



Growth Management Action Plan Background Report

Township of Wellington North

Final Report

March 2024

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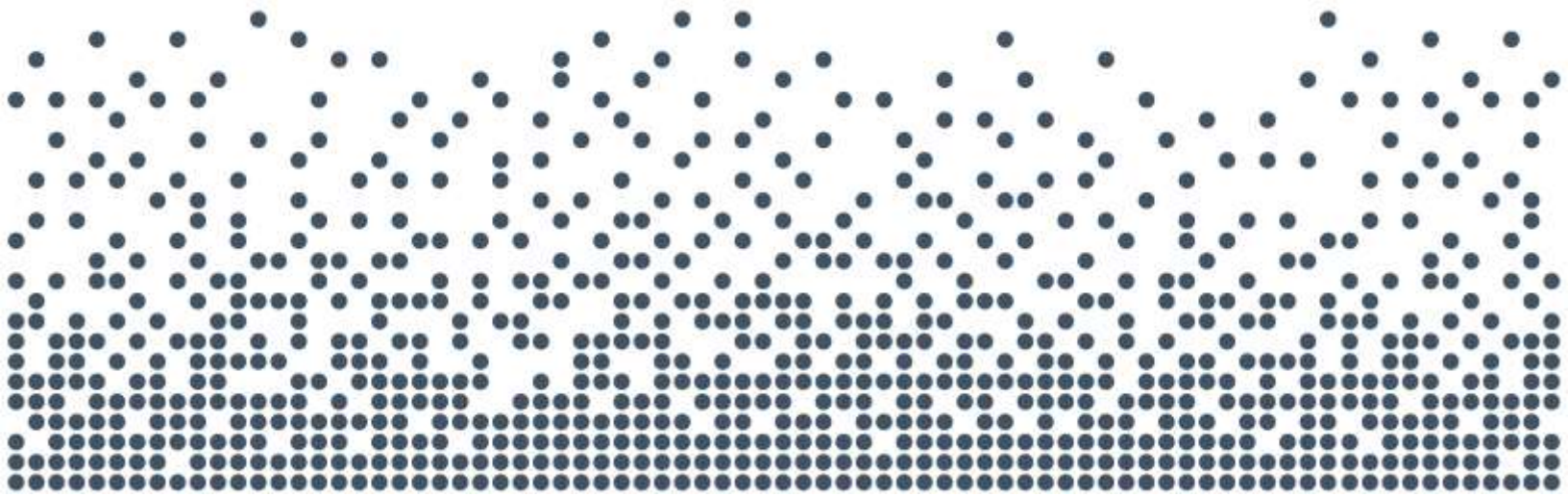
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List of Acronyms and Abbreviations

A.R.U.	Additional Residential Unit
C.I.P.	Community Improvement Plan
COVID-19	Coronavirus disease
D.C.	Development charge
G.G.H.	Greater Golden Horseshoe
G.T.H.A.	Greater Toronto and Hamilton Area
M.C.R.	Municipal Comprehensive Review
OMAFRA	Ontario Ministry of Agriculture, Food and Rural Affairs
O.P.	Official Plan
O.P.R.	Official Plan Review
O.P.A.	Official Plan Amendment
P.P.S., 2020	Provincial Policy Statement, 2020
P.P.S., 2023	Provincial Planning Statement, 2023
P.P.U.	Persons per unit
S.A.B.E.	Settlement Area Boundary Expansion
S.E.P.	Stakeholder Engagement Plan



Executive Summary



Executive Summary

Introduction

In December 2023, the Township of Wellington North retained Watson & Associates Economists Ltd., in association with WSP Canada Inc. (hereinafter referred to as “the Consulting Team”) to prepare a Township of Wellington North Growth Management Action Plan. The Consulting Team comprises a multi-disciplinary team working together to provide a study that addresses and integrates a wide range of considerations in planning for growth and development within Wellington North, including the long-term population and employment trends, urban land needs, hard and soft infrastructure requirements, financial impacts of development on the Township, and strategic planning policy direction. In developing the study work plan, the Consulting Team has established a detailed consultation and public engagement strategy to address the above-mentioned considerations.

Growth management strategically plans the when and where of growth, considering both current and anticipated urban needs. Its goal is to advance sustainable growth patterns by optimizing the utilization of land, resources and infrastructure, while also managing other key priorities. Additional priorities often encompass building complete communities, addressing climate resiliency, preserving the character of communities and safeguarding natural heritage.

As discussed further in this report (Chapter 3), the Township of Wellington North Growth Management Action Plan must conform with provincial and County planning policies. The County of Wellington, as an upper-tier municipality, has a responsibility to set growth management parameters for the Member Municipalities within the County, including growth forecasts and allocations, and minimum targets for density and intensification. The County is required to prepare these under the provincial policy framework which includes the Provincial Policy Statement, 2020 (P.P.S., 2020) and A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019.^[1] In updating the County of Wellington Official Plan, the County recently undertook a Municipal Comprehensive Review (M.C.R.).^[2] That document provides further details on planning

^[1] A Place to Grow, Growth Plan for the Greater Golden Horseshoe, 2019, p. 55.

^[2] County of Wellington, Municipal Comprehensive Review, Phases 1 and 2, March 31, 2022, and August 2022.



for growth across the County, including growth forecasts by Member Municipality, Urban Centre growth allocations and an urban land needs assessment to the year 2051.

The Township of Wellington North, as with other lower-tier municipalities in Ontario, holds responsibility for managing growth through a range of tasks, including:

- zoning by-law;
- development approvals;
- infrastructure planning;
- phasing of growth;
- municipal finance;
- leadership in greenhouse gas reduction;
- accommodating a range of housing options;
- business retention and expansion; and
- collaboration in County planning.

The Township of Wellington North Growth Management Action Plan will be designed to serve as a guiding document that broadly addresses the future impacts of growth related to municipal service delivery, infrastructure requirements, urban land needs and land use planning policy, economic development, and financial sustainability as the Township evolves.

Key objectives of the Growth Management Action Plan include the following:

- Develop a long-term vision for growth and development for the Township to guide local growth management decision-making;
- Describe the type of growth the community wants and where that growth should occur;
- Implement the County's growth forecasts and policy directions through a local lens;
- Prepare a high-level assessment of the growth impacts from a services/ infrastructure perspective; and
- Suggest areas where the Township may need to explore a further review and study.

A key difference between the 2018 Township of Wellington Growth Plan, the previous growth management study, and this study is that this analysis will not conduct and



evaluate growth scenarios for the Township's Urban Centres. This study, the Growth Management Action Plan, will instead focus on building upon the County's growth management work, developing a local vision for growth and providing direction on local implementation. Through engagement with public stakeholders, this study will identify a series of preferred growth principles and priorities for the Township.

As part of this study, the Consulting Team prepared a Stakeholder Engagement Plan (S.E.P.) (refer to Appendix A for the full document). The purpose of the S.E.P. is to identify all key stakeholders for this project and develop an agreed-upon approach with the Township for engaging with stakeholders. The S.E.P. sets out the approach to develop a well-balanced engagement process that encourages idea sharing, pursues diversity of viewpoints, respects differences, and inspires dialogue.

Phase 1, which started in December 2023, lays the foundation for the project's success by reviewing a series of background technical information related to planning for growth, conducting analysis of evolving development trends and identifying key stakeholders. This report, the Background Report, is a deliverable in Phase 1. The next deliverable is the Growth Management Action Plan which will summarize the Township's vision for growth, growth principles, and priorities. That report will also include a high-level assessment of the growth impact on municipal finance and operations, as well as hard servicing requirements (e.g., roads, water and wastewater servicing). Furthermore, it will include recommendations and direction on local growth implementation. The report will be completed in the last phase of the Township of Wellington North Growth Management Action Plan.

The Township of Wellington North Growth Management Action is planned under five phases of work as illustrated in Figure ES-1. This Background Report documents the first phase of the study.



Figure ES-1
Growth Management Action Plan
Study Components



Key Highlights of the Background Report

Broader Economic and Employment Trends

- Despite the Township's local strengths and recent economic success, Wellington North faces several broader opportunities and challenges related to its future economic growth potential and prosperity. Many of these opportunities and challenges relate to macro-economic trends over which the Township has limited control. This includes the relative strength of the global economy, international trade policy and the competitiveness of the Canadian economic base relative to other established and emerging global markets.
- Continued structural changes in the global economy and technological advancements will require municipalities to be increasingly responsive and adaptive to changing industry needs and disruptive economic forces, which have been accelerated by the coronavirus disease (COVID-19) pandemic.
- To ensure that economic growth is not constrained by future labour shortages, a continued effort will be required by the Township (working with their public- and



private-sector partners) to explore ways to attract and accommodate new skilled and unskilled working residents within a broad range of rental and ownership housing options.

- Immigration is an important driver of labour growth and a key priority for the federal government. Immigration accounts for almost 100% of Canada’s labour force growth and nearly 80% of its population growth. With 960,000 currently unfilled positions across all sectors and an estimated worker-to-retiree ratio of only 3:1 by 2030, Canada has a strong economic need for increased immigration.^[3]
- Canada has continued to raise its immigration targets and aims to welcome 485,000 new permanent residents in 2024, 500,000 in 2025 and 500,000 in 2026. The federal government will also be stabilizing targets for permanent residents at 500,000 per year after 2026 to allow for successful integration and sustainable growth.

Local Employment Trends

- The Township of Wellington North offers a diverse range of economic and employment opportunities across various sectors. Manufacturing is the largest employment sector in Wellington North, representing just over 1,400 jobs, or approximately 20% of the Township’s employment base. Other key industrial sectors, following manufacturing, include construction, transportation and warehousing, and wholesale trade. Health care and social assistance and retail trade are large sectors that serve the needs of local residents. Agriculture is also a notable sector that provides economic opportunities within rural areas.
- Over the past decade (2013 to 2023), the Township has experienced growth in several sectors, including industrial and sectors that serve the local population base. The largest decline has been in agriculture and the “other services” sector.^[4]

^[3] Statistics Canada, news release: New immigration plan to fill labour market shortages and grow Canada’s economy, published February 14, 2022.

^[4] The “other services” category would include establishments primarily engaged in activities such as repairing equipment and machinery, promoting or administering religious activities, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services, death care services and pet care services.



Population and Housing Trends

- Population growth comprises two key components: natural increase (i.e., births less deaths), and net migration. Population change is, and will continue to be, heavily influenced by trends in net migration. From 2001 to 2016, the County of Wellington Census Division (which includes the City of Guelph) increased by an average of approximately 2,220 people per year (approximately 11,080 per five-year period). Within the last five years (2016 to 2022), the County of Wellington Census Division experienced a strong rebound in population growth, largely driven by in-migration from other areas of the Province, increasing by approximately 3,620 people per year (18,100 people over five years).
- The Township's population base has grown from 11,600 in 2001 to 13,900 in 2024, an increase of 2,300 people. Since 2016, the population of Wellington North has grown at an annual rate of 1.5%. Comparatively, the population over the 2001 to 2016 period grew at an annual rate of 0.4%.
- Demographic trends strongly influence both housing need and form. Across Ontario the population is getting older on average, due to the aging of the Baby Boomers.^[5] The first wave of this demographic group turned 75 years of age in 2021. The share of population in the 75+ age cohort in the Township has steadily increased from 8% in 2001 to 10% in 2021. This coincided with a similar increase in the 65-74 age cohort; growing from 9% in 2001, to an allocation of 11% in 2021.
- The Township of Wellington North experienced strong housing development activity over the 2021 to 2023 period, averaging 194 new units annually. During that three-year period, the Township issued building permits for the construction of over 580 housing units, which was more than the total building permits issued for new housing units over the previous 15 years (2006 to 2020).
- The surge in residential building permit activity over the past few years was due to development activity in the Township's two Urban Centres (Mount Forest and Arthur). Over the 2016 to 2019 period, the Urban Centres averaged 42 housing units annually; that increased to 142 housing units annually over the 2020 to 2023 period.
- Between 2020 and 2023, low-density housing (single detached and semi-detached) accommodated 57% of the housing activity in the Township,

^[5] Baby Boomers are generally defined as people born between 1946 and 1964.



compared to 76% over the 2006 to 2015 period. Over the long-term planning horizon, housing demand is anticipated to gradually shift from low-density housing forms to medium- and high-density housing types, largely driven by the aging of the Township's population base and declining housing affordability.

- Housing tenure falls under two categories – owner occupied, and tenant occupied. Within the Township of Wellington North approximately 74% of housing units are owner occupied, with a corresponding 26% of units being tenant occupied. Looking forward, demand for rental housing options within the Township's Urban Centres is anticipated to increase driven by the declining affordability of ownership housing.

Policy Context

- The provincial policy framework in Ontario has undergone significant changes in recent years to adapt to evolving economic, social and environmental challenges. A key provincial policy thrust has been the need to address the shortfall of housing across Ontario which set in motion a series of provincial policy changes and new provincial legislation.
- On April 7, 2023, the Province of Ontario released a new Provincial Planning Statement (P.P.S., 2023) in concert with introducing Bill 97: *Helping Homebuyers, Protecting Tenants Act, 2023*. Bill 97 proposes amendments to seven provincial statutes, including the *Planning Act*. A key focus of the proposed P.P.S., 2023 is that it recognizes that the approach to delivering housing needs and Employment Area land needs requirements will vary by municipality and, as such, moves away from a prescriptive guideline-based approach.
- The County of Wellington completed a series of M.C.R. documents that informed the County's Official Plan Review (O.P.R.). The M.C.R. comprises three relevant completed documents related to growth management, including M.C.R. Phase 1 Report: Growth Structure and Allocations; M.C.R. Phase 2 Report: Land Urban Lands; and an Urban Land Needs Municipal Comprehensive Review Municipal Servicing Analysis.
- The County of Wellington M.C.R. Phase 2 Report provides an urban land needs assessment for each of the Member Municipalities within the County of Wellington. The report identified that Mount Forest and Arthur have enough urban lands to accommodate housing and employment growth to 2051. While



the assessment did not identify a need for additional urban lands, it did identify the need to re-designate approximately 81 ha (200 acres) of Future Development lands for residential use, which represents approximately 48% of the Future Development lands in Wellington North. The report further concluded that the Township has a surplus of 40 ha of Employment Area lands to 2051.^[6]

- Based on the Urban Land Needs Municipal Comprehensive Review Municipal Servicing Analysis, the Township of Wellington North has existing water and wastewater servicing capacity to accommodate near-term growth. The report considered the Township's plans to expand the wastewater treatment plant capacity in Arthur within the next two to four years. Over the long term, Mount Forest is projected to have sufficient water capacity over the planning horizon, but not wastewater capacity.^[7]

County of Wellington Official Plan Amendments

- In September 2019, the County of Wellington initiated its O.P.R. to conform with provincial policy updates. Since 2019, a series of provincial policy updates has extended the timing of the O.P.R. The County has completed the drafting of three Official Plan Amendments (O.P.A.s), including the following: O.P.A. 119; O.P.A. 120; and O.P.A. 123.
- **O.P.A. 119: County Growth Structure** adds new policies for complete communities, as well as revises the County's growth structure and settlement hierarchy based on servicing. The O.P.A. was adopted by the County Council and subsequently approved by the Ministry of Municipal Affairs and Housing, with modifications. Modifications included urban boundary expansions and two Employment Area conversions to Community Area uses (one in Arthur of approximately 14 ha and a small conversion in Elora) that were not a part of the County's O.P.A. submission.^[8]

^[6] County of Wellington, Phase 2 Municipal Comprehensive Review Report: Land Needs, prepared by Watson & Associates Economists Ltd., March 31, 2022.

^[7] County of Wellington, Municipal Comprehensive Review Municipal Servicing Analysis Memorandum prepared by WSP Canada Inc., January 31, 2022.

^[8] County of Wellington, County Official Plan Review – County Official Plan Review – Provincial Decision on OPA 119, prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, May 11, 2023.



- On October 23, 2023, the Province announced plans to reverse its modifications to County O.P.A. 119, including urban boundary expansions and the Employment Area conversions that were not part of the original Council-adopted O.P.A. The modifications by the Province are no longer in effect.^[9]
- **O.P.A. 120: County Growth Forecast** was adopted by County Council on February 23, 2023. The amendment extends the growth horizon in the County of Wellington from 2041 to 2051 and allocates the additional population, household and employment growth to Member Municipalities. The amendment was submitted to the Ministry of Municipal Affairs and Housing on March 1, 2023. No decision has been made by the Province and there has been no update from the Ministry on the likely approval of this amendment.^[10]
- **O.P.A. 123: Future Development Lands** is the most recently completed O.P.A. The purpose of this O.P.A. is to redesignate certain Future Development lands within Urban Centres, to address the results of the County's Land Needs Assessment prepared under the M.C.R.^[11] O.P.A. 123 has been circulated for comment to County of Wellington Council. That O.P.A. is currently being paused by the County in response to the provincial government's recent announcement to reverse its decisions on previous County O.P.A.s which impact this O.P.A.^[12]

Review of Initiatives and Plans

- The County of Wellington has an Economic Development Strategic Plan, as well as a climate mitigation plan. These documents identify a list of action items for the planning of growth in the County, in terms of climate resiliency and attracting and retaining economic growth.

^[9] County of Wellington, County Official Plan Review – Progress Report #10, prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, November 9, 2023.

^[10] County of Wellington, County Official Plan Review – Growth Forecast Amendment (OPA 120), prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, September 8, 2022.

^[11] County of Wellington, County Official Plan Review – OPA 123 Future Development Lands, prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, September 14, 2023.

^[12] County of Wellington, County Official Plan Review – Progress Report #10, prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, November 9, 2023.



- As the Township grows, a key consideration for the Township will be the review of the Zoning By-law. A review of the Zoning By-law will ensure that the by-law provides a framework to accommodate new desired development forms and employment opportunities and provides an opportunity to tackle climate resiliency.
- The Growth Management Action Plan should include consideration to the priorities of the Township 2024 Strategic Plan, which identifies short-term priorities for Council and Township staff.
- The Wellington North Development Charges By-law provides a few discounts to attract targeted development to the Township, as well as to encourage development in key areas of interest.
- The Township of Wellington North Asset Management Plan was prepared in 2021 and provides a strategic planning document outlining a logical approach to manage transportation, stormwater, water and wastewater assets proactively and efficiently. It identified the need for stormwater management plans.
- The Township of Wellington North has an industrial strategy with a list of seven key elements. The Growth Management Action Plan should explore this list.
- The Township has carried out a number of initiatives to support the business base in the Township, including the Community Improvement Plan program, the Township's partnership with Saugeen Connects and Business Retention and Expansion Surveys.

Planning for Growth

- The Township is tracking to the County of Wellington M.C.R. forecast. Based on a review of recent trends, the forecast appears to remain appropriate for the Township. As discussed previously, all forecasts and targets set by the County are considered minimums.
- Population and housing growth in Arthur appears to be tracking slightly higher in the short term (i.e., to 2031) than what was anticipated in the M.C.R., while Mount Forest is tracking slightly lower. Collectively, the forecast assumes very robust growth in the two Urban Centres in the short term, exceeding the growth rate experienced from 2020 to 2024.
- The Township has the opportunity to allocate employment growth within the Township. The County O.P. and its M.C.R. did not assign employment growth by



Urban Centre or by Employment Area. As part of this Growth Management Action Plan there will be a need to prioritize Employment Area lands.

- The Township is achieving a very high rate of intensification, largely due to the development of large vacant sites within the B.U.A.
- In order to achieve a 20% intensification rate within the Township's Urban Centres, most of the intensification opportunities identified would be required to develop. The Township may want to explore a further review of its intensification potential, including opportunities beyond what has been identified by the County. While the Township has been successful in achieving a higher rate of intensification than 20%, it is important to recognize that the Township's current supply of intensification opportunities is limited.
- The Township is required to plan for a minimum density of 32 people and jobs/ha in the designated greenfield area. The Township has been achieving a lower density of 30 people and jobs/ha in Mount Forest and 26 people and jobs/ha in Arthur. Given that the density target is a minimum, there is an opportunity to strive for a higher density beyond the 32 people and jobs/ha.
- Working with the County, the Township should prepare a strategy to guide the implementation of the Special Policy Area for the Future Development lands planned for residential use. For example, that strategy should consider what conditions and infrastructure improvements would be required for the Township to allow development to proceed on these lands. This strategy would help to communicate the Township's objectives of these lands with the public and inform other Township initiatives and plans that may be impacted.

Housing Potential and Land Supply to Accommodate Residential and Non-Residential Growth

- The Township's Urban Centres (Mount Forest and Arthur) would require the re-designation of Future Development lands to residential uses by 2036 to accommodate housing growth. This will also require consideration of planning for infrastructure.
- As the Township plans for the future, it will need to strengthen the existing commercial base of Arthur and Mount Forest. The Community Improvement Plan and other downtown initiatives will be key to building a resilient commercial base.



- Over the past decade, most of the Employment Area development has largely been focused within Mount Forest. Arthur on the other hand has some large anchor employers, including those in the auto parts manufacturing sector. As part of this Growth Management Action Plan, there is a need to explore how to plan for Employment Area lands within the Township, including where to prioritize Employment Area efforts.

Next Steps

The next step in the Growth Management Action Plan is to craft a growth vision that identifies key growth principles and priorities for the Township in planning for growth. A session will be held with the Growth Management Action Plan Advisory Group that will develop this vision and its principles and priorities. Once finalized, the Consulting Team will assess the impact of the growth of services and infrastructure, as well as provide growth management recommendations on implementation.

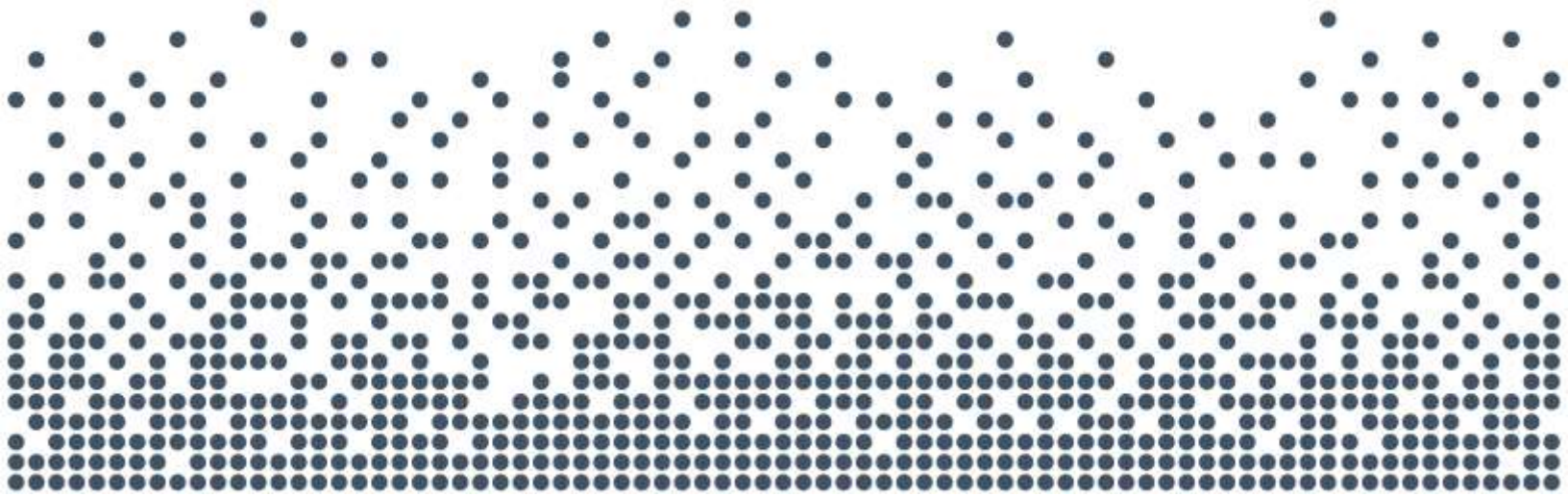
This Background Report explores several fundamental opportunities and challenges that the Township of Wellington is anticipated to face over the next 20 years and beyond. Questions that can be explored in developing the Township's Growth Management Action Plan include, but are not limited to, the following:

- What are the characteristics of the Township's Urban Centres that need to be protected?
- What is missing in the Township to support a complete community?
- As the Township's Urban Centres grow, what are some of the lessons the Township should learn from other municipalities?
- What are some of the key concerns as the Township grows (i.e., "growing pains")?
- What would be required for the Township to plan for a higher amount of growth and the re-designation of further Future Development lands to other uses?
- What opportunities are there for the Township to promote climate resiliency as it significantly expands its urban population base?
- Should the Township consider flexible policies and zoning for residential and mixed-use development in the downtown areas?
- What additional planning policies, tools, and incentives should be maintained and potentially introduced to support the development of the Township's non-



residential areas, including Downtown Core Areas, Commercial Areas, Mixed Use Areas and Employment Areas?

- What opportunities should the Township explore in strengthening its Employment Area lands? Recognizing that the Township has a surplus of Employment Area lands, what Employment Area lands should be prioritized?



Report



Chapter 1

Introduction



1. Introduction

1.1 Purpose of Growth Management Action Plan

1.1.1 *Terms of Reference*

In December 2023, the Township of Wellington North retained Watson & Associates Economists Ltd., in association with WSP Canada Inc. (hereinafter referred to as “the Consulting Team”), to prepare a Township of Wellington North Growth Management Action Plan. The Consulting Team comprises a multi-disciplinary team working together to provide a study that addresses and integrates a wide range of considerations in planning for growth and development within Wellington North, including the long-term population and employment trends, urban land needs, hard and soft infrastructure requirements, financial impacts of development on the Township, and strategic planning policy direction. In developing the study work plan, the Consultant Team has established a detailed consultation and public engagement strategy to address the above-mentioned considerations.

1.1.2 *What is Growth Management?*

Growth management strategically plans the when and where of growth, considering both current and anticipated urban needs. Its goal is to advance sustainable growth patterns by optimizing the utilization of land, resources, and infrastructure, while also managing other key priorities. Additional priorities often encompass building complete communities, addressing climate resiliency, preserving the character of communities, and safeguarding natural heritage.

1.1.3 *Growth Management Roles*

As discussed further in this Report (Chapter 3), the Township of Wellington North Growth Management Action Plan must conform with provincial and County planning policies. The County of Wellington, as an upper-tier municipality has a responsibility to set growth management parameters for the Member Municipalities within the County, including growth forecasts and allocations and minimum targets for density and intensification. The County is required to prepare these under the provincial policy framework which includes the Provincial Policy Statement, 2020 and A Places to Grow, Growth Plan for the Greater Golden Horseshoe Region, 2019. In updating the County



of Wellington O.P., the County recently undertook a Municipal Comprehensive Review (M.C.R.).^[13] That document provides further details on planning for growth across the County, including growth forecasts by Member Municipality, Urban Centre growth allocations and an urban land needs assessment to the year 2051.

1.1.4 What Role Does the Township of Wellington North have in Growth Management?

The Township of Wellington North, as with other lower-tier municipalities in Ontario, holds responsibility for managing growth through a range of tasks, including:

- **Zoning By-law:** regulates how land can be used and developed, including provisions for setbacks, building heights, parking requirements and permitted uses.
- **Development approvals:** reviewing and approving development applications, such as subdivisions and site plans.
- **Infrastructure planning:** planning and providing for infrastructure such as roads, water supply, wastewater treatment, and community facilities to accommodate growth and development.
- **Phasing of growth:** staging the development of lands that align with infrastructure planning, economic development plans and community priorities and values.
- **Municipal finance:** ensuring that the Township is planning for growth that is fiscally responsible over the long term.
- **Leadership in greenhouse gas reduction:** the Provincial Policy Statement, 2020 (P.P.S., 2020) requires municipalities address energy conservation and emissions reductions through land use and development patterns.^[14] Local municipal governments have a key responsibility in reducing greenhouse gas emissions, as it is estimated that 44% of Canada's greenhouse gas emissions were directly and indirectly controlled by municipal government.^[15]
- **Accommodating opportunities for a range of housing options:** the provincial policy framework includes a series of housing policies that stresses the

^[14] Provincial Policy Statement, 2020, policy 1.8.1.

^[14] Provincial Policy Statement, 2020, policy 1.8.1.

^[15] EnviroEconomics, Act Locally. The Municipal Role in Fighting Climate Change, prepared for the Federation of Canadian Municipalities, 2009.



importance of municipalities in facilitating housing development, including supporting affordable housing options.

- **Business retention and expansion:** implementing policies and initiatives to encourage business growth and retention within the Township, thereby supporting local employment opportunities and preventing the erosion of the non-residential assessment tax base.
- **Collaboration in County planning:** collaborating with the County of Wellington and neighbouring Member Municipalities to coordinate growth management efforts, address regional issues, and achieve broader planning objectives.

A local growth management strategy can serve as a guide in decision making related to the above responsibilities, ensuring that development and initiatives align with the Township's long-term vision, priorities, and goals.

1.1.5 What is the Purpose of the Growth Management Action Plan?

The Township of Wellington North Growth Management Action Plan will be designed to serve as a guiding document that broadly addresses the future impacts of growth as they relate to municipal service delivery, infrastructure requirements, urban land needs and land use planning policy, economic development, and financial sustainability as the Township evolves.

Key objectives of the Growth Management Acton Plan include the following:

- Develop a long-term vision for growth and development for the Township to guide local growth management decision-making;
- Describe the type of growth the community wants and where that growth should occur;
- Implement the County's growth forecasts and policy directions through a local lens;
- Prepare a high-level assessment of the growth impacts from a services/ infrastructure perspective; and
- Suggest areas where the Township may need to explore a further review and study.



1.1.6 The Growth Management Action Plan Serves as the Township's Growth Management Update

This Growth Management Action Plan is intended to update the Township of Wellington Growth Plan prepared in 2018 by GSP Group Inc. and Curtis Planning Inc. The 2018 Township of Wellington North Growth Plan was used to inform the County of Wellington on Wellington North's growth priorities and issues as the County conducted its M.C.R. and drafted Official Plan Amendments (O.P.A.s).^[16]

The Township's 2018 Growth Plan provided guidance as the County reviewed growth allocations by Urban Centre and assessed Employment Area conversion requests (conversions of Employment Area uses to other uses). Furthermore, as part of O.P.A. 123, the County used the Township's 2018 Growth Plan to provide direction on the re-designation of Future Development lands (urban lands not yet designated for a specific urban land use) identified in the land use schedules of Mount Forest and Arthur in the County O.P. (Schedules B6-1 Mount Forest and B6-2 Arthur).^[17]

A key difference between the 2018 Township of Wellington Growth Plan and this study, is that this study will not conduct and evaluate growth scenarios for the Township's Urban Centres. This study, the Growth Management Action Plan, will instead focus on building upon the County's growth management work, developing a local vision for growth and providing direction on local implementation. Through engagement with public stakeholders, this study will identify a series of preferred growth principles and priorities for the Township.

^[16] County of Wellington, County Official Plan Review – Report #PD2023-24, prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, September 14, 2023.

^[17] The purpose of the Future Development designation, as noted in the County O.P., is to provide the orderly future development of unbuilt areas in the Urban Centre, which requires an O.P.A., including a proper site plan or concept, and that municipal services can be accommodated to the area prior to the approval of development (County of Wellington, O.P., policy 8.10.2, p. 113).



1.2 Study Components and Process

This Growth Management Action Plan comprises two main deliverables: a Background Report, and a Growth Management Action Plan Report. Provided below is a summary of the two deliverables.

1.2.1 Background Report

This report, the Background Report, is the first component of the Growth Management Action Plan. It provides important context for the Township of Wellington North Growth Management Action Plan, and discusses the implications of trends, growth projections, demographic shifts and other factors influencing development patterns and how the Township is to plan for growth. Designated as a resource for discussions, this document provides background information and explores key themes related to residential and non-residential development trends that require long-term growth management considerations.

1.2.2 Growth Management Action Plan Report

The Growth Management Action Plan Report will summarize the Township's vision for growth, growth principles, and priorities. The report will also include a high-level assessment of the growth impact on municipal finance and operations, as well as hard servicing requirements (e.g., roads, water and wastewater servicing). Furthermore, it will include recommendations and direction on local growth implementation. This report will be completed in the last phase of the Township of Wellington North Growth Management Action Plan.

1.2.3 Stakeholder Engagement Plan

As part of this study, the Consulting Team prepared a Stakeholder Engagement Plan (S.E.P.) (refer to Appendix A for the full document). The purpose of the S.E.P. is to identify all key stakeholders for this project and develop an agreed-upon approach with the Township for engaging with stakeholders. The S.E.P. sets up the approach to develop a well-balanced engagement process that encourages idea sharing, pursues diversity of viewpoints, respects differences, and inspires dialogue. The S.E.P. reflects the International Association for Public Participation's (IAP2) Core Values, Spectrum of Engagement, and Best Practices, as well as the guidelines of applicable policies and guiding documents.



The S.E.P. provides an internal approach and will guide the Township and the Consulting Team through the Growth Management Action Plan project. It also highlights objectives, audiences and techniques to engage with stakeholders in a manner that is interactive, visual, and meaningful.

1.2.4 Study Components

The Township of Wellington North Growth Management Action Plan is prepared under five phases of work as illustrated in Figure 1. This Background Report documents the first phase of the study.

Figure 1
Growth Management Action Plan
Study Components



Provided below is a summary of the phases of work that will be carried out to complete the Growth Management Action Plan Report.



Phase 1 – Background Report

Phase 1, which started in December 2023, lays the foundation for the project's success by reviewing a series of background technical information related to planning for growth, conducting an analysis of evolving development trends, and identifying key stakeholders. This report, the Background Report, is a deliverable in Phase 1.

Phase 2 – Developing a Vision for Growth

As part of this phase, the vision for growth developed in the 2018 Wellington North Growth Plan will be reviewed and updated. The Consulting Team will undertake a visioning session with the Township's Advisory Committee with the primary objective of determining whether the 2018 vision is still applicable and drafting updates to guide future development of the Township and its Urban Centres (Mount Forest and Arthur). Once the vision and its guiding principles are solidified, the session will focus on identifying the priorities that will underpin and advance this vision.

Phase 3 – Preferred Growth Vision

Phase 3 will identify the preferred growth vision and its principles and priorities. Furthermore, this phase will include a review of the staging of growth within the Township's Urban Centres. This phase will ultimately inform the next phases of work, as growth is reviewed in terms of its impact and implementation.

Phase 4 – Service Impact Analysis

Phase 4 involves the assessment of the preferred growth vision based on its impact on services provided by the Township. This phase includes a review of the service impacts of the preferred growth vision based on a high-level evaluation of infrastructure requirements and associated impacts from a fiscal and operational perspective. The service impact analysis has been broken down into two types:

- **External Service** includes services such as water, wastewater and stormwater, transportation needs, community development/recreational needs, property development (land use development and economic development); and public safety.
- **Internal Service** includes services related to the administration and corporate services of the Township.



This phase aims to recognize existing infrastructure capacities and to plan growth around the existing and anticipated infrastructure. A high-level analysis of data provided by the Township will be completed, which will summarize the existing infrastructure and provide guidance on what additional roadway, water supply and sanitary sewer systems would need to be in place to accommodate the population and employment levels anticipated.

Phase 5 – Implementation and Action Plan Development

The final phase will define the specific implementation resources and action plan over the next 10 to 15 years. Based on the findings of the previous phases and recent County of Wellington O.P.A.s, the Consultant Team will identify a series of strategic recommendations for the Township under key themes, including, but not limited to, the following:

- Growth allocations;
- Intensification and density targets;
- Housing strategy;
- Employment strategy;
- Transportation strategy;
- Infrastructure strategy; and
- Community facilities and services strategy.

The strategic recommendations will identify priorities for studies, plans, and resources, such as a Service Action Plan or a policy/by-law update.



Chapter 2

Demographic and Employment Trends



2. Demographic and Employment Trends

This chapter explores recent demographic and housing trends within the Township of Wellington North and the surrounding market area based on Statistics Canada data and other available information sources, including Township of Wellington North building permit data. In addition, this chapter provides a summary of the macro-economic trends influencing regional labour force and employment trends within the County of Wellington and the Township of Wellington North over the past two decades.

