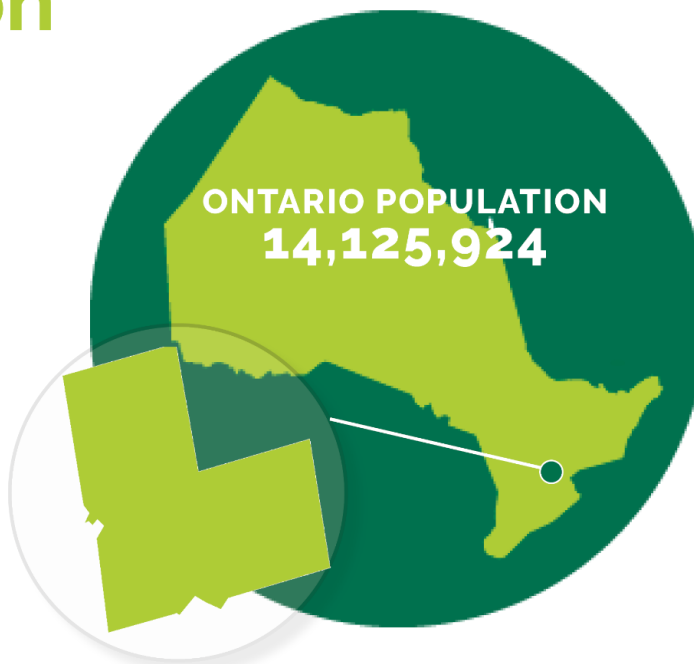


5.2. Statistical Analysis

A Snapshot of Grey Highlands

Location

The Municipality of Grey Highlands is situated in one of the most beautiful parts of Grey County and is made up of the amalgamated Townships of Artemesia, Euphrasia, Osprey and the Villages of Markdale and Flesherton. It proudly boasts the natural beauty of waterfalls, the Bruce Trail, the Osprey Bluffs and the Saugeen and Beaver Rivers and encompasses the "heart of the Beaver Valley" truly making Grey Highlands the place for all seasons.

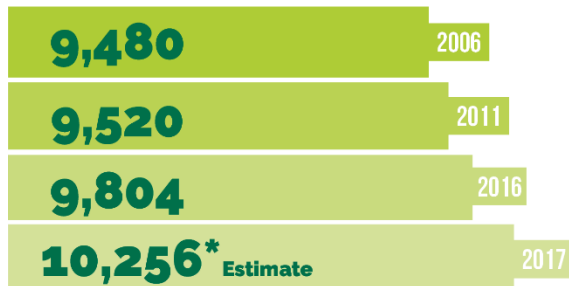


MARKET ACCESS

157km	.....	Toronto
181km	.....	Hamilton
194km	.....	London
272km	.....	Buffalo, NY
407km	.....	Windsor/Detroit

DEMOGRAPHICS

CENSUS POPULATION



MEDIAN AGE



POPULATION BY GENDER



AGE PROFILE



4%

1 YEAR MOBILITY

Residents that had moved within the previous year



26%

5 YEAR MOBILITY

Residents that had moved within the previous 5 years

LANGUAGE



HIGHEST EDUCATION LEVEL

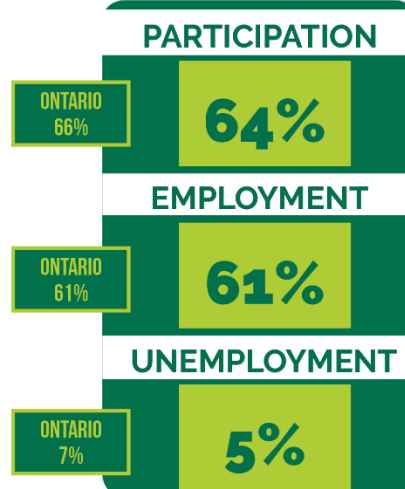
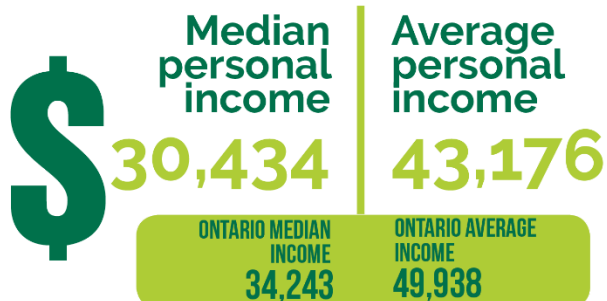
24%
SECONDARY

64%
POST-SECONDARY



All data sourced from Manifold SuperDemographics unless otherwise specified.

