

The background of the slide is a photograph of a modern, multi-story building with a curved facade and large glass windows. Two prominent, cylindrical clock towers rise from the building, each featuring a large, round clock face. The sky is blue with some light clouds. The bottom of the slide features a purple and white geometric design.

2051 Forecast and Land Needs & Integrated Growth Management

Presented to
YORK REGION
PUBLIC ADVISORY COMMITTEE

Presented by
Lauren Sauve
Senior Planner
Long Range Planning

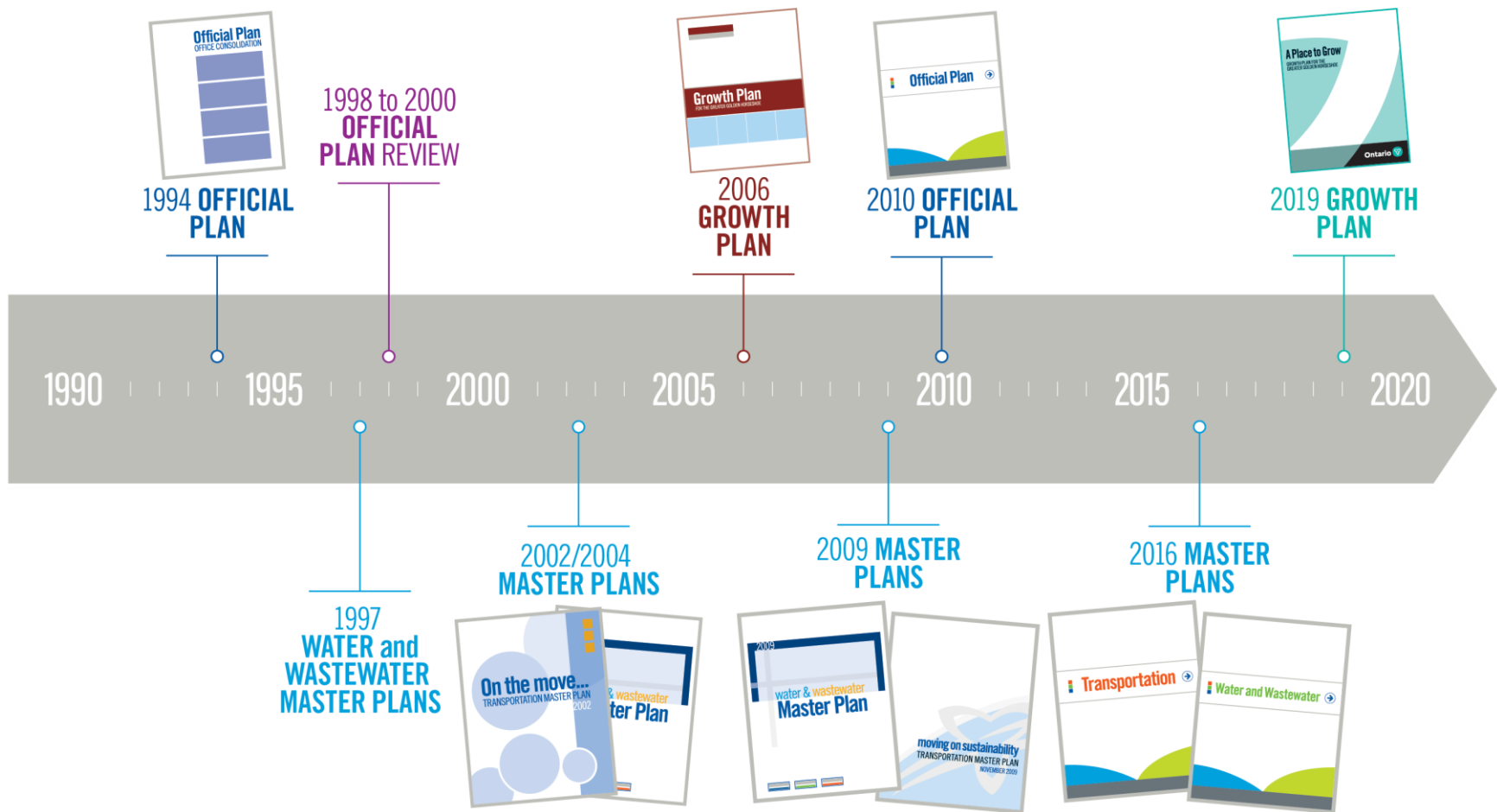
February 17, 2021



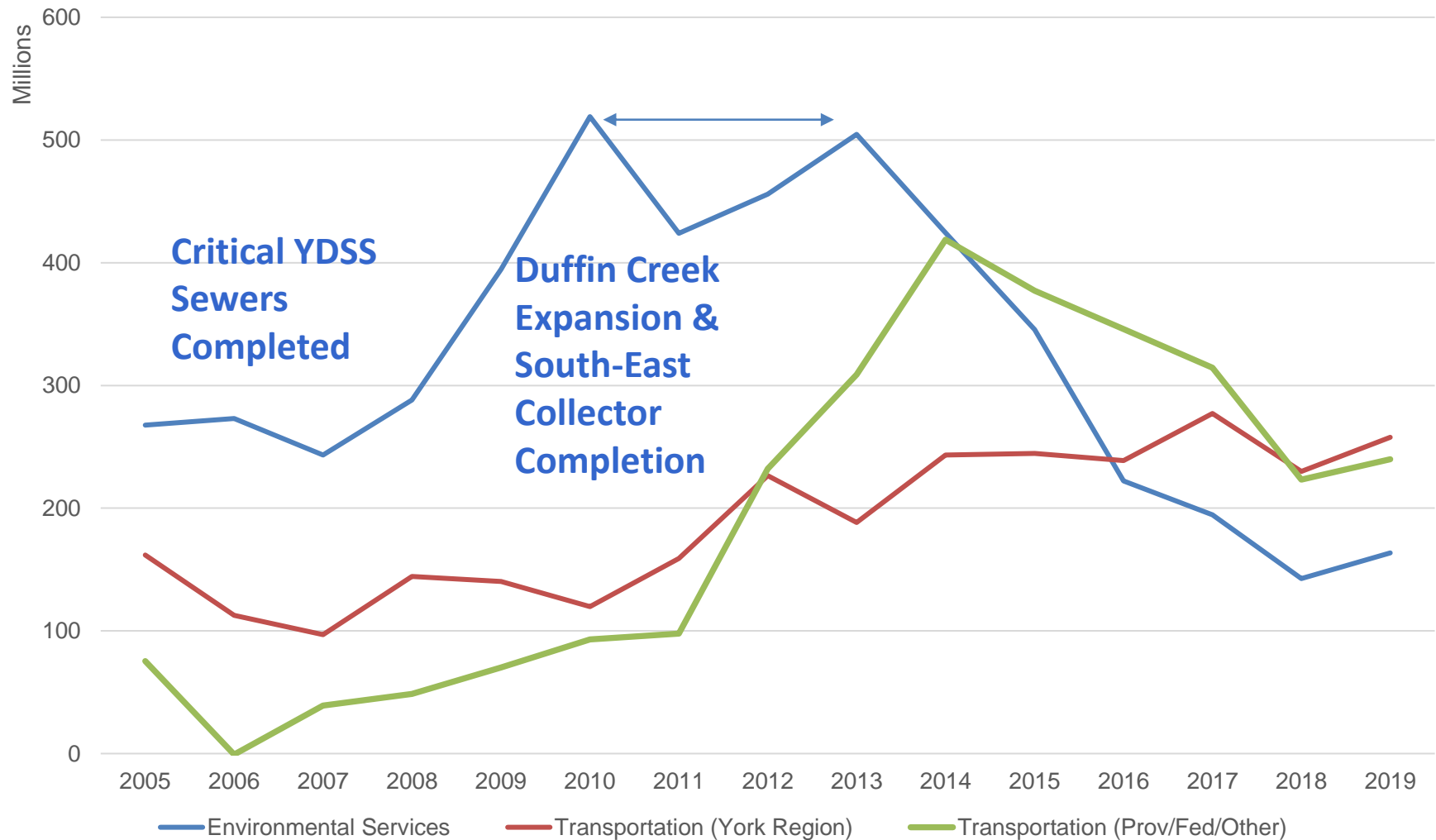