2.1 Overview of Macro-Economic Outlook and Regional Employment Trends

2.1.1 *Evolving Macro-Economic Trends*

Since the pandemic was declared by the World Health Organization on March 12, 2020, the economic impacts of coronavirus disease (COVID-19) on global economic output have been significant. Economic sectors such as travel and tourism, accommodation and food, manufacturing, and energy were hit particularly hard by COVID-19 social-distancing measures. On the other hand, many employment sectors, particularly knowledge-based sectors, which have been more adaptable to the current remote work environment and evolving hybrid work-from-home/work-at-office environment, have been less negatively impacted and in certain cases have prospered. Furthermore, required modifications to social behavior (i.e., physical distancing) and increased work-at-home requirements stemming from government-induced containment measures and increased health risks have resulted in significant economic disruption, largely related to changes in consumer demand and consumption patterns. Lastly, escalating tensions and constraints related to international trade, which remain elevated since the onset of COVID-19, have also begun to raise questions regarding the potential vulnerabilities of globalization and the structure of current global supply chains. This has been further exacerbated with the geopolitical unrest that has arisen due to the 2022 Russian invasion of Ukraine.

For many Ontario municipalities, including the Township of Wellington North, the COVID-19 pandemic has been a significant driver of ownership housing demand. This was largely led by the ultra-low interest rate environment generated throughout 2020 and 2021 in response to the pandemic, combined with steady outward growth pressure



during this period from the larger urban centres of the Province. It is recognized, however, that the longer-term population and employment growth potential for the Township will be heavily dependent on the overall sustained economic growth potential of the Greater Golden Horseshoe (G.G.H.) and the surrounding economy. As such, it is important not to overstate, or simply extrapolate, the recent impacts of COVID-19 on housing demand in Wellington North over the long term.

Looking ahead over the next year and beyond, there are growing macro-economic headwinds of which to be aware that are influencing economic conditions within the Township and the surrounding economic region. Most notably, persistently high global and national inflation levels have required an aggressive response by central banks to tighten monetary conditions through sharp increases in interest rates and quantitative tightening.^[18] It is noted that as of August 2022, Canada's inflation rate reached 7.6%, a level not seen since 1983.^[19] Current measures by central banks have worked to moderate inflation; however, on-going trade disruptions, geo-political conflict, and tight labour conditions continue to aggravate global supply shortages of goods and services. In turn, this limits the ability of tighter monetary conditions to ease rising inflationary pressures.

Rising public-sector debt due to pandemic response measures and increasing household debt loads resulting from sharp housing price appreciation in many areas of Canada, most notably the Country's largest urban centres, is also a concern. While the national housing market is now starting to show cooling signs as a result of higher mortgage rates, rising borrowing costs and upward pressures on rents are further exacerbating challenges associated with declining housing affordability through increases in monthly household carrying costs. These impacts, combined with the broader inflationary concerns outlined above, are increasingly likely to result in potential near-term setbacks in the economic recovery path for Ontario, and more broadly for Canada. Despite these consequences of COVID-19 and the near-term economic headwinds discussed above, the long-term economic and housing outlook for the G.G.H. and Wellington North remains positive as the region continues to be attractive to international investment and newcomers alike.

^[18] Quantitative tightening is a process whereby a central bank reduces the supply of money circulating in the economy by selling its accumulated assets, mainly bonds.

^[19] Canada Inflation Rate (CPI) - July 2022 Update | WOWA.ca



2.1.2 The Changing Nature of Work

In addition to its broader impacts on the economy, COVID-19 also accelerated changes in work and commerce as a result of technological disruptions which were already taking place prior to the pandemic. Prompted by COVID-19, businesses have been increasingly required to rethink the way they conduct business with an increased emphasis on remote work enabled by technologies such as virtual private networks, virtual meetings, cloud technology and other remote work collaboration tools. These disruptive forces continue to broadly impact the nature of employment by place of work and sector, and have a direct influence on commercial, institutional and industrial real estate space needs.

It is anticipated that the percentage of people who work from home on a full-time and part-time basis, as well as those who do not have a fixed place of work, will remain high across Wellington County and Wellington North over the long term, driven by the County's agriculture industry, continued growth in knowledge-based employment sectors, and continued technological advancement. As the percentage of work at home and off-site employment continues to steadily rise, it may reduce the relative need for future commercial and institutional building space across the County and the Township.

2.1.3 Canadian Immigration Targets

In November 2023, the Government of Canada released its Immigration Levels Plan for the next three years. Canada has continued to raise its immigration targets and aims to welcome 485,000 new permanent residents in 2024, 500,000 in 2025 and 500,000 in 2026. In addition, the federal government will be stabilizing targets for permanent residents at 500,000 per year after 2026 to allow for successful integration and sustainable growth. Immigration accounts for almost 100% of Canada's labour force growth and nearly 80% of its population growth. With 960,000 currently unfilled positions across all sectors and an estimated worker-to-retiree ratio of only 3:1 by 2030, Canada has a strong economic need for increased immigration.^[20]

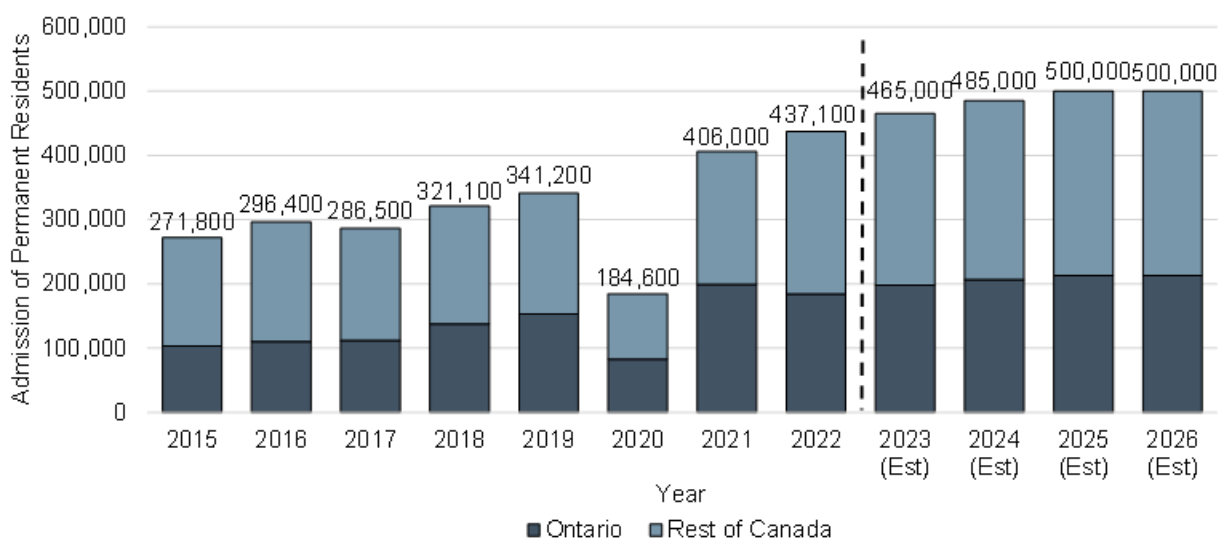
Figure 2-1 shows annual admissions to Canada and Ontario since 2015. In 2020, national and provincial immigration levels sharply declined due to COVID-19. Immigration in 2021 rebounded strongly, resulting in 405,000 permanent residents

^[20] Statistics Canada, news release: New immigration plan to fill labour market shortages and grow Canada's economy, published February 14, 2022.



admitted to Canada in 2021, roughly half of which were accommodated in the Province of Ontario that year. Based on 2022 data and looking forward, immigration levels to Canada and Ontario are anticipated to remain strong, exceeding pre-pandemic averages between 2015 and 2019.

Figure 2-1
Admission of Permanent Residents in Ontario and Canada
Historical (2015 to 2022) and Forecast (2023 to 2026)



Source: 2015 to 2022 derived from IRCC December 31, 2022 data. 2023 to 2026 federal targets from Government of Canada's Immigration Levels Plan for 2023-2025 and 2024 to 2026, and Ontario target estimated based on historical share of about 45% of the Canadian Permanent Residents Admissions from 2018 to 2022, by Watson & Associates Economists Ltd.

2.1.4 Broader Regional Economic Outlook, 2001 to 2023

Figure 2-2 illustrates total labour force and unemployment rate trends for the Kitchener-Waterloo-Barrie Economic Region alongside the unemployment rate in Ontario. This is the geographic area where information is available that includes the Township of Wellington North. The Kitchener-Waterloo-Barrie Economic Region includes the northwestern fringe of the G.G.H., and includes the Region of Waterloo, County of Wellington, City of Guelph, Dufferin County and the Simcoe Area (City of Barrie, City of Orillia and Simcoe County).^[21] Labour force data represents the number of residents who live in the Kitchener-Waterloo-Barrie Economic Region and are part of the labour

^[21] Based on the levels of geography for which the data on labour force and employment rate trends is maintained, Economic Region level data is the closest regional data available for the Township of Wellington North.

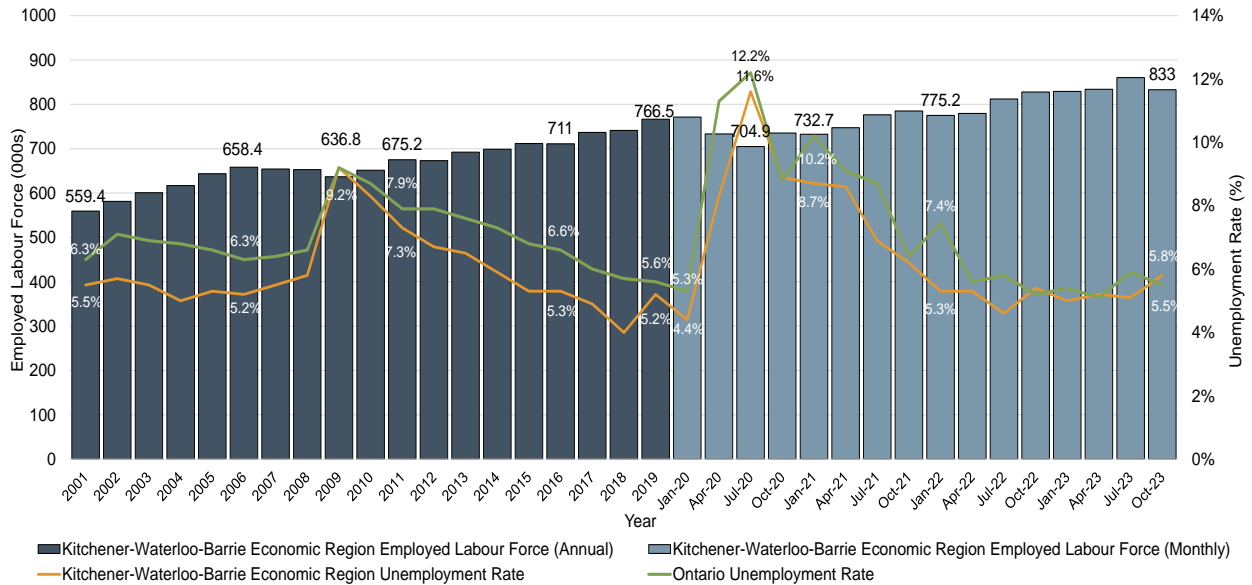


force, regardless of where they work. This includes residents who live and work in the region, those who work from home, and those who commute outside the region for work. Key observations include:

- The unemployment rate in the Kitchener-Waterloo-Barrie Economic Region rose to 9.2% in 2009, coinciding with the 2008/2009 global economic recession, and subsequently fell to 5.2% in 2019, before peaking in May 2020 at 11.6% as a result of the COVID-19 pandemic.
- After the second quarter of 2020, the region's labour force steadily recovered, reaching new record heights in July 2023.
- Coinciding with the labour force growth in the second quarter of 2023, the Kitchener-Waterloo-Barrie Economic Region's unemployment rate dropped to historical lows that have not been reached within the past two decades.
- From 2001 to 2023, the total labour force within the region increased by approximately 49%, from 559,400 to 833,000.
- To ensure that economic growth is not constrained by future labour shortages, a continued effort will be required by the municipalities within the Kitchener-Waterloo-Barrie Economic Region (working with their public- and private-sector partners) to explore ways to attract and accommodate new skilled and unskilled working residents within a broad range of rental and ownership housing options.



Figure 2-2
 Kitchener-Waterloo-Barrie Economic Region
 Total Labour Force and Unemployment Rate Trends, 2001 to 2023



Note: Statistics Canada Labour Force Survey and Census labour force statistics may differ.
 Source: Statistics Canada Data Tables 14-10-0090-01, 14-10-0393-01, 14-10-0387-01, 14-10-0327-01, and 14-10-0017-01. Data derived by Watson & Associates Economists Ltd., 2024.

2.1.5 Key Employment Sectors in the Township of Wellington North

The Township of Wellington North offers a diverse range of economic and employment opportunities across various sectors. With a strong agricultural heritage, the Township boasts a thriving agriculture sector providing employment opportunities in farming and agri-food processing industries. In addition to agriculture, Wellington North supports a robust manufacturing base, with companies producing a variety of goods, including automotive parts, machinery, and consumer products. The Township is home to some of Wellington County’s largest industrial businesses which are key anchors for the Employment Area base in Wellington North.

Moreover, the commercial and institutional employment base in Wellington North not only provides job opportunities within the Urban Centres but also offers a range of goods and services that serve the daily needs of residents, contributing towards the quality of life for residents. As with the rest of Wellington County, tourism is becoming a vibrant and growing industry, providing unique employment opportunities within both the rural and urban settings. Given their distinctive character, the Township’s Urban



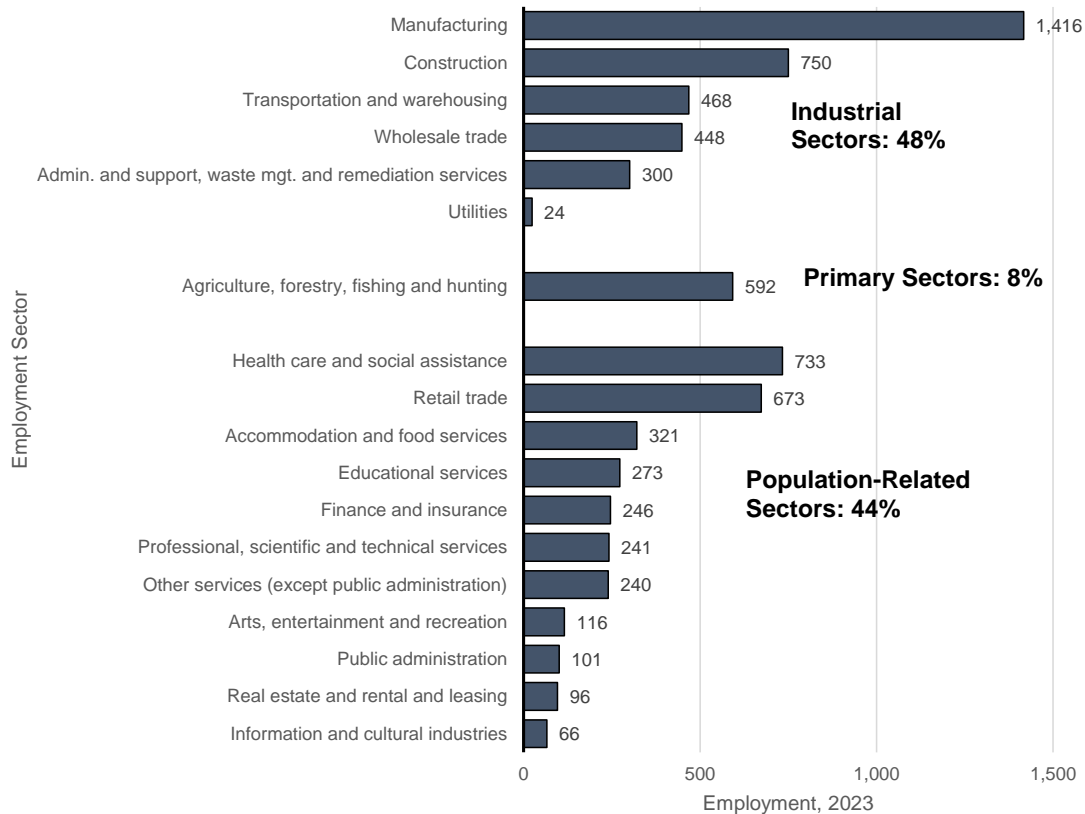
Centres are anticipated to become service hubs as the Township's tourism industry grows.

Wellington North also benefits from its strategic location within the G.G.H. The Township's proximity to the large urban areas of Guelph and Kitchener-Waterloo offers additional employment and educational/training opportunities for local residents. While these areas provide opportunities for residents, a key challenge for the Township will be to support more live/work opportunities within the Township.

As illustrated in Figure 2-3, manufacturing is the largest employment sector in the Township of Wellington North, representing just over 1,400 jobs, or approximately 20% of the employment base in Wellington North. The manufacturing sector provides significant employment opportunities and contributes to the local economy's resilience and stability. Key industrial sectors, following manufacturing, include construction, transportation and warehousing, and wholesale trade. Health care and social assistance and retail trade are large sectors that serve the needs of local residents. Agriculture is also a notable sector that provides economic opportunities within rural areas.



Figure 2-2
Township of Wellington North
Employment Sectors by Number of Employees



Source: Derived from OMAFRA EMSI Analyst by Watson & Associates Economists Ltd.

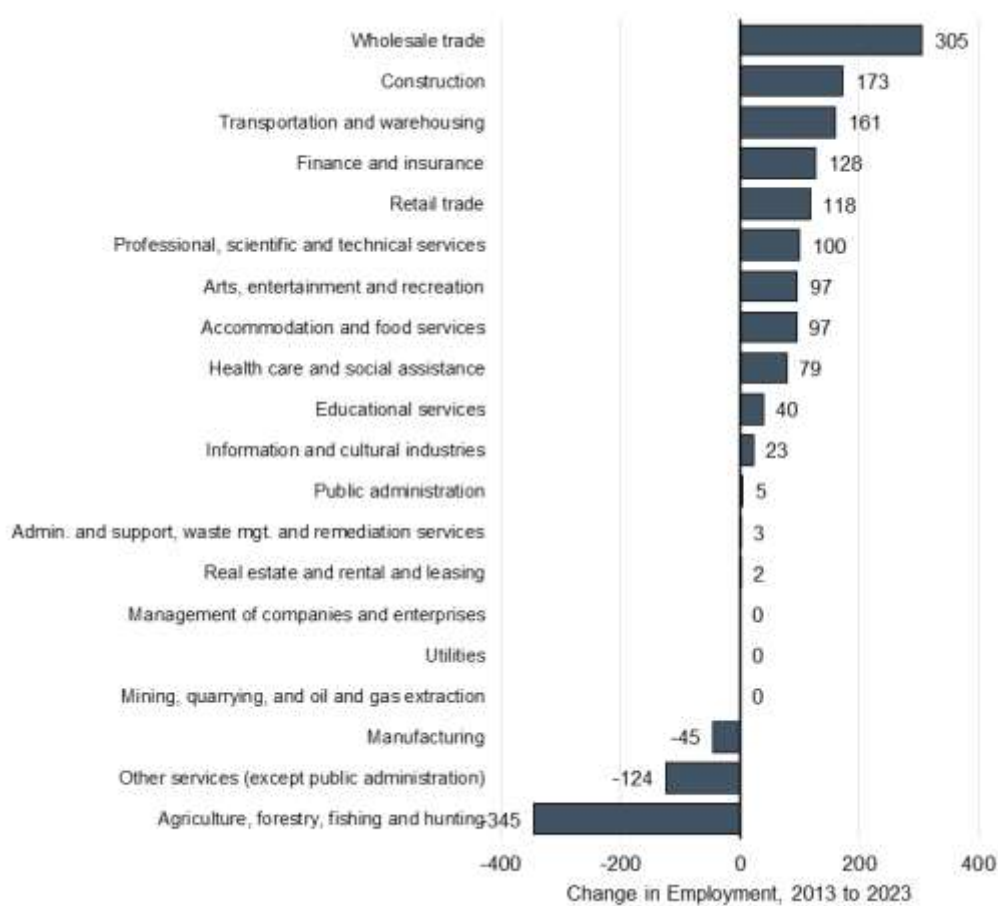
As illustrated in Figure 2-4, over the past decade (2013 to 2023), several sectors have experienced growth, including industrial and sectors that serve the local population base. The largest decline has been in agriculture and the “other services” sector.^[22] The decline in agricultural employment is likely due to the consolidation of farms with larger, more efficient farms. Larger farms tend to have a higher level of automation of agricultural activities, which has a downward impact on employment needs. Based on the agricultural Census from the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA), the number of farms in Wellington North with total gross farm sales of over

^[22] The “other services” category would include establishments primarily engaged in activities such as repairing equipment and machinery, promoting or administering religious activities, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services, death care services and pet care services.



\$2 million increased from four farms in 2016, to 13 farms in 2021.^[23] Over the forecast horizon, it is expected that there will be growing pressure for farms to be more sustainable and technology-driven to meet the growing global demand for food while minimizing the environmental impact. This is likely to result in the shift of job opportunities in the agricultural sector with a focus more on technology and innovation, rather than unskilled labour opportunities.

Figure 2-4
Township of Wellington
Change in Employment by Sector, 2013 to 2023



Source: Derived from OMAFRA EMSI Analyst by Watson & Associates Economists Ltd.

^[23] Ontario Ministry of Agriculture, Food and Rural Affairs, Ontario business, agri-food, and farm data profiles - West - Wellington – obtained online Ontario Data Catalogue, February 11, 2024.

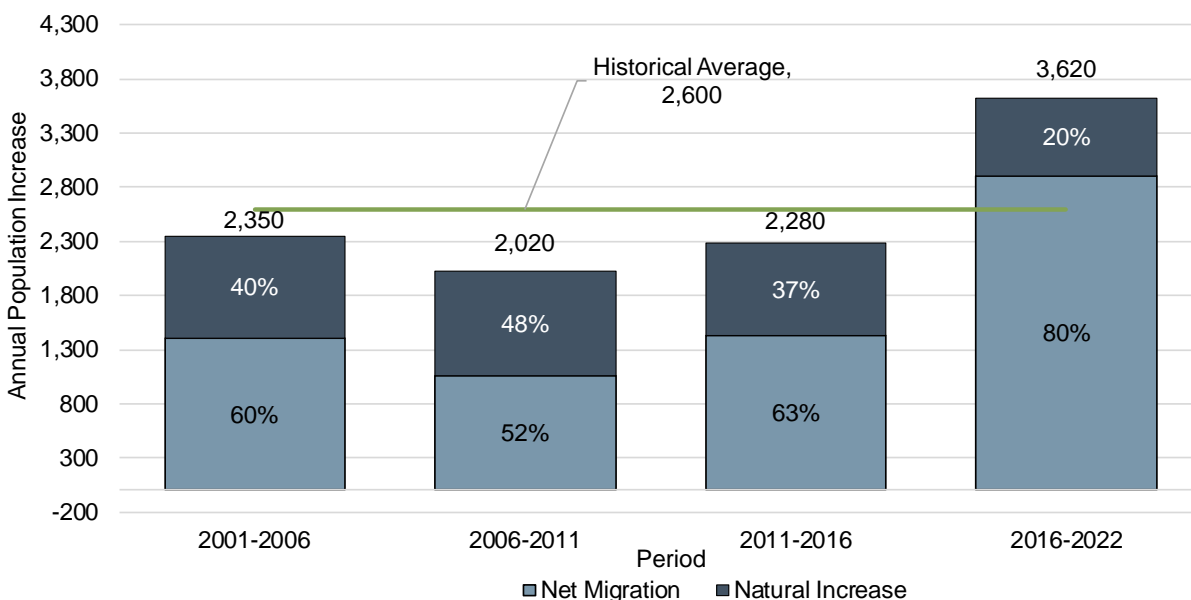


2.2 Historical Population Trends

2.2.1 Wellington County Census Division Historical Components of Population Growth, 2001 to 2022

Population growth comprises two key components: natural increase (i.e., births less deaths), and net migration. Figure 2-5 summarizes historical trends related to net migration and natural increase for the County of Wellington Census Division (which includes the City of Guelph). As shown, population change is, and will continue to be, heavily influenced by trends in net migration. From 2001 to 2016, the County of Wellington Census Division increased by an average of approximately 2,220 people per year (approximately 11,080 per five-year period). Within the last five years (2016 to 2022), the County of Wellington Census Division experienced a strong rebound in population growth, largely driven by in-migration from other areas of the Province, increasing by approximately 3,620 people per year (18,100 people over five years).

Figure 2-5
Wellington County Census Division (includes the City of Guelph)
Components of Population Growth, 2001 to 2022

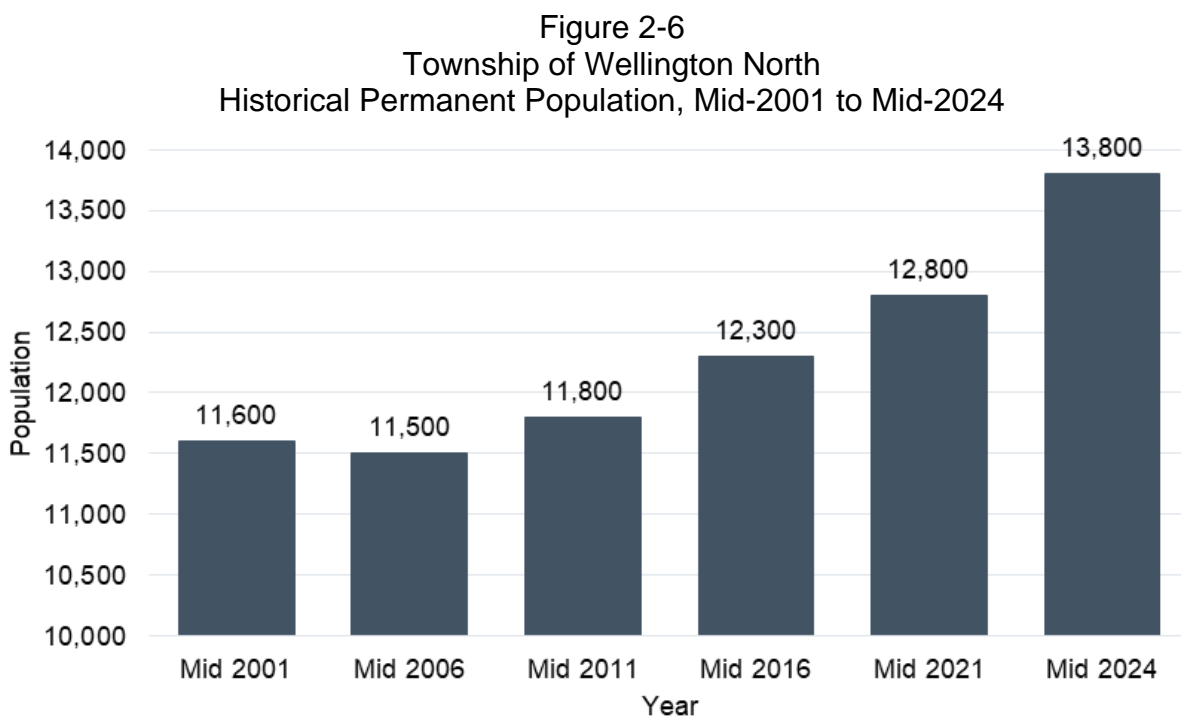


Note: Figures have been rounded. Figures are not adjusted for the residual deviation.
Source: Statistics Canada Table 17-10-0140-01, Components of Population Change by Census Division, 2016 boundaries, by Watson & Associates Economists Ltd.



2.2.2 Township of Wellington North Population Trends, 2001 to 2023

Figure 2-6 summarizes historical permanent population trends for the Township of Wellington North over the 2001 and to 2024 period. During this period, the Township's population base has grown from 11,600 in 2001 to 13,800 in 2024; an increase of 2,200 persons. Since 2016, the population of Wellington North has grown at an annual rate of 1.4%. Comparatively, the population over the 2001 to 2016 grew at annual rate of 0.4%.



Note: All figures include population undercount, estimated at 3%.

Source: Statistics Canada Census; 2024 is an estimate by Watson & Associates Economists Ltd. based on a review of residential building permit activity.

Demographic trends strongly influence both housing need and form. Across Ontario the population is getting older on average, due to the aging of the Baby Boomers.^[24] The first wave of this demographic group turned 75 years of age in 2021. Figure 2-7a summarizes historical trends in permanent population structure by major age group over the 2001 to 2021 period for the Township of Wellington North. As illustrated, the share of population in the 75+ age cohort steadily increased from 8% in 2001 to 10% in 2021.

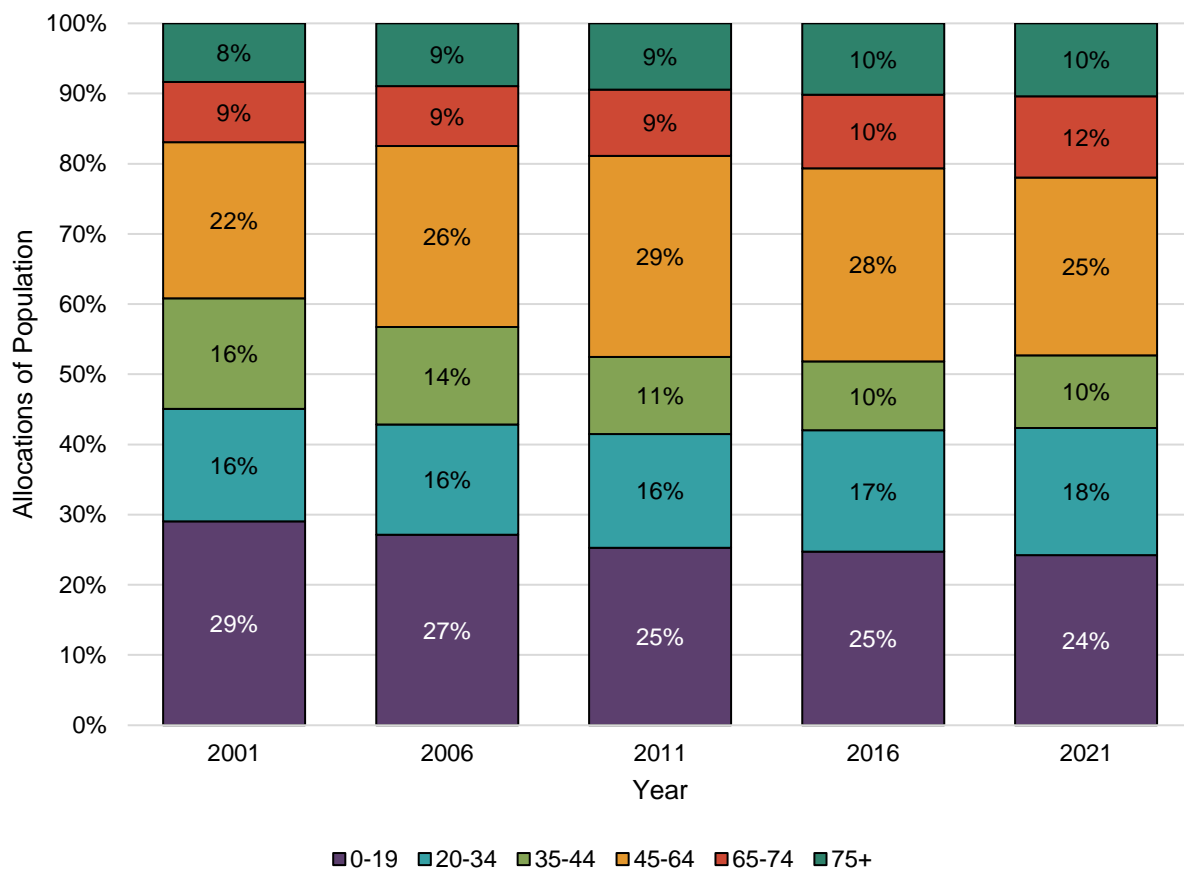
^[24] Baby Boomers are generally defined as people born between 1946 and 1964.



This coincided with a similar increase in the 65-74 age cohort; growing from 9% in 2001, to an allocation of 11% in 2021. There were modest increases in the allocations for the 20-34 age group, increasing from 16% in 2001, to 18% in 2021; and for the 45-64 age group, rising from 22% in 2001, to 25% in 2021.

In contrast to the above population age groups, the population share for the 35-44 age group declined from 16% in 2001, to 10% in 2021. Similarly, the share of the 0-19 age group steadily declined from 29% in 2001, to 24% in 2021.

Figure 2-7a
Township of Wellington North
Historical Permanent Population by Major Age Group, 2001 to 2021

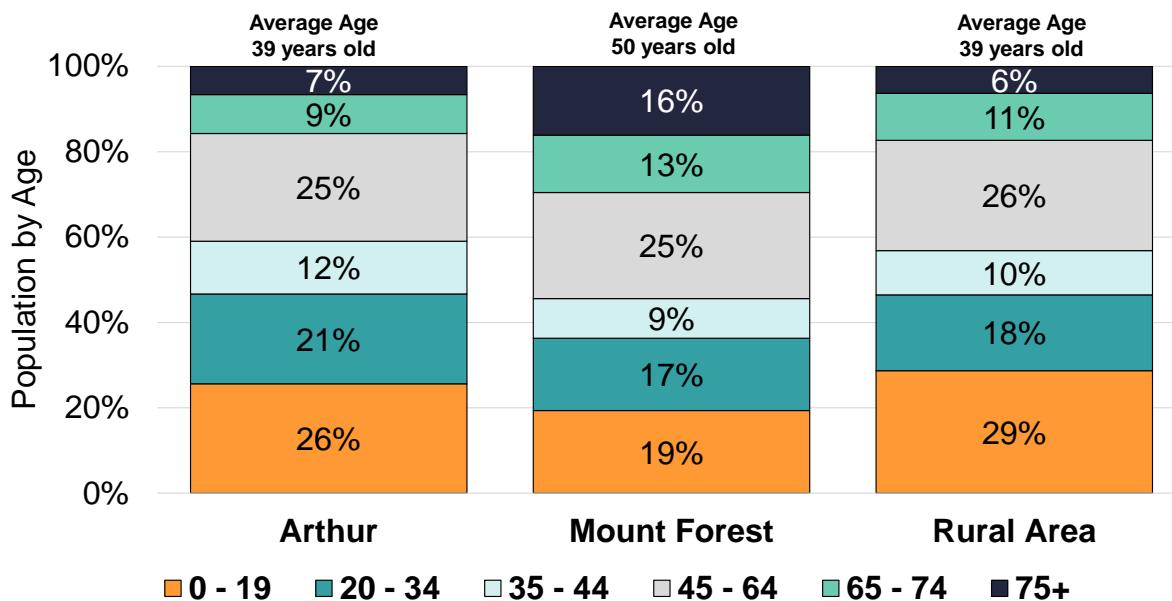


Note: Population does not include net Census undercount at approximately 3%.
Source: Population forecast by age derived from 2001-2021 Statistics Canada Census by Watson & Associates Economists Ltd.



The population age structure varies across the Township as of 2021 based on Statistics Canada 2021 Census. As illustrated in Figure 2-7b, the average age of the population in Arthur and the Rural Area is 39 years old, compared to Mount Forest at 50 years old. It is estimated that in Mount Forest 30% of the population is over the age of 65, compared to 16% in Arthur and 17% in the Rural Area.

Figure 2-7b
Township of Wellington North
Historical Permanent Population by Major Age Group, 2021



Note: Population does not include net Census undercount at approximately 3%.
Source: Population forecast by age derived from 2001-2021 Statistics Canada Census by Watson & Associates Economists Ltd.

2.2.3 Township of Wellington North Population by Urban Area, 2006 to 2024

As of Mid-2024, approximately 71% of the Wellington North population resides within Urban Centres. The Mount Forest Urban Centre accounts for approximately 47% of the Township population, while Arthur represents 24% of the population as summarized in Figure 2-8. The Rural Area represents 29% of the total Wellington North population base.



Figure 2-8
Township of Wellington North
Population by Urban Centre and Remaining Rural Area, Mid-2024

Location	Mid-2021 Population	Mid-2024 Population	2024 Share of Population
Mount Forest	2,290	2,490	47%
Arthur	1,035	1,240	24%
Urban Area	3,325	3,730	71%
Rural Area	1,465	1,540	29%
Wellington North Total	4,790	5,270	100%

Note: All figures include population undercount, estimated at 3%. Figures have been rounded.
Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations, prepared by Watson & Associates Economists Ltd., 2022. 2021 estimates are based on Statistics Canada Census. 2024 is an estimate by Watson & Associates Economists Ltd.