LABOUR FORCE



Top 5 Sectors*



Construction
(12%)



Manufacturing
(12%)



**Agriculture, Forestry,
Fishing & Hunting**
(10%)



Retail Trade
(9%)



**Health Care &
Social Assistance**
(9%)

Top 5 Occupations*



**Trades, Transport &
Equipment Operators**
(22%)



**Sales &
Service**
(18%)



Management
(14%)



**Business, Finance
& Administration**
(12%)



**Education, Law &
Social, Community &
Govt Services**
(11%)

* by labour force employment

All data sourced from Manifold SuperDemographics unless otherwise specified.



5.3. Statistical Overview

Demographics

- ◆ Grey Highland's **population grew** from 9,480 (in 2006) to 9,804 (in 2016) residents over the last two census periods for a total of 3.4% growth and is expected to grow by 2.85% by 2022, to a total of 10,548.
- ◆ Grey Highlands' **population is slightly older** than the province; it has a larger percentage of residents aged 65 years and older (25% of residents vs. 17.5% in Ontario).
- ◆ Grey Highlands **resident population is lower** than the province; it has 60% of its resident population within the normal working age (15-64 years), compared to 66% in Ontario.
- ◆ **Average age is higher** than the province: it is 45 years in Grey Highlands compared to 42 years in Ontario.
- ◆ Average family incomes in Grey Highlands (\$98,225) are **24% lower** than in the province.



Labour Force

- ◆ 60% of residents in Grey Highlands commute to work out-of-town (mainly to Collingwood, The Blue Mountains, Owen Sound, Clearview, or Toronto).
- ◆ 58% of the persons working in Grey Highlands lived elsewhere (mainly in West Grey, Chatsworth, Southgate, Owen Sound, or Meaford).

Export Sales

The largest export industries to domestic and foreign markets (outside of the Municipality of Grey Highlands) are:

Industry	Export (\$)
Dairy product manufacturing	\$164,438,018
Beverage manufacturing	\$116,749,429
Other leather and allied product manufacturing	\$85,302,871

These three industries directly relate to the three largest businesses in the community which includes Chapman's Ice Cream, Ice River Springs Water Co., and Medike Leather Products and represent over half of the total exports of \$584.8 billion from the municipality.

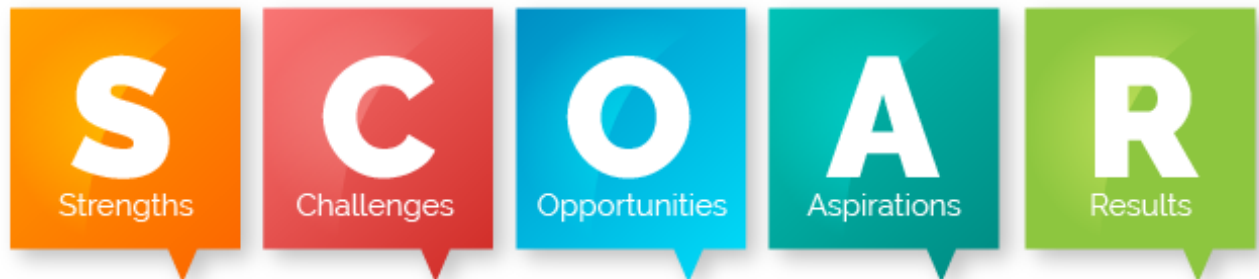
Employer Structure Analysis

The **Municipality of Grey Highlands** had a total of 779 businesses in 2011, which grew to 1,405 businesses in 2016, for a total of **80% business growth over a 5-year period.**

6. STRENGTHS, CHALLENGES, OPPORTUNITIES, ASPIRATIONS, RESULTS

6.1. High Level SCOAR™ Analysis

The following comprehensive SCOAR™ (Strengths, Challenges, Opportunities, Aspirations, Results) Analysis was prepared by analyzing the current stats and data, a document review plus the feedback from elected officials, staff, stakeholders and residents engaged in the consultation.