Objectives

1. Setting the stage for success
2. Land Needs Assessment results
3. Considerations to achieve 2051 growth forecasts and mitigate associated risks
4. Aligning infrastructure and financial planning with land use planning
5. MCR Next Steps

Integrated planning has been undertaken in York Region since 1994

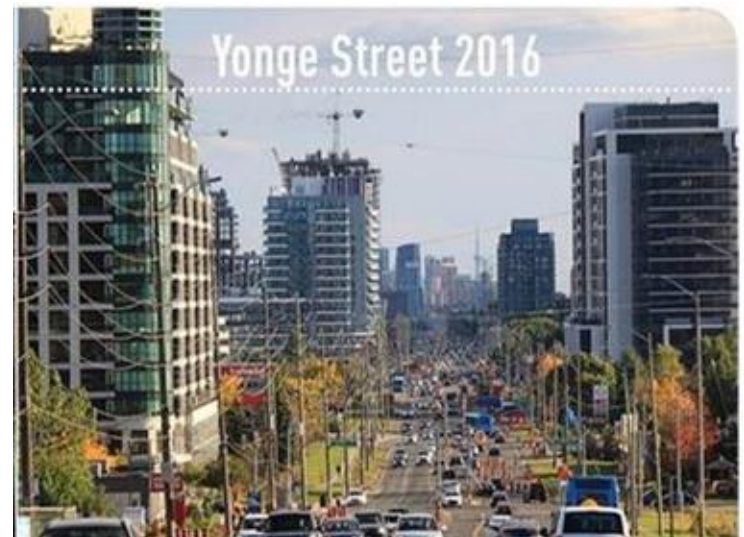


Significant capital investments have been made to support growth in York Region



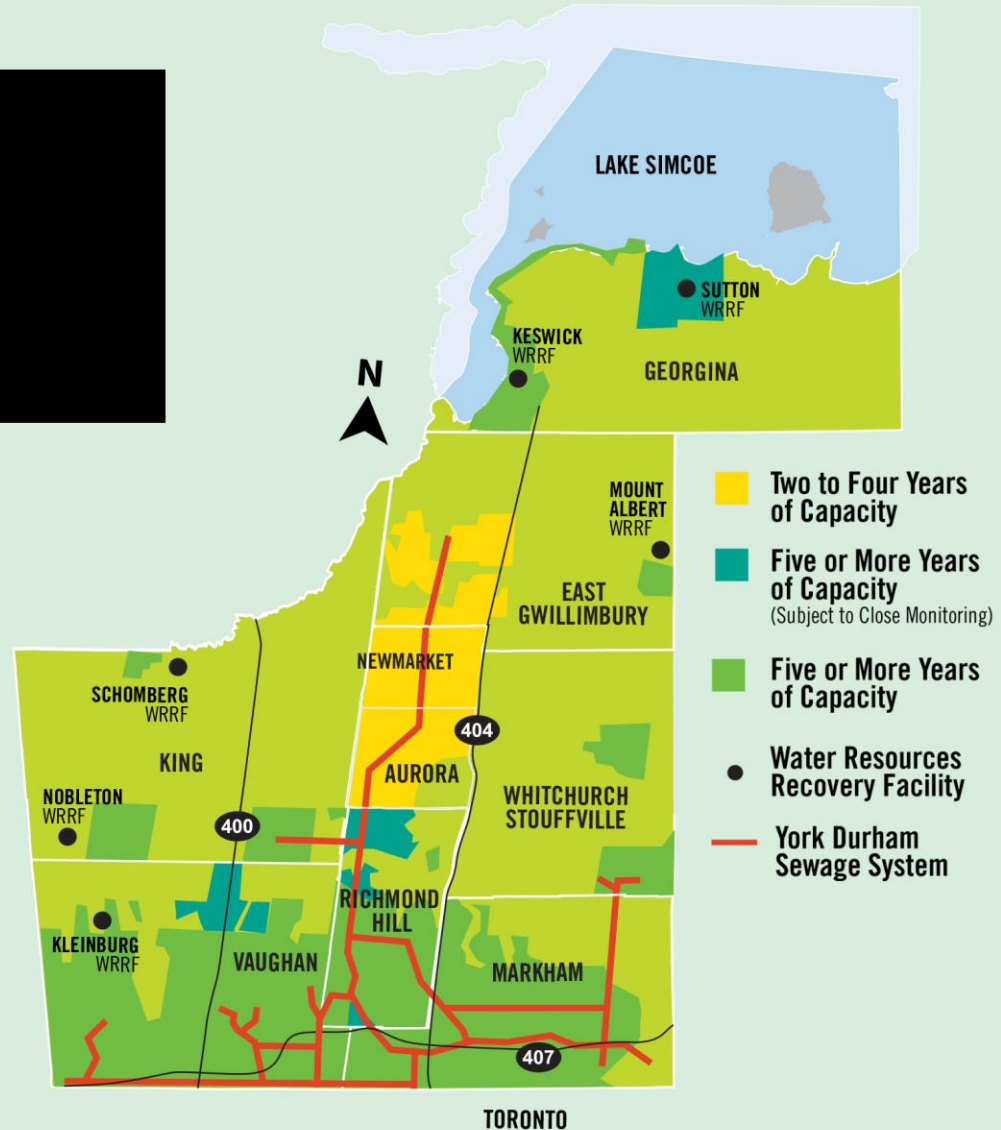
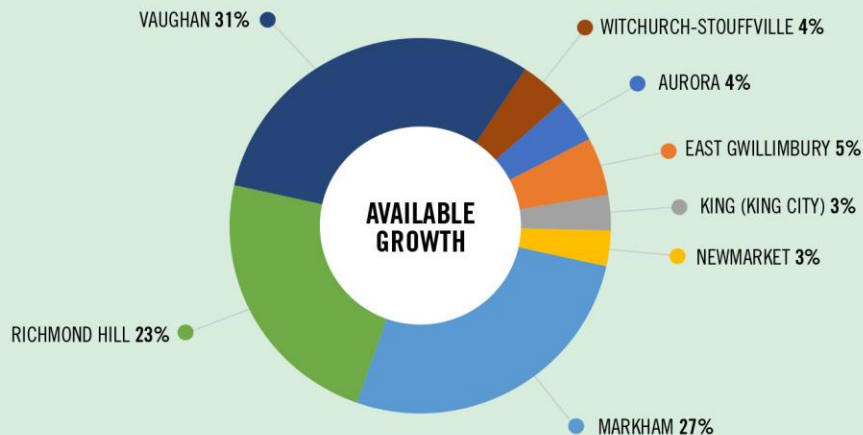
Long range integrated planning and capital investments have supported the Region's economic success