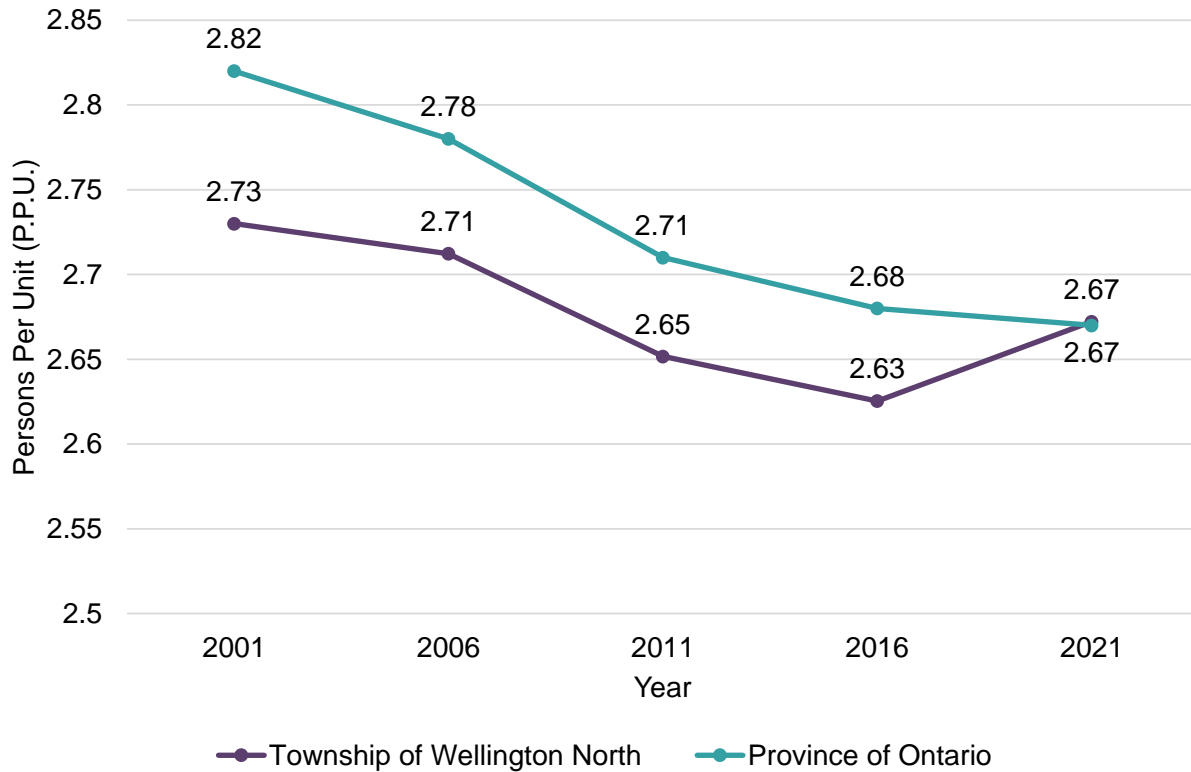
2.3 Township of Wellington North Housing Trends, 2006 to 2023

2.3.1 Persons Per Housing Unit, 2006 to 2021

Figure 2-9 summarizes the historical persons per unit (P.P.U.) average for the Township of Wellington North from 2001 to 2021 in accordance with Statistics Canada Census data. For comparative purposes, P.P.U. data for the Province of Ontario has also been provided. As shown, the average P.P.U. for Wellington North steadily declined over the 2001 to 2016 period; however, during the 2016 to 2021 period the P.P.U. increased. Provincially, the rate of P.P.U. decline moderated over the past two recent Census periods; however, average P.P.U. levels are anticipated to further decline over the next three decades, largely driven by the aging of population. In 2021, the average P.P.U. for the Township of Wellington North was 2.67, which is the same as the provincial average.



Figure 2-9
Township of Wellington North
Historical P.P.U., 2001 to 2021

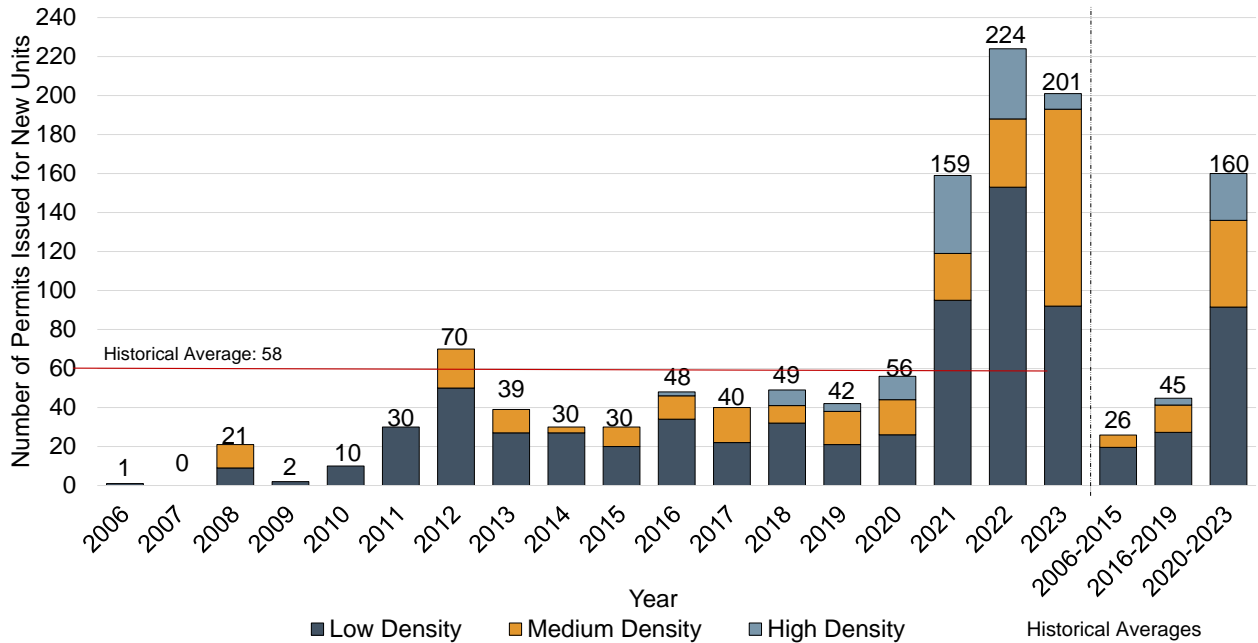


Note: Population includes net Census undercount at approximately 3%.
Source: Historical data from Statistics Canada and Statistics Canada Demography Division 2001 to 2021, by Watson & Associates Economists Ltd.

Figure 2-10 summarizes trends in historical residential building permit activity (new units only) for the Township of Wellington North during the 2006 to 2023 period. Over this period, the Township of Wellington North averaged the issuance of 58 new residential units annually based on building permit activity. The largest increase in residential building permit activity was over the 2021 to 2023 period, averaging 194 new units annually. During that three-year period, the Township issued building permits for the construction of over 580 housing units, which was more than the building permits issued for new housing units over the previous 15 years (2006 to 2020).



Figure 2-10
Township of Wellington North
Historical Residential Building Permits Issued for New Housing Units, 2006 to 2023

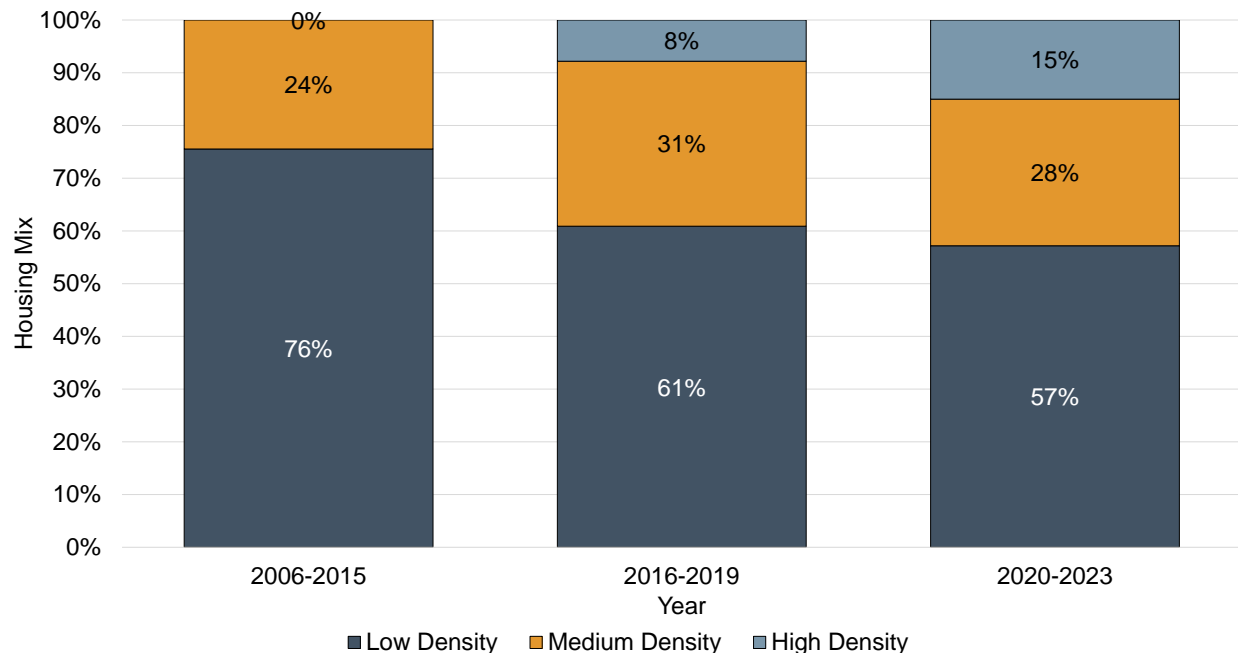


Notes: Low density comprises singles and semi-detached; medium density comprises row housing; and high density comprises apartments and Additional Residential Units (A.R.U.).
Source: Derived from Township of Wellington North residential building permit data, 2006 to 2023, by Watson & Associates Economists Ltd.

Figure 2-11 illustrates historical household growth by structure type based on building permit activity from 2006 to 2023 in the following periods: 2006 to 2015; 2016 to 2019; and 2020 to 2023. As illustrated, while low-density housing (single detached and semi-detached) has been a dominant housing structure type, over the past 17 years the Township has experienced a shift towards higher-density housing. Over the past few years, 2020 to 2023, low-density housing accommodated 57% of housing activity, compared to 76% over the 2006 to 2015 period. Over the long-term planning horizon, housing demand is anticipated to gradually shift from low-density housing forms to medium- and high-density housing types, largely driven by the aging of the Township’s population base and declining housing affordability.



Figure 2-11
Township of Wellington North
New Housing Units by Structure Type, 2006 to 2023



Notes: Low density comprises singles and semi-detached; medium density comprises row housing; and high density comprises apartments and Additional Residential Units (A.R.U.).
Source: Derived from Township of Wellington North residential building permit data, 2006 to 2023, by Watson & Associates Economists Ltd.

2.3.2 Historical Residential Building Permit Activity by Urban Area, 2006 to 2023

As summarized in Figure 2-12, the surge in residential building permit activity over the past few years was due to development activity in the Township's two Urban Centres (Mount Forest and Arthur). Over the 2016 to 2019 period, the Urban Centres averaged 42 housing units annually; that increased to 142 housing units annually over the 2020 to 2023 period. Growth has been strong in both Mount Forest and Arthur, with average annual building permits for 73 new units and 69 new units, respectively. While annual permits have slightly increased in the Rural Area, the share of development within the Rural Area has dropped from 28% over the 2016 to 2019 period, to 11% over the 2020 to 2023 period.



Figure 2-12
Township of Wellington North
Annual Housing Units and Share of Housing Units in the Urban and Rural Areas
2016 to 2023

Location	Annual Unit Average 2016-2019	Annual Unit Average 2020-2023	Share of Township 2016-2019 (%)	Share of Township 2020-2023 (%)
Mount Forest	22	73	37%	46%
Arthur	20	69	35%	43%
Urban Centres	42	142	72%	89%
Rural Areas	16	18	28%	11%
Total	58	160	100%	100%

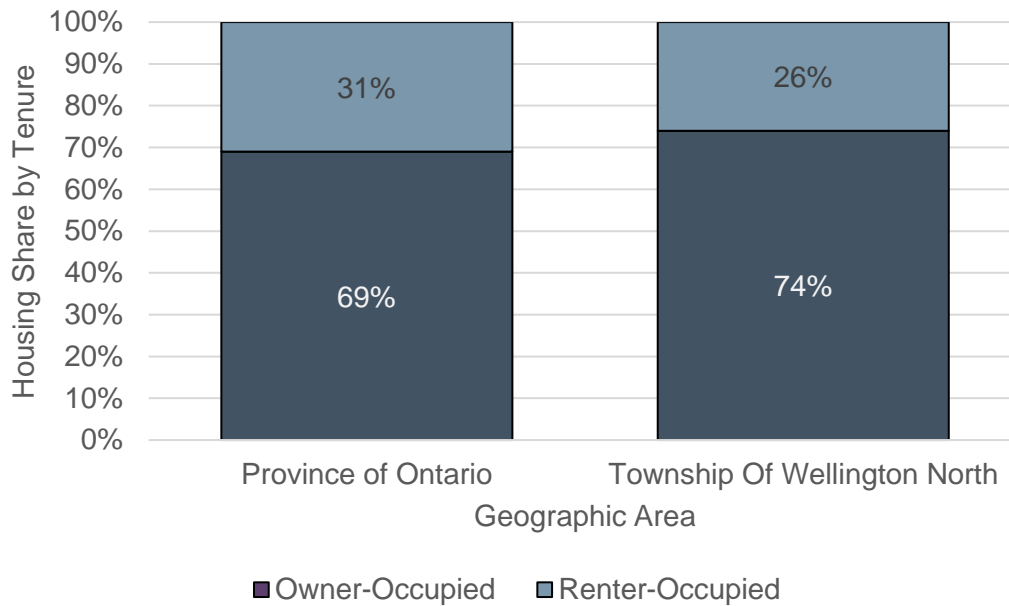
Source: Derived from Township of Wellington North residential building permit data, 2016 to 2023, by Watson & Associates Economists Ltd.

2.3.3 Housing Tenure Trends

Housing tenure falls under two categories – owner occupied, and tenant occupied. Within the Township of Wellington North, approximately 74% of housing units are owner occupied, with a corresponding 26% of units being tenant occupied. The percentage share of renter-occupied units in the Township is marginally lower than the provincial average (31% are renter occupied). Figure 2-13 illustrates the tenure of both the Township of Wellington North and the Province of Ontario. Looking forward, demand for rental housing options within the Township’s Urban Centres is anticipated to increase, driven by the declining affordability of ownership housing.



Figure 2-13
Township of Wellington North and Province of Ontario
Housing Tenure, 2021



Note: Figures may not add precisely due to rounding.

Source: Data derived from Statistics Canada 2021 Census by Watson & Associates Economists Ltd.



Chapter 3

Policy Considerations and Local Initiatives



3. Policy Considerations and Local Initiatives

This chapter provides a summary of key relevant planning policy directions from the Province and the County of Wellington. Furthermore, this chapter introduces the County of Wellington's Official Plan Review (O.P.R.), including the M.C.R., as well as County and local initiatives that support growth management. The purpose of this chapter is to provide the policy context for the Growth Management Action Plan and explore themes from previous studies that identify key action items upon which the Growth Management Action Plan can build.

3.1 Provincial Policy Directions

3.1.1 A Changing Policy Framework

The provincial policy framework in Ontario has undergone significant changes in recent years to adapt to evolving economic, social, and environmental challenges. A key provincial policy thrust has been the need to address the shortfall of housing across Ontario, which set in motion a series of provincial policy changes and new provincial legislation.

3.1.1.1 Provincial Planning Statement, 2023 and Bill 97

On April 7, 2023, the Province of Ontario released a new Provincial Planning Statement (P.P.S., 2023) in concert with introducing Bill 97: *Helping Homebuyers, Protecting Tenants Act, 2023*. Bill 97 proposes amendments to seven provincial statutes, including the *Planning Act*.



The proposed P.P.S., 2023 is intended to simplify and integrate existing provincial policies (A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019, and the P.P.S., 2020) while providing municipalities and the Province with greater flexibility to deliver on housing objectives. A key focus of the proposed P.P.S., 2023 is that it recognizes that the approach to delivering housing needs and Employment Area land needs requirements will vary by municipality and, as such, moves away from a prescriptive guideline-based approach.



Another change in the proposed P.P.S., 2023 allows for Settlement Area Boundary Expansion (S.A.B.E.) at any time and without the requirement of an M.C.R., provided that all P.P.S. policies under section 2.3.4 are considered.^[1] Furthermore, the policies allow for a simplified and flexible approach for municipalities to undertake a S.A.B.E. which would not necessarily require a demonstrated need for urban expansion.

Under the proposed P.P.S., 2023 and the *Planning Act*, municipalities are required to plan for and protect industrial uses, based on a more narrowly scoped definition of “area of employment” limited to these uses that are primarily industrial in nature or other uses associated or ancillary to the primary use. Employment Area lands and uses that do not meet the definition of Employment Area should be removed as Employment Area. Lands that do not meet the Employment Area definition would not be subject to provincial Employment Area protection policies and would allow for opportunities for residential and other uses.

The achievement of complete and competitive communities is an important concept to consider with respect to the balance between residential and non-residential growth across the Township over the long term. In accordance with the proposed P.P.S., 2023, complete and competitive communities include an appropriate mix of jobs and a full range of housing. Accordingly, the long-term growth vision for the Township should be considered within the context of complete and competitive communities. Attempting to accelerate population growth too aggressively within the Township, without consideration of how such population growth would be balanced by an appropriate mix of jobs (including export-based/industrial jobs in addition to community-supportive employment), would potentially undermine the proposed P.P.S., 2023 policies related to complete and competitive communities.

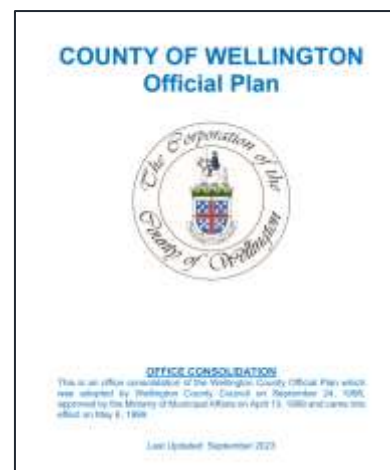
^[1] Under the Growth Plan, 2019 and P.P.S., 2020, S.A.B.E. boundary expansions were permitted only through an M.C.R.



3.2 County of Wellington Official Plan Review

3.2.1 County of Wellington Official Plan

The County of Wellington is currently undergoing a review of its Official Plan (O.P.) to reflect current provincial policy direction and the County's strategic initiatives. The County is updating its O.P. through a series of O.P.A.s, as discussed later in this chapter. The County O.P. is a long-range document designed to manage change and the physical development of the County over a long-term planning horizon. All Member Municipalities within the County are required to plan for long-term growth in accordance with the policies of the County O.P. All Zoning By-laws and local growth management strategies are required to implement the policies of the County O.P.



Except for the Town of Erin and the Township of Centre Wellington, the County O.P. is the only statutory plan for the Member Municipalities in accordance with the Ontario *Planning Act*. The local O.P.s of the Town of Erin and the Township of Centre Wellington are also required to conform to the County O.P. Upon the completion of the County O.P., Erin and Centre Wellington will be required to update their local O.P. to conform to the County's O.P.A.s.

It is important to note that while the Township of Wellington North does not have its own O.P., it does have its own section in the County of Wellington O.P. (section 9.7) for local policies. The local policies within the County O.P. primarily include special policy areas.^[1] The County O.P. also includes the following schedules for the Township of Wellington North: growth structure, land use, source water protection, and mineral aggregates. Appendix B provides a copy of the County O.P. growth structure and land use schedules for the Township of Wellington.

^[1] County of Wellington Official Plan, adopted by Wellington County Council on September 24, 1998, approved by the Ministry of Municipal Affairs on April 13, 1999, and came into effect on May 6, 1999, Updated September 2023, Wellington North Local Policies, policy section 9.7.



As previously discussed, the Township of Wellington North Growth Management Action Plan will be an important document to inform the County's future O.P. updates. The previous Township of Wellington North Growth Plan served as an important document to inform the County of local growth priorities as the County carried out O.P.A.s as part of the O.P.R.

3.2.2 Key Findings of the Municipal Comprehensive Review

As previously discussed, the County completed a series of M.C.R. documents that informed the County's O.P.R. The M.C.R. related to growth management comprises three completed documents as summarized below. Other completed studies carried out by the County to inform the O.P. include Agricultural Systems and Policy Review. The County is now carrying out Phase 3 M.C.R. growth management tasks focused on S.A.B.E. and re-designation of Future Development lands (currently that work is paused pending direction from the Province).

3.2.2.1 Phase 1 M.C.R. Report: Urban Structure and Growth Allocations

This report provides detailed growth allocations to 2051 by Member Municipality and identifies where growth and development is to occur based on a review of the County Growth Structure. Key highlights include the following:

- By 2051, the County of Wellington is anticipated to comprise a population base of 160,000 people. It is anticipated that approximately 44% of the County's population base will be concentrated in Urban Centres (settlement areas that are serviced).
- The Township of Wellington North is anticipated to accommodate 13% of the County's population growth from 2021 to 2051 and 12% of the County's employment growth over the same period.
- The Township of Wellington North is anticipated to comprise a population base of 20,500 people and 10,500 jobs by 2051. It is estimated that approximately 92% of the Township's population base will be concentrated in the Urban Centres of Arthur and Mount Forest by 2051.^[1]

^[1] County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., Final Report, as amended January 31, 2022.



3.2.2.2 Phase 2 M.C.R. Report: Urban Land Needs

This report provides an urban land needs assessment for each of the Member Municipalities within the County of Wellington. The report identified that Mount Forest and Arthur have enough urban lands to accommodate housing and employment growth to 2051. While the assessment did not identify a need for additional urban lands, it did identify the need to re-designate approximately 81 ha (200 acres) of Future Development lands for residential use, which represents approximately 48% of the Future Development lands in Wellington North. The report further concluded that the Township has a surplus of 40 ha of Employment Area lands to 2051.^[1]

3.2.2.3 Urban Land Needs Municipal Comprehensive Review Municipal Servicing Analysis

As part of the M.C.R., the County undertook a Municipal Servicing Analysis to identify the municipal servicing capacity for each Member Municipality. The analysis evaluates the existing water and wastewater capacities of the Member Municipalities. Based on the analysis, the Township of Wellington North has existing water and wastewater servicing capacity to accommodate near-term growth. The report considered the Township's plans to expand the wastewater treatment plant capacity in Arthur within the next two to four years. Over the long term, Mount Forest is projected to have sufficient water capacity over the planning horizon, but not wastewater capacity.^[2] While this report does not include analysis of water distribution system capacity, it was noted that there is a current water storage deficiency in Mount Forest.^[3]

[1] County of Wellington, Phase 2 Municipal Comprehensive Review Report: Land Needs, prepared by Watson & Associates Economists Ltd., March 31, 2022.

[2] County of Wellington, Municipal Comprehensive Review Municipal Servicing Analysis Memorandum, prepared by WSP Canada Inc., January 31, 2022.

[3] Ibid.



3.2.3 Overview of Official Plan Review

In September 2019, the County of Wellington initiated its O.P.R. to conform with provincial policy updates. Since 2019, a series of provincial policy updates has extended the timing of the O.P.R. The County has completed drafting three O.P.A.s., including the following:



- **O.P.A. 119: County Growth Structure** adds new policies for complete communities, and revises the County’s growth structure and settlement hierarchy based on servicing. The O.P.A. was adopted by County Council and subsequently approved by the Ministry of Municipal Affairs and Housing, with modifications. Modifications included urban boundary expansions and two Employment Area conversions to Community Area uses (one in Arthur of approximately 14 ha and a small conversion in Elora) that were not a part of the County’s O.P.A. submission.^[1]

On October 23, 2023, the Province announced plans to reverse its modifications to County O.P.A. 119, including urban boundary expansions and the Employment Area conversions that were not part of the original Council-adopted O.P.A. The modifications by the Province are no longer in effect.^[2]

- **O.P.A. 120: County Growth Forecast** was adopted by County Council on February 23, 2023. The amendment extends the growth horizon in the County of Wellington from 2041 to 2051 and allocates the additional population, household and employment growth to Member Municipalities. The amendment was submitted to the Ministry of Municipal Affairs and Housing on March 1, 2023. No decision has been made by the Province and there has been no update from the Ministry on the likely approval of this amendment.^[3]

^[1] County of Wellington, County Official Plan Review – County Official Plan Review – Provincial Decision on OPA 119, prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, May 11, 2023.

^[2] County of Wellington, County Official Plan Review – Progress Report #10, prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, November 9, 2023.

^[3] County of Wellington, County Official Plan Review – Growth Forecast Amendment (OPA 120), prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, September 8, 2022.



- **O.P.A. 123: Future Development Lands** is the most recently completed O.P.A. The purpose of this O.P.A. is to redesignate certain Future Development lands within Urban Centres to address the results of the County’s Land Needs Assessment prepared under the M.C.R.

Furthermore, O.P.A. 123 also designated Future Development lands beyond what has been rationalized through the County Land Needs Assessment within the settlement areas of Arthur, Mount Forest, and Drayton. Future Development lands that are considered in addition to those required in the County’s Land Needs Assessment are subject to a Special Policy Area overlay. The Special Area Policy overlay delays development on these lands until full municipal servicing is available and comprehensive planning has occurred. The benefit of this approach is to remove the requirement of the County O.P.A. for lands where the future use is generally known, and to allow development to proceed faster once the technical aspects needed to support development are in place.^[1]

It is important to note that while O.P.A. 123 was been circulated for comment to County of Wellington Council, that O.P.A. is currently being paused by the County in response to the provincial government’s recent announcement to reverse its decisions on previous County O.P.A.s which impact this O.P.A.^[2]

3.2.4 Relevant County of Wellington Studies

The County of Wellington has prepared other studies at the County-wide level that relate to planning for growth, including studies on infrastructure, affordable housing, tourism, climate mitigation and economic development. Provided below is an overview of the County of Wellington Climate Change Mitigation Plan and the County of Wellington Economic Development Strategic Plan that have been recently prepared utilizing the County’s updated population and employment forecasts to 2051.

^[1] County of Wellington, County Official Plan Review – OPA 123 Future Development Lands, prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, September 14, 2023.

^[2] County of Wellington, County Official Plan Review – Progress Report #10, prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, November 9, 2023.



3.2.5 County of Wellington Climate Change Mitigation Plan

Prepared under the cover Future Focused: A Climate Change Mitigation Plan for the County of Wellington, the report discusses how the County and its Member Municipalities can integrate climate change into decision-making. Furthermore, the document explores how the County can plan for climate resilient communities, while maintaining the quality of life that the County offers today.



It is projected that the County of Wellington will experience the following changes in climate change over the next 80 years: increase in annual daily temperatures above 30 Celsius; increase in average annual precipitation; extreme weather events; increase in storm intensity; decrease in snowfall; and increase in ice storms. The Plan notes that the County has already experienced an increase in average temperatures, as well as higher levels of precipitation. As noted in the plan, the anticipated change in climate will have a significant impact on how we plan for infrastructure, the provision of municipal services, and how we build homes and places of work.^[1]

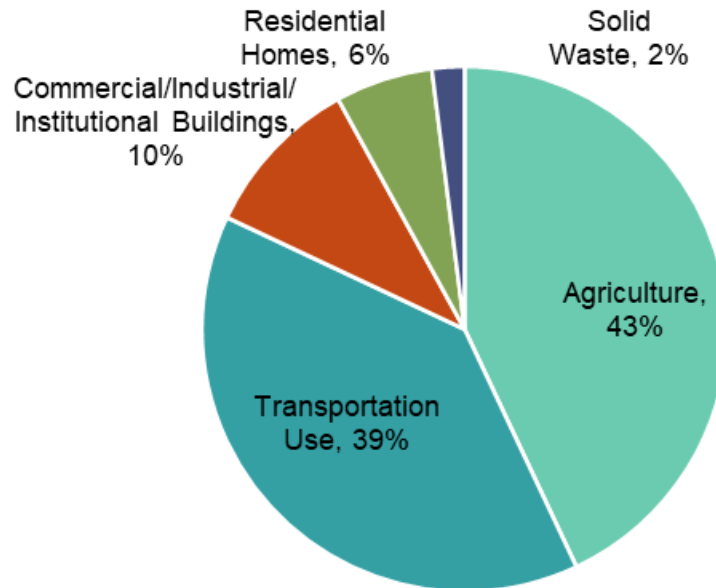
According to the Plan, the County of Wellington greenhouse gas emissions in 2017 averaged 12.7 tonnes per capita. This is slightly above the provincial average of 12.6 tonnes per capita in 2013. It is estimated that 43% of the County's greenhouse gas emissions are from the agriculture sector, followed by transportation uses at 39%, and commercial/industrial/institutional uses at 10%. Emissions from residential homes account for 6%, while solid waste accounts for the remaining 2% of emissions, as illustrated in Figure 3-1.^[2]

^[1] County of Wellington, 2022-2023 Future Focused: A Climate Change Mitigation Plan for the County of Wellington, carried out with assistance from the Government of Canada and the Federation of Canadian Municipalities, 2022.

^[2] Ibid.



Figure 3-1
County of Wellington
Greenhouse Gas Emissions, 2017



Source: Derived from the County of Wellington, 2022-2023 Future Focused: A Climate Change Mitigation Plan for the County of Wellington, carried out with assistance from the Government of Canada and the Federation of Canadian Municipalities, 2022.

The Province has committed to reducing greenhouse gas emissions by 30% by 2030. In response to the provincial plan, the County's Climate Change Mitigation Plan recommends a target of 20% reduction in greenhouse gas emissions over 10 years for the County's corporate operations and a County community target of 6%. The Plan notes that it is important to understand our energy use, the carbon intensity of current energy sources, and technology available, among other influencing factors. For example, given the County's expansive rural and agricultural base, it is important to consider that the County has some limitations on reductions compared to urban municipalities. The Plan identifies the opportunities to reduce greenhouse gas emissions by 2030 based on the following actions:

- Existing buildings: retrofit 20% of homes and businesses (efficiency improvement of 40%);
- New buildings: 40% energy efficiency improvement over pre-2017 standards;
- Transportation use: 20% adoption of cars to electric vehicles;



- Agriculture: 12% reduction in emissions from manure management and soil management; and
- Solid waste: 20% reduction in waste emission.^[1]

The following are approaches to mitigate climate change and its impact as identified in the report:

- The Plan noted that over 88% of homes in the County of Wellington are single detached dwellings which are less energy efficient than attached and multi-family dwellings. Encouraging attached and multi-family dwellings that are typically more compact and have shared walls will lead to lower heating demand and less heat loss.
- The vast majority (90%) of the County's residential dwellings were built prior to energy efficiency requirements in the 2012 Ontario Building Code. There is a significant opportunity to retrofit buildings and improve efficiencies of utilities use.
- The potential to lower energy demand starts in the placement of new buildings to take advantage of the local environment (e.g., increasing sun exposure in the winter, limiting wind exposure, etc.) and efficiencies in community infrastructure (e.g., district energy or heating) followed by energy efficient design of the building and its systems; and
- Like most rural communities, the County has a substantial portion of residents commuting outside the community for work and commercial needs. There is an opportunity to increase the number of residents that will stay within their local communities for their daily vehicle trips; and
- Continue to support farmers through established programs, including rural water quality programs, develop strategies to empower farmers to reduce greenhouse gases on the farm and encouraging the development of on-farm energy sources (66% of emissions from biogenic methane that have the potential to be used as energy sources).^[2]

^[1] County of Wellington, 2022-2023 Future Focused: A Climate Change Mitigation Plan for the County of Wellington, carried out with assistance from the Government of Canada and the Federation of Canadian Municipalities, 2022.

^[2] Ibid.



3.2.6 County of Wellington Economic Development Plan, 2023-2026

The County of Wellington Economic Plan, 2023-2026, is a plan that identifies economic activities and priorities for the next three years for the County's Economic Department. The three-year Economic Development Action Plan focuses on addressing local challenges and being proactive in preparing the local economy to be more resilient. The areas of focus for development activities in the County include:

- Business Attraction, Retention, and Expansion;
- Community Improvement Program;
- Talent Attraction and Newcomer Support;
- Tourism;
- Shop Local Support;
- Workforce Development;
- Attainable Housing;
- Our Food Future;
- Broadband Internet and Connectivity; and
- Rural Transportation.^[1]



The Plan notes that the northern municipalities of the County (Mapleton, Wellington North, and Minto) rely more heavily on agriculture, retail, and manufacturing sector employment. It goes on to note that this region faces greater challenges in attracting and retaining a workforce compared to other areas of the County. The difficulty is exacerbated by outward growth pressures from the Greater Toronto and Hamilton Area (G.T.H.A.) and increased migration to the northern municipalities from the G.T.H.A. communities. These new residents to the area largely commute to the G.T.H.A. or work from home. It is noted that local residents find themselves competing with new migrants from the G.T.H.A. Moreover, many local employers struggle to meet the salary expectations of G.T.H.A. migrants, limiting their ability to capitalize on this influx of potential employees.^[2]

^[1] County of Wellington Economic Development Plan, 2023-2026, prepared by the County of Wellington Economic Development Department, 2023.

^[2] Ibid.



The Economic Development Plan includes the following areas of focus for the northern municipalities in the County:

- Developing more welcoming and inclusive communities;
- Downtown beautifications/improvements;
- Diversity and inclusion plans; and
- Attainable housing.^[1]

3.3 Local Policy Context and Initiatives

Provided below is a list of key policy documents and initiatives prepared at the local level that the Township has influence in shaping and directing growth:

- Zoning By-law;
- Strategic Plan;
- Development Charges Background Study;
- Asset Management Plan;
- Township Industrial Strategy;
- Community Improvement Program;
- Partnership in Saugeen Connects;
- Business Retention & Expansion Surveys; and
- Application for the Canada Mortgage and Housing Corporation (CMHC) Housing Accelerator Fund.

The following section provides a summary of the above policy documents and initiatives. Appendix C includes a complete list of local studies and initiatives that relate to growth management.

3.3.1 Township of Wellington North Zoning By-law

The Wellington North Comprehensive Zoning By-law^[2] is a regulatory tool used by the Township to control and regulate land use. It divides the Township into zones or special policy areas, each with a specific regulation governing the types of land uses, building

^[1] County of Wellington Economic Development Plan, 2023-2026, prepared by the County of Wellington Economic Development Department, 2023.

^[2] Ibid.



sizes, heights, parking requirements, setbacks and other development standards. The Zoning By-law is enacted under the authority of the Ontario *Planning Act* and must conform to provincial policies and O.P.s (i.e., County of Wellington O.P.). The Zoning By-law is an important tool for the Township, as it provides a framework for managing growth.

The Township of Wellington North has 26 zones within the Zoning By-law. Zone classes within the Township of Wellington North Urban Centres include the following zones that accommodate housing and employment growth:

- **Residential:** Low Density Residential (R1B and R1C); Medium Density Residential (R2); and High Density Residential (R3).
- **Mixed-Use:** Mixed-Use (MU1); and Main Street Mixed-Use (MU2).
- **Commercial and Institutional:** Institutional Zone (IN); Central Commercial Zone (C1); Highway Commercial Zone (C2); Neighbourhood Commercial Zone (C3); and Shopping Central Commercial Zone (C4).
- **Industrial:** Industrial Zone (M1).
- **Unserviced and Future Uses:** Unserviced Residential Zone (R1A); and Future Development Zone (FD). These include sites where the zoning limits the type of development/use until the lands are fully serviced (i.e., water and wastewater servicing).

As the Township grows, a key consideration for the Township will be the review of the Zoning By-law. A review of the Zoning By-law will ensure that the Township's Zoning By-law provides a framework to accommodate new, desired development forms and employment opportunities, and provides an opportunity to tackle climate resiliency. Furthermore, there may be an opportunity to consolidate zones, to provide more simplicity. For example, zones permitting commercial uses include several zones that may not reflect the evolving commercial structure and hierarchy of the Urban Centres of Arthur and Mount Forest. Moreover, the housing built-forms in the Zoning By-law do not consider new built-forms that are now appearing within the County of Wellington, including stacked townhouses and back-to-back townhouses.

3.3.2 Township of Wellington North Strategic Plan

Over several recent terms of Council, the Township has advanced its strategic planning framework. The 2019 to 2022 strategic plan was focused upon modernization and



efficiency, partnerships, municipal infrastructure, as well as alignment and integration. It is important to recognize that the Strategic Plan is a document that is focused on short-term priorities for Council and Township staff. The Strategic Plan involved extensive consultation with the public and stakeholders to understand the satisfaction of the delivery of municipal services, and to identify key focus areas for the Township.