Strengths



COMMUNITY

- The friendly people living and working in Grey Highlands
- Small town/rural lifestyle
- New investments including the regional hospital, a school and housing developments
- Reasonably priced housing
- The ability to have easy access to urban centres yet living in a rural setting



BUSINESS

- Core businesses (Chapman's, Ice River Springs, Medike)
- Existing business community



NATURAL ENVIRONMENT

- Beautiful, natural environment (Beaver Valley, Niagara Escarpment, waterfalls)



AGRICULTURE

- Agricultural history and with a significant number of farms still in production
- Mennonite community



TOURISM AND CULTURE

- Significant cultural community made up of world class artists, musicians and crafts people scattered throughout the municipality
- In the heart of ski country and can benefit from its close proximity to Blue Mountain
- Outdoor 4-season recreational and tourism amenities



Challenges



COMMUNITY

- Lack of Municipal resources
- Lack of an overall community vision
- Lack of a community identity



PEOPLE

- Aging workforce
- Aging population



BUSINESS

- Lack of upgraded and new infrastructure to support growth
- Lack of actual locations for businesses to do business (land/buildings)
- Lack of investment in downtowns and on main streets



CULTURE

- Lack of interest from the arts community to participate in Grey Highlands initiatives.



TOURISM

- Lack of tourism infrastructure (parking lots, signage, etc.)



Opportunities



INVESTMENT

- Become tourism ready
- Become investment ready
- By-laws in place to support farm and home-based businesses



AGRICULTURE

- Develop opportunities in the agricultural sector- both tourism and business
- Understand and build partnerships with the agricultural community



COMMUNITY DEVELOPMENT

- Develop a collective vision for Grey Highlands
- Increase diversity of housing stock including affordable housing for local workforce
- Build a 'quality of place' that is attractive to young people and families
- Expand and improve transportation networks
- Develop a responsible land use planning policy
- Improve communications internally and externally and to build partnerships
- Improve broadband and internet access to the entire municipality
- Improve the look of the municipality by enforcing property standards



MAIN STREETS & VILLAGES

- Create opportunities to encourage economic growth and re-energize downtown/main street
- Bring development to downtown/main street



TOURISM & CULTURE

- Untapped number of creative resources throughout the Municipality



Aspirations & Results

- Celebrating Grey Highlands' uniqueness
- Diverse population including families, retirees and younger people
- Increased and diversified job opportunities
- Bustling villages with successful businesses and interesting shops
- Sustainable community where people live, work and play
- Living a rural/small town lifestyle
- Recreational activities readily accessible
- Strong local foods, art, culture, entertainment and events
- Friendly people living in Grey Highlands
- Thriving economy
- Strong agricultural sector





7. GREY HIGHLANDS ECONOMIC DEVELOPMENT ACTION PLAN

Based on 2 separate yet connected streams Community Development and Economic Development/Investment Readiness

The following actions are recommended as priorities for the Municipality of Grey Highlands in community and economic development.

7.1. Theme 1: Community Development

Community development directly impacts the growth of the economy. The role of community development is, in part, one of the building blocks to support strong and vibrant communities. The assets and services help to shape the community into what it is today and what it will be in the future.

1. Identify full time resources (staff) to guide and implement both the economic development and community development actions and initiatives.
2. Create a priority setting and action-oriented plan to roll out broadband across the Municipality.
3. Engage residents and business to create a Community Vision for Grey Highlands (including individual separate visions for villages and settlements). Growth is ongoing to happen in Grey Highlands – now is the ideal timing for residents/businesses to determine what important and what kind of community they want Grey Highlands to be in the future.
4. Create a Grey Highlands community visual identity and use the new identity on all community communications and marketing pieces.
5. Develop a set of design guidelines for new residential that reflects the vision of the community.
6. Complete an Official Plan Review including new or updated secondary plans for Markdale and Flesherton.
7. Develop a community branded signage program and link to tourism assets/attractions.
8. Undertake a planning study for development lands.
9. Update Grey Highlands property standards bylaw and enforce the bylaw.
10. Attract affordable housing development to the municipality.



7.2. Theme 2: Main Streets and Village Cores

Main Streets and Village Cores are often the hub of the community acting as public meeting spaces, commercial centres and provides the identity for the area. It is essential to have an economically vibrant main street and village core that are the heart and soul of the community.