- Growth of 270,000 jobs since 2001
- 52,000 businesses and 500+ foreign companies
- 2nd largest tech cluster in Canada
- Diverse economic base

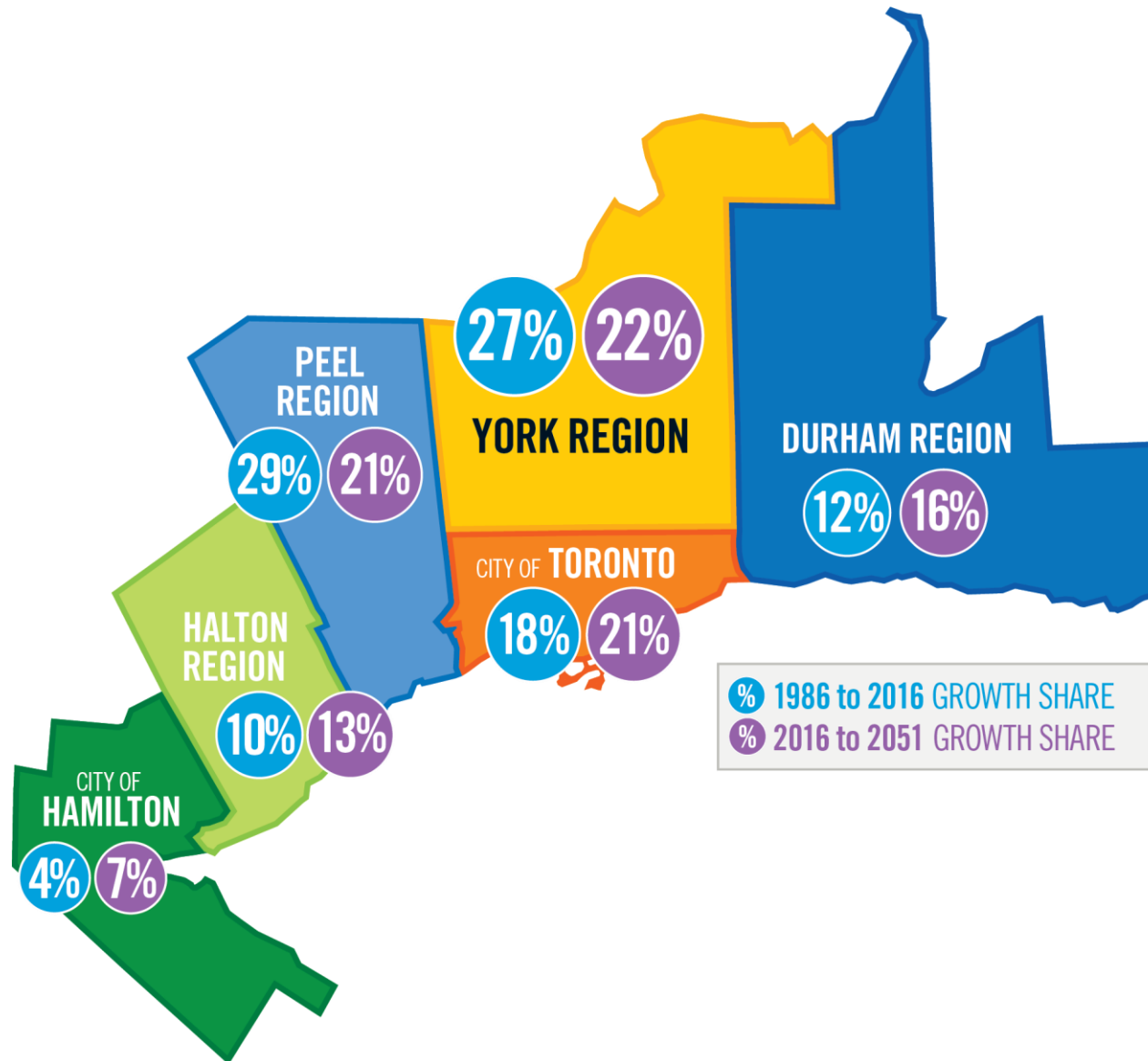


There is significant capacity for growth in the Region

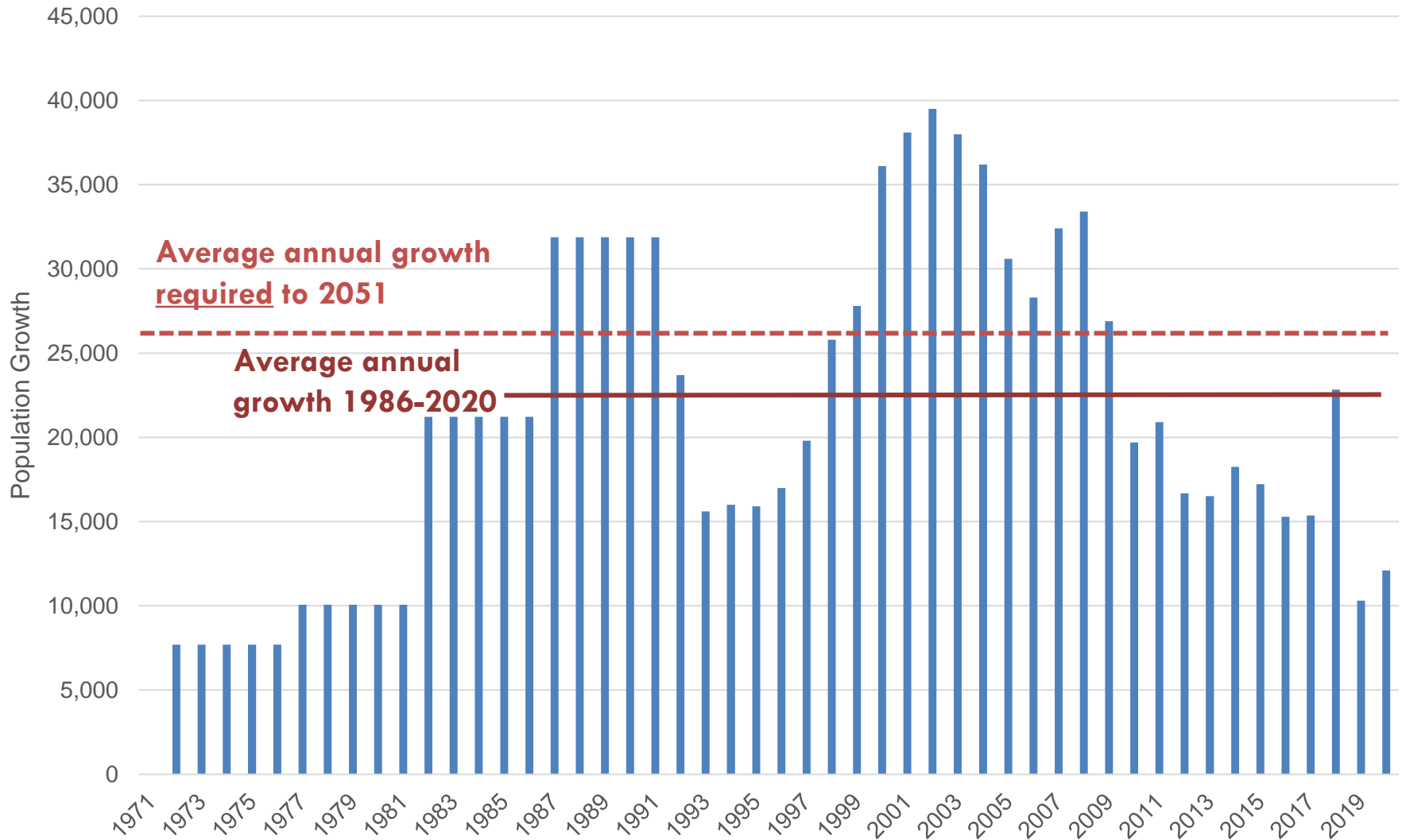
**YDSS Can support over
223,000 persons
of growth**