Provided below is a summary of the three key focus areas identified in the 2024 Strategic Plan for the Township:

- Shape and support sustainable growth so that the Township maintains and supports growth for a balanced and inclusive community;
- Deliver quality, efficient community services aligned with the Township's mandate and capacity so that the Township carefully maintains, enhances, and improves services that are balanced with community needs and resources; and
- Enhance information sharing and participation in decision-making so that the Township increases engagement and sense of community.^[1]

3.3.3 Township of Wellington North Development Charges Background Study

Development charges (D.C.s) allow the Township to recover the cost of growth-related capital expenditures from new development. These charges are calculated by the Township every five years to ensure that new developments pay for their fair share of the capital expenditures for services they will receive. The current Township of Wellington North D.C. By-law provides policies and charges related to development within the Township covering a period from April 1, 2022, to March 31, 2027.^[2]

The Wellington North D.C. By-law provides the following discounts to attract targeted development, as well as to encourage development in key areas of interest to the Township. Provided below is a brief overview.

- **D.C.s. within the Built Boundary of Arthur and Mount Forest are reduced by 10%.** Reducing the D.C.s in the Built Boundary provides a mechanism for the Township to support intensification.

[1] Township of Wellington North Strategic Plan, 2024, prepared by Do/Able Consulting.

[2] Township of Wellington North, By-law 027-22 for the Imposition of Development Charges.



- **D.C.s within the Central Intensification Corridor in Arthur and Mount Forest are reduced by 25%.** Reducing D.C.s within this area provides a mechanism for the Township to support intensification, as well as support commercial business opportunities that contribute towards the social and cultural hub of the community.
- **Development that meets the definition of Purpose-Built Rental Housing may be eligible for an additional 25% reduction in D.C.s.** Reducing the D.C.s for purpose-built rental housing is a key mechanism for the Township to support a wide range of housing options. As previously discussed, most of the Township's housing stock is owned occupied.^[1]

It should be noted that the Township of Wellington North D.C. By-law also includes a lower D.C. rate for industrial uses (\$3.54/sq.ft. for industrial and \$1.77/sq.ft. for warehouses), compared to other non-residential uses (commercial charges are \$7.07/sq.ft.).^[2] Furthermore, D.C. rates for high-density housing forms are lower than the rate for single detached/semi-detached housing forms on a per housing unit basis.^[3]

3.3.4 Township of Wellington North Asset Management Plan

An asset management plan is a crucial part of growth management. It provides a strategic framework for municipalities to effectively plan, maintain and expand infrastructure assets to support the demands of a growing population and economy. Furthermore, planning for growth requires infrastructure that is resilient to natural hazards and climate change impacts. The Township of Wellington North Asset Management Plan was prepared in 2021 and provides a strategic planning document outlining a logical approach to manage transportation, stormwater, water and wastewater assets proactively and efficiently.^[4]

The asset management plan identified infrastructure expansions and upgrades required. Many of those improvements are included in the Township of Wellington

^[1] Township of Wellington North, By-law 027-22 for the Imposition of Development Charges.

^[2] Ibid.

^[3] Ibid.

^[4] Township of Wellington North, 2021 Asset Management Plan, Transportation, Stormwater, Water and Wastewater Services prepared by the Township of Wellington North, 2021.



North 10-Year Capital Plan (refer to Appendix D for a summary of projects). Furthermore, the Plan identifies the need for the Township to commission stormwater studies to obtain the performance metrics required by O. Reg. 588/17: Asset Management Planning for Municipal Infrastructure, specifically the percentage of properties in the municipality resilient to a 100-year storm, and the percentage of the network resilient to a five-year storm.^[1]

3.3.5 Township of Wellington North Industrial Strategy

The Township of Wellington North has an Industrial Land Strategy framework for programs and policies that are updated to changing requirements and market conditions. The seven elements of the strategy are discussed below.

1. Ensure that Wellington North's three industrial areas have an adequate supply of serviced industrial land, based on current trends, through public- and private-sector land and infrastructure development activities.
2. Play an active and strategic role as a land developer through strategic land acquisition, planning, land development, development partnerships and land sales, to ensure that land is available for industrial development in the short term and long term, based on the Township's employment land needs.
3. Participate in strategic partnerships and programs to capitalize on economic development opportunities that involve industrial land development.
4. Develop and maintain a database of vacant industrial land in the Township.
5. Undertake and facilitate new planning activities to encourage development and redevelopment of industrial areas in an orderly, cost-effective way, and ensure development opportunities are continually available.
6. Streamline development approval processes and enhance communication and customer service to facilitate the development of industrial land and buildings. Conduct frequent analysis of D.C.s to ensure the municipality stays competitive.

^[1] Township of Wellington North, 2021 Asset Management Plan, Transportation, Stormwater, Water and Wastewater Services, prepared by the Township of Wellington North, 2021, p. iii.



7. Implement active marketing programs to make marketing and real estate information readily available to prospective users of industrial property.^[1]

A key part of the Township's industrial strategy has been maintaining a supply of marketable municipally owned industrial lands. Recently, the Township sold its last remaining industrial lot.

Municipally owned industrial lands is a key strategy used by municipalities outside the G.T.H.A. to competitively attract development. Examples of communities that are active with respect to municipal land development on employment lands include the City of London, City of Guelph, Town of Minto, City of Cambridge and the City of Stratford.



Relatively low land prices and slower rates of development activity in these communities, compared to the G.T.H.A., create difficulties in attracting and sustaining private-sector development of industrial lands. The relatively low market price of serviced land creates conditions that limit private-sector interest and involvement in industrial land development (i.e., the costs of servicing lands are too high relative to market prices of serviced land). The absence of the private sector necessitates municipal development of industrial/business parks. Under these circumstances, many municipalities take a pro-active approach and develop municipal industrial/business parks, investing municipal dollars to buy, subdivide and fully service the land. Recouping municipally funded servicing costs (in full or in part) occurs through land sales to end users who then develop the parcel.

As the Township has run out of vacant municipally owned industrial land, the Township is exploring opportunities to establish new municipality-owned industrial lands. Extending the Mount Forest Industrial Park into Grey County is a potential possibility being explored. The Township has included funding in the 2024 budget to do consulting work to explore this further.^[2]

^[1] Township of Wellington North website, <https://www.wellington-north.com/business/industrial-land>, accessed February 5, 2024.

^[2] Based on discussions with the Township of Wellington North staff.



3.3.6 Community Improvement Program

Community Improvement Plans (C.I.P.s) are a sustainable community planning tool used by municipalities to revitalize areas of a community through programs, grants, and incentives. Under the Ontario *Planning Act*, C.I.P.s can be undertaken for environmental, social or economic development reasons.

The Township updated its C.I.P. in 2023. The C.I.P. provides a framework to encourage and support the redevelopment of vacant, underutilized and/or inaccessible properties and buildings. The Township's C.I.P. objectives include the following:

- a) To provide for rehabilitation or improvement of commercial, institutional and industrial façades, through the use of municipally assisted programs and funding sources;
- b) To provide an incentive for private investment through the use of municipally assisted programs, (e.g., tax incentives, grants, loans) and funding sources; and
- c) To improve the physical, functional and aesthetic amenities of buildings in downtown Mount Forest, Arthur, hamlets and agricultural areas while stimulating private investment, revitalization, and sustainability.



Over the last 12 years, the Township has implemented a robust C.I.P. program for its communities. Since 2012, over 150 applications have been received by the Township towards access to its C.I.P. financial support programs. The total dollar value of the overall improvements to date is estimated to exceed \$3.2 million.^[1]

3.3.7 Partnership in Saugeen Connects

In March of 2017, the Saugeen Economic Development Corporation and five municipalities, including Brockton, Hanover, Minto, Wellington North, and West Grey, banded together in a partnership to create a project called “Saugeen Connects.” Today that partnership has expanded to include Arran-Elderslie and South Bruce. The mission

^[1] Township of Wellington North Community Improvement Plan Update 2023, prepared by PI.ural, 2023.



of this organization is to collaborate and positively impact area economic growth in the surrounding market area. Recognizing that this market area shares similarities, this organization covers multiple municipal jurisdictions, as well as portions of three upper-tier jurisdictions (Grey, Bruce, and Wellington). The partnership is focused on the following: support for youth retention and development; support for growth and retention of businesses; and integrate efforts to leverage immigrant attraction to the area as residents, workers, entrepreneurs, business owners, operators, and investors.^[1]

3.3.8 Business Retention and Expansion Surveys

The Township of Wellington North continually monitors the conditions of the local businesses in construction and manufacturing, as well as other industry sectors, with a Business Retention & Expansion Survey. Regularly monitoring existing businesses in the County is important as it is estimated that a large portion of new jobs in the Township come from existing businesses.^[2]

3.3.9 Housing Initiatives

The Township of Wellington recently applied for the CMHC Housing Accelerator Fund. The Housing Accelerator Fund is a federal program that provides incentive funding to local governments encouraging initiatives aimed at increasing housing supply. The Township of Wellington North's application was aimed at securing some funding for seven proposed infrastructure projects in the Township's 10-year capital plan that are required to facilitate further housing growth, including upgrades to Arthur Urban Centre's water supply, improvement to water towers in Mount Forest and Arthur and the construction of the Mount Forest Aquatics Centre.^[3]

^[1] Saugeen Connects website – <https://www.saugeenconnects.com>, accessed February 5, 2024.

^[2] Township of Wellington North website <https://www.wellingtonnorth.com/business/economic-development/business-retention-expansion>, accessed February 5, 2024.

^[3] The Wellington Advertiser, article- Wellington North applies for Housing Accelerator Fund dollars, talks municipal funding, September 1, 2023.



Chapter 4

Planning for Growth in the Township of Wellington North



4. Planning for Growth in the Township of Wellington North

This chapter provides a summary of key findings of the County of Wellington M.C.R. focusing on the population, housing and employment forecasts and allocations for the Township of Wellington North. Appendix E provides a summary of the population, housing and employment forecasts. Furthermore, this Chapter will review key planning policy targets, including people and jobs density and residential intensification.

4.1 Wellington North Population, Housing and Employment Forecast, 2021 to 2051

In the past, the Area Municipalities in the northern portion of the County, which includes the Township of Wellington North, have represented a smaller share of the County's population growth. The coronavirus disease (COVID-19) pandemic has accelerated labour force and housing demand relative to trends observed over the past decade, driven by the rise of telework and the associated outward growth pressures to the Outer Ring of the Greater Golden Horseshoe (G.G.H.) region. Additionally, although population growth in Wellington North is predominately fueled by migration from other regions of Ontario, it is important to acknowledge the significant population potential resulting from increased federal immigration targets. This places a strain on the G.T.H.A. and has a ripple effect on the rest of the province, including the Township of Wellington North.

Over the 2016 to 2021 period, the Township of Wellington North population increased from 12,300 to 12,800 persons, or an annual growth rate of 0.8% which is the highest the Township has experienced over the past 25-years based on Census years.^[1] Furthermore, based on residential building permit activity, over the past four years (2020 to 2023), the Township has averaged 160 new housing units annually through building permit issuances.^[2] It is estimated as of Mid-2024, the Township of Wellington North has a population of approximately 13,800 persons. While the Township of Wellington North has experienced a spike in population and housing growth over the past four years, it is important to recognize that the forecast is over the long-term

[1] Based on Statistics Canada, Census data.

[2] Based on Township of Wellington North residential building permit data issuances.



horizon. Planning for responsible and sustainable growth requires careful consideration of the broader demographic and economic factors, as well as consideration of the provision of municipal services (e.g., infrastructure) over a long-term horizon.

4.1.1 Population and Housing Forecast, 2021 to 2051

Figures 4-1 through to 4-6 provide a summary of the population and housing forecast to 2051. It is noted that population estimates for 2021 have been updated for the Township of Wellington North, as well as the rest of the County based on Statistics Canada 2021 Census and upwardly adjusted for the Census undercount at 3%.^[3] Watson has also provided current year (Mid-2024) estimates for the Township of Wellington North and its Urban Centres based on the Township of Wellington North residential building permit activity since the Census period, factoring an occupancy lag for new housing units (timing from building permit issuances to occupancy of new households). For comparison purposes, all population growth figures that are compared with the County and other Member Municipalities are based on growth between 2021 to 2051, as estimates for 2024 have not been prepared by Watson for the rest of the County.

The population and housing forecasts prepared as part of the County's M.C.R. have been reviewed for the Township of Wellington North. Based on a review by Watson, recent population and housing growth in the Township is generally tracking to the forecast. The short-term (i.e., 2016 to 2026) population and housing already assumed robust growth for the Township. The County of Wellington will review the long-term forecast again at its next O.P.R. (10 years following the completion of the County's current O.P.R.) and further adjustments may be made to the forecast for 2051. Furthermore, it should be recognized that the forecasts prepared by the County are considered minimums according to the provincial policy framework (i.e., Growth Plan, 2019). For the Township of Wellington North, a key consideration in accommodating additional growth is its ability to service growth (i.e., water and wastewater servicing).

^[3] This is the same Census undercount rate utilized in the County of Wellington M.C.R. The unadjusted 2021 Census population for the Township of Wellington North is 12,431. The Census undercount is the net number of persons missed in the base population during Census enumeration. This is calculated after the Census results. The updated undercount for 2021 is not yet finalized by Statistics Canada.



Key Findings

The population base of the Township of Wellington North is anticipated to increase from 12,800 in 2021 to 20,500 persons by 2051, as illustrated in Figure 4-1. This results in a population increase of 7,700 persons over that period (256 persons annually) and a population increase of 60% over the 2021 to 2051 period. This population increase of 7,700 persons is notable, as it is more than double the size of the existing population base of Arthur.

Figure 4-1
County of Wellington and Township of Wellington North
Population Forecast, 2021 to 2051

Year	Township of Wellington North	Rest of County of Wellington County	County of Wellington	Township of Wellington North as Share of County of Wellington
Mid-2016	12,300	81,300	93,600	13.1%
Mid-2021	12,800	87,400	101,200	12.8%
Mid-2051	20,500	139,500	160,000	12.8%
Growth, 2021 - 2051	7,700	52,100	59,800	12.8%
Change 2021 to 2051	60%	60%	60%	-
Annual Growth Rate, 2021 – 2051	1.5%	1.6%	1.6%	-

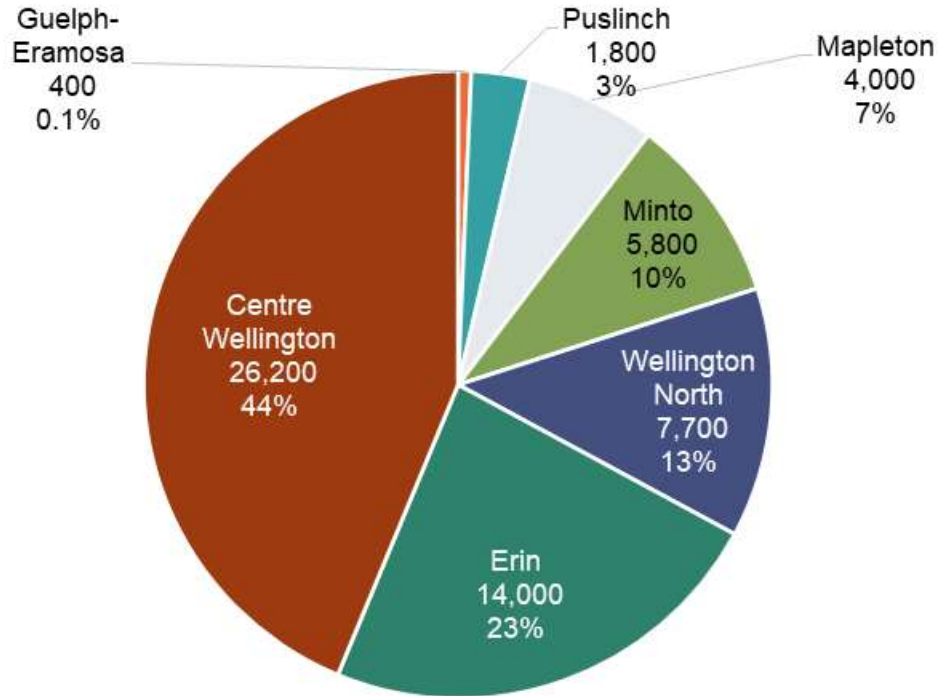
Note: All figures include population undercount, estimated at 3%.

Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022; 2021 estimates are based on Statistics Canada Census.

As summarized in Figure 4-2, the Township of Wellington is forecast to accommodate 13% of the County of Wellington population growth over the 2021 to 2051, the third largest share following the Township of Centre Wellington and the Town of Erin.



Figure 4-2
County of Wellington
Population Growth Allocation by Member Municipality, 2021 to 2051

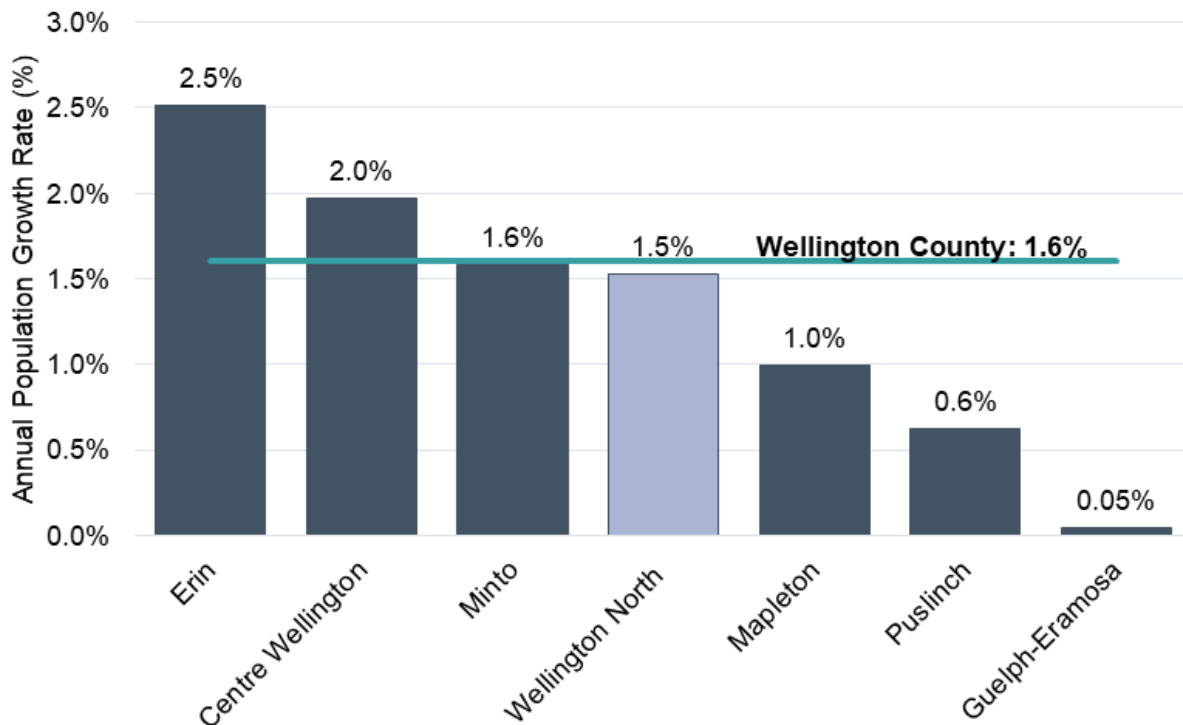


Note: May not add up precisely due to rounding. All figures include 3% population undercount.
Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022; 2021 estimates are based on Statistics Canada Census.

The Township of Wellington North is expected to grow at an annual population rate of 1.5% which is significantly higher than the growth rate observed over the most recent 5-year Census period of 0.6% annually. As illustrated in Figure 4-3 the annual population growth is slightly below the County of Wellington average.



Figure 4-3
County of Wellington
Annual Population Growth Rate by Member Municipality, 2021 to 2051



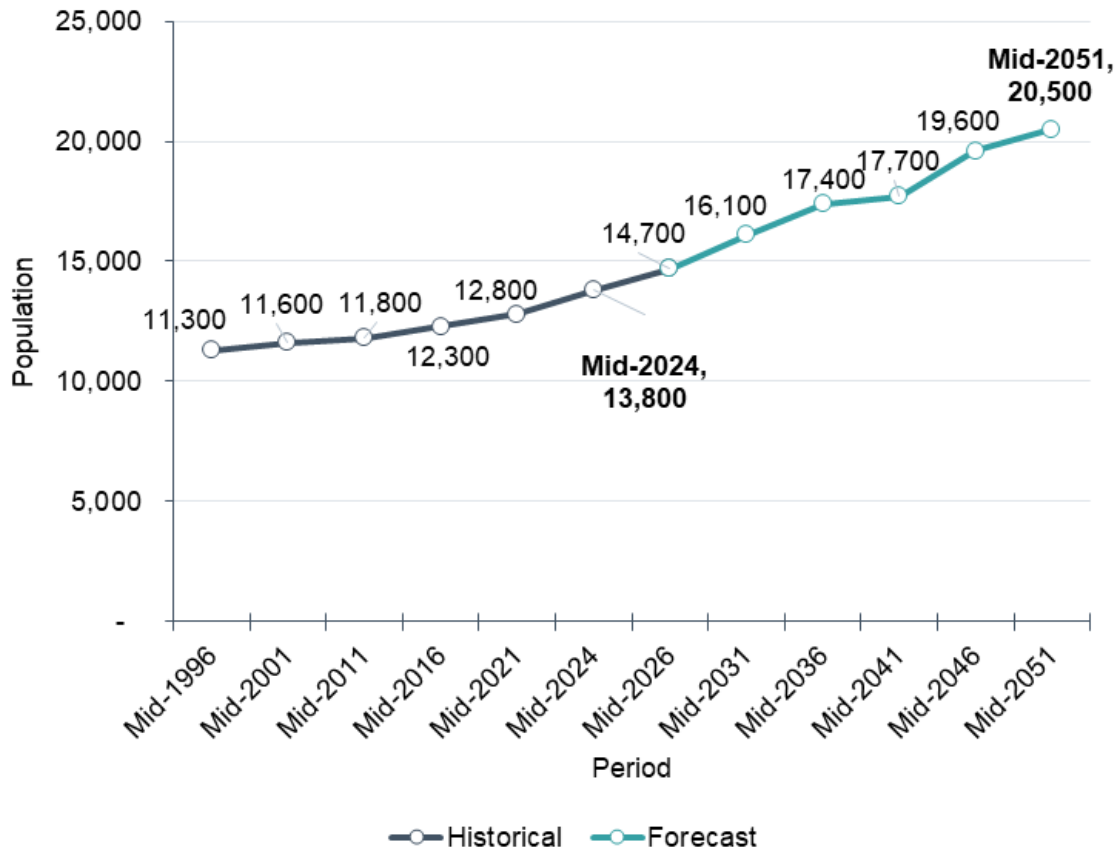
Note: May not add up precisely due to rounding. All figures include 3% population undercount.
Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022; 2021 estimates are based on Statistics Canada Census.

Figure 4-4 summarizes the forecast to 2051 based on five-year increments, as well as the Mid-2024 population estimate of the Township of Wellington North. By 2031, the Township is forecast to accommodate a population of 16,100, an increase of 2,300 or 329 residents annually over the 2024 to 2031 period. As a result, the population growth over that period is anticipated to increase at an annual rate of 2.2%. While the growth rate is very robust, this is slightly lower growth than the Township has experienced over the past few years, 2021 to 2024 2.5% due to a spike in residential building permit activity.

The growth rate is anticipated to gradually slow down. Over the 2031 to 2051 period, the Township is anticipated to add an additional 4,400 residents, at an annual growth rate of 1.2% due to an aging population base.



Figure 4-4
Township of Wellington North
Population Forecast 2051



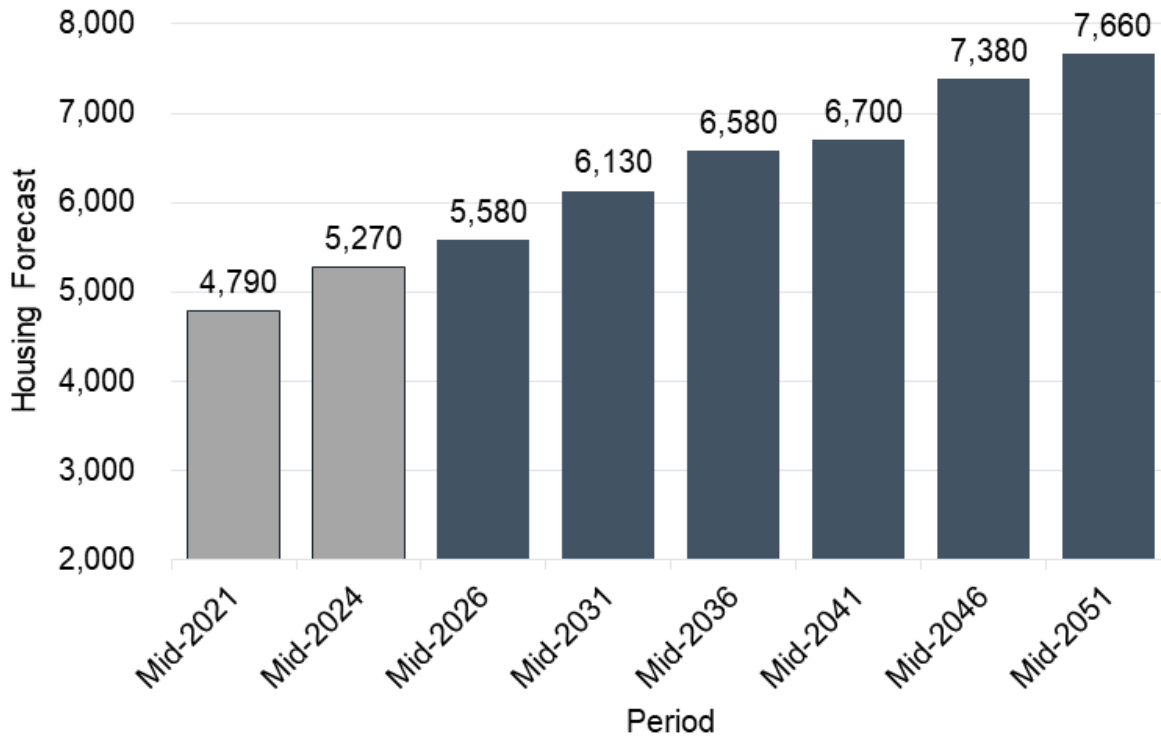
Note: All figures include 3% population undercount.

Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022. 2021 and 2024 estimates are based on Statistics Canada Census and building permit issued for new housing since 2021 Census.

As summarized in Figure 4-5, over the Mid-2024 to Mid-2031 period, the Township is forecast to add approximately 860 housing units over this period, or 123 units annually. Housing growth over the Mid-2031 to Mid-2051 is anticipated to slow down, increasing by approximately 77 units annually. By 2051 it is forecast that the Township will accommodate 7,660 housing units, an increase of 2,400 housing units over the Mid-2024 to Mid-2051 period, or an annual average of 89 housing units annually.



Figure 4-5
Township of Wellington North
Housing Forecast 2051

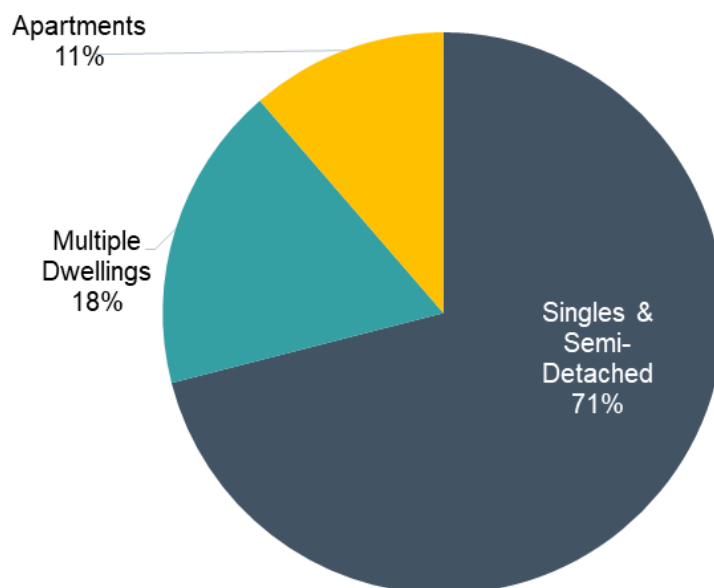


Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022. 2021 and 2024 estimates are based on Statistics Canada Census and building permit issued for new housing since 2021 Census; 2026 has been adjusted by Watson & Associates Economists Ltd., 2023.

As summarized in Figure 4-6, over the early 2024 to Mid-2051 period, it is forecast that approximately 71% of the new housing units will be single and semi-detached units, while 18% would comprise multiples (townhouses) and the remaining 11% would represent apartments.



Figure 4-6
Township of Wellington North
Housing Forecast by Housing Structure Type,
Mid-2024 to Mid-2051



Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022. 2021 and 2024 estimates are based on Statistics Canada Census and building permit issued for new housing since 2021 Census.

4.1.2 Wellington North Employment Forecast, 2021 to 2051

Figures 4-7 through to 4-9 provide a summary of the employment forecast to 2051. It is noted that the employment figures for the Township of Wellington North in 2021 do not reflect Statistics Canada 2021 Census Place of Work data. The 2021 Census was conducted during a provincial pandemic lockdown and is not considered reliable for forecasting purposes, as it reflects the place of work of employees during the lockdown. Watson has reviewed annualized OMFRA EMSI employment estimates since 2021. Based on that data, it appears that employment within Wellington North contracted slightly in 2020, however quickly rebounded over the past few years. Unlike other municipalities in the Greater Golden Horseshoe (G.G.H.), the Township of Wellington North does not have a large office employment base, a sector that has experienced a significant change in employment in Ontario. It is estimated that Wellington North has likely benefitted from the surge in work at home employment driven largely by changes



in office workplace arrangements in the G.G.H. It is estimated that the influx of work at home employment in office sectors has largely offset losses in other employment sectors in the Township. Furthermore, while there was a contraction of retail sector employment in Wellington North over the period of 2020 and 2021, that sector has quickly rebounded and recovered by 2023. The retail structure in Wellington North primarily comprises local-serving retail uses (e.g., food stores, drug stores, restaurants and commercial services), which are less vulnerable to the impacts of e-commerce. Shopping malls and big-box retail stores in large urban centres have experienced the greatest impact from the growth of e-commerce.

For comparison purposes with the County and Member Municipalities, employment growth figures are based on growth as of 2021 identified in the County M.C.R. forecasts. Employment has only been reviewed for the Township of Wellington North.

Key Findings

The employment base of the Township of Wellington North is anticipated to increase from 7,100 jobs in 2021 to 10,500 jobs by 2051, as illustrated in Figure 4-7. This results in an employment increase of 3,200 jobs over that period (107 jobs annually) and an employment increase of 44% over the 2021 to 2051 period.

Figure 4-7
County of Wellington and Township of Wellington North
Employment Forecast, 2021 to 2051

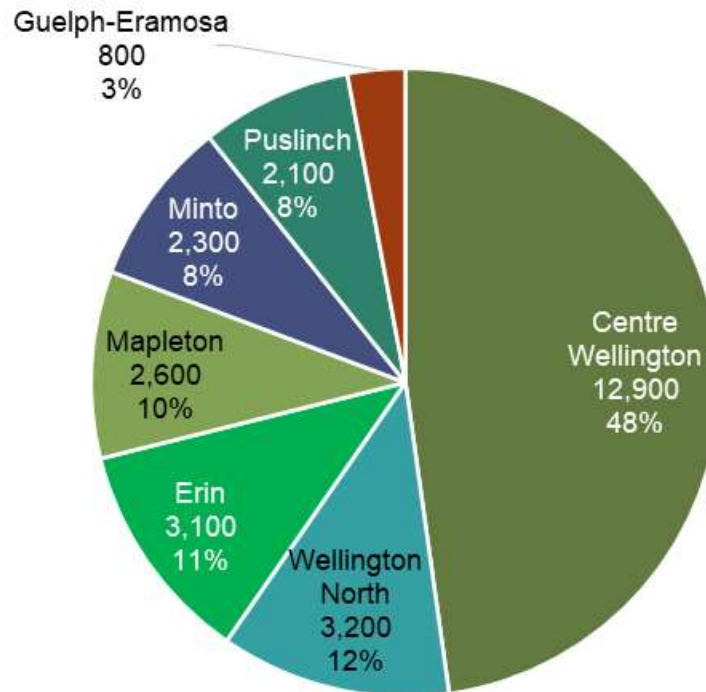
Year	Township of Wellington North	Rest of County of Wellington County	County of Wellington	Township of Wellington North as Share of County of Wellington
Mid-2016	7,100	32,900	40,000	17.7%
Mid-2021	7,300	35,800	43,100	16.9%
Mid-2024	7,600	-	-	-
Mid-2051	10,500	59,500	70,000	15.0%
Growth, 2021 - 2051	3,200	23,700	26,900	12.0%
Change 2021 to 2051	44%	66%	62%	-
Annual Growth Rate, 2021 – 2051	1.2%	1.7%	1.6%	-

Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022.



As summarized in Figure 4-8, the Township of Wellington is forecast to accommodate 12% of the County of Wellington population growth over the 2021 to 2051, the second largest share following the Township of Centre Wellington.

Figure 4-8
County of Wellington
Employment Growth Allocation by Member Municipality, 2021 to 2051



Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022.

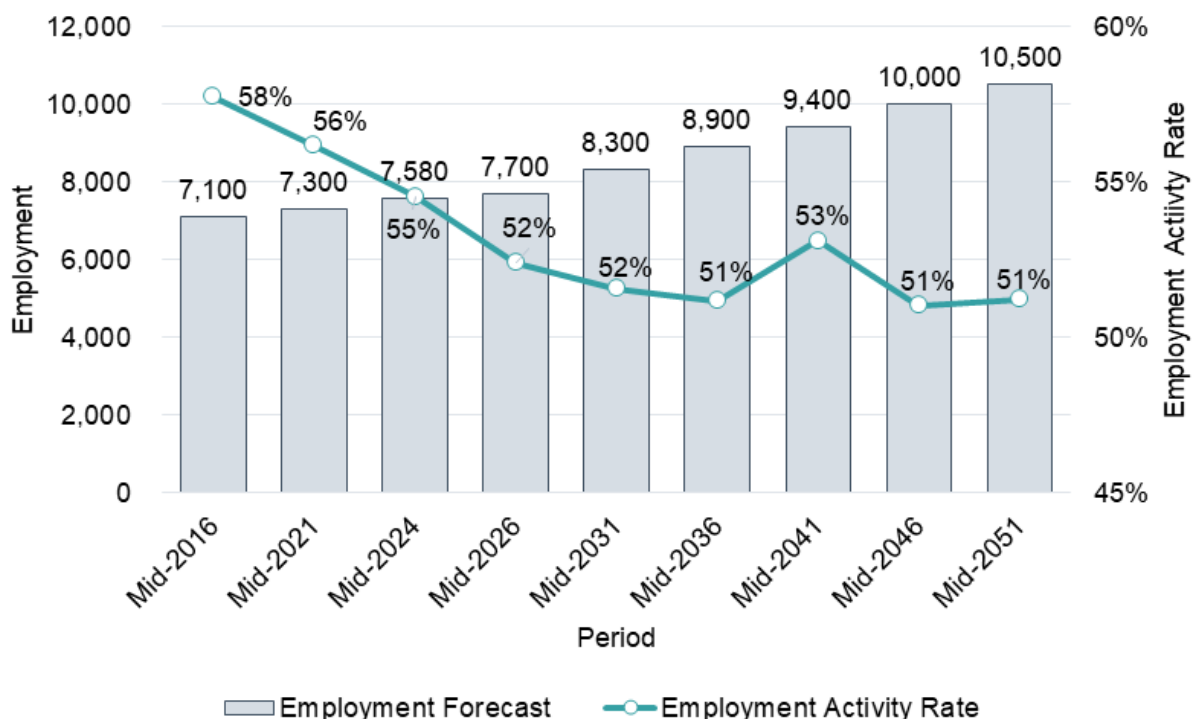
Figure 4-9 summarizes the employment forecast to 2051 based on five-year increments, as well as the Mid-2024 employment estimate of the Township of Wellington North. By 2031, the Township is forecast to accommodate an employment base of 8,300, an increase of 720 or 103 jobs annually over the 2024 to 2031 period. As a result, employment growth over that period is anticipated to increase at an annual rate of 1.3%. Over the 2031 to 2051 period, the growth rate is anticipated to continue to remain stabilize at 1.2%.