1. Create a Community Pride Program to beautify and clean up the main streets and village cores.
2. Undertake a visioning exercise to craft Individual main streets and village design guidelines (buildings and road cross sections). Use these visions as the starting points for Community Improvement Plans.
3. Develop a set of guidelines for streetscape and building design.
4. Use these visions as the starting points for Community Improvement Plans* to develop a program using Community Improvement Plan (including a façade improvement program) for each of the rural communities in Grey Highlands.
5. Develop a Greyfields and Brownfields policy providing incentives for development.
6. Create a Grey Highlands Business Improvement Area.
7. Work with Grey County to establish a Small Business Centre* in an appropriate location.
8. Develop a downtown parking plan for Markdale and Flesherton.
9. Craft and Infrastructure upgrade plan for both Markdale and Flesherton.
10. Update Grey Highlands property standards bylaw and ensure resources are in place for enforcement of the bylaw.

7.3. Theme 3: Economic Development/Investment Readiness

When investors want to invest in an area they are looking for a strong, well-organized municipality with the capacity to meet their business needs. The key to securing both existing and new business is to undertake all the actions to be 'investment ready'.

1. Secure full-time resources (staff) and allocate annual operational and capital funding for economic development.
2. Undertake an investment readiness training/coaching exercise as well as an assessment to create an investment ready action plan.
3. Complete the following actions to become investment ready:
 - a) Compile a market-ready Industrial and Commercial Land Inventory. Use the inventory as the first step in creating an industrial land strategy
 - b) Develop an Industrial land strategy*
 - c) Develop a Business Retention & Expansion (BR&E) program*
 - d) Develop a Business Visitation Program (as part of BR&E) and implement*
 - e) Compile a Business Directory
 - f) Keep Grey Highlands Community Profile up to date on an annual basis.
 - g) Develop a set of economic development pages or an entire new website to be included on Grey Highlands new municipal website
4. Complete a review and update of Grey Highlands homebased business and on-site agricultural industries policies.
5. Develop a communications/marketing plan for economic development once Grey Highlands is investment ready.
6. Continue to build and strengthen relationships with Chamber of Commerce, Grey County and other business associations to support economic development.

7.4. Theme 4: Tourism

Tourism can be a major economic driver for Grey Highland's economy. The sector encompasses local/regional activities such as food and accommodations, retail, festivals and events, sporting activities, arts, culture and heritage. To best benefit from tourism, there needs to be a strategic plan to ensure that it grows and develops based on the community's vision.

1. Work closely with the Tourism Committee to promote tourism for the county.
2. Update the asset inventory of attractions, cultural assets and supporting infrastructure.
3. Create and implement a Tourism Infrastructure Development Plan.
4. Create and implement a Tourism Signage program.
5. Develop a sports tourism strategy with enhanced programming to fully occupy the four arenas over the winter season.
6. Align and work closely with Grey County's Tourism Program. Ensure that there isn't duplication; that Grey County knows Grey Highlands tourism assets; and, that Grey Highlands has their tourism assets included in all appropriate Grey County itineraries.
7. Review existing Culture Plan and implement the action items that are currently relevant. Where possible ensure the Cultural Plan aligns with the County's tourism efforts

**Aligns with the Grey County Economic Development Plan*



7.5. Top 10 Priority Actions & Timelines

ACTION	SUGGESTED TIMING	LEAD / SUPPORT
1. Identify full time resources (staff) to guide and implement both the economic development and community development actions and initiatives.	Immediate	CAO
2. Create a priority setting and action-oriented plan to roll out broadband across the Municipality.	Immediate	CAO Grey County staff
3. Engage residents and business to create a Community Vision for Grey Highlands (including individual separate visions for villages and settlements). Growth is ongoing to happen in Grey Highlands – now is the ideal timing for residents/businesses to determine what important and what kind of community they want Grey Highlands to be in the future.	Immediate	CAO Community & Economic Development Staff
4. Create a Grey Highlands community visual identity and use the new identity on all community communications and marketing pieces.	Immediate	CAO Community & Economic Development Staff
5. Undertake a visioning exercise to craft Individual main streets and village design guidelines (buildings and road cross sections). Use these visions as the starting points for Community Improvement Plans.	Immediate	CAO Community & Economic Development Staff
6. Complete an Official Plan Review including new or updated secondary plans for Markdale and Flesherton.	Immediate	CAO, Planning Staff, Community & Economic Development Staff
7. Develop a set of economic development pages or an entire new website to be included on Grey Highlands new municipal website.	Immediate	CAO Community & Economic