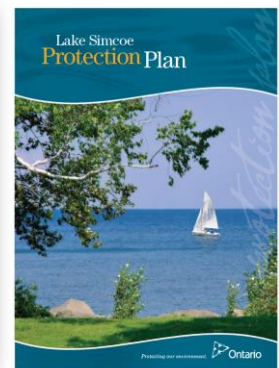
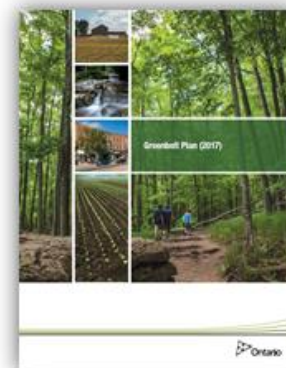
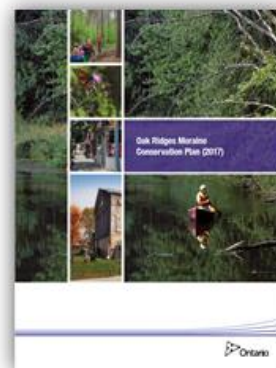
Province anticipates York Region to attract highest share of growth in the Greater Toronto and Hamilton Area



York Region's growth has been cyclical



York Region is required to conform to Provincial policy



Regional Official Plan to be approved by the Province

Provincial Land Needs Assessment Methodology

- Determines quantum, not location of urban expansion
- Premised on achieving minimum Growth Plan targets
- New mandated methodology

2020 update:

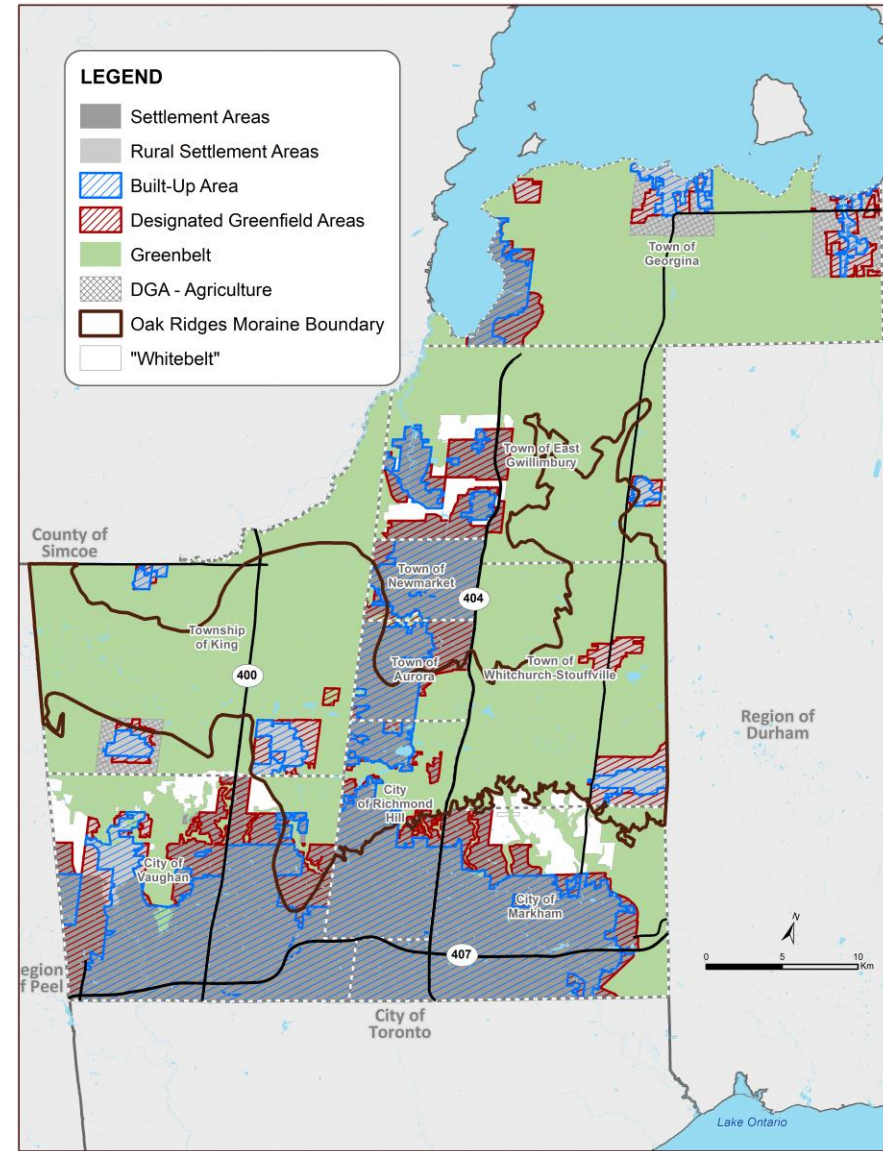
- Introduced flexibility to address local market conditions
- Places increased emphasis on the need for a market-based approach

Community Land Needs Assessment

**800,000 people and
276,000 housing units**

| Land Use Category | Housing Growth | Share |
|----------------------------|----------------|-------------|
| Built-up area | 138,000 | 50% |
| Designated Greenfield Area | 137,000 | 49% |
| Rural Area | 1,000 | <1% |
| Total | 276,000 | 100% |