A key consideration in planning for complete communities is the ability to accommodate jobs as the community grows in population. An employment activity rate, the ratio of



jobs to population, is used to understand the relationship between population growth and employment growth. Figure 4-9 illustrates the employment activity forecast for the Township of Wellington North over the long-term horizon. Compared to other Member Municipalities in the County, Wellington North has one of highest employment activity rates at 55%. As identified in the County of Wellington M.C.R. Phase 1 Report, the employment activity rate in the County ranges from 26% in the Town of Erin to 73% in the Township of Puslinch. The County-wide employment activity rate is 43%.

Figure 4-9
Township of Wellington North
Employment Forecast and Employment Activity Rate to 2051



Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022.

Wellington North boasts a strong industrial employment base, coupled with a strong agriculture and agri-food business sector which bodes well in accommodating a diversified employment base. The Township is home to one of the County's largest employers, Musashi Auto Parts Inc, an anchor business in Wellington County which



supports Ontario’s robust automobile and auto parts sector.^[4] The Township of Wellington North along with the Township of Centre Wellington accommodate a large share of the County’s Urban Employment Lands Employment (i.e., industrial-type employment). The two municipalities each accommodate over a third of the County’s Employment Lands Employment, as a result they are key areas in the County for industrial growth.



4.2 Township of Wellington North Growth Structure

4.2.1 How is Growth Allocated and Managed within the Township?

As illustrated in Figure 4-10, the Township of Wellington’s North Growth Structure comprises several components, as discussed below. Each component has different growth management objectives. The County has developed a Growth Structure that guides allocations within each of the Member Municipalities.

Urban System: this is where 94% of the Township’s population growth and 91% of the Township’s employment is anticipated by 2051. The Urban System comprises the Urban Centres of Mount Forest and Arthur that offer full municipal servicing (water/wastewater). Each Urban Centre includes the following sub-components with specific growth objectives:

^[4] County of Wellington Economic Development Plan, 2023 – 2026, prepared by the County of Wellington Economic Development Department, 2023.



- **Built-up Area (B.U.A.):** this area is identified in dark purple on the map. This is where intensification is planned to occur and where the minimum intensification rate target applies. The delineation was created by the Province as part of the Growth Plan in 2006.
- **Designated Greenfield Area (D.G.A.):** this area is identified in light purple on the map. This is where new urban residential, commercial and institutional development on large vacant lands occurs. This is the area where a people and jobs density minimum target apply. The planning objective is to maximize the utilization of land for housing and population-related employment opportunities.

The above two sub-components are referred to as **Urban Community Area**. This is where people live, go to school, shop, as well as work in offices, retail and other facilities. The objective of the Urban Community Area is to build a complete community with a range of housing options, jobs and amenities.

- **Urban Employment Area:** identified in aqua blue on the map. This is the area that accommodates industrial and export-based industries. This area is protected from Community Area uses that may be sensitive to the function of the Employment Area. The objective of this area is to accommodate employment uses that require separation from other uses and contribute towards a range of employment and economic opportunities for the Township.

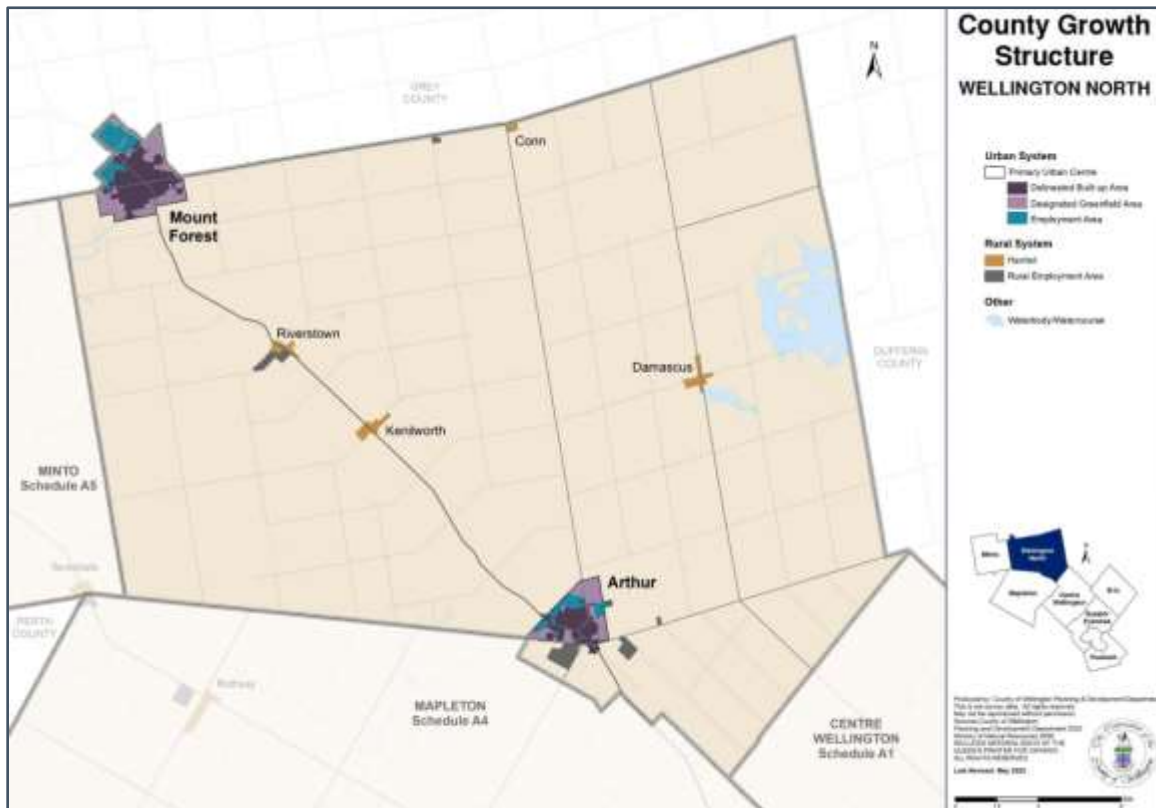
Rural System: this is where 6% of the Township's population growth and 9% of the Township's employment is forecast by 2051. The Rural System comprises the Hamlets, Rural Employment Areas and agricultural lands. The Rural System does not offer full municipal servicing (water/wastewater). The Rural System has the following sub-components with specific growth objectives:

- **Hamlets:** identified in orange on the map. These small rural communities are planned for minor rounding out of subdivisions and other small-scale residential and employment opportunities. Wellington County has four Hamlets: Riverstown, Kenilworth, Damascus and Conn.
- **Rural Employment Areas:** identified in grey on the map. These areas provide opportunities for the cluster of rural economic development activities that are industrial in nature and do not require servicing.
- **Remaining Rural:** identified in light yellow on the map. This includes the largest component of the Township. These lands accommodate agricultural and other



rural-based activities. These lands are protected from large-scale urban development and include prime agricultural lands that require protection.

Figure 4-10
Township of Wellington North
Growth Structure



Source: County of Wellington O.P.A. 119.

4.3 Urban Centre and Rural Area Population and Housing Allocations, 2021 to 2051

Figure 4-11 provides a summary of the population growth allocations for the Township's Urban Centres and the Rural Area, while Figure 4-12 provides the housing growth allocations. Allocations by Urban Centre in the County's M.C.R. were carried out based on a review of supply and demand factors, as well as consideration of servicing and other potential constraints.



The population and housing estimates have been updated based on 2021 Census data. An estimate is provided for the current population and housing base as of Mid-2024. As of Mid-2024, Mount Forest is estimated to have a population base of 5,800, while Arthur is estimated to have a population base of 3,300. Mount Forest and Arthur are both anticipated to experience robust growth, growing at an annual growth rate of 2.2% and 1.4% to 2051. The Rural Area has a population of 4,700 as of Mid-2024. Over the 2024 to 2051 period, Mount Forest is estimated to add 4,700 residents and 1,620 households, while Arthur is anticipated to add 1,500 residents and 600 households. The Rural Area is anticipated to add 500 residents and 170 households over the same period.

Figure 4-11
Township of Wellington North
Population Allocations by Urban Centre and Remaining Rural Area

Location	Mid-2021 Population	Mid-2024 Population	2024 Share of Township Population	Mid-2051 Population	Population Growth, 2024 to 2051
Mount Forest	5,300	5,800	42%	10,500	4,700
Arthur	2,700	3,300	24%	4,800	1,500
Urban Area	8,000	9,100	66%	15,300	6,200
Rural Area	4,800	4,700	34%	5,200	500
Township	12,800	13,800	100%	20,500	6,700

Note: All figures include population undercount, estimated at 3%. Figures have been rounded. Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022. 2021 estimates are based on Statistics Canada Census. 2024 is an estimate by Watson.

Figure 4-12
Township of Wellington North
Housing Allocations by Urban Centre and Remaining Rural Area

Location	Mid-2021 Housing Units	Mid-2024 Housing Units	2024 Share of Township Housing Units	Mid-2051 Housing Units	Housing Growth, 2024 to 2051
Mount Forest	2,290	2,490	47%	4,110	1,620
Arthur	1,035	1,240	24%	1,840	600
Urban Area	3,325	3,730	71%	5,950	2,220



Location	Mid-2021 Housing Units	Mid-2024 Housing Units	2024 Share of Township Housing Units	Mid-2051 Housing Units	Housing Growth, 2024 to 2051
Rural Area	1,465	1,540	29%	1,705	166
Township	4,790	5,270	100%	7,655	2,386

Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022. 2021 estimates are based on Statistics Canada Census. 2024 is an estimate by Watson based on residential building permit activity.

Figure 4-12 compares the County's M.C.R. forecast for 2021 versus the 2021 Census by Urban Centre and the Township's Rural Area. Overall, the Township-wide population forecast for 2021 came in approximately 100 persons higher in the 2021 Census versus the M.C.R. forecast. As summarized in Figure 4-13, the 2021 Census for Arthur corresponds to the 2021 M.C.R. forecast. The population for Mount Forest was lower based on the 2021 Census compared to the M.C.R. forecast, by approximately 200 persons. The Rural Area population was approximately 300 persons higher than what was forecast in the M.C.R.

Figure 4-13
Township of Wellington North
Population by Urban Centre and Remaining Rural Area Comparison with County M.C.R.

Location	M.C.R. Forecast – 2021	Census 2021	Difference
Mount Forest	5,500	5,300	200
Arthur	2,700	2,700	0
Rural Area	4,500	4,800	-300
Wellington North	12,700	12,800	-100

Note: All figures include population undercount, estimated at 3%.

Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022. 2021 estimates are based on Statistics Canada Census.

Figure 4-14 compares the County's M.C.R. forecast to 2031. As illustrated over the short-term, given the robust recent housing activity in Arthur, Arthur has almost reached its Mid-2026 forecast. Over the short-term, it is likely that Arthur will exceed the growth forecast, while Mount Forest may experience a slower rate of growth than anticipated. The Township's Urban Centres collectively are forecast to achieve an annual growth



rate of 5.9% (or 550 persons annually) over the 2024 to 2026 period, higher than over the 2021 to 2024 period of 4.4% (or 370 persons annually). The Urban Centre forecast assumes very robust growth to 2031 at an annual growth rate of 3.4%.

Figure 4-14
Township of Wellington North
Population Growth to 2031

Location	Census Mid-2021	Estimated Mid-2024	Mid-2026	Mid-2031
Mount Forest	5,300	5,800	6,700	7,600
Arthur	2,700	3,300	3,500	3,900
Urban Area	8,000	9,100	10,200	11,500
Rural Area	4,800	4,700	4,500	4,700
Township	12,800	13,800	14,700	16,200

Note: All figures include population undercount, estimated at 3%.

Source: Derived from the County of Wellington, Phase 1 M.C.R. Report: Urban Structure and Growth Allocations prepared by Watson & Associates Economists Ltd., 2022. 2021 estimates are based on Statistics Canada Census.

4.4 Employment Growth Allocation by Urban Structure

4.4.1 How is Employment Growth Allocated?

These areas are broken down into three major categories for the purposes of planning for employment and land needs assessment:

- Urban Employment Areas – industrial areas within the Urban Centres;
- Rural Employment Areas – industrial areas outside the Urban Centres; and
- Urban Community Areas – residential uses and non-residential uses to support the population within the Urban Centres and surrounding market area.

Figure 4-15 illustrates examples of employment uses in Urban and Rural Employment Areas across the County.



Figure 4-15
Examples of Employment Area Uses in Wellington County



Images include a trucking operation in Aberfoyle Rural Employment Area; construction use in Mount Forest; manufacturing use in Mount Forest; a multi-tenant building in Fergus; an industrial mill in Palmerston; and an industrial facility with service bays in Drayton.

Figure 4-16 illustrates examples of population-related employment uses in Community Areas across the County.



Figure 4-16
Examples of Community Area Non-Residential Uses (Population-Related Employment
Across the County



Notes: Images include a library/medical centre in Arthur; professional offices in Hillsburgh; retail uses in Fergus; a school in Rockwood; the downtown area in Erin Village; and a theatre in Drayton.

As illustrated in Figure 4-17, the County of Wellington M.C.R. Phase 2 Report forecasts strong employment growth within the Urban Centres. The Urban Centre Community Areas are anticipated to accommodate 50% of the Township's employment growth, accommodating commercial, institutional and work at home employment. Urban Employment Areas are anticipated to continue to accommodate a large portion of the Township's employment base, accommodating 41% of the Township's employment growth. The Township's Urban Employment Areas are anticipated to build upon the industrial strengths of the industrial base. The remaining employment growth within the Township comprises growth in Rural Employment Areas, as well as growth in other rural areas, including agriculture.

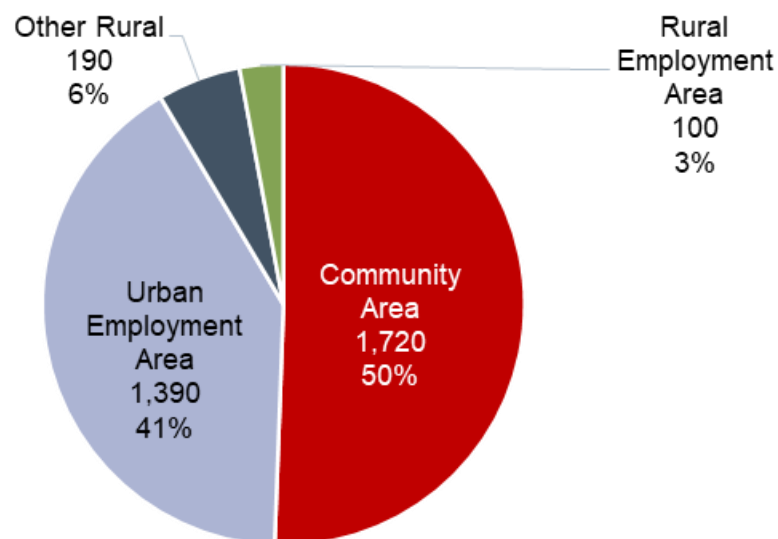
It is important to note that the County does not allocate employment growth by Urban Centre in the County O.P. Employment growth in the County of Wellington O.P. is allocated at the Member Municipality level. For the purposes of the land needs assessment in the County's M.C.R. Phase 2 Report, employment growth is allocated



based on the categories in Figure 4-17 on an aggregate basis. This means that the land needs assessment for employment does not breakdown growth for Arthur versus Mount Forest. This allows the Member Municipalities the flexibility to plan for employment.

As part of this Growth Management Action Plan, the Township will need to consider whether for local planning purposes there is a need to breakdown employment by Urban Centre. This would identify priorities areas for employment.

Figure 4-17
Township of Wellington North
Employment Growth Allocations by Area, 2020 to 2051



Source: Derived from the County of Wellington, Phase 2 M.C.R. Report: Urban Land Needs Report prepared by Watson & Associates Economists Ltd., 2022.

The above categories are broad structure components. The Township also has a series of land-use designations identified in the County of Wellington O.P., as well as zoning regulations in the Township of Wellington Zoning By-law to guide non-residential development.



4.5 Review of Housing Intensification Target

4.5.1 *Defining Residential Intensification and Intensification Opportunities in Arthur and Mount Forest*

Defining Residential Intensification

The Growth Plan, 2019 considers any residential development within the delineated B.U.A. as intensification. All residential development between Mid-2022 and Mid-2051 occurring within the B.U.A. counts towards the County's intensification target. As previously discussed, a B.U.A. was delineated for all urban settlements as of 2006 as part of the Growth Plan for the G.G.H., 2006 under the *Places to Growth Act, 2005*.^[1] The B.U.A. was based on the portion of the urban settlement that was primarily developed at that time. It is important to note that the delineation of the B.U.A. does not change over time.

Intensification includes the following opportunities:

- Development on infill sites (i.e., accommodating growth on underutilized sites).
- Redevelopment at a higher density level;
- Vacant lands and the rounding out of existing subdivisions;
- Residential development incorporated on commercial or mixed-use lands;
- Conversion of buildings to other uses (e.g., conversion of a non-residential building for housing); and
- Additional Residential Units (A.R.U.) on existing residential lots.

What are the Benefits of Intensification?

Intensification maximizes the use of existing urban infrastructure and services by increasing the density of development in established areas, thereby reducing the potential needs to expand the Urban Centres outward. Furthermore, intensification builds compact development patterns that can provide a range of housing options that are accessible to amenities, as well as improve climate resilience by building housing that is more energy efficient (multiple dwelling unit structures are more energy efficient

[1] Places to Grow. Better Choices. Brighter Future. Built Boundary for the Growth Plan for the Greater Golden Horseshoe, 2006. Ministry of Public Infrastructure Renewal. Ontario. 2008.



than single housing unit structures). It is important not to oversimplify the benefits of intensification. Accommodating too much intensification or focusing on growth only through intensification may pose challenges, as the Township may be required to upgrade and replace infrastructure (e.g., bigger water mains and trunk sewers) prior to its identified useful life, which can have significant financial implications. Furthermore, considering the range of demographic groups attracted to the Township (i.e. young adults, families with children, empty nesters and seniors) Wellington North is anticipated to need to accommodate a variety of housing options by structure type, tenure (i.e. ownership and rental) and location. To effectively accommodate the forecast housing demand for this area, the Township will need to plan for an appropriate balance of housing options within both its B.U.A. and D.G.A. areas which aligns with anticipated market demand. Accordingly, the Township should plan for intensification that considers a range of factors, including servicing requirements and market demand.

What are the Intensification Opportunities in Arthur and Mount Forest?

Figures 4-11 and 4-12 illustrates the B.U.A. in the Mount Forest Urban Centre and the Arthur Urban Centre. The B.U.A. is identified in the purple outline, lands outside the purple outline, but within the Urban Centre are referred to as the D.G.A. As illustrated on the map, the B.U.A. represents a large portion in each of the Urban Centres.

The maps also identify existing intensification opportunities identified by the County of Wellington. As illustrated in Figure 4-18, the Urban Centre of Arthur has some large development sites within the B.U.A. that can accommodate low density (single-detached and semi-detached) units. A large site in the Arthur B.U.A. of 11 ha can accommodate 102 units. While the site is within the B.U.A., the site has the general characteristics of a greenfield site. This site area has already accommodated the development of 95 single-detached units over the past three years, contributing towards the Township's intensification rate set by the County of Wellington.

As summarized in Figure 4-20, it is estimated that the Township has the potential to accommodate just over 550 units, including 15% (82 units) low density units; 46% (255 units) medium density units; and 39% (217 units) high density units within the B.U.A.s of the Urban Centres. It is estimated that approximately 80% of the identified intensification potential is in the planning approvals process (i.e., registered, draft approved and application under review). The intensification supply potential excludes A.R.U. potential. The County of Wellington M.C.R. forecasts that the Urban Centres in



Wellington North can accommodate approximately 90 A.R.U.s over the 2019 to 2051 period.^[2]

^[2] County of Wellington, Phase 2 Municipal Comprehensive Review Report: Land Needs, prepared by Watson & Associates Economists Ltd., March 31, 2022.



Figure 4-18
Arthur B.U.A. and Intensification Opportunities

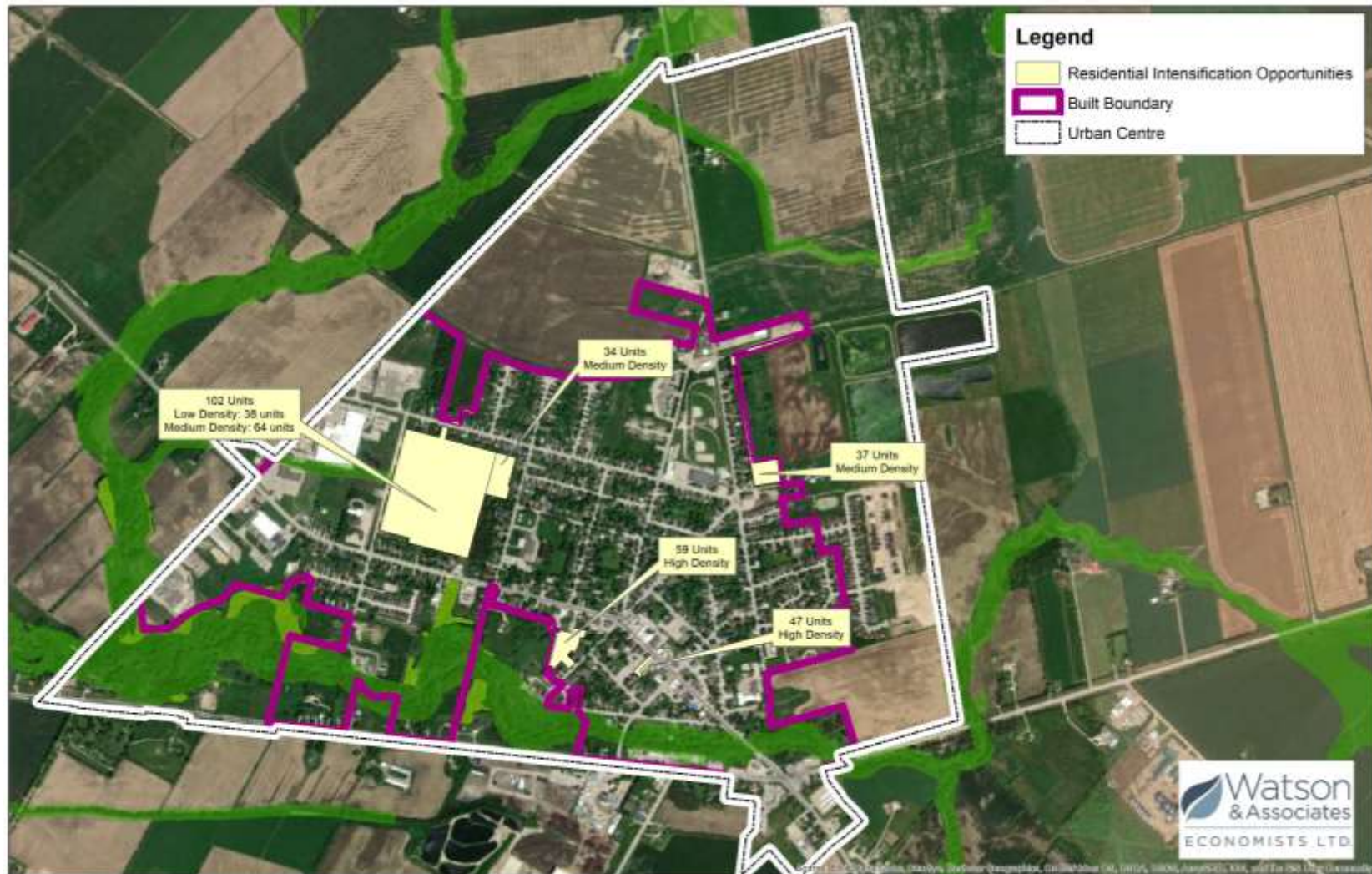




Figure 4-19
Mount Forest B.U.A. and Intensification Opportunities

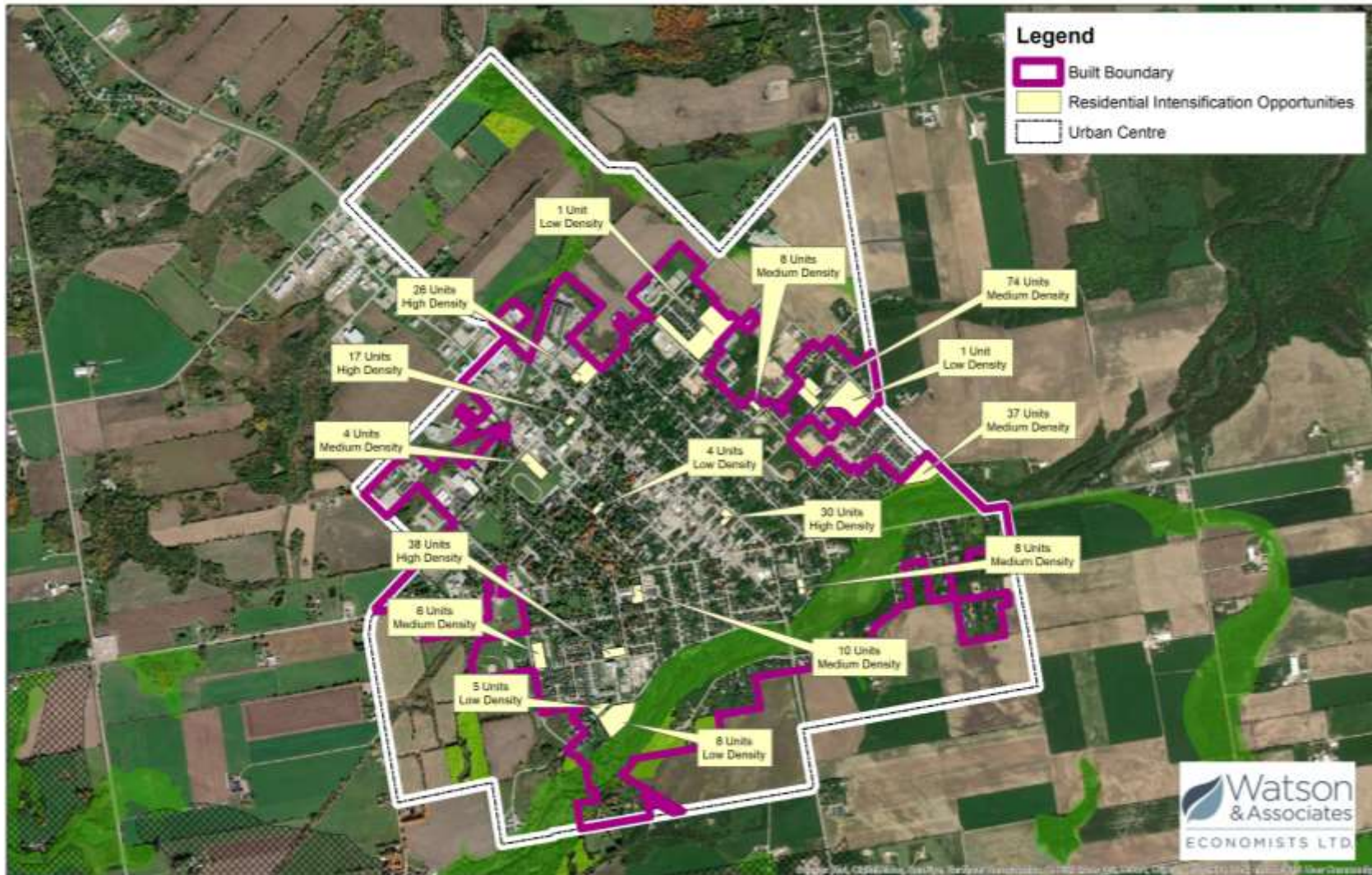




Figure 4-20
Arthur and Mount Forest
Intensification Housing Unit Potential

Location and Status	Low Density Units	Medium Density Units	High Density Units	Total Housing Unit Potential	Share by Development Status (%)
Arthur	55	136	106	297	100%
Registered	49	64	0	113	38%
Draft Approved	0	35	0	35	12%
Application Under Review	0	0	106	106	36%
Vacant Designated	6	37	0	43	14%
Mount Forest	27	119	111	257	100%
Registered	19	46	94	159	62%
Draft Approved	0	0	0	0	0%
Application Under Review	0	28	0	28	11%
Vacant Designated	8	45	17	70	27%
Arthur and Mount Forest Total	82	255	217	554	100%
Housing Mix (%)	15%	46%	39%	100%	-

Source: Derived from the County of Wellington residential land inventory by Watson & Associates Economists Ltd., 2023.

4.5.2 Intensification Target

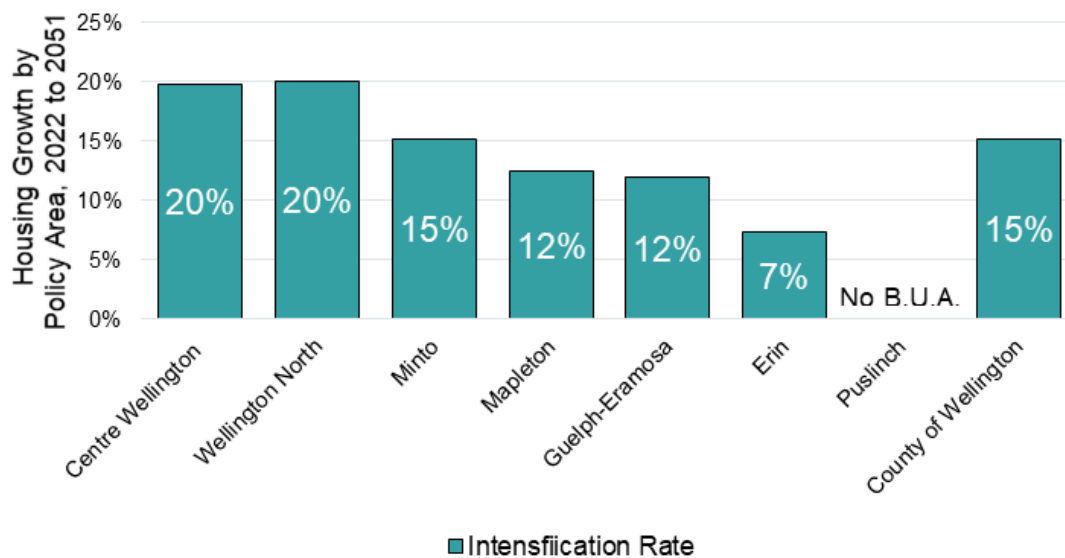
Through the County of Wellington M.C.R. analysis, the County is targeting an average minimum residential intensification target of 15% over the 2022 to 2051 period.^[1] This means on a County-wide average that 15% of all residential housing units within the County are planned to be accommodated within the B.U.A. The County's current intensification is 20% in the County of Wellington O.P., however, through the County's M.C.R. analysis, the County has requested an alternative target of 15% to the Province. The County of Wellington M.C.R. reviewed the potential by each respective Member Municipalities and Urban Centre that took in consider the opportunities and challenges of each Urban Centre.

^[1] County of Wellington, Phase 2 Municipal Comprehensive Review Report: Land Needs, prepared by Watson & Associates Economists Ltd., March 31, 2022.



As summarized in Figures 4-21 and 4-22, the Township of Wellington North is planned to accommodate a minimum target of 20% which represents approximately 19 housing units annually. The intensification rate for Wellington North is among the highest in the County, reflecting opportunities to accommodate a range of housing options in the B.U.A.s of Mount Forest and Arthur.

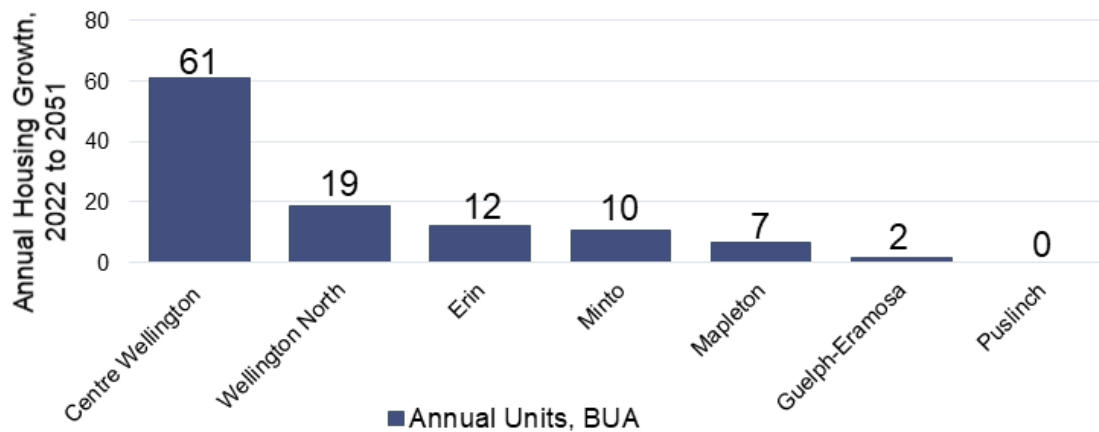
Figure 4-21
County of Wellington
Residential Housing Intensification Target by Member Municipality, 2022 to 2051



Source: County of Wellington M.C.R. Phase 2 Report – Urban Lands prepared by Watson & Associates Economists Ltd.



Figure 4-22
County of Wellington
Annual Residential Intensification by Member Municipality, 2022 to 2051



Source: County of Wellington M.C.R. Phase 2 Report – Urban Lands prepared by Watson & Associates Economists Ltd.

4.5.3 Intensification Trends

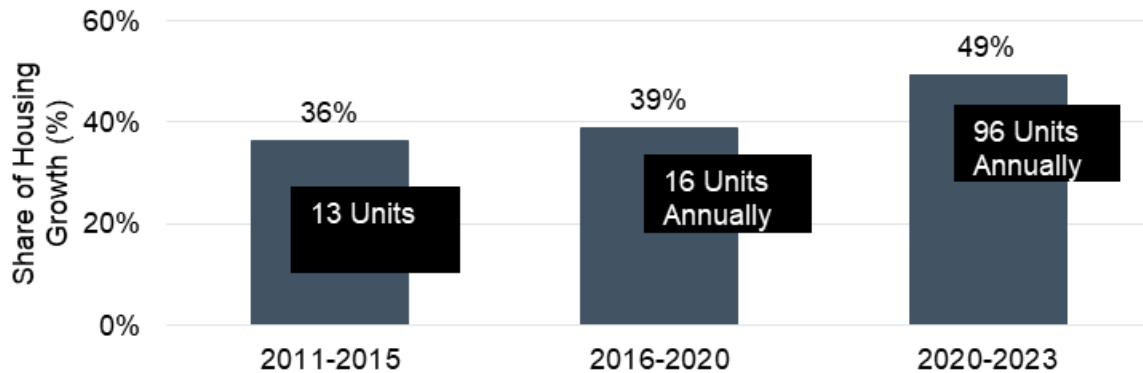
As summarized in Figure 4-23, the Township is tracking higher than its intensification target of 20%. Over the past decade, the Township has accommodated more than 20% of its housing growth within the BUA.^[2] It is important to review the intensification in terms of annual unit average, as well as the types of units that were accommodated. Over the 2020 to 2023 period, a large portion of the intensification potential was due to 95 low density (single-detached) dwellings constructed in a large vacant site in Arthur, as previously discussed. This development alone represented nearly a quarter of the intensification. Similarly, prior to 2020, more than one-third of intensification housing development in Arthur and Mount Forest primarily comprised ground-oriented units (i.e., not apartments) which consisted of the completion of subdivisions and development on large vacant sites (i.e., larger than 2 ha).

In order to reach a 20% intensification rate to 2051, it is estimated that the Township will need to accommodate just over 470 housing units in the BUA, which represents the majority of the Township's intensification potential (550 units). Achieving a higher rate of intensification would require that the Township encourage more A.R.U.s or redevelopment of existing lands.

^[2] Based on a review of residential building permit activity.



Figure 4-23
Township of Wellington North
Share of Housing Unit Growth in the B.U.A.



Source: Township of Wellington North residential building permit activity, 2011 to 2023 by Watson & Associates Economists Ltd.

4.6 Review of People and Jobs Community Area Density

What is the D.G.A.?