Economic Development Strategy

Municipality of Grey Highlands

ACTION	SUGGESTED TIMING	LEAD / SUPPORT
		Development Staff
8. Undertake an investment readiness training/coaching exercise as well as and assessment to create an investment ready action plan.	Immediate	Mayor, Council, CAO Community & Economic Development Staff
9. Compile a market-ready Industrial and Commercial Land Inventory. Use the inventory as the first step in creating an industrial land strategy.	Short term	Economic Development Staff
10. Complete a review and update of Grey Highlands home-based business and on-site agricultural industries policies.	Short term	Community & Economic Development Staff Grey County staff

**Aligns with the Grey County Economic Development Plan*

Immediate = 2018- 2019
Short term = before the end of 2020
Long term = before the end of 2022

8. COMMUNITY IMPROVEMENT PLAN (CIP)

Community Improvement Plans are tools that allow municipalities to direct funds and implement policies towards a specifically defined area. Section 28 of the Ontario Planning Act, gives municipalities that have enabling policies in their Official Plans, the ability to prepare and enact, through By-law(s), Community Improvement Project Area(s) and a Community Improvement Plan. The Community Improvement Plan is intended to encourage rehabilitation initiatives and/or stimulate development. Once implemented, the plan allows municipalities to provide grants or loans to assist in the rehabilitation of lands and/or buildings within the defined boundaries of a Community Improvement Project Area(s).

Grey Highlands is interested in developing new community improvement plans for each of the seven rural communities in the Municipality. Grey County is also currently in the process of developing a County wide CIP. It is imperative that Grey Highlands CIP efforts are aligned with those of Grey County to ensure maximum effectiveness.

PUBLIC AND BUSINESS ENGAGEMENT

There are a number of times during the CIP process that the public and the business community are required to engage and participate. Based on the Ministry of Municipal Affairs and Housing, a three-stage process has been developed to help build the foundation for a CIP. During the first two stages – 'Building Your Plan's Foundation' and 'Preparing Your Plan' there are three opportunities to engage the community and to build support through stakeholder input and feedback. (see Appendix C for more details on the CIP process).

CIP PROGRAMS COULD INCLUDE:

Based on a compilation of programs from various CIPs this represents specific programs that can be applied to CIPs;

1. Improvement Programs

- a) Façade improvement program
- b) Signage and awning program
- c) Accessibility improvements

- d) Commercial/Residential Interior Improvements
- e) Affordable housing

2. Design Guidelines

- a) Exterior façade improvements
- b) Signage
- c) Awnings
- d) Interior improvement guidelines

3. Fee Programs

- a) Vacant land tax assistance
- b) Development charges refund
- c) Tax increment equivalent grant
- d) Municipal fee grants
- e) Heritage tax incentive

4. Industrial Lands

Within the Community Improvement Project Areas may acquire lands for developing an industrial/business park, as recommended by the Economic Development Strategic Plan. However, lands acquired under this provision shall not be sold for less than market value.

5. Brownfields Development

A Brownfield site can include properties that are abandoned, vacant, or underutilized properties where past actions have resulted in actual or perceived environmental contamination and/or derelict or deteriorated buildings. The CIP policies could include Site Assessment Grants, Property Tax Assistance Programs, Rehabilitation Grants, Development Grants, Financial Tax Incentive Programs, etc.

6. Heritage Properties

Can be used in conjunction with the Community Improvement Plan



APPENDIX A: ECONOMIC BASE ANALYSIS

This section examines the economic base of the **Municipality of Grey Highlands** in terms of jobs that exist in the community, regardless of where the employee lives. The local economy currently sustains approximately **4,450 jobs**.

Employment by industry between 2012 and 2017 is presented in the following tables. Employment is categorized by 4-Digit North American Industry Classification System (NAICS) codes¹. Negative changes in employment are in **bold** text.

Largest Employment Industries				
Industry	2012 Jobs	2017 Jobs	Change in Jobs (2012-2017)	% Change
Dairy product manufacturing	441	511	70	16%
Beverage manufacturing	318	482	164	52%
Farms	472	282	-190	-40%
Other leather and allied product manufacturing	84	179	95	113%
Full-service restaurants and limited-service eating places	100	173	73	73%
Farm, lawn and garden machinery and equipment merchant wholesalers	105	168	63	60%
Grocery stores	113	168	55	49%
Building equipment contractors	107	145	38	36%
Residential building construction	123	138	15	12%
Elementary and secondary schools	199	134	-65	-33%

Source: EMSI Analyst economics modelling tool supported by OMAFRA

¹ For more details see: <http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=118464>