Determines community land needs



York Region well positioned to meet intensification target



INTENSIFICATION SUPPORTS

\$3.6 BILLION

INVESTED BUS RAPID TRANSIT
and SPADINA SUBWAY EXTENSION



\$5.6 BILLION
YONGE SUBWAY EXTENSION

2,300 hectares of community land required

$$\begin{array}{ccc} 137,000 & \text{units} & - & 101,000 & \text{units} \\ \text{(Demand)} & & & \text{(Supply)} \end{array}$$

$$= \frac{36,000 \text{ units}}{17 \text{ units/Ha}}$$

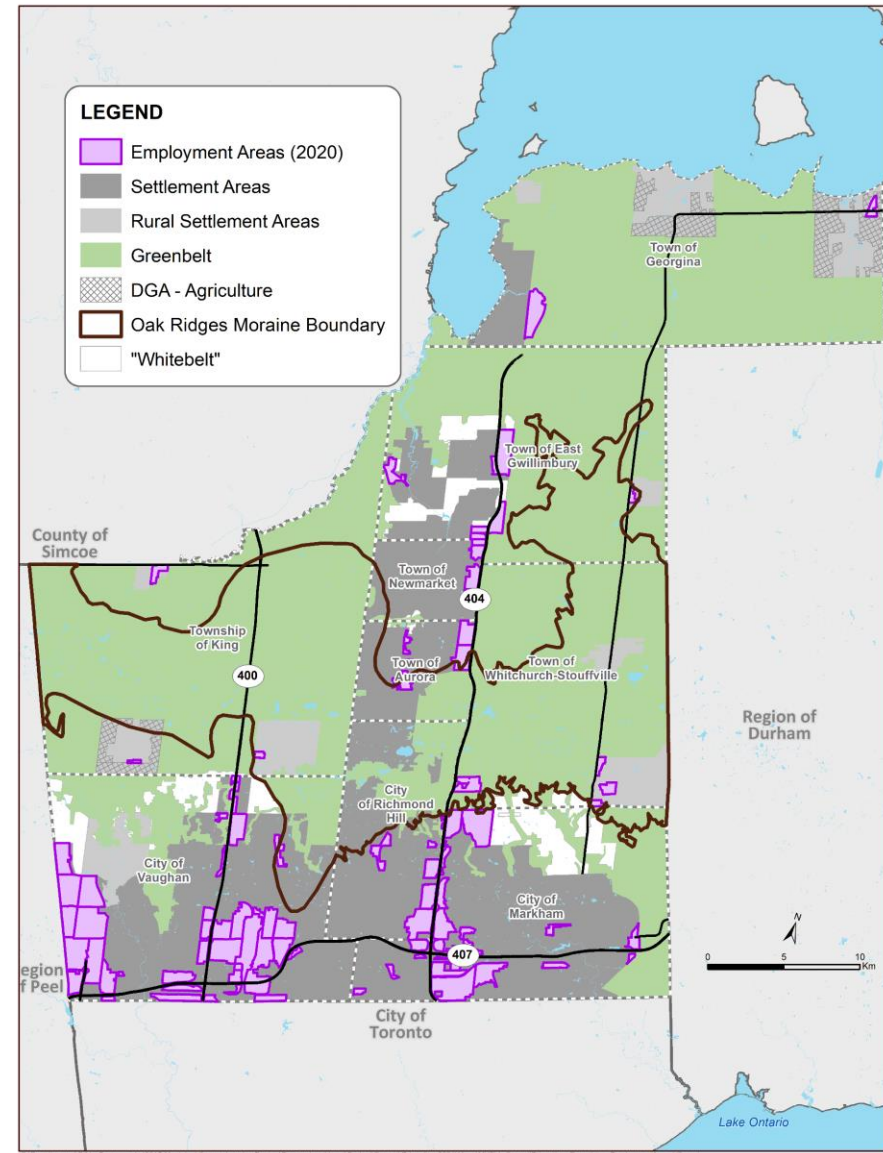
$$= 2,100 \text{ Ha} + \text{Contingency (200 Ha)}$$

$$= 2,300 \text{ Ha}$$

Employment Land Needs Assessment

| Employment Category | Job growth | Share |
|---------------------|----------------|-------------|
| Rural | 1,500 | 0.5% |
| Population Related | 124,000 | 36% |
| Employment Area | 128,000 | 37% |
| Major Office | 92,000 | 26% |
| Total | 345,500 | 100% |

Determines employment land needs



1,100 hectares of employment land required

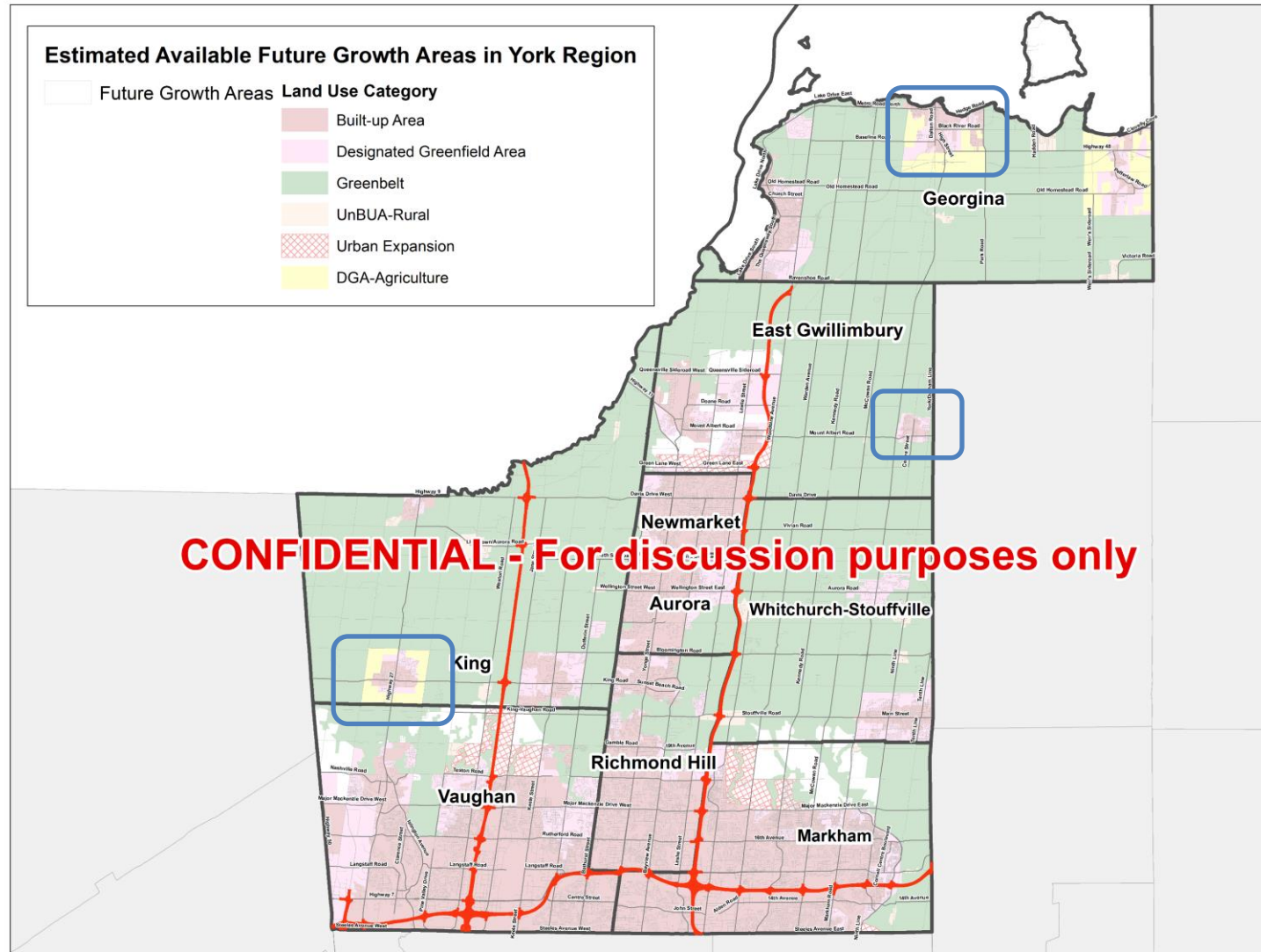
$$\begin{array}{ccc} 128,000 \text{ jobs} & - & 90,000 \text{ jobs} \\ \text{(Demand)} & & \text{(Supply)} \end{array}$$