The D.G.A. is defined as the area outside the delineated built boundary within the urban boundary of an Urban Centre. As previously discussed, the B.U.A. was delineated by the Province based on the extent of lands in an Urban Settlement Area that were primarily developed as of 2006. Using the Mount Forest Urban Centre as an example, Figure 4-24 identifies the D.G.A. The D.G.A. is further refined based on Community Area and Employment Area, as previously discussed. The Community Area includes all lands within the settlement boundary excluding Employment Areas.



Figure 4-24
Township of Wellington North
D.G.A. Example (Mount Forest Urban Centre)



Source: County of Wellington Planning Department.

What are the Growth Management Objectives of the D.G.A.?

The D.G.A. comprises lands that are primarily vacant, as well as newly developing communities. The vacant lands in the D.G.A. are used to assess whether the Township has an adequate supply of land to accommodate housing, after first factoring in the potential for intensification.

The Township of Wellington North as of 2019, had approximately 149 gross ha (net of environmental features) of vacant D.G.A. lands designated in the O.P. for Community Uses (i.e., residential, commercial and institutional), as well as 170 gross ha (net of environmental features) of lands designated as Future Development. Future Development lands are identified in the O.P. as lands that require re-designation in order to accommodate development. As discussed previously, the County recently



completed an O.P.A. to re-designated nearly half of the Future Development lands in Wellington North. In total the Township has the potential of 319 gross ha of D.G.A. land that could accommodate housing and other Community Area uses.

A key objective of planning for the D.G.A. lands is to plan for a density that would accommodate an optimal utilization of land, as well as a range of housing and job options. In planning for the D.G.A., municipalities are required to plan for a minimum people and jobs density. The County of Wellington is required to plan for a minimum of 40 people and jobs per ha as a County-wide average. Similar to the intensification target, the County reviewed as part of the M.C.R. the opportunities and challenges of achieving a higher density for each Member Municipality and Urban Centre. As illustrated in Figure 4-25, the Township of Wellington North is required to planned to accommodate the following as a minimum by Urban Centre:

- Arthur: 32 people and jobs/ha
- Mount Forest: 32 people and jobs/ha

Based on the minimum D.G.A. density target of 32 people and jobs/ha, the Township's D.G.A. lands are planned to accommodate at a minimum a population of 6,500 people and 1,000 jobs by 2051. The population and employment base in the D.G.A. as of Mid-2019 is less than 700 people and jobs.^[1]

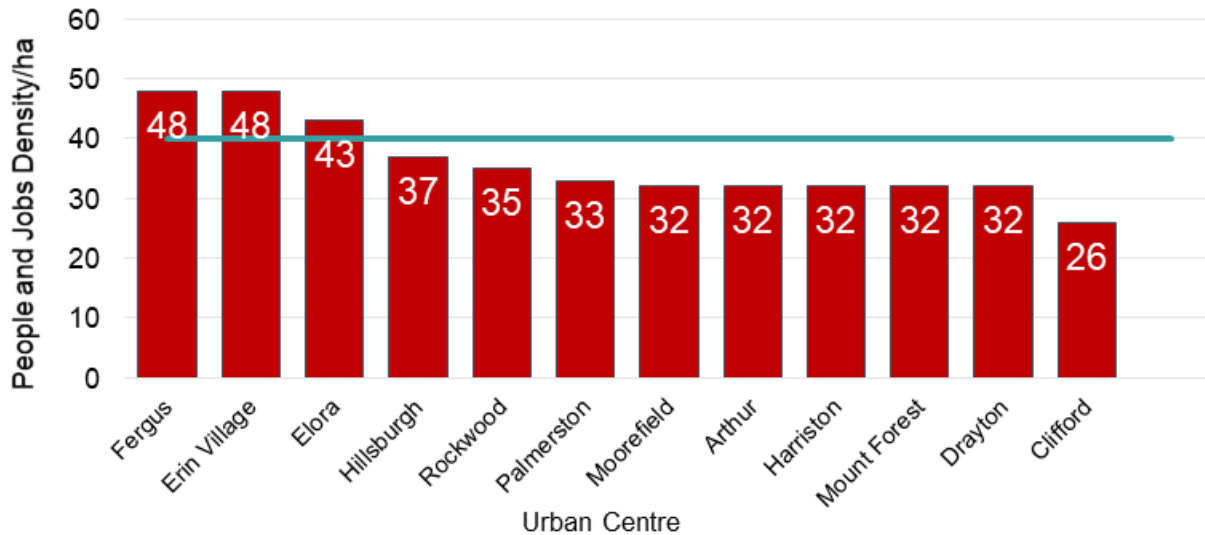
As illustrated in Figure 4-25, higher densities are anticipated for Fergus, Elora and Erin Village which have demonstrated through a review of development approvals and development activity that there is the potential to achieve a higher density than the County-wide average, while maintaining a range of housing options.^[2]

^[1] County of Wellington, Phase 2 Municipal Comprehensive Review Report: Land Needs, prepared by Watson & Associates Economists Ltd., March 31, 2022.

^[2] County of Wellington, Phase 2 Municipal Comprehensive Review Report: Land Needs, prepared by Watson & Associates Economists Ltd., March 31, 2022.



Figure 4-25
County of Wellington
D.G.A. People and Jobs Density by Urban Centre, 2051



Source: Watson & Associates Economists Ltd.

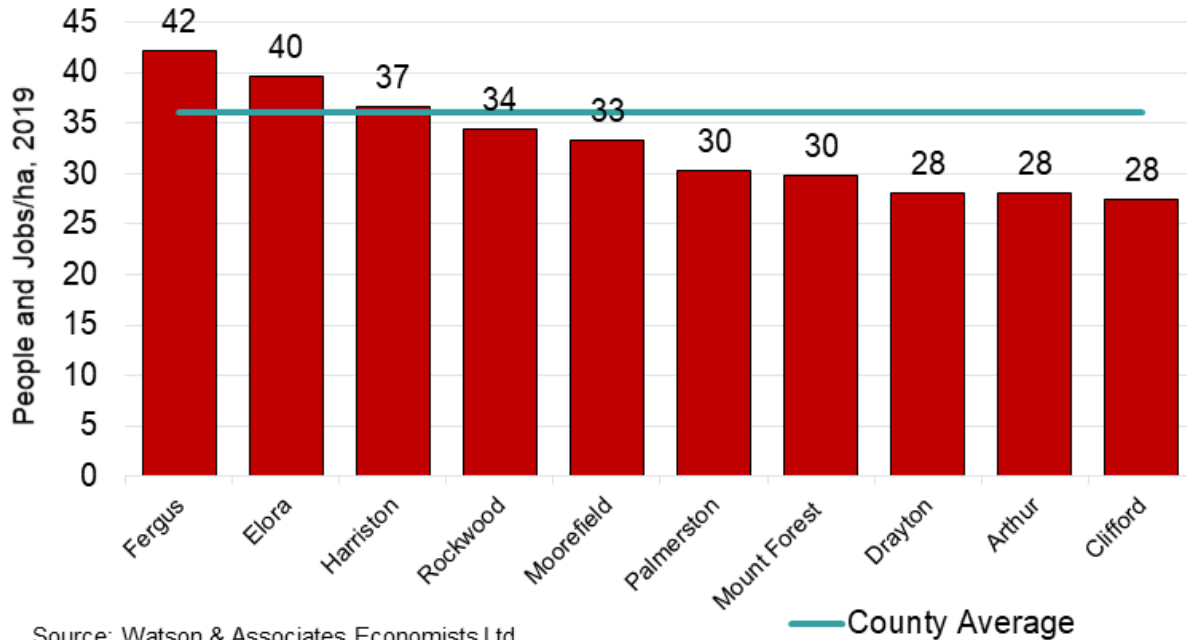
4.6.1 What People and Jobs Density Average is the Township Achieving?

As summarized in Figure 4-26, the Township has been achieving a density of 30 people and jobs/ha in Mount Forest and 28 people and jobs/ha in Arthur as of Mid-2019. It is important to note that the D.G.A. density average is applied to all lands developed and future lands in the D.G.A. This means that the density average has to account for lands already developed, lands that are already subject to an application and remaining vacant lands. As of Mid-2019 the Township's developed approximately only 22 ha of its D.G.A. lands. While development has been strong since 2019, the majority of the Township's D.G.A. lands are vacant, which provides an opportunity for the Township to proactively plan for the best use of these lands. The County's D.G.A. density requirement for the Township of Wellington North is considered a minimum.

Chapter 5 will provide a summary of the vacant land opportunities in the D.G.A.



Figure 4-26
County of Wellington
D.G.A. Community Area Density as of Mid-2019 by Urban Centre



Source: Watson & Associates Economists Ltd.

Figure 4-26a provides example of a residential development on D.G.A. lands in Arthur with an average density of 26 people and jobs/ha. As illustrated, this neighbourhood offers single detached dwellings exclusively on large lots. This neighbourhood yields an average density of 9 housing units per gross hectare (ha). Figure 4-26b provides an example of a residential development achieving 32 people and jobs/ha which is comprised of a mix of single-detached (76%) and townhouse developments (24%). It is anticipated over the planning horizon that housing options within Urban Centres will broaden by structure type and built form contributing towards higher average housing and population densities. Appendix F provides additional density visualizations.



Figure 4-26a
Arthur – Carroll Street and Schmidt Drive
D.G.A. Density Example



Source: Watson & Associates Economists Ltd. Imagery Source: Google Earth.

Figure 4-26b
Arthur – Preston Road and North of Smith Street (Cachet Development)
Density Example (in B.U.A.)



Source: Watson & Associates Economists Ltd. Imagery Sources: Google Earth and MLS Realtor.ca



4.6.2 Does the Township Require Additional Community Area Land?

The County's M.C.R. identified that Mount Forest and Arthur have sufficient land available within the Urban Centre boundary to accommodate growth to 2051. While the Township does not require additional lands to accommodate growth, it does require approximately 81 gross ha of Future Development lands to be re-designated for Community Area uses. As previously discussed, the County is undergoing an O.P.A. to re-designate 81 ha of Future Development lands in Wellington North to the land-use schedules in the O.P.

4.6.3 Future Development Lands

The County's O.P.A. 123 designated 81 gross ha of Future Development lands to Community Area lands (residential, recreational and commercial) in the Township that have been demonstrated through the County's M.C.R. and land needs to 2051. In addition, the County has designated all the remaining Future Development lands (115 ha) in Arthur and Mount Forest as residential, but with a Special Policy Area overlay. The Special Area Policy delays development on these lands until full municipal servicing is available and comprehensive planning has occurred. As previously mentioned, the benefit of this approach is that it removes the requirement of the County O.P.A. for lands where the future use is generally known and allows development to proceed faster once the technical aspects need to support development are in place.^[3] Working with the County, the Township should prepare a strategy to guide the implementation of this policy. For example, that strategy should consider what conditions and infrastructure improvements would be required for the Township to allow development to proceed on these lands.

Refer to Appendix G for a map of Future Development lands.

4.7 Key Considerations for the Growth Management Action Plan

Provided below is a summary of key findings:

^[3] County of Wellington, County Official Plan Review – OPA 123 Future Development Lands, prepared for County of Wellington Chair and Members of the Planning Committee by County of Wellington planning staff, September 14, 2023.



- The Township is tracking to the County of Wellington M.C.R. forecast. Based on a review of recent trends, the forecast appears to remain appropriate for the Township. As discussed previously, all forecasts and targets set by the County are considered minimums.
- Population and housing growth in Arthur appears to be tracking slightly higher in the short term (i.e., to 2031) than what was anticipated in the M.C.R., while Mount Forest is tracking slightly lower. Collectively, the forecast assumes very robust growth the two Urban Centres in the short-term, exceeding the growth rate experienced in 2020 to 2024.
- The Township has the opportunity to allocate employment growth within the Township. The County O.P. and its M.C.R. did not assign employment growth by Urban Centre or by Employment Area. The Township may want to explore, as part of this Growth Management Action Plan, the prioritization of Employment Area lands.
- The Township is achieving a very high rate of intensification, largely due to the development of large vacant sites within the B.U.A.
- In order to achieve a 20% intensification rate within the Township's Urban Centres, most of the intensification opportunities identified would be required to develop. The Township may want to explore a further review of its intensification potential, including opportunities beyond what has been identified by the County. While the Township has been successful in achieving a higher rate of intensification than 20%, it is important to recognize that the Township's current supply of intensification opportunities is considered tight over the long-term horizon.
- The Township is required to plan for a minimum density of 32 people and jobs/ha in the D.G.A. The Township has been achieving a lower density of 30 people and jobs/ha in Mount Forest and 26 people and jobs/ha in Arthur. Given that the density target is a minimum, there is an opportunity to strive for a higher density beyond the 32 people and jobs/ha.
- Working with the County, the Township should prepare a strategy to guide the implementation of the Special Policy Area for the Future Development lands planned for residential use. For example, that strategy should consider what conditions and infrastructure improvements would be required for the Township to allow development to proceed on these lands. This strategy would help to communicate the Township's objectives of these lands with the public and inform other Township initiatives and plans that may be impacted.



Chapter 5

Housing Supply Potential and Land Supply Summary



5. Housing Supply Potential and Land Supply Summary

This chapter provides an overview of the opportunity to accommodate population and employment growth within the Township of Wellington North's Urban Centres with respect to urban land supply.

5.1 Housing Supply Potential

5.1.1 Township of Wellington North Housing Supply Potential

Figure 5-1 provides a summary of the housing supply potential within the Township of Wellington North by location and housing type. It is estimated that the Township can accommodate approximately 1,760 housing units within its Urban Centres and 120 housing units in settlement areas within the Rural System. The Township's housing supply potential comprises a housing mix of 54% low density housing units (1,022 units); 31% medium density housing units (583 units); and 15% high density housing units (276 units). It is important to note that this identified housing supply potential excludes potential on Future Development lands, as well as opportunities for A.R.U.s.



Figure 5-1
Township of Wellington North
Housing Unit Supply Potential as of Year-End 2023

Location	Low Density Units	Medium Density Units	High Density Units	Total Housing Unit
Mount Forest	706	376	114	1,196
Arthur	195	207	162	563
Urban Centres Total	901	583	276	1,759
Countryside	42	0	0	42
Lifestyle Community	40	0	0	40
Damascus	18	0	0	18
Riverstown	10	0	0	10
Kenilworth	7	0	0	7
Rural Estate	4	0	0	4
Conn	0	0	0	0
Rural System Total	121	0	0	121
Township Total	1,022	583	276	1,880

Source: Derived from the County of Wellington Planning Department, Vacant Land Inventory, 2023 by Watson & Associates Economists Ltd.

5.1.2 Township of Wellington North Housing Supply Potential within Urban Centres by Status

Figure 5-2 provides a summary of housing units within the Township of Wellington North by status of development by Urban Centre. As previously noted, the Township's Urban Centres have the potential to accommodate a range of housing, including 51% low density units; 33% medium density units; and 16% high density units. It is estimated that approximately 72% (approximately 1,270 units) of the housing units potential is within the planning approvals process (e.g., registered, draft approved and application under review). The remaining 28% of the housing unit potential is on vacant designated lands with no applications yet.



Figure 5-2
Township of Wellington North
Housing Unit Supply Potential by Status in Urban Centres

Location	Low Density Units	Medium Density Units	High Density Units	Total Housing Unit Potential	Urban Centre Units by Status (%)
Arthur	195	207	162	563	100%
Registered	86	84	0	170	30%
Draft Approved	48	43	49	139	25%
Application Under Review	0	0	106	106	19%
Vacant Designated	61	80	7	148	26%
Mount Forest	706	376	114	1,196	100%
Registered	68	78	94	240	20%
Draft Approved	291	120	0	411	34%
Application Under Review	98	110	0	208	17%
Vacant Designated	249	68	20	337	28%
Total Urban Centres	901	583	276	1,759	-
Housing Mix (%)	51%	33%	16%	100%	-

Source: Derived from the County of Wellington Planning Department, Vacant Land Inventory, 2023 by Watson & Associates Economists Ltd.

5.1.3 Housing Supply Requirements in Urban Centres

The following explores the Township’s ability to accommodate long- and short-term housing needs within the Township’s Urban Centres. The County’s M.C.R. reviewed the ability of the Member Municipalities to accommodate growth over the long-term horizon based on an urban land needs assessment in accordance with the Growth Plan, 2019. As previously, discussed, it was identified through the County’s land needs assessment for Arthur and Mount Forest that there is adequate supply of land within Urban Centres to accommodate housing growth through intensification and development on D.G.A. lands. While the Township has an adequate supply of urban lands to accommodate housing growth long-term (i.e., to 2051), the Township has a shortfall of lands designated for residential use. As a result, it is recommended that the Township re-designate approximately 81 ha of Future Development lands for residential use.



Appendix I provides mapping of the housing supply potential in the Urban Centres, while Appendix G provides mapping of the Future Development lands proposed to be re-designated by the County of Wellington in accordance with O.P.A. 123.

5.1.3.1 Arthur Urban Centre Housing Supply Requirements

The following explores the Township's ability to accommodate long- and short-term housing needs within the Township's Urban Centres. The County's M.C.R. reviewed the ability of the Member Municipalities to accommodate growth over the long-term horizon based on an urban land needs assessment in accordance with the Growth Plan, 2019. As previously, discussed, it was identified through the County's land needs assessment for Arthur and Mount Forest that there is adequate supply of land within Urban Centres to accommodate housing growth through intensification and development on D.G.A. lands. While the Township has an adequate supply of urban lands to accommodate housing growth long-term (i.e., to 2051), the Township has a shortfall of lands designated for residential use. As a result, it is recommended that the Township re-designate approximately 81 ha of Future Development lands for residential use.

Appendix H provides mapping of the housing supply potential in the Urban Centres.

5.1.3.2 Arthur Urban Centre Housing Supply Requirements

As summarized in Figure 5-3, it is estimated that Arthur has enough housing supply potential on designated lands to accommodate range of housing options to at least 2036. The housing supply potential is based on opportunities in the D.G.A. and B.U.A., including opportunities for A.R.U.s. (included in high density category at 30 units between 2024-2051). By 2036, housing supply potential on designated land tightens with a small shortfall to accommodate low density housing units by 2041. The Township would need to consider developing the Future Development lands (some of lands are proposed to be re-designated by the County) by 2036 in order to ensure an adequate supply of housing in Arthur. This will also require consideration of planning for infrastructure.



Figure 5-3
Arthur Urban Centre
Housing Units Required on Designated Lands, 2024 to 2051

Arthur	Low Density Units	Medium Density Units	High Density Units	Total Housing Unit
2024-2036				
Housing Forecast, 2024 to 2036	185	68	107	360
Designated Housing Supply Potential	195	207	174	576
Surplus/(Shortfall), 2024 to 2036	10	139	67	216
2024-2041				
Housing Forecast, 2024 to 2041	215	68	137	420
Designated Housing Supply Potential	195	207	181	583
Surplus/(Shortfall), 2024 to 2041	-20	139	44	163
2024-2051				
Housing Forecast, 2024 to 2051	315	118	167	600
Designated Housing Supply Potential	195	207	192	594
Surplus/(Shortfall), 2024 to 2051	-120	89	25	-6

Source: Watson & Associates Economists Ltd., 2024.

5.1.3.3 Mount Forest Urban Centre Housing Supply Requirements

As summarized in Figure 5-4, it is estimated that Mount Forest has enough housing supply potential on designated lands to accommodate range of housing options to at least 2041. This housing supply potential is based on opportunities in the D.G.A. and B.U.A., including opportunities for A.R.U.s. (included in high density category at 55 units between 2024-2051). By 2051, Mount Forest has a significant shortfall of low-density housing, which is estimated at approximately 485 units. The Township would need to consider developing the Future Development lands (some of lands are proposed to be re-designated by the County) by 2036 in order to ensure an adequate supply of housing in Mount Forest. This will also require consideration of planning for infrastructure.



Figure 5-4
Mount Forest Urban Centre
Housing Units Required on Designated Lands, 2024 to 2051

Mount Forest	Low Density Units	Medium Density Units	High Density Units	Total Housing Unit
2024-2036				
Housing Forecast, 2024 to 2036	662	172	62	896
Designated Housing Supply Potential	706	376	138	1,220
Surplus/(Shortfall), 2024 to 2036	44	204	76	324
2024-2041				
Housing Forecast, 2024 to 2041	672	192	72	936
Designated Housing Supply Potential	706	376	149	1,231
Surplus/(Shortfall), 2024 to 2041	34	184	77	295
2024-2051				
Housing Forecast, 2024 to 2051	1,192	302	102	1,596
Designated Housing Supply Potential	706	376	169	1,251
Surplus/(Shortfall), 2024 to 2051	-486	74	67	-345

Source: Watson & Associates Economists Ltd., 2024.

5.2 Urban Commercial Land Requirements

It is estimated Mount Forest has a small supply of vacant developable commercial lands of 7 ha, while Arthur currently has no vacant commercial lands.^[1] A high-level commercial land needs assessment and analysis was prepared in the County of Wellington M.C.R. Phase 2 Report – Urban Lands Needs. The M.C.R. Report identified that Mount Forest has more than enough commercial lands designated to accommodate commercial growth to 2051, while Arthur has small minimum need of 2 ha of commercial designated lands to accommodate commercial growth.^[2]

It is important to recognize that planning for commercial growth requires consideration of opportunities to intensify existing commercial sites, as well as opportunities to

^[1] Based on the current County of Wellington Vacant Commercial Land Inventory.

^[2] County of Wellington, Phase 2 Municipal Comprehensive Review Report: Land Needs, prepared by Watson & Associates Economists Ltd., March 31, 2022.



strengthen the existing commercial base. Current commercial development trends across Ontario suggest a strong demand for intensification of existing commercial sites.

A key observation of the County of M.C.R. Report was that Arthur has among the highest retail floorspace per capita ratio among the County at 9.2 sq.m (100 sq.ft.) of retail floorspace per resident. This suggests that Arthur has more retail space relative to its population base compared to other Urban Centres in the County. Moreover, the high retail space per capita in Arthur was noted as a concern, since the Arthur Urban Centre has an estimated commercial vacancy rate of 14% in 2019 (a healthy vacancy rate is between 5% to 8%).^[4] Despite the current commercial conditions, it is anticipated that the significant amount of population growth anticipated will fuel the need for additional commercial development, as well as strengthen the existing commercial base. Up until recently, Arthur has not experienced significant population growth in the past couple of decades. As the Township plans for the future, it will need to plan to strengthen the existing commercial base of Arthur and Mount Forest. The C.I.P. and other downtown initiatives will be key to building a resilient commercial base.

Appendix I provides a mapping of the vacant commercial land supply potential in the Urban Centres.

5.3 Urban Employment Area Land Requirements

It is estimated that Mount Forest has a vacant developable Employment Area land supply of 86 ha, while Arthur has approximately 15 has of vacant developable Employment Area lands.^[5] An Employment Area land needs assessment and analysis was prepared for the County of Wellington in the M.C.R. Phase 2 Report – Urban Lands Needs. The M.C.R. Report identified that collectively, the two Urban Centres have a demand of 70 gross ha (net of environmental features) of Employment Area lands to 2051, averaging 2 ha annually, as well as accommodating 10% of the employment growth through intensification.

^[4] County of Wellington, Phase 2 Municipal Comprehensive Review Report: Land Needs, prepared by Watson & Associates Economists Ltd., March 31, 2022.

^[5] Based on the current County of Wellington Vacant Commercial Land Inventory.



In accordance with the County M.C.R. Report, it was identified that there is a 70-ha surplus of Employment Area lands to 2051.^[6] As previously discussed, the Employment Area land needs assessment did not separate the land requirements between Arthur and Mount Forest. As part of this Growth Management Action Plan, there will need to explore how to plan for Employment Area lands within the Township, including where to prioritize Employment Area development efforts. Over the past decade, most of the Employment Area development has largely been focused within Mount Forest.

Appendix I provides mapping of the vacant Employment Area land supply potential in the Urban Centres.

^[6] County of Wellington, Phase 2 Municipal Comprehensive Review Report: Land Needs, prepared by Watson & Associates Economists Ltd., March 31, 2022.



Chapter 6

Next Steps



6. Next Steps

The purpose of this Background Report is to provide the first component of the Growth Management Action Plan. It provides important context for the Township of Wellington North Growth Management Action Plan, and discusses the implications of trends, growth projections, demographic shifts and other factors influencing development patterns and how the Township is to plan for growth. Furthermore, the Report explores policies and initiatives carried out by the County and Township that are relevant to planning for growth in the Township. A key aspect of this Growth Management Action Plan is to build upon the work and findings that have already been identified through past efforts. Moreover, by reviewing all past efforts, it also allows the Township to explore potential gaps and focus areas for further review.

The next step in the Growth Management Action Plan is to craft a growth vision that identifies key growth principles and priorities for the Township in planning growth. A visioning session will be held with the Growth Management Action Plan Advisory Group that will develop this vision and its principles and priorities. Once finalized, the Consultant Team will assess the impact of growth of services and infrastructure, as well as provide growth management recommendations on implementation.

This Background Report explores several fundamental opportunities and challenges that the Township of Wellington is anticipated to face over the next 20 years and beyond. Below is a summary of some of the questions that can be explored in developing the Township's Growth Management Action Plan. These questions include, but are not limited to, the following:

- What are the characteristics of the Township's Urban Centres that need to be protected?
- What is missing in the Township to support to support a complete community?
- As the Township's Urban Centres grow, what are some of the lessons the Township should learn from other municipalities?
- What are some of the key concerns as the Township grows (i.e., 'growing pains')?
- What would be required for the Township to plan for a higher amount of growth and the re-designation of further Future Development lands to other uses?



- What opportunities are there for the Township to promote climate resiliency as it significantly expands its urban population base?
- Should the Township consider flexible policies and zoning for residential and mixed-use development in the downtown areas?
- What additional planning policies, tools, and incentives should be maintained and potentially introduced to support the development of the Township's non-residential areas, including Downtown Core Areas, Commercial Areas, Mixed Use Areas and Employment Areas?
- What opportunities should the Township explore in strengthening its Employment Area lands? Recognizing that the Township has a surplus of Employment Area lands, what Employment Area lands should be prioritized?

This Background Report identifies the following findings based on a review of initiatives and plans:

- The County of Wellington has an Economic Development Strategic Plan, as well as a climate mitigation plan. These documents identify a list of action items for the planning of growth in the County, in terms of climate resiliency and attracting and retaining economic growth.
- As the Township grows, a key consideration for the Township will be the review of the Zoning By-law. A review of the Zoning By-law will ensure that the Township Zoning By-law provides a framework to accommodate new desired development forms and employment opportunities, as well as provide an opportunity to tackle climate resiliency.
- The Growth Management Action Plan should give consideration to the priorities of the Township 2024 Strategic Plan which identifies short-term priorities for Council and the Township staff.
- The Wellington North D.C. By-law provides a few discounts to attract targeted development, as well as to encourage development in key areas of interest to the Township.
- The Township of Wellington North Asset Management Plan was prepared in 2021 and provides a strategic planning document outlining a logical approach to manage transportation, stormwater, water and wastewater assets proactively and efficiently. It identified the need for stormwater management plans.
- The Township of Wellington North has an industrial strategy with a list of seven key elements. The Growth Management Action Plan should explore this list.



- The Township has carried out a number of initiatives to support the business base in the Township, including the C.I.P. program, the Township's partnership with Saugeen Connects and Business Retention and Expansion Surveys.

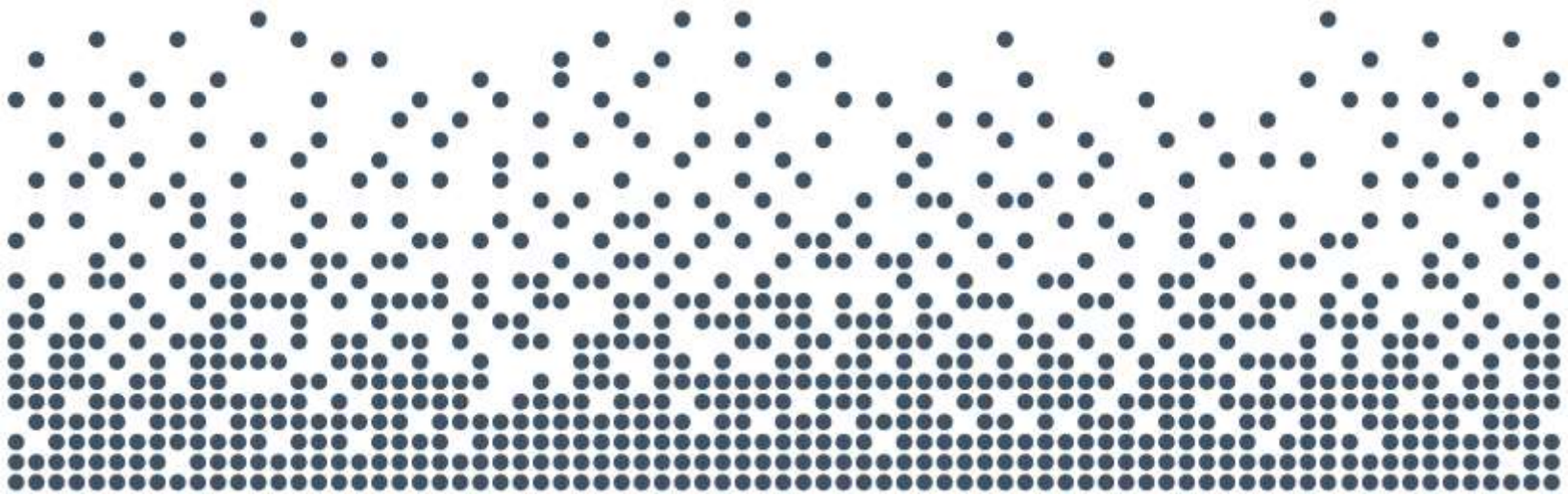
The Background Report identified the following findings based on the review of growth trends and land requirements in the Township:

- The Township is tracking to the County of Wellington M.C.R. forecast. Based on a review of recent trends, the forecast appears to remain appropriate for the Township. As discussed previously, all forecasts and targets set by the County are considered minimums.
- Population and housing growth in Arthur appears to be tracking slightly higher in the short-term (i.e., to 2031) than what was anticipated in the M.C.R., while Mount Forest is tracking slightly lower. Collectively, the forecast assumes very robust growth the two Urban Centres in the short-term, exceeding the growth rate experienced in 2020 to 2024.
- The Township has the opportunity to allocate employment growth within the Township. The County O.P. and its M.C.R. did not assign employment growth by Urban Centre or by Employment Area. As part of this Growth Management Action Plan there will be a need to prioritize Employment Area lands.
- The Township is achieving a very high rate of intensification, largely due to the development of large vacant sites within the B.U.A.
- In order to achieve a 20% intensification rate within the Township's Urban Centres, most of the intensification opportunities identified would be required to develop. The Township may want to explore a further review of its intensification potential, including opportunities beyond what has been identified by the County. While, the Township has been successful in achieving a higher rate of intensification than 20%, it is important to recognize that the Township's current supply of intensification opportunities is limited.
- The Township is required to plan for a minimum density of 32 people and jobs/ha in the D.G.A. The Township has been achieving a lower density of 30 people and jobs/ha in Mount Forest and 26 people and jobs/ha in Arthur. Given that the density target is a minimum, there is an opportunity to strive for a higher density beyond the 32 people and jobs/ha.
- Working with the County, the Township should prepare a strategy to guide the implementation of the Special Policy Area for the Future Development lands



planned for residential use. For example, that strategy should consider what conditions and infrastructure improvements would be required for the Township to allow development to proceed on these lands. This strategy would help to communicate the Township's objectives of these lands with the public and inform other Township initiatives and plans that may be impacted.

- The Township's Urban Centres (Mount Forest and Arthur) would require the re-designation of Future Development lands to residential uses by 2036 in order to accommodate housing growth. This will also require consideration of planning for infrastructure.
- As the Township plans for the future, it will need to plan to strengthen the existing commercial base of Arthur and Mount Forest. The C.I.P. and other downtown initiatives would be key to building a resilient commercial base.
- Over the past decade, most of the Employment Area development has largely been focused within Mount Forest. Arthur on the other hand has some large anchor employers, including those in the Auto Parts manufacturing sector. As part of this Growth Management Action Plan, there will need to explore how to plan for Employment Area lands within the Township, including where to prioritize Employment Area efforts.



Appendices



Appendix A

Stakeholder Engagement Plan

Township of Wellington North Growth Management Action Plan Stakeholder Engagement Plan

February 2024 - DRAFT



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1. Purpose

The purpose of the Stakeholder Engagement Plan (the SEP) is to identify all key stakeholders for this project and develop an agreed-upon approach with the Township ship in engaging with stakeholders. The SEP establishes the approach to develop a well-balanced engagement process that encourages idea sharing, pursues diversity of viewpoints, respects differences, and inspires dialogue. The SEP reflects the International Association for Public Participation's (IAP2) Core Values, Spectrum of Engagement, and Best Practices, as well as the guidelines of applicable policies and guiding documents.

The SEP provides an internal approach and will guide the Township and the Project Team (includes Watson & Associates Economist Ltd. and WSP Canada Inc.), through the Growth Management Action Plan project. It also highlights objectives, audiences and techniques to engage with stakeholders in a manner that is interactive, visual, and meaningful.

Overall, the SEP provides details on the following:

- The overall approach to engagement, including a stage-by-stage breakdown;
- Engagement purpose, objectives, and key messaging;
- Alignment with IAP2 Core Values and Principles;
- Stakeholders and rights holders' audiences, including their overall level of interest and involvement in the project; and
- Engagement tactics and tools, including key timelines, milestones, and deliverables.

1.1 Guiding Principles

The SEP, and its implementation, is premised on the following guiding principles:

- To maintain a transparent process which informs the public about key project milestones and opportunities to get involved;
- To be inclusive and respectful towards the local community's needs and values;
- To learn from and listen to local businesses and entrepreneurs;
- To establish open lines for communication that are met with a timely response; and,
- To encourage collaboration among the community to develop a shared vision for Wellington North's future.

2. Roles and Responsibilities

For the Project to be a success, the roles and responsibilities of all those involved need to be clearly outlined and defined. The following sections outline the expectations of the involved team and stakeholders.

2.1 Engagement Team

The Engagement Team will be led by Matt Alexander. Matt will serve as the primary point of contact, who should be copied on all email correspondence related to engagement activities.

The Project Team will be responsible for the following tasks with relation to the Project:

- Content for public events / meetings and notices;
- Design and delivery of all public events / meetings; and
- Summary of public input.

2.2 Township Staff

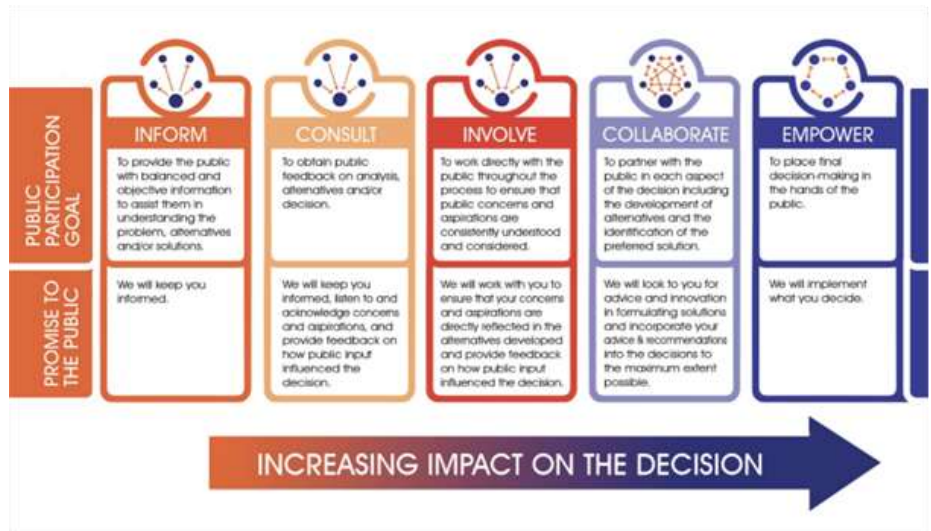
The Township's Project Manager will be the primary contact and is responsible for the overall project coordination with the Project Team for engagement activities. The Township's responsibilities include the following:

- Day-to-day liaison between the Engagement Team, Township Staff, and stakeholders;
- Providing timely input / assistance regarding technical issues;
- Receiving comments from the public, and circulation of comments to the Project Team;
- Advertising and circulating / reviewing notices for public meetings;
- Booking of, and coordinating with, venues for all events / meetings; and
- Attendance at public meetings.