The fastest growing industries in Grey Highlands are **Beverage manufacturing, Other leather and allied product manufacturing, Full-service restaurants and limited-service eating places, and Dairy product manufacturing.**

Fastest Growing Industries				
Industry	2012 Jobs	2017 Jobs	Change in Jobs (2012-2017)	% Change
Beverage manufacturing	318	482	164	52%
Other leather and allied product manufacturing	84	179	95	113%
Full-service restaurants and limited-service eating places	100	173	73	73%
Dairy product manufacturing	441	511	70	16%
Farm, lawn and garden machinery and equipment merchant wholesalers	105	168	63	60%
Direct selling establishments	72	131	59	82%
Grocery stores	113	168	55	49%
Dry cleaning and laundry services	70	117	47	67%
Other amusement and recreation industries	52	93	41	79%
Building equipment contractors	107	145	38	36%
Other machinery, equipment and supplies merchant wholesalers	<10	38	Insf. Data	Insf. Data

Source: EMSI Analyst economics modelling tool supported by OMAFRA



Furthermore, Location Quotient (LQ) Analysis is used to identify specialized industries in the area. LQ is a way of comparing regional employment by industry group to a benchmark; here we use the Canadian economy. This helps to reveal industry concentrations based on employment. The following table identifies the to 10 most concentrated industries in the **Municipality of Grey Highlands**.

Major Employment Sectors				
Industry	2012 Jobs	2017 Jobs	% Change	2017 LQ
Other leather and allied product manufacturing	84	179	113%	471
Leather and hide tanning and finishing	16	25	56%	196
Dairy product manufacturing	441	511	16%	95
Beverage manufacturing	318	482	52%	55
Farm, lawn and garden machinery and equipment merchant wholesalers	105	168	60%	31
Remediation and other waste management services	98	94	-4%	24
Dry cleaning and laundry services	70	117	67%	18
Direct selling establishments	72	131	82%	15
Other personal services	39	42	8%	5
Building material and supplies dealers	120	131	9%	4
Farms	472	282	-40%	4

Source: EMSI Analyst economics modelling tool supported by OMAFRA

An LQ greater than 1.25
signifies industry concentration.



Export Sales

The table below indicates the value of exports sales (for the largest exporting industries) to domestic and foreign markets (outside of the Municipality of Grey Highlands). The total value of **exports from the municipality to foreign and external domestic markets totalled \$584.8 billion in 2013.**

Largest Export Industries	
Industry	Export (\$)
Dairy product manufacturing	\$164,438,018
Beverage manufacturing	\$116,749,429
Other leather and allied product manufacturing	\$85,302,871
Residential building construction	\$32,579,226
Farms	\$29,659,019
Leather and hide tanning and finishing	\$15,483,823
General freight trucking	\$15,222,880
Farm, lawn and garden machinery and equipment merchant wholesalers	\$15,120,408
Elementary and secondary schools	\$14,233,911
General medical and surgical hospitals	\$10,755,059
Local, municipal and regional public administration	\$8,028,388

Source: EMSI Analyst economics modelling tool supported by OMAFRA



Employer Structure Analysis

The **Municipality of Grey Highlands** had a total of 779 businesses in 2011, which grew to 1,405 businesses in 2016, for a total of **80% business growth over a 5-year period.**

Business Counts 2016

Industries with the Largest Number of Businesses				
Description	2011 Total	2016 Total	% of Total	Change 2011 - 2016
Farms	128	261	18.6%	133
Lessors of real estate	30	123	8.8%	93
Residential building construction	44	46	3.3%	2
General freight trucking	19	42	3.0%	23
Building finishing contractors	25	37	2.6%	12
Management, scientific and technical consulting services	22	33	2.3%	11
Other financial investment activities	17	32	2.3%	15
Automotive repair and maintenance	13	29	2.1%	16
Other specialty trade contractors	14	23	1.6%	9
Offices of real estate agents and brokers	14	23	1.6%	9
Services to buildings and dwellings	18	22	1.6%	4
Full-service restaurants and limited-service eating places	15	22	1.6%	7
Building equipment contractors	12	20	1.4%	8
Accounting, tax preparation, bookkeeping and payroll services	10	20	1.4%	10
Foundation, structure, and building exterior contractors	9	18	1.3%	9

Source: Canadian Business Patterns, Statistics Canada 2011 & 2016

The following table identifies the industries which added the most number of businesses to the local economy in the Municipality of Grey Highlands, between 2011 and 2016.