$$= \frac{38,000 \text{ jobs}}{40 \text{ jobs/Ha}}$$

$$= 950 \text{ Ha} + \text{Contingency (150 Ha)}$$

$$= 1,100 \text{ Ha}$$

Approximately 80% of available whitebelt required to 2051



Considerations to achieve 2051 growth forecasts and mitigate associated risks

Achieving Council priorities



Strong, caring, and safe communities



Balanced housing mix with affordable options



Supporting investment in infrastructure



Continued economic development success

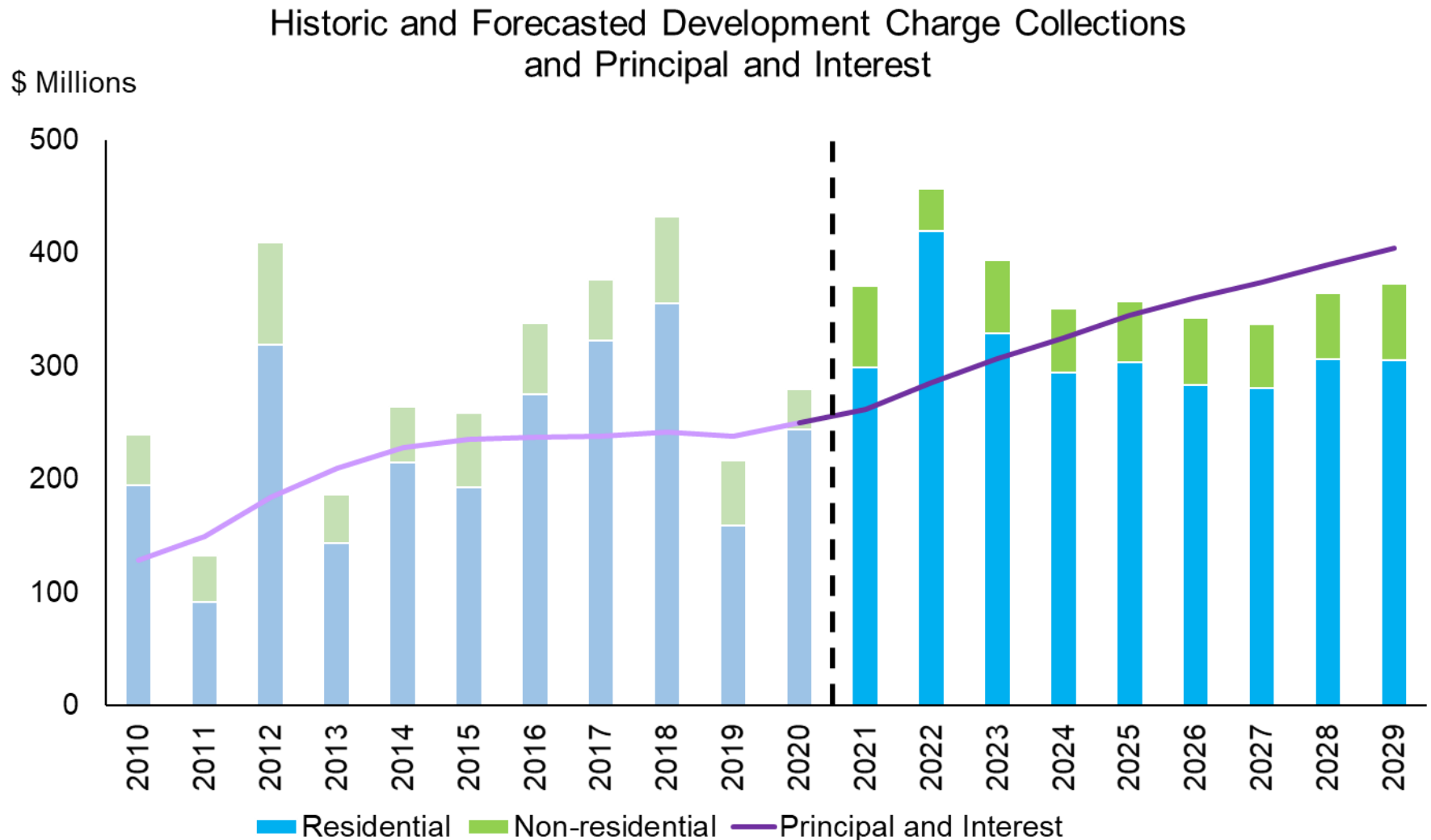


Protect and enhance the natural environment

York Region is entering a mature stage of growth

- Significant investments in infrastructure have been made
- Experiencing a lower rate of growth
- Fiscal Strategy was put in place to manage debt
- Capitalize on existing infrastructure to maintain borrowing capacity for next generation

Development Charges fund DC debt and planned infrastructure



Source: Fiscal Sustainability: 2020 Update Report

Slower than forecasted growth poses a risk to being able to afford new infrastructure

- The projected average annual DC collection of \$370 million assumes robust development activity
- A sustained 10% reduction in collections versus the forecast could require capital deferral of up to \$300 million
- If the pace of development stays at 2020 levels, annual average collections over the next 10 years would be about 20% lower than projected

An estimated \$12 billion in infrastructure would support growth to 2051 and beyond