3. Stakeholders

3.1 International Association of Public Participation Approach

The IAP2 developed the Spectrum of Public Participation to demonstrate the role of the public in the planning and decision-making process. The framework differentiates between the different levels of participation depending on the project goals, timeline, and level of concern or priority. For clarity, there are five levels of engagement in the IAP2 spectrum, as shown in **Figure 1**, and the selected level of engagement required with each stakeholder group will vary.



Stakeholders have varying levels of interest, knowledge, and therefore involvement in the Growth Management Action Plan. To determine the most appropriate method of consultation it is important to assess their level of interest in and commitment to the Action Plan. For the purposes of this SEP, the anticipated audiences have been organized into stakeholder groups. The Project Team has reviewed the preliminary stakeholder scan and has assigned

the appropriate engagement tactics to each stakeholder group based on the impact the project will have on each group.

3.2 Stakeholder Map

Table 3-1 below is structured to provide an overview of stakeholders for the project. The table also includes a description of the group and intended representatives, the anticipated level of interest in relevant projects and where they fall on the IAP2 decision-making spectrum. Also included below are proposed consultation approaches that the Township can review as options for future work.

Table 3-1: Stakeholder Sensitivity Analysis

Stakeholder Group	Description	Level of Impact	Level of Consultation	Engagement Tools
Council	The Mayor and Councillors are elected by the residents of the Township for a four-year term. Councillors represent each of the 4 Township wards.	High	Collaborate	<ul style="list-style-type: none"> — One-on-one meetings with members of Council — Leverage Council newsletters and communications to distribute information to the public and to provide Ward updates. — Distribute project notifications through regularly scheduled email updates. — Invite to engagement launch events and pop-ups. — Attend Ward meetings. — Encourage Council to reshare social media posts
Township of Wellington North	Township staff represent several unique and interrelated departments that have an enhanced understanding of the planning process and community organizations in Wellington North.	High	Collaborate and Involve	<ul style="list-style-type: none"> — Distribute project notifications through regularly scheduled email updates. — Facilitate engagement launch event with Township staff to reintroduce the projects and encourage engagement and participation broadly. — Invite to participate in community pop-ups. — Encourage Township staff and/or departments to reshare social media posts as part of the communications campaign. — Participate in Focus Group meetings. — Participate in Implementation Workshop for the GBS

Stakeholder Group	Description	Level of Impact	Level of Consultation	Engagement Tools
Steering Committee	The Steering Committee will act as a sounding board for technical information, may serve as a forum for collaboration and idea sharing, and may have the ability to disseminate information to the public.	High	Collaborate and Involve	<ul style="list-style-type: none"> — Distribute project notifications through regularly scheduled email updates. — Encourage sign-up for project notifications and alerts posted to Engage Hamilton — Facilitate engagement launch event to reintroduce the projects and encourage engagement and participation broadly.
Local Organizations and Association	Local organizations represent a broad range of interests and . include representation from all geographic areas in Wellington North.	Medium	Consult	<ul style="list-style-type: none"> — Distribute project notifications through regularly scheduled email updates. — Encourage sign-up for project notifications and alerts posted to project webpage.
Members of the Public	Members of the general public includes Wellington North residents and visitors. The range of interest can vary significantly depending on individual background, needs, and other contextually specific details.	Low	Inform	<ul style="list-style-type: none"> — Distribute project notifications through regularly scheduled email updates. — Encourage sign-up for project notifications and alerts posted to project webpage.
Other Interested and Affected Parties	Includes conservation authorities, business improvement associations, subject matter experts and cultural heritage organizations.	Medium	Consult and Involve	<ul style="list-style-type: none"> — Distribute project notifications through regularly scheduled email updates. — Encourage sign-up for project notifications and alerts posted to project webpage.

3.3 Stakeholder Descriptions

3.3.1 County of Wellington

The County (“the County”) has authority for the County Official Plan and is an important stakeholder in the Growth Management Action Plan. During all stages of the Project, the County will be circulated on notices and major updates.

3.3.2 Township Council

Township Council will be consulted during all three stages of the Project. They will participate in several key meetings and will be responsible for endorsing the Growth Management Action Plan upon completion. Specifically, they will participate in the following tasks:

- Review and comment on the major deliverables; and
- Help redirect comments on the project to the Township’s Project Manager.

3.3.3 Project Steering Committee

Representatives from the County, Township, Council and the broader community will be invited to participate in the Project Steering Committee. The Project Team will provide guidance to the Steering Committee on how to review the background materials and provide comments to be addressed through the project deliverables.

3.3.4 Local Organizations

Wellington North has an active community of Local Organizations providing representation for residents across the Township. Neighbourhood Associations range from well-established groups with formal decision-making structures to informal collectives and include sports clubs, Lions Clubs, Optimist Clubs, Seniors Clubs.

Local Organizations are an important conduit for engagement with residents on a range of topics including climate change, diversity and equity, heritage, and other matters. Depending on the matter(s) of concern or interest for each organization, the level of influence and impact on the Growth Management Action Plan may vary. This Plan accommodates for a scoped level of engagement with Local Organizations and seeks to inform residents on the project. The intent is to inform all these parties as a baseline.

3.3.5 Indigenous Communities

It is advised that the Township consult with Indigenous Communities to engage on the priorities for and implementation of the Growth Management Action Plan and to continue to build relations with Indigenous Communities.

3.3.6 General Public

The “public” is a term that is broadly applied, and includes residents, business owners, and visitors to Wellington North that may have an interest in the Project. Efforts to engage the public on a broad scale will complement the focused attention provided to Community Stakeholders and will be made throughout all stages of the Project, which are further outlined in Section 5 of the Strategy.

3.3.7 Other Interested and Affected Parties

- Representation from Conservation Authority's such as **Grand River Conservation Authority, Saugeen Conservation Authority, and Maitland Conservation Authority** is recommended to coordinate alignment between relevant policies and/or guidelines in-effect to understand key directions and/or alignment with potential Growth Management metrics or targets.
- To support any initiatives towards economic development within the Plan, representation from the following groups or organizations is recommended:
 - Business Improvement Associations such as the **Arthur Business Improvement Association** and **Mount Forest Business Improvement Association**.
 - Chambers of Commerce such as the **Arthur Chamber of Commerce** and the **Mount Forest Chamber of Commerce**.
 - Historical and cultural organizations such as the **Wellington North Cultural Roundtable, Arthur Historical Society** and **Mount Forest Museum and Archives and Lynes Black Smith Shop** is recommended
- There may also be subject matter specific organization such as agricultural or environmental organizations such as that the Township will be interested engaging with to inform any recommendations related to sensitive land uses. These groups include the **Wellington Federation of Agriculture, Arthur Agricultural Society**, and the **Mount Forest Green Team**.

4. Communications

4.1 Digital and Print Media

Having a strong, clear, and accessible presence is essential to raising the profile of the Project and plays an essential role in documenting key milestones and initiatives as they unfold.

4.1.1 Online Updates

WSP recommends that all public notices are uploaded on the Township's website, and that project messaging is shared on the Township's various social media platforms. All of the text for the website and social media platforms will be provided to the Township to be incorporated into their template(s), including pdf formats. This will allow community members who are not able to attend meetings in person to remain up to date on the project. In addition, all technical reports completed for the project will also be made available for public review. The Project Team will provide updates to the Township for the website at necessary milestones throughout the project.

5. Meetings and Events

The following is an overview of administrative procedures and protocols for all meetings and events, as well as the respective objectives for each type of event / meeting.

Preparation of Meeting Materials

A meeting agenda will be prepared in advance of each meeting or event. This will provide the content and timing of the meeting. Meeting minutes will be prepared by the Project Team and should be distributed within two days of each meeting with Township Staff. Township Staff will distribute the meeting minutes.

Public event / meeting agendas will also identify responsibilities and logistics. The Project Team has a standard internal process and checklist for the preparation of all public meeting materials (e.g. name tags and sign-in sheets). Where a registration table is required, it will be supervised by a combination of the Project Team and Township Staff. A projector and screen will be provided by the Township for presentations. The Project Team may provide presentation boards and easels if the Township cannot provide these.

Public Notices

The Project Team will generate content for public notices, which will be reviewed and approved by Township Staff. All associated costs for the printing of public notices and publication in the local paper will be paid for by the Township. Note that the scheduling of meetings during statutory holiday and summer breaks will be avoided whenever possible.

Accessibility for Ontarians with Disabilities Act ("AODA")

As we will be interacting directly with the public, the Project Team will ensure that all materials prepared for public consumption, such as presentation materials, visuals, and webpage content will meet AODA requirements, where applicable.

Every effort will be made to book venues for public meetings and events that are accessible (e.g. wide aisle widths, unobstructed entries, presentation materials with larger fonts and high contrast, etc.). Township Staff will be responsible for the selection, booking and payment for accessible meeting venues. Requests for alternative formats will be the responsibility of the Township.

5.1 Consultation Schedule and Engagement Objectives

It is important to ensure that the consultation and engagement schedule established in this Plan is aligned with the overall project work plans and presents a realistic approach to implementing proposed consultation tools and tactics.

As part of Phase 1, senior members of the Project Team will meet virtually with the Steering Committee to confirm the work plan, deliverables, and schedule for the project, as well as identify key contacts, detail the information requirements and establish information collection responsibilities. An Advisory Committee Public Open House is planned in Phase 1 which will include presenting the key findings of the draft Background Study, as well as the Provincial and County Growth Policy Context, to ensure all opportunities and constraints are understood before proceeding to Phase 2.

In Phase 2, meetings with the Advisory Committee, the Project Team will facilitate a virtual visioning session with the primary objective of determining whether the 2018 vision is still applicable and

drafting updates to guide future development of the Township and its urban centres. Once the vision and its guiding principles are solidified, the session will focus on identifying the priorities that will underpin and advance this vision. As part of the visioning session, participants will provide further context as to what success looks like within the scope of the Growth Management Action Plan.

Phase 3 will include engagement with Township Staff, the Steering Committee, and Advisory Committee. Comments received during this phase will aid in the refinement of the Preferred Growth Vision. These engagements will involve selecting principles and priorities for guiding growth and provide insight into the implementation related to future action items.

During Phase 4, Steering Committee Meeting #4 will be engaged to assess the Preferred Growth Vision developed by the Project Team and help determine the current and projected Full Time Equivalent (FTE) staffing requirements on a per capita basis.

During Phase 5, the Steering Committee and Township Staff will review the Growth Management Action Plan prior to it being finalized and presented to the Township of Wellington North Council for adoption in June 2024.

5.2 Roles and Responsibilities of Stakeholders

5.2.1 Township Council Meetings

Township of Wellington North Council (Council) represents the main decision-making body with respect to the implementation of this Action Plan. Council therefore has a pivotal role in supporting execution of this Plan. Members of Council are responsible for advocating on behalf of their constituents and can encourage participation in consultation and engagement events for the project. Members of Council will have a role in disseminating information and may require updates or notices in advance of major milestones. For example, Councillors can disseminate project information, including opportunities to become involved in the project(s), through regularly distributed Councillor Newsletters.

A Township Council Meeting is planned upon the completion of the Growth Management Action Plan. The anticipated completion of the Growth Management Action Plan is late June 2024. It is important to note that the Advisory Committee is represented by some of the members of the Township of Wellington North Council which will be involved throughout the study process.

5.2.2 Meetings with Township Staff & Steering Committee

A project initiation meeting will be held with Township Staff & Steering Committee. The Committee is made up of Township and County staff. They will support the project team by helping to finalize the work plan for the project deliverables, and schedule for the project, as well as identify key contacts, detail the information requirements and establish information collection responsibilities.

Several meetings of the Staff & Steering Committee will be held throughout the project to discuss draft deliverables prior to release to the public. The purpose of the meetings is to ensure the reports are technically correct, address key priorities of the Township and to give Township staff and Steering Committee a preview of the information about to be released.

5.2.3 Meetings with the Advisory Committee

The Advisory Committee includes Township Councillors, community leaders as well as a number of residents, including those who are business owners and members of community groups. The Advisory Committee will provide important insights from a Community Engagement and Advisory perspective. A total of five meetings will be held with the Advisory Committee throughout the project to discuss overall vision for the Township of Wellington North and the intent and implementation of the Growth Management Action Plan.

The following Advisory Committee meetings are planned:

1. **Advisory Committee Meeting #1:** Introduction – Jan. 16 (virtual)
 - Project goals, objectives and approach
2. **Advisory Committee Meeting #2:** Background Study – February 20 (virtual)
 - How have we grown?
 - Discussing the Provincial and County growth policy context from a local perspective
3. **Advisory Committee Meeting #3:** Developing a Vision – March 19 (in-person)
 - Identify principles and priorities for guiding growth.
4. **Advisory Committee Meeting #4:** Selecting the Preferred Vision – April 30 (virtual)
 - Selected principles and priorities for growth
5. **Advisory Committee Meeting #5:** Growth Management Recommendations Review – June 11 (in-person)
 - Strategic directions for growth

The Project Team will prepare materials (e.g., presentations) for the Advisory Committee meetings, while the Township Staff (Dale Small and Darren Jones) will assist in facilitating the discussion period. Further, the Township staff will open and adjourn the Advisory Committee meetings.

6. Conclusion

This Stakeholder Engagement Plan provides a framework for gathering input from Township staff, key stakeholders, members of the Public and Council. It is intended to be flexible and adaptable to changing circumstances. As the project progresses, a need to undertake additional engagement activities may be identified. The scope of any additional activities will be determined in consultation with the Township and additional resources may need to be requested.

The purpose of the engagement activities undertaken as part of this project is to ensure the public remains informed and for the Project Team to understand the priorities of the public and other stakeholders with regards to the future of the Township of Wellington North.

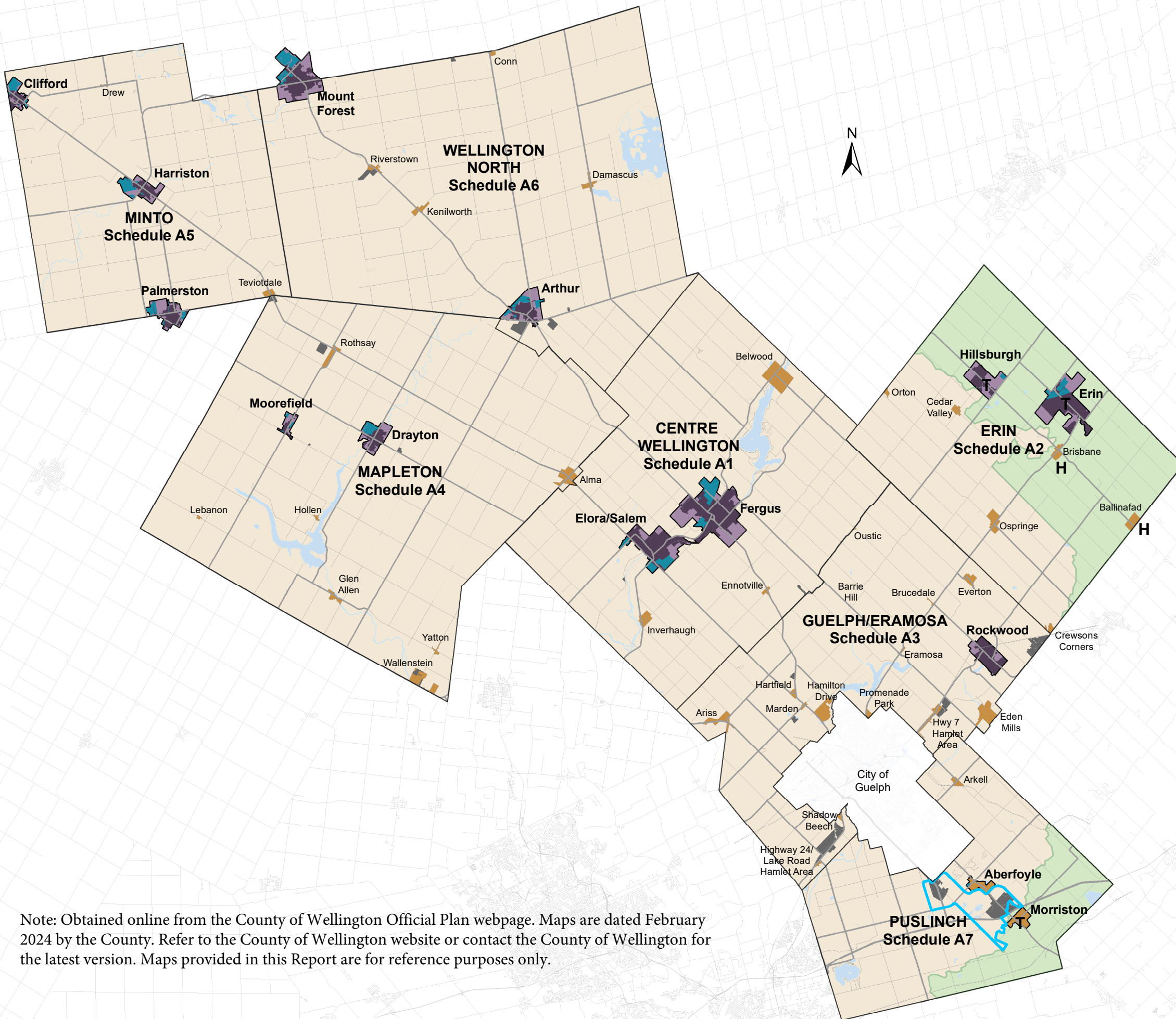


Appendix B

County of Wellington Official Plan Land Use Schedules and Growth Structure

Note: Obtained online from the County of Wellington Official Plan webpage. Maps are dated February 2024 by the County. Refer to the County of Wellington website or contact the County of Wellington for the latest version. Maps provided in this Report are for reference purposes only.

County Growth Structure



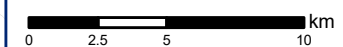
Note: Obtained online from the County of Wellington Official Plan webpage. Maps are dated February 2024 by the County. Refer to the County of Wellington website or contact the County of Wellington for the latest version. Maps provided in this Report are for reference purposes only.

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Last Revised: February 2024



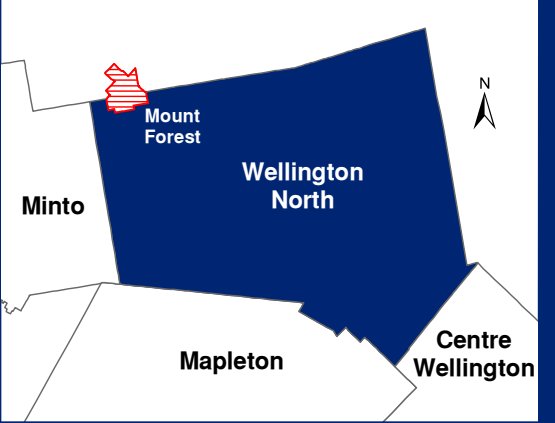
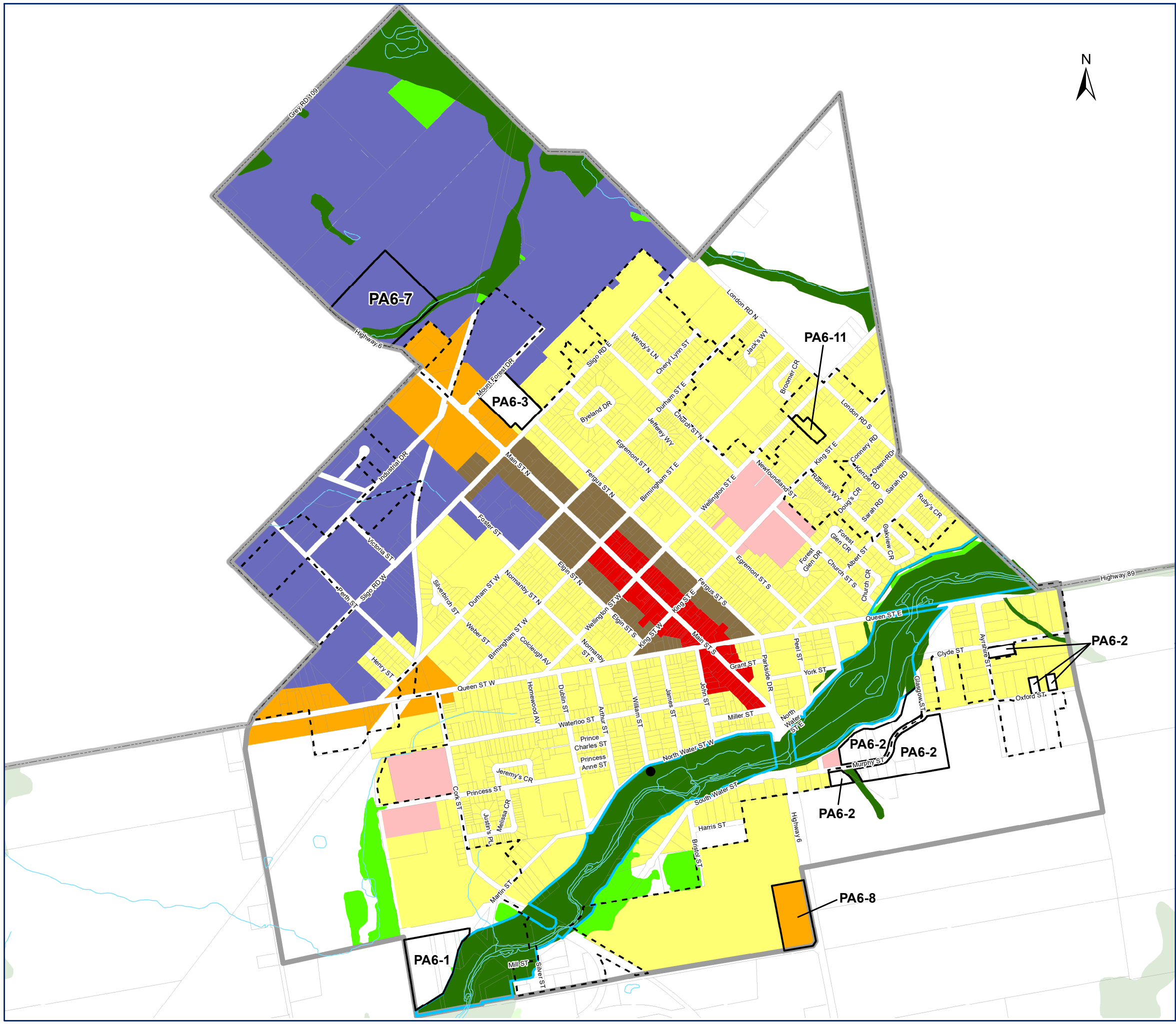
Land Use

MOUNT FOREST

WELLINGTON NORTH

Legend

- Residential
- Central Business District
- Residential Transition Area
- Highway Commercial
- Industrial
- Recreational
- Future Development
- PA Policy Area
- Core Greenlands
- Greenlands
- Regulatory Floodline
- Built Boundary
- Urban Centre Boundary
- Waste Water Facility
- Waterbody
- Watercourse



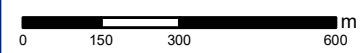
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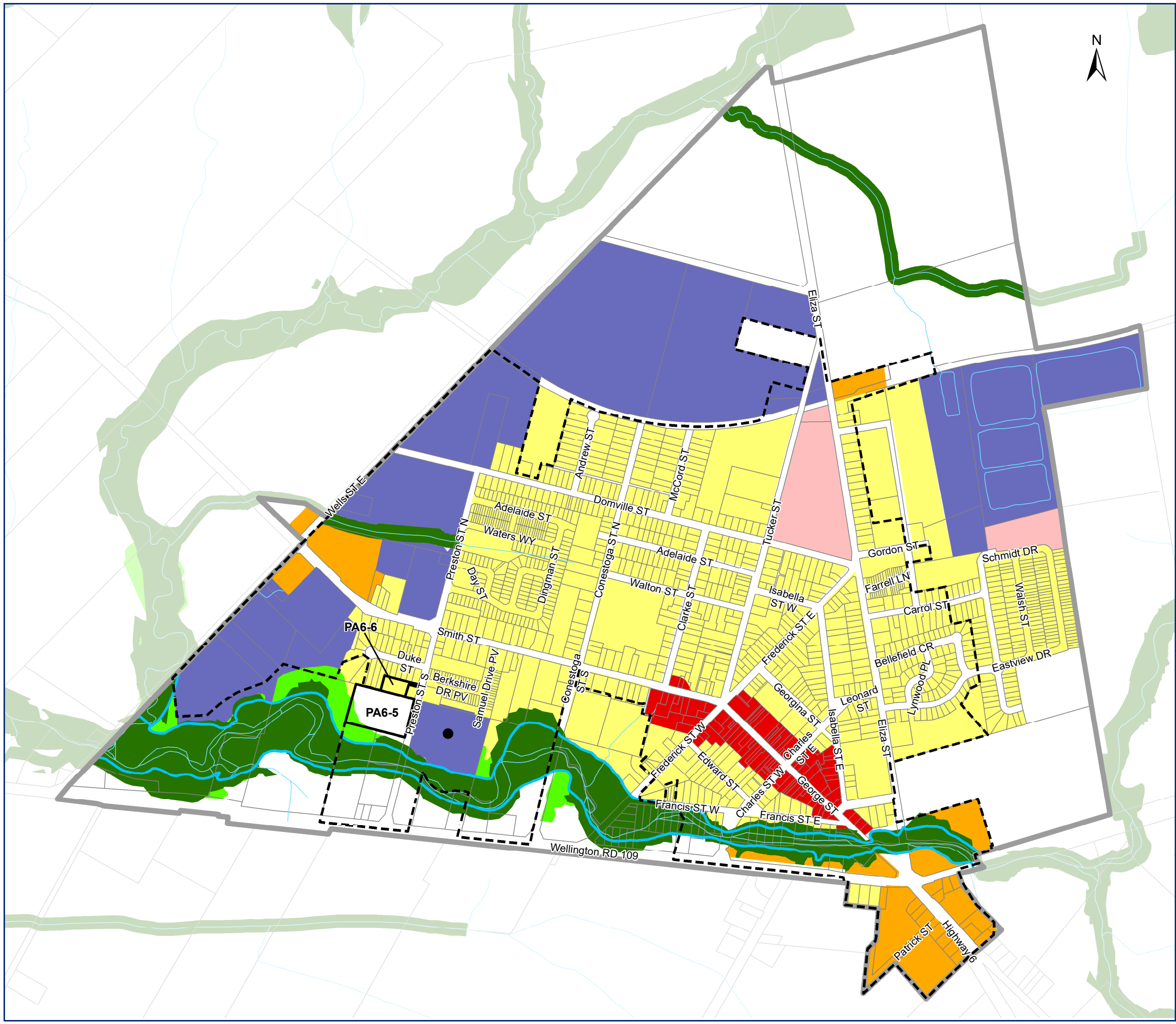
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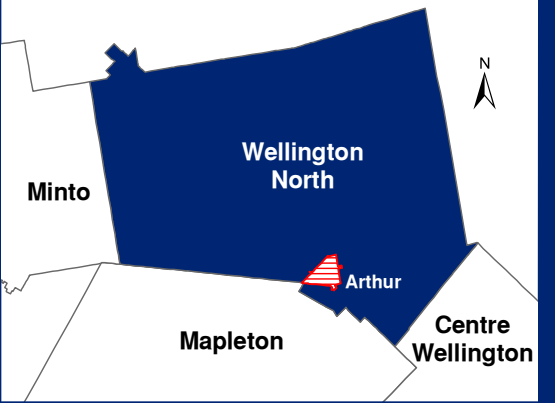


Land Use

ARTHUR

WELLINGTON NORTH

- Legend**
- Residential
 - Central Business District
 - Residential Transition Area
 - Highway Commercial
 - Industrial
 - Recreational
 - Future Development
 - Policy Area
 - Core Greenlands
 - Greenlands
 - Regulatory Floodline
 - Built Boundary
 - Urban Centre Boundary
 - Waste Water Facility
 - Waterbody
 - Watercourse



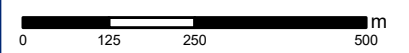
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Last Revised: February 2024





Appendix C

List of Local Studies and Initiatives



Appendix C: List of Local Studies and Initiatives

Provided below is a list of relevant growth management studies and initiatives.

County of Wellington Reports

- County of Wellington Municipal Comprehensive Review Phase 1: Growth Structure and Forecasts
- County of Wellington Municipal Comprehensive Review Phase 2: Urban Land Needs
- County of Wellington Municipal Comprehensive Urban Land Needs Municipal Comprehensive Review Municipal Servicing Analysis
- County of Wellington Economic Development Strategic Plan
- County of Wellington Climate Change Mitigation Plan

Development Control

- County of Wellington Official Plan
- Township of Wellington Zoning By-law

Corporate

- Township of Wellington North Strategic Plan

Finance and Infrastructure

- Development Charges Background Study
- Asset Management Plan
- 2020 North O.Reg 453/07 Water System Financial Plan No. 113-301A and Wastewater System Financial Plan
- 2020 Water and Wastewater Rate Study & O. Reg 453/07 Financial Plan
- Wellington North 10 Year Capital Forecast
- Wellington North Municipal Servicing Standards
- Wellington North Capital Projects
- Recreation Master Plan

Economic Development Strategies/Reports

- Application for the Canada Mortgage and Housing Corporation (CMHC) Housing Accelerator Fund
- Township Industrial Strategy
- Community Improvement Plan
- Municipal Cultural Plan



- Business Retention & Expansion Programs
- Saugeen Connects Strategic Plan
- Taste Real Tourism Strategy & Plans
- Cycling & Walking Trails/Plans



Appendix D

Ten-Year Capital Plan Projects

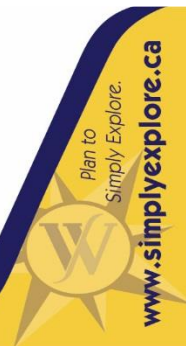
Capital Program – 10 Year Capital Forecast

Renewal and Maintenance Projects	Total
Full Road Reconstruction	\$ 59,668,506
Sidewalk /Pedestrian Safety Investment	\$ 2,983,425
Equipment Investment	\$ 11,933,701
Recreation Investment	\$ 22,375,690
Pavement Rehabilitation	\$ 14,917,127
Bridge Rehabilitation	\$ 11,187,845
Subtotal	\$ 123,066,294
Major Capital Projects	
Arthur Water Tower	\$ 5,953,500
Arthur Water Supply	\$ 5,103,000
Mount Forest Water Tower	\$ 6,563,734
Mount Forest Wastewater Plant Upgrade	\$ 7,598,342
Arthur Wastewater Plant Upgrade	\$ 13,500,000
Arthur Operations Centre	\$ 5,670,000
Mount Forest Operations Centre	\$ 7,236,516
Mount Forest Fire Hall	\$ 8,930,250
Mount Forest Outdoor Pool and Aquatics Centre	\$ 6,310,710
Arthur and Area Community Centre	\$ 5,670,000
Mount Forest & District Sports Complex	\$ 3,799,171
Subtotal - Major Capital Projects	\$ 76,335,224
Total Capital Project Cost	\$ 199,401,517



Capital Program – 10 Year Capital Forecast

Funding Options	Total
OCIF	\$ 22,000,000
Gas Tax	\$ 4,400,000
Operating budget contribution - tax base	\$ 25,300,000
Operating budget contribution - user base	\$ 14,520,000
Development Charges	\$ 7,200,000
Reserve use	\$ 17,600,000
Senior govt conditional grant	
Total funding available - estimate	\$ 91,020,000
Funding Surplus (deficit)	-108,381,517.43





Appendix E

Township of Wellington

Growth Forecasts



Appendix E: Township of Wellington Growth Forecasts

Figure E-1
Township of Wellington Population and Housing Forecast to 2051

Year	Population (Including Census Undercount) ¹	Households					Persons Per Unit (PPU)
		Low Density ²	Medium Density ³	High Density ⁴	Other	Total	
2016	12,300	3,660	260	730	20	4,670	2.634
2021	12,800	3,780	330	730	20	4,860	2.634
2024	13,800	4,060	370	820	20	5,270	2.619
2026	14,700	4,260	420	880	20	5,580	2.634
2031	16,100	4,640	500	970	20	6,130	2.626
2036	17,400	4,960	610	990	20	6,580	2.644
2041	17,700	5,020	630	1,030	20	6,700	2.642
2046	19,600	5,520	760	1,080	20	7,380	2.656
2051	20,500	5,760	790	1,090	20	7,660	2.676

¹Based on Census undercount of 3%.

²Low density includes single-detached and semi-detached housing units.

³Medium density includes row housing units and back-to-back townhouses.

⁴High density includes apartments and stacked townhouses.

Notes: 2016 and 2021 are based on Statistics Canada Census. 2024 is an estimate by Watson & Associates Economists Ltd.

May not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure E-2
Township of Wellington North Population and Employment Growth Forecast to 2051

Year	Population (Including Census Undercount) ¹	Employment	Employment Activity Rate
2016	12,300	7,100	58%
2021	12,800	7,300	57%
2024	13,800	7,600	55%
2026	14,700	7,700	52%
2031	16,100	8,300	52%
2036	17,400	8,900	51%
2041	17,700	9,400	53%
2046	19,600	10,000	51%
2051	20,500	10,500	51%
2024-2051	6,700	2,900	-

¹Based on Census undercount of 3%.

Notes: 2016 and 2021 are based on Statistics Canada Census. Employment for 2021 is an estimate by Watson & Associates Economists Ltd. 2024 is an estimate by Watson & Associates Economists Ltd. May not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Figure E-3
Population and Housing Growth Forecast by Area

Arthur							
Year	Population (Including Census Undercount) ¹	Households					Persons Per Unit (PPU)
		Low Density ²	Medium Density ³	High Density ⁴	Other ⁵	Total	
2021	2,700	765	90	170	10	1,035	2.61
2024	3,300	925	132	173	10	1,240	2.66
2026	3,500	940	140	240	10	1,330	2.63
2031	3,900	1,060	170	260	10	1,500	2.60
2036	4,200	1,110	200	280	10	1,600	2.63
2041	4,400	1,140	200	310	10	1,660	2.65
2046	4,700	1,200	240	330	10	1,780	2.64
2051	4,800	1,240	250	340	10	1,840	2.61

2024 - 2051	1,500	315	118	167	-	600
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Mount Forest							
Year	Population (Including Census Undercount) ¹	Households					Persons Per Unit (PPU)
		Low Density ²	Medium Density ³	High Density ⁴	Other ⁵	Total	
2021	5,300	1,545	170	575	0	2,290	2.31
2024	5,800	1,628	238	648	0	2,490	2.33
2026	6,700	1,840	270	640	0	2,750	2.44
2031	7,600	2,060	330	710	0	3,100	2.45
2036	8,500	2,290	410	710	0	3,410	2.49
2041	8,600	2,300	430	720	0	3,450	2.49
2046	10,000	2,670	530	740	0	3,940	2.54
2051	10,500	2,820	540	750	0	4,110	2.55

2024 - 2051	4,700	1,192	302	102	-	1,620
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Rural							
Year	Population (Including Census Undercount) ¹	Households					Persons Per Unit (PPU)
		Low Density ²	Medium Density ³	High Density ⁴	Other ⁵	Total	
2021	4,800	1,460	0	0	5	1,465	3.28
2024	4,700	1,511	0	0	5	1,540	3.05
2026	4,500	1,480	0	0	5	1,485	3.03
2031	4,600	1,520	0	0	5	1,525	3.02
2036	4,700	1,570	0	0	5	1,575	2.98
2041	4,800	1,570	0	0	5	1,575	3.05
2046	5,000	1,650	0	0	5	1,655	3.02
2051	5,100	1,700	0	0	5	1,705	2.99

2024 - 2051	400	189	-	-	-	166
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¹Based on Census undercount of 3%.

²Low density includes single-detached and semi-detached housing units.

³Medium density includes row housing units and back-to-back townhouses.

⁴High density includes apartments and stacked townhouses.

Notes: 2021 is based on Statistics Canada Census. 2024 is an estimate by Watson & Associates Economists Ltd.

May not add up precisely due to rounding.

Source: Watson & Associates Economists Ltd.