Fastest Growing Industries by Change in Number of Businesses					
Description	2011 Total	2016 Total	% of Total	Change 2011 - 2016	% Change
Farms	128	261	18.6%	133	103.9%
Lessors of real estate	30	123	8.8%	93	310.0%
General freight trucking	19	42	3.0%	23	121.1%
Automotive repair and maintenance	13	29	2.1%	16	123.1%
Other financial investment activities	17	32	2.3%	15	88.2%
Building finishing contractors	25	37	2.6%	12	48.0%
Machine shops, turned product, and screw, nut and bolt manufacturing	1	12	0.9%	11	1100.0%
Management, scientific and technical consulting services	22	33	2.3%	11	50.0%
Other wood product manufacturing	3	13	0.9%	10	333.3%
Accounting, tax preparation, bookkeeping and payroll services	10	20	1.4%	10	100.0%
Electric power generation, transmission and distribution	1	10	0.7%	9	900.0%
Foundation, structure, and building exterior contractors	9	18	1.3%	9	100.0%
Other specialty trade contractors	14	23	1.6%	9	64.3%
Offices of real estate agents and brokers	14	23	1.6%	9	64.3%
Metalworking machinery manufacturing	1	9	0.6%	8	800.0%
Architectural, engineering and related services	9	17	1.2%	8	88.9%
Building equipment contractors	12	20	1.4%	8	66.7%

Source: Canadian Business Patterns, Statistics Canada 2011 & 2016



APPENDIX B: FORMULA FOR SUCCESS

McSweeney & Associates developed the **Formula for Economic Development Success** to better simplify and organize the many ongoing activities that take place within the realm of economic development.

The **Process** wheel represents the notion that the work of economic developers is never finished. Projects need to be revisited and refreshed to ensure the local economy is healthy. Each colour denotes a different category of action. Below is the visual representation of the formula.

Formula *for* Economic Development Success®



The Formula for Economic Development Success involves **People** and organizations working in collaboration, to leverage to the Economic Development Process and to Inspire Economic Sustainability in communities.

People	Process	Power of Economic Development
The right attitude and belief of people and organizations that they can affect change resulting in growth and sustainability	The McSweeney E.D. Process Wheel indicates a logical build order for economic activities. Preparing activities are fundamental, upon which Analyzing and Strategizing activities can occur, all of which support Economic Doing™ activities that are core to economic development, such as business visitation and investment attraction.	Increase the economic sustainability (and quality of life) by keeping, growing, and getting businesses that succeed – thereby supporting other aspects of community development.

The McSweeney E.D. Process Wheel illustrates a logical order of economic activities. **Preparing** activities are fundamental, upon which Analyzing and **Strategizing** activities can be applied, all of which support **Economic Doing™** activities that are the core of economic development, such as business visitation and investment attraction.

APPENDIX C: COMMUNITY IMPROVEMENT PLAN

Objectives for CIPs

As laid out in the Ministry of Municipal Affairs and Housing Community Improvement Planning Handbook 2008, the objectives of the Province of Ontario for CIPs include:

- Focus redevelopment, infill and mixed-use opportunities in the core area.
- Maintain and improve public space and pedestrian linkages.
- Traffic calming through alternative design standards for roads.
- Increase affordable housing opportunities through grant or loan programs.
- Improve the appearance of historic commercial buildings through façade improvement loan programs.
- Stimulate private sector clean up and redevelopment of contaminated lands through grant programs.
- Enhance energy supply and conservation through grant or loan programs.
- Promote streetscape improvements such as benches and bicycle parking facilities.
- Require built form that is accessible to everyone including senior citizens and persons with disabilities.
- Improve efficiency and sustainability of regional wastewater works/stormwater works through the area.
- Facilitate or encourage the redevelopment of lands and buildings to achieve densities that support transit use through grant or loan programs.