\$3.4 BILLION
WATER and WASTEWATER

\$7.2 BILLION
ROADS and TRANSIT



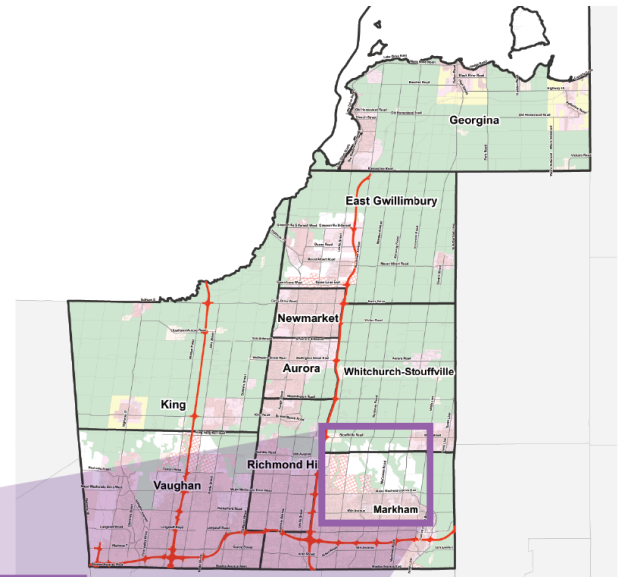
\$1.3 BILLION
YONGE SUBWAY EXTENSION

Growth in Southeast

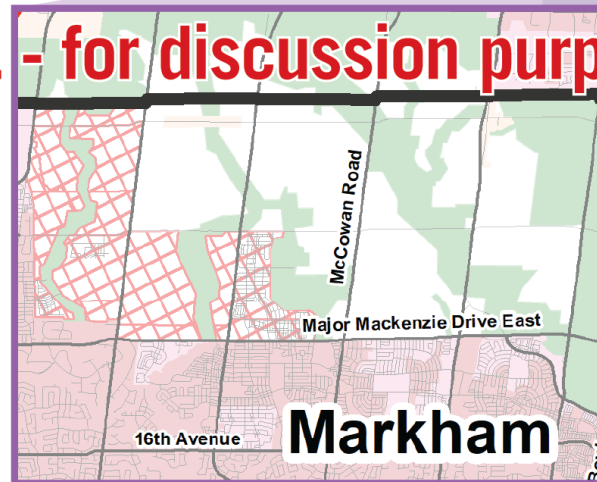
Total Infrastructure Cost
\$480 Million

Supports Population of
85,000 and **20,000 jobs**

Infrastructure
cost per capita **\$4,600**



CONFIDENTIAL - for discussion purposes only



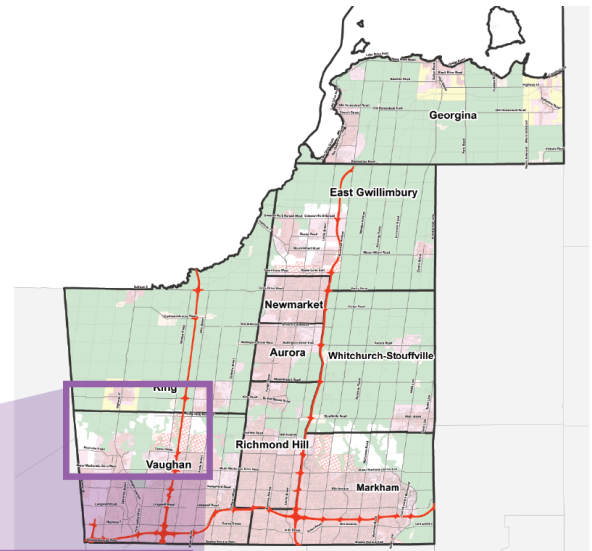
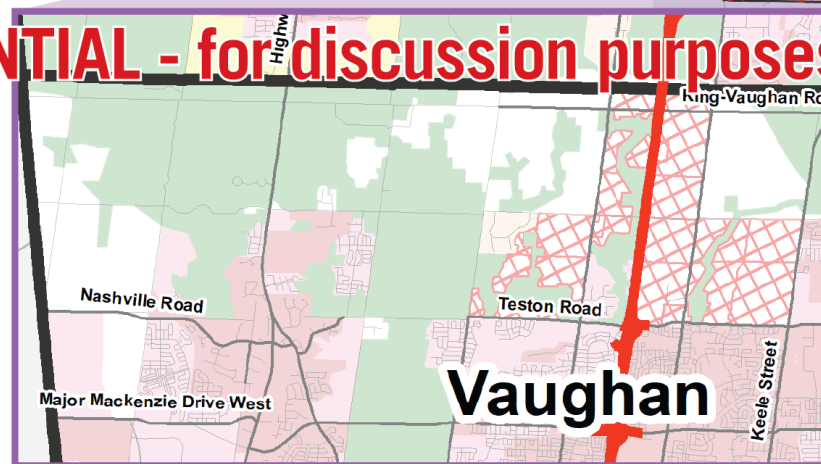
Growth in Southwest