Appendix F

Density Visualizations

Density Visualizations

Arthur – Carroll St./Schmidt Dr. (Designated Greenfield Area)

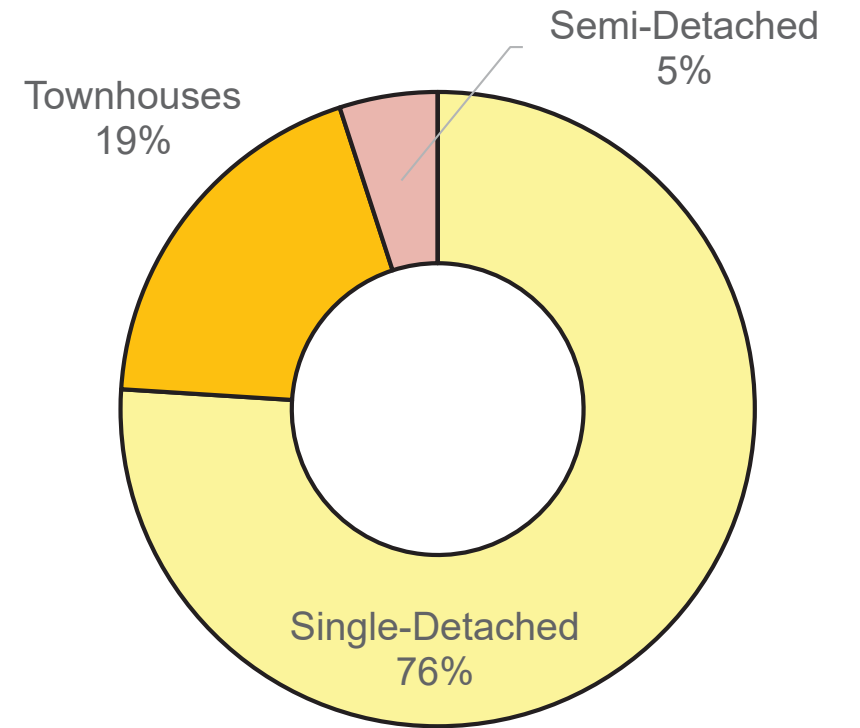
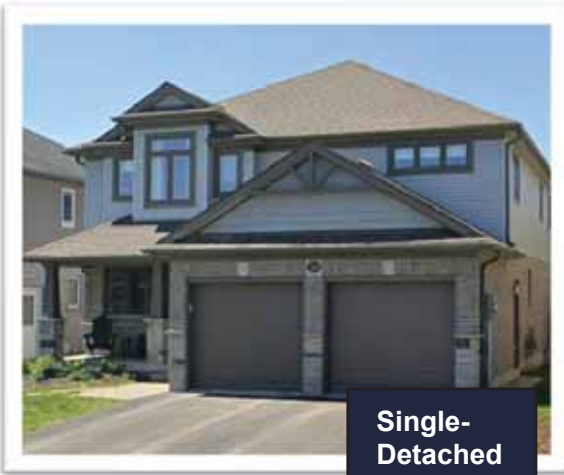
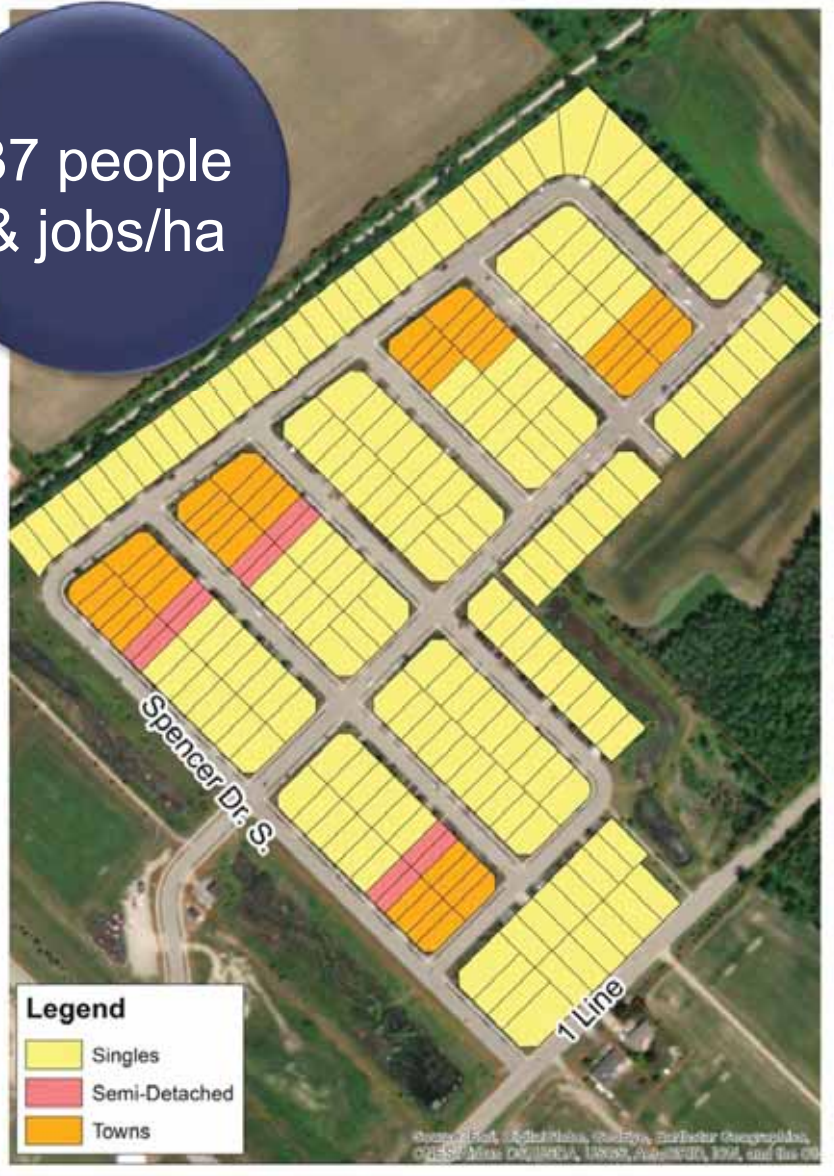


Density Visualizations

Elora – Spencer Dr. S./1 Line (Designated Greenfield Area)



37 people
& jobs/ha



Density Visualizations

Fergus – Storybrook/Beatty Line Subdivision (Designated Greenfield Area)



51 people
& jobs/ha



Single-Detached



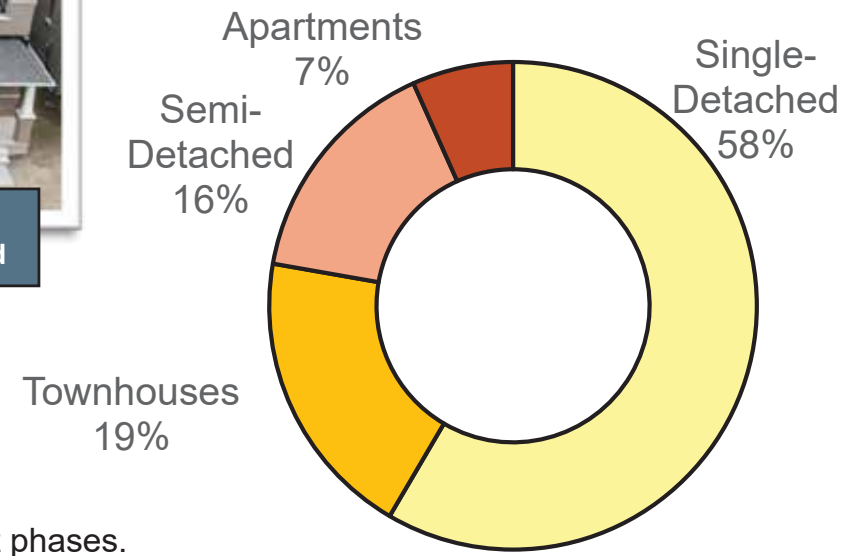
Towns



Semi-Detached



Apartments



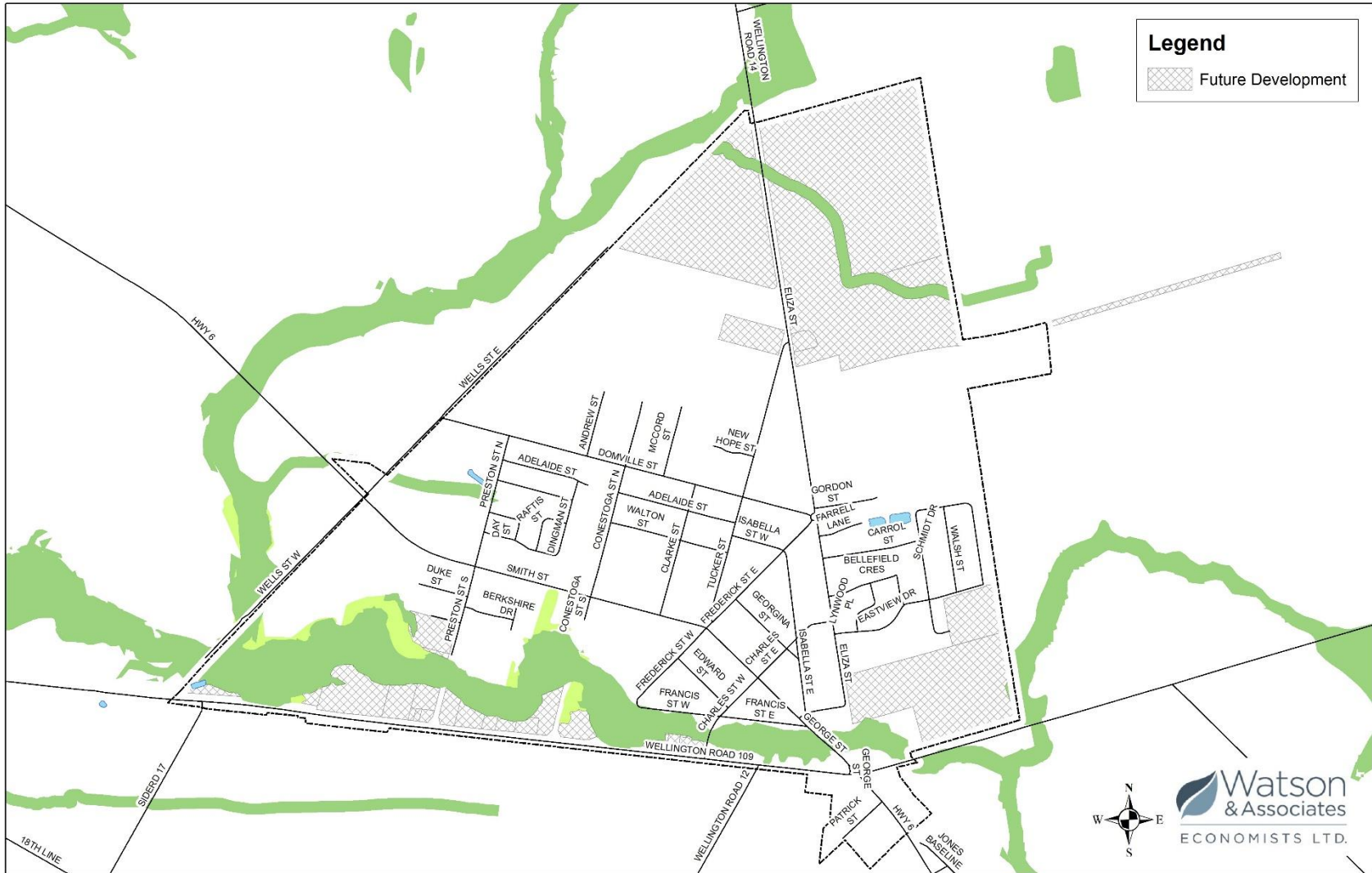
Note: Based on draft approved plans. Photos are based on housing completed in the first phases.



Appendix G

Future Development Lands

Arthur Urban Centre



Mount Forest Urban Centre





Appendix H

Housing Supply and Vacant Land Supply Mapping



Appendix H: Housing Supply and Vacant Land Supply Mapping

Figure H-1
Housing Unit Supply in Arthur

Map Id#	Urban Centre	Supply Category	Development	Low Density Units	Medium Density Units	High Density Units	Total Units	Built Boundary
WN-65	Arthur	Registered	Vacant Lots in Existing Neig	11	0	0	11	Yes
WN-96	Arthur	Registered	Frederick St West Lot	1	0	0	1	
WN-118	Arthur	Registered	Cachet Developments	38	64	0	102	Yes
WN-131	Arthur	Registered	Accessory Residential Units	0	0	0	0	Yes
WN-132	Arthur	Registered	Eastridge Landing Phase 4	36	20	0	56	
WN-55	Arthur	Draft-Approved	Disapio-Bolger 23T-89002-C	30	0	25	55	
WN-50	Arthur	Draft-Approved	Domville W of Andrew	18	8	24	50	
WN-135	Arthur	Draft-Approved	VED Homes	0	35	0	34	Yes
WN-123	Arthur	Application-Under-Review	Arthur Green Development I	0	0	32	32	Yes
WN-124	Arthur	Application-Under-Review	Arthur Green Development I	0	0	15	15	Yes
WN-133	Arthur	Application-Under-Review	Frederick Street Apartment	0	0	59	59	Yes
WN-52	Arthur	Vacant-Designated	Edelbrook Brothers	51	15	7	73	
WN-66	Arthur	Vacant-Designated	Potential Infill Consents	6	0	0	6	Yes
WN-79	Arthur	Vacant-Designated	204 Gordon St.	0	37	0	37	Yes
WN-97	Arthur	Vacant-Designated	Gordon ST Hidden lots	0	17	0	17	
WN-98	Arthur	Vacant-Designated	Hidden Lot behind Schimdt	0	0	0	0	
WN-99	Arthur	Vacant-Designated	Francis St W Vacant Lot	4	0	0	4	
WN-1002	Arthur	Vacant-Designated	213 Gordon Street Intensific	0	11	0	11	
Total Arthur				195	207	162	563	

Source: County of Wellington Planning Department, summarized by Watson & Associates Economists Ltd., 2023.

Refer to map on next page.

Arthur Urban Centre – Residential Vacant Lands

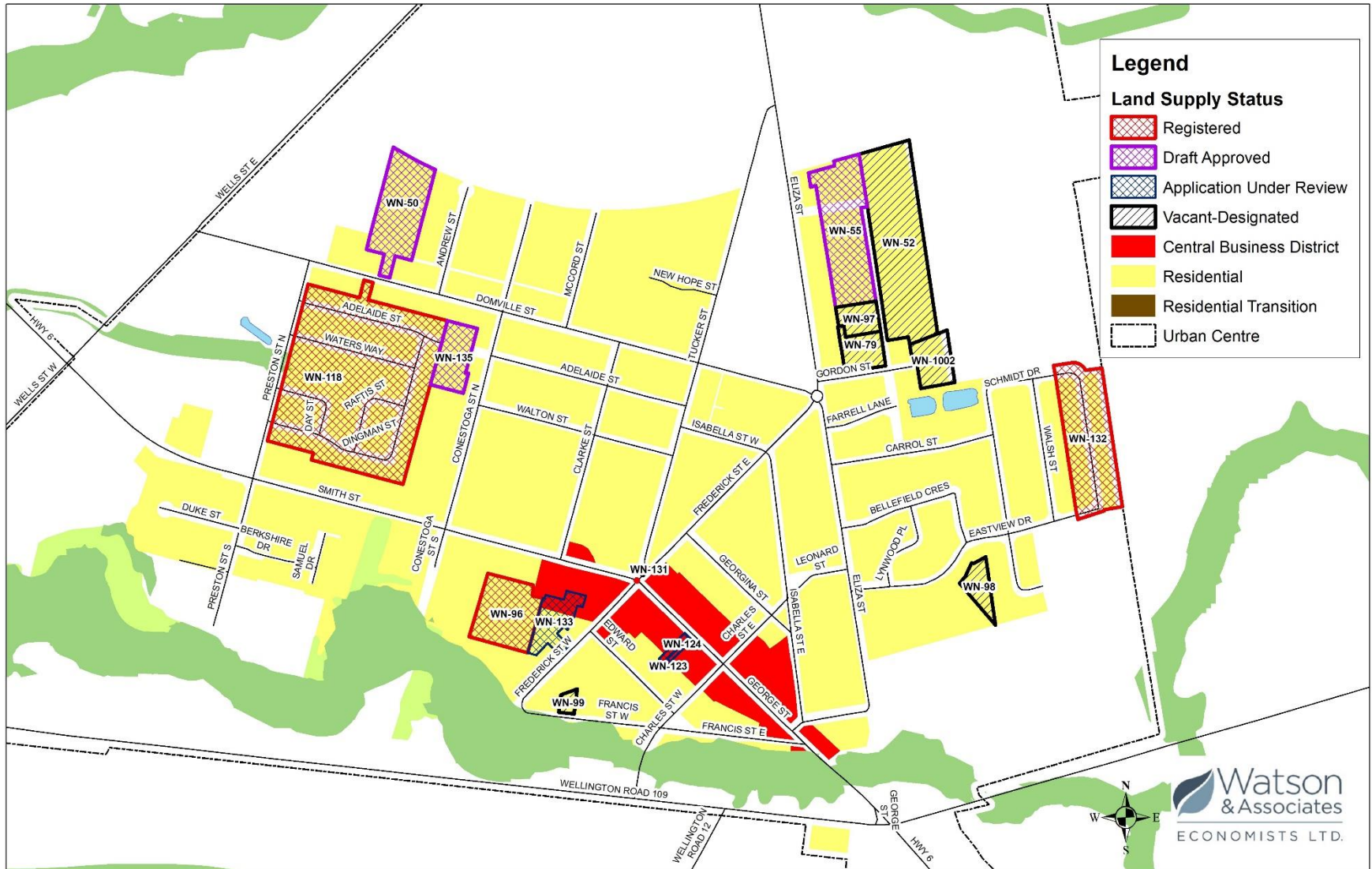




Figure I-2
Housing Unit Supply in Mount Forest

Map Id#	Urban Centre	Supply Category	Development	Low Density Units	Medium Density Units	High Density Units	Total Units	Built Boundary
WN-05	Mount Forest	Registered	N of Sligo T w Fergus	0	0	26	26	Yes
WN-09	Mount Forest	Registered	N Princess (Nursing)	0	0	38	38	Yes
WN-15	Mount Forest	Registered	S of Murphy	2	0	0	2	
WN-23	Mount Forest	Registered	H. Bye	0	22	0	22	
WN-26	Mount Forest	Registered	N Birm. W London	19	10	0	29	
WN-105	Mount Forest	Registered	Reeves Saugeen Highlands - Greenfield	1	0	0	1	
WN-56	Mount Forest	Registered	Royal Stone 190 King	0	0	30	30	Yes
WN-59	Mount Forest	Registered	470 Cork St.	0	6	0	6	Yes
WN-76	Mount Forest	Registered	Plan 419	1	0	0	1	Yes
WN-21	Mount Forest	Registered	Marlanna Homes	22	0	0	22	
WN-31	Mount Forest	Registered	Reeves Saugeen Highlands - Built Boundary	1	0	0	1	Yes
WN-110	Mount Forest	Registered	Circuit Holding Inc	0	10	0	10	Yes
WN-111	Mount Forest	Registered		4	0	0	4	Yes
WN-112	Mount Forest	Registered		3	0	0	3	
WN-63	Mount Forest	Registered	Vacant Lots in Existing Neighbourhoods	13	0	0	13	Yes
WN-107	Mount Forest	Registered	Martin ST Severances	1	0	0	1	
WN-109	Mount Forest	Registered	Sharpe Development	0	4	0	4	Yes
WN-120	Mount Forest	Registered	Consents off Wellington Street E	1	0	0	1	
WN-136	Mount Forest	Registered	425 and 427 King Street East	0	18	0	18	Yes
WN-130	Mount Forest	Registered	405 Wellington Street E	0	8	0	8	Yes
WN-87	Mount Forest	Draft-Approved	Murphy Lands	291	120	0	411	
WN-07	Mount Forest	Application-Under-Review	Betty Dee	0	34	0	34	
WN-30	Mount Forest	Application-Under-Review	John Welton Custom Homebuilding	93	48	0	141	
WN-137	Mount Forest	Application-Under-Review	Betty Dee consents	5	0	0	5	
WN-138	Mount Forest	Application-Under-Review	440 Wellington Street East	0	28	0	28	Yes
WN-03	Mount Forest	Vacant-Designated	S of Sligo W of London	39	0	0	39	
WN-04	Mount Forest	Vacant-Designated	N of Sligo E of NoFrills	26	0	0	26	
WN-10	Mount Forest	Vacant-Designated	S Martin W Saugeen	8	0	0	8	Yes
WN-16	Mount Forest	Vacant-Designated	E Murphy S Glasgow	6	0	0	6	
WN-17	Mount Forest	Vacant-Designated	E Ayrshire N Oxford	6	0	0	6	
WN-18	Mount Forest	Vacant-Designated	W Cork N ball fields	0	4	0	4	
WN-25	Mount Forest	Vacant-Designated	S Birmingham	17	0	0	17	
WN-27	Mount Forest	Vacant-Designated	Greenhouse N Birm.	32	0	0	32	
WN-29	Mount Forest	Vacant-Designated	N Durham W London	39	0	0	39	
WN-86	Mount Forest	Vacant-Designated	N of Sligo W of High School	20	0	0	20	
WN-08	Mount Forest	Vacant-Designated	Reeves E London	34	0	0	34	
WN-113	Mount Forest	Vacant-Designated		0	13	0	13	
WN-116	Mount Forest	Vacant-Designated		0	8	0	8	Yes
WN-117	Mount Forest	Vacant-Designated		0	37	0	37	Yes
WN-24	Mount Forest	Vacant-Designated	Chicken Barns (N Well.)	22	6	3	31	
WN-134	Mount Forest	Vacant-Designated	WT Land CORP	0	0	17	17	Yes
Total Mount Forest				706	376	114	1,196	

Source: County of Wellington Planning Department, summarized by Watson & Associates Economists Ltd., 2023.

Refer to map on next page.



Appendix I

Commercial and Employment Area Vacant Land Supply Mapping



Appendix I: Commercial and Employment Area Vacant Land Supply Mapping

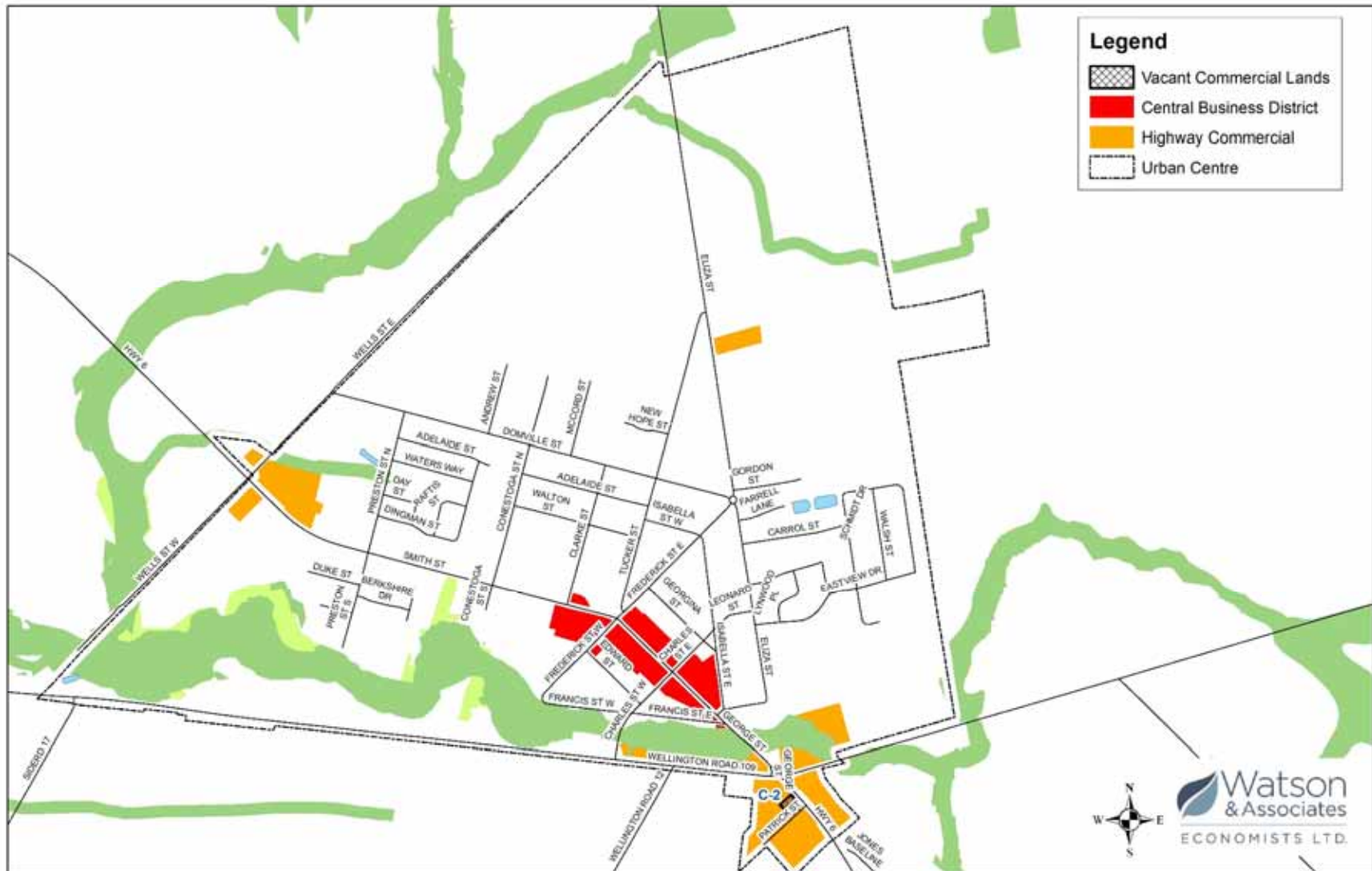
Figure I-1
Commercial Vacant Land Supply

Map Id	Urban Area	Location	Legal Description	Official Plan Designation	Zoning Class	Zoning	Status	Designated Land, ha	Developable Land, ha
C-1	Arthur	Highway Commercial Lands in Arthur	SVY ELLEN DANIEL PT LOTS 2;AND	Highway Commercial	R1A	Residential	Vacant	0.2	0.0
C-2	Arthur	Highway Commercial Lands in Arthur	SVY ELLEN DANIEL PT LOT 1	Highway Commercial	R1A	Residential	Vacant	0.1	0.0
Total Arthur								0.3	0.0
C-3	Mount Forest	Northwest Mount Forest Employment Lands	CON 1 PT LOT 33 PT LOT 32;DIV 3 RP 60R3459 PARTS 1 & 2	Highway Commercial	(H)C2-62	Highway Commercial - Holding Provision requires Water and Sewage servicing to be available, SWM issues addressed, Site plan approval, and entrance design.	Vacant	0.7	0.7
C-4	Mount Forest	Main Street South Area	LOTS;Q-R SVY ALLAN&GEDDES PT LOTS;& STS ARTHUR WOSR PT LOT 2;DIV 3-4 RP61R7881 PARTS 1-4	Highway Commercial	M1-26	Industrial (Site-Specific)	Vacant	3.2	3.2
C-5	Mount Forest	Northwest Mount Forest Employment Lands	MOUNT FOREST S QUEEN ST PT;PK LOTS 10 TO 12 RP 61R6683;PARTS 2 TO 4 PT PART 5	Highway Commercial	M1	Industrial	Vacant	1.1	1.1
C-6	Mount Forest	Northwest Mount Forest Employment Lands	CON 11 PT LOT 1	Highway Commercial	FD	Future Development	Vacant	1.8	1.8
C-7	Mount Forest	Employment Lands	CON 1 PT LOT 33 RP 60R3404;PART	Highway Commercial	(H)C2-62	Holding Provision	Vacant	0.3	0.3
Total Mount Forest								7.1	7.1
Total								7.3	7.1

Source: County of Wellington Planning Department, summarized by Watson & Associates Economists Ltd., 2023.

Refer to map on next page.

Arthur Urban Centre – Commercial Vacant Lands



Mount Forest Urban Centre – Commercial Vacant Lands

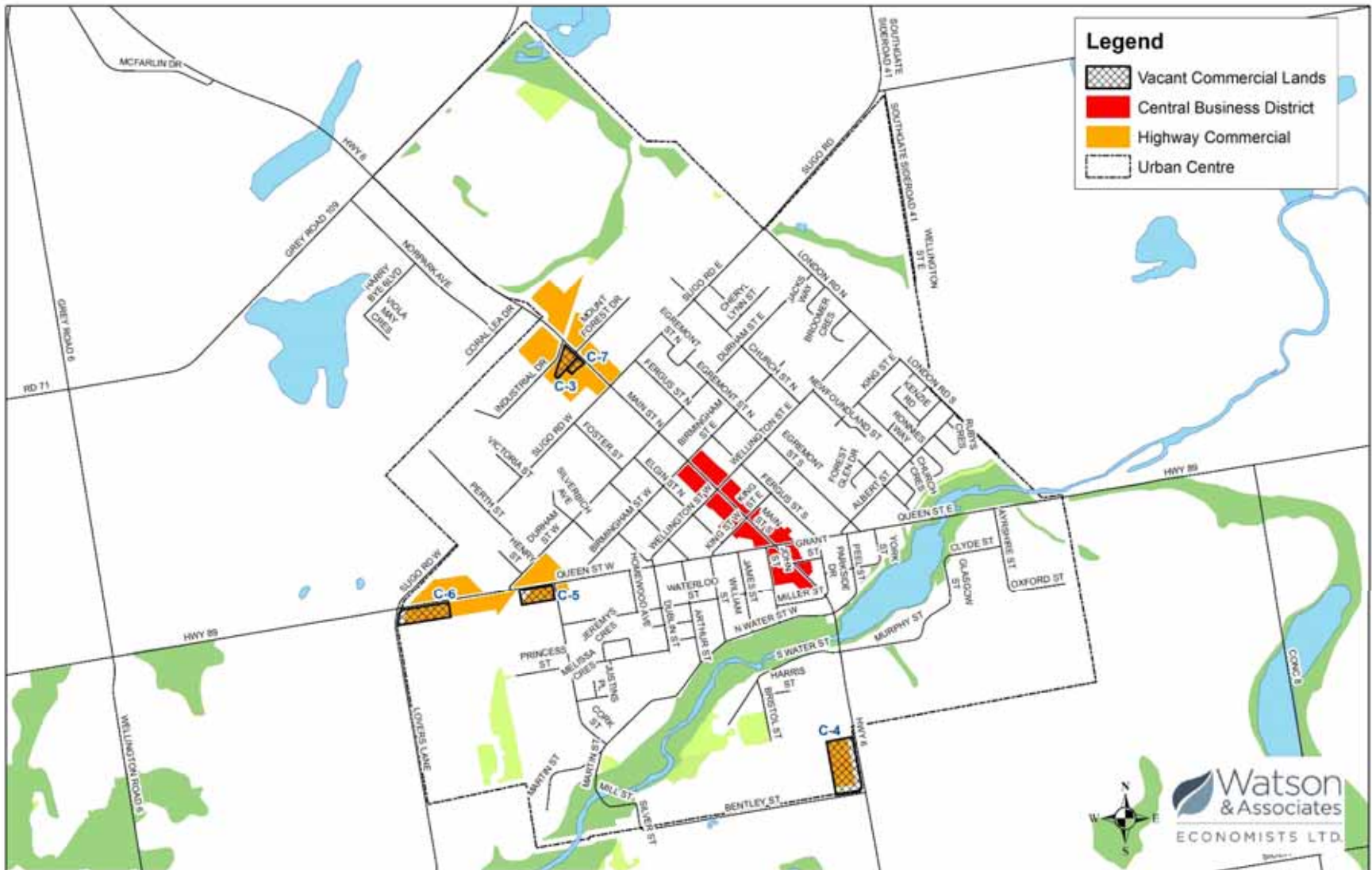




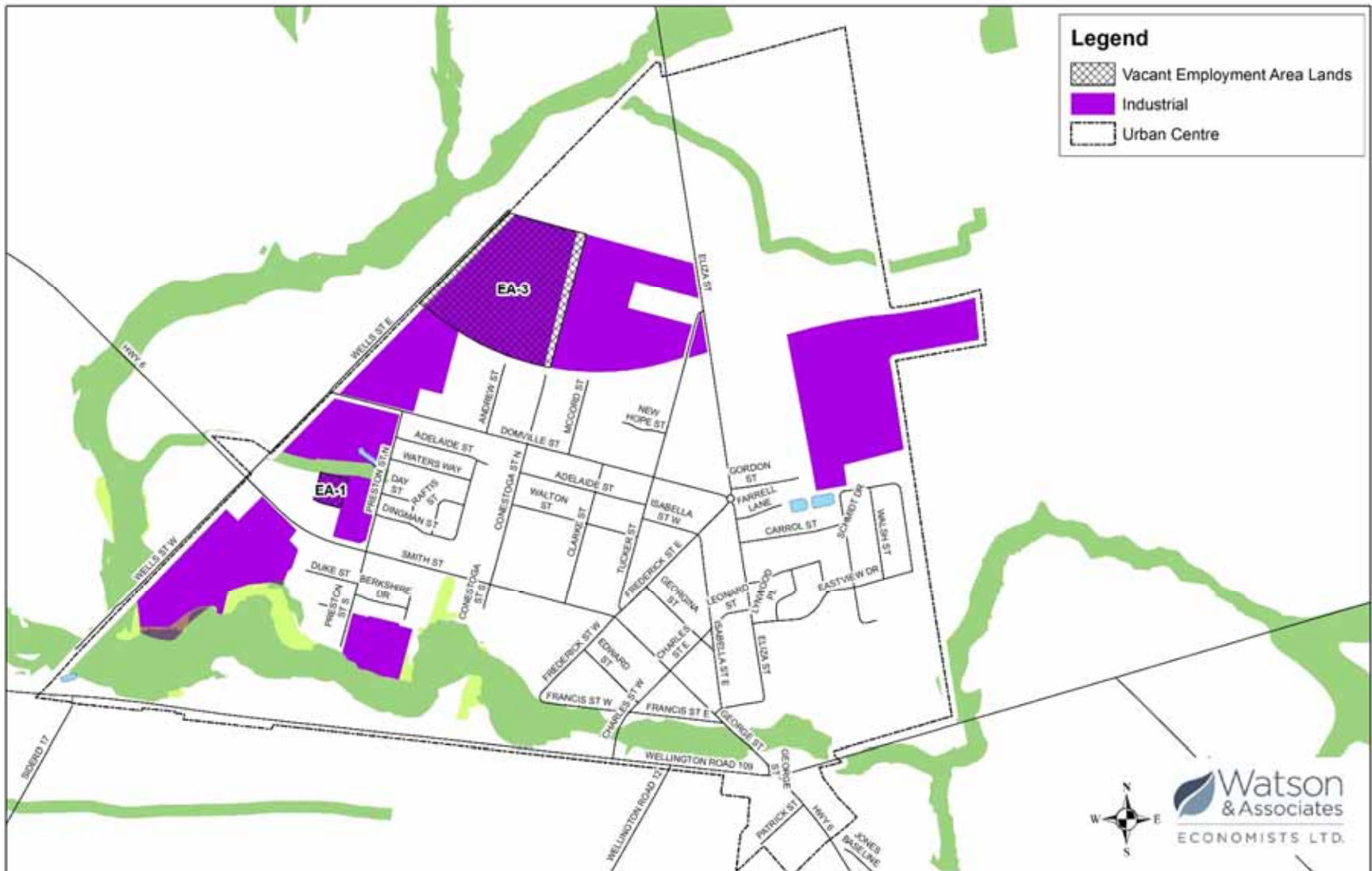
Figure I-2
Employment Area Vacant Land Supply

Map Id	Urban Area	Employment Area	Designation	Zoning Class	Zoning	Designated Land Area, ha	Developable Land Area, ha
EA-1	Arthur	Industrial Lands in Arthur	Industrial	M1H	Industrial (Holding)	0.9	0.9
EA-3	Arthur	Industrial Lands in Arthur	Industrial	M1H	Industrial (Holding)	17.0	13.6
Total Arthur						17.9	14.5
EA-2	Mount Forest	Northeast Mount Forest Employment Lands	Industrial	M1-24(H)	Industrial	18.1	14.5
EA-4	Mount Forest	Northwest Mount Forest Employment Lands	Industrial	R2	Residential	0.2	0.2
EA-5	Mount Forest	Northwest Mount Forest Employment Lands	Industrial	R2	Residential	0.3	0.3
EA-6	Mount Forest	Northwest Mount Forest Employment Lands	Industrial	M1	Industrial	2.5	1.9
EA-7	Mount Forest	Northwest Mount Forest Employment Lands	Industrial	M1	Industrial	1.0	1.0
EA-8	Mount Forest	Northeast Mount Forest Employment Lands	Industrial	FD	Future Development	1.3	1.3
EA-