As a result of research including a review of the CIP for the Township of North Dundas and others, their objectives for their CIP include, but are not limited to:

- To maintain the well-being of downtowns and main streets in urban and rural settlement areas.
- To provide a safe, vibrant, pedestrian friendly environment;
- To provide an attractive and inviting environment;
- To provide a cleaner, healthier, safer environment;
- To increase employment, economic activity and investment;
- To maintain and improve public space and pedestrian linkages;
- To provide for a balanced opportunity for growth and settlement;
- To ensure that community improvement projects are carried out within the built-up areas of the Township;

- To ensure the maintenance of the existing building stock;
- To encourage private sector investment and the strengthening of the economic base;
- To enhance the visual appearance of Community Improvement Project Areas;
- To encourage the continued commercial vitality and economic viability throughout all seasons of the year.
- To revitalize the Urban Settlement Areas, (Flesherton and Markdale) as commercial nodes and vibrant shopping destinations;
- To encourage the continued commercial vitality and economic viability throughout all seasons of the year;
- To integrate the conservation of heritage resources within development and infrastructure decisions which may affect those resources;
- To create an attractive image of the Township that reflects the historic character and heritage of the community;
- To protect and enhance the heritage character of the Village centres.
- To encourage infilling and redevelopment of vacant or underutilized land as with Brownfield sites.

Process for developing a CIP

The Ministry of Municipal Affairs lays the groundwork for developing a CIP. The following three stage process is taken from the Ministry of Municipal Affairs and Housing Community Improvement Planning Handbook 2008 which reflects common municipal practices in developing a community improvement plan. Municipalities are responsible for their decisions about community improvement plans, and the steps within each stage should be adjusted to suit municipal goals and needs. In some instances, a municipality may decide to combine or modify steps. In other instances, such as public consultation and reporting, steps may be repeated as work progresses and builds upon information previously collected.

Stage 1- Building Your Plan's Foundation

- Identify community needs based on the Planning Act definition of "community improvement" and "community improvement project area".
- Call your local Ministry of Municipal Affairs and Housing Municipal Services Office for a staff contact and for advice and assistance.
- Build community support through stakeholder input and feedback.
- Report to council for authorization and direction to prepare a community improvement plan.

Stage 2 – Preparing Your Plan

- Analyze and gather data on the physical, economic, social and environmental characteristics of the study area.
- Conduct background analysis of planning, land use and other policies and strategies applicable to the study area.
- Review your official plan to:
 - determine if it contains necessary or appropriate provisions; and
 - determine if official plan policies need updating or if new policy direction is needed.
- Report back to council with recommendations for designating a community improvement project area based on findings. If supported, council may direct staff to prepare a bylaw.
- Draft municipal actions, programs and implementation policies that address identified problems and goals.
- Develop detailed implementation policies for each incentive-based program.
- Tailor eligibility criteria for each program.
- Develop marketing policies to promote the uptake of your programs. Political leadership and municipal staff expertise and support are key components for the promotion and success of these programs.
- Develop criteria to measure and monitor the effectiveness of your land or financial assistance programs.
- Further stakeholder input may be desirable at this point.
- Develop an Action Plan for the allocation of resources and development of administrative practices and procedures necessary to implement programs.
- Report the Action Plan to council, including any funding requirements.
- Finalize the draft community improvement plan and circulate it to the appropriate Ministry of Municipal Affairs and Housing Municipal Services Office, and any other interested persons or organizations.
- Once comments are received from the circulation process, revise the draft plan where appropriate.
- Schedule and hold a formal public meeting no earlier than 20 days after the requirements for giving public notice have been completed.
- Finalize the community improvement plan and forward it to council for adoption by bylaw, after making any necessary revisions based on public input.
- Specify funding requirements for council's consideration.
- Finalization of Plan. Once a decision is made and notice is given (in accordance with the requirements under the Planning Act), and if there are no appeals within 20 days, the decision is final.

Stage 3 – Implementing Your Plan

- Put your Action Plan into place establishing marketing programs to raise interest in and stimulate uptake of each program.
- Periodically monitor each program based on established performance criteria.
- Periodically monitor service delivery of each program
- Make adjustments based on information gained through monitoring.

Incentive-based programs (grant, loan and property tax assistance)

The following are taken from the Ministry of Municipal Affairs and Housing Community Improvement Planning Handbook 2008 outlining general incentive-based programs that can be included in the CIP:

- Brownfields environmental assessment, remediation and redevelopment
- Commercial building façade improvements
- Downtown/core area and waterfront revitalization
- Preservation and adaptive reuse of heritage and industrial buildings
- Provision of affordable housing
- Property tax assistance for remediation purposes
- Project feasibility studies
- Space conversion for residential and commercial uses
- Structural improvements to buildings (e.g., Building Code upgrades)
- Improvement of community energy efficiency
- Accessibility enhancements