Total Infrastructure Cost
\$900 Million

Supports Population of
90,000 and **40,000** jobs

Infrastructure **\$6,900**
cost per capita

CONFIDENTIAL - for discussion purposes only



Growth in North

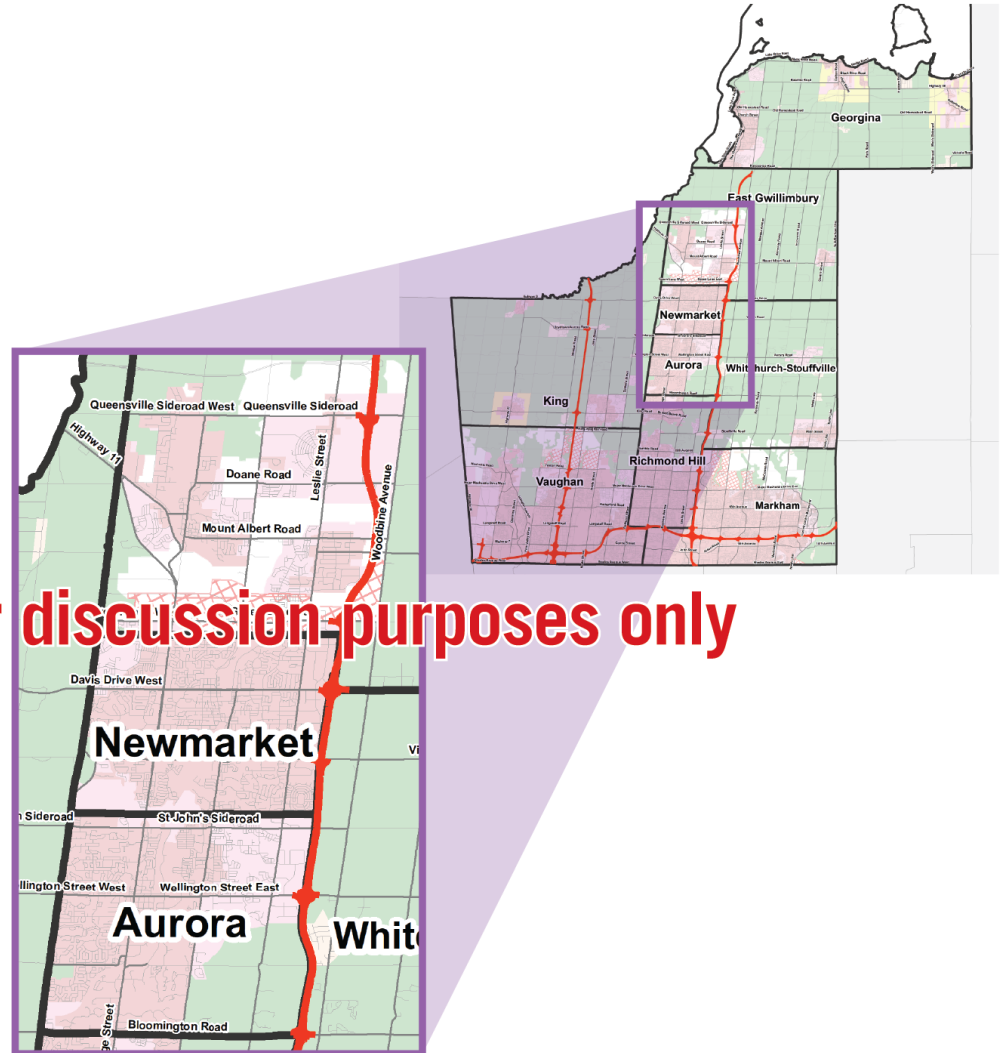
Total Infrastructure Cost

\$1.6 Billion

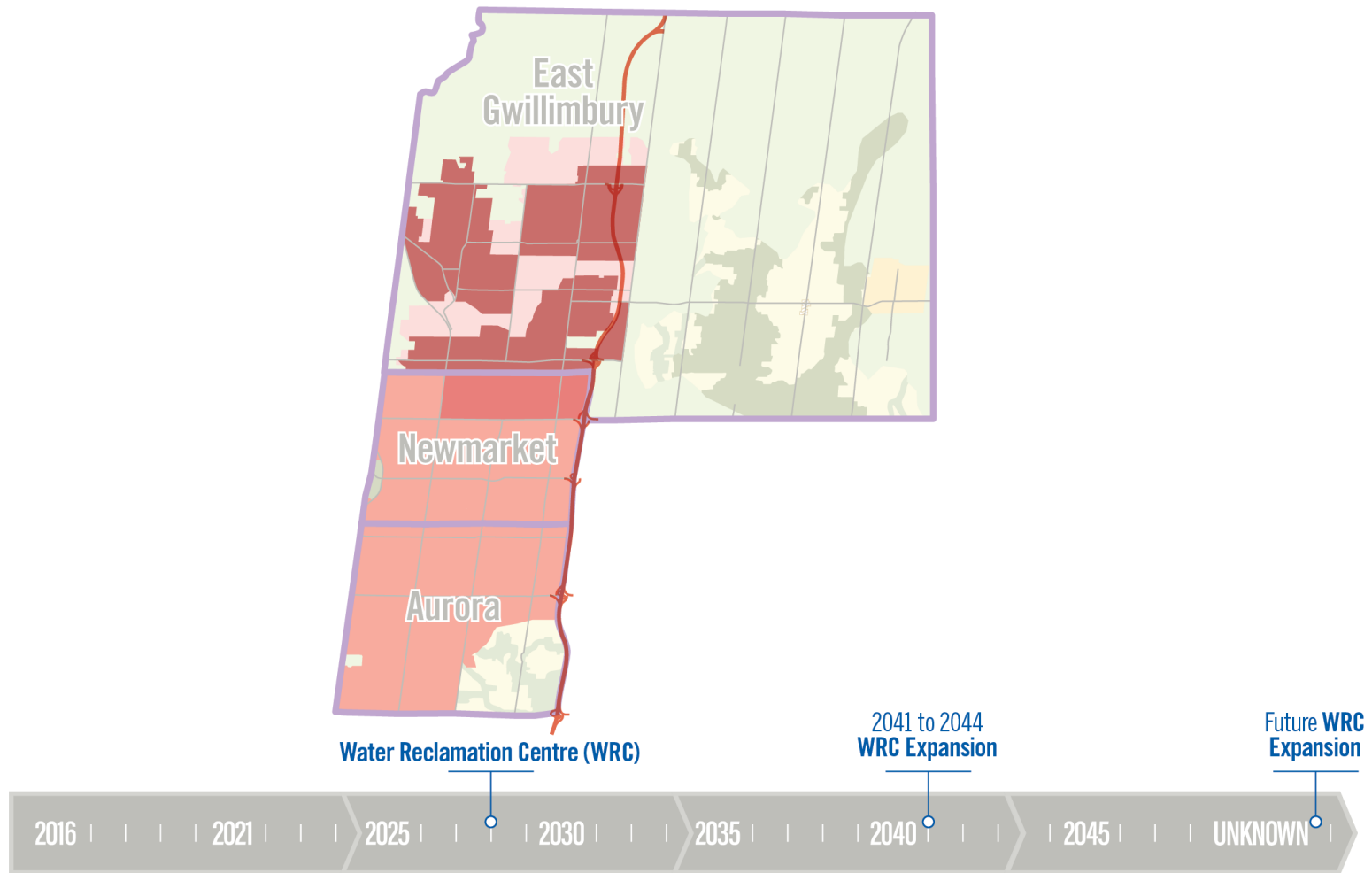
Supports Population of
150,000 and **55,000** jobs

Infrastructure
cost per capita **\$7,600**

CONFIDENTIAL - for discussion purposes only



Infrastructure delivery in the north



Phasing growth and infrastructure will be key to mitigating risk

- The path to financial sustainability requires:
 - Alignment with delivery and efficient use of community services
 - Managing debt
 - Contributions toward reserves to fund capital replacement and rehabilitation
- Increased costs of maintaining and operating infrastructure if put in place too early
- Insufficient growth in the assessment / rate base may result in tax levy or rate increases on existing residents and businesses

Integrating infrastructure and financial planning with land use planning

Integrate fiscal strategy with Regional plans, programs and processes

Analyze full infrastructure cost and debt implications of land use decisions

Stage and phase capital investments in line with actual growth

Provide an agile approach to achieving our long term vision

Greater coordination and information exchange with local municipalities and development community

Strategies for managing growth

- LNA results in a need to designate 80% of the whitebelt to 2051
 - ability to focus on delivering infrastructure
 - better alignment between infrastructure delivery and timing/ pace of DC collections
- Identify remaining whitebelt as 'Future Urban'
 - Opportunity for innovations in technology to be leveraged
- Align capital spending with population thresholds
- Early priority to areas that maximize return on investment

Importance of partners in mitigating and sharing risks

Provincial



Regional



Local



Development and Building Industry



Key takeaways

1. Significant infrastructure investments have led to the Region's continued economic success
2. York Region will remain a high growth municipality to 2051
3. Eventually 100% of the whitebelt will be required for future growth
 - Provincial Land Needs Assessment determined 80% is required by 2051
 - Significant growth will continue in Centres and Corridors
4. The path to financial sustainability will require:
 - An agile approach to growth management
 - Staging and phasing of development and infrastructure
 - Aligning investments with the ability to recover DC collections

Next Steps

- Continue consultation with local municipalities on distribution of growth
- Report to Regional Council – March 2021
- MCR Consultation – Spring/Summer 2021
 - Local municipalities
 - Public
 - Development industry
- Draft Regional Official Plan – Fall 2021
- Master Plans and Development Charges Bylaw update – 2021/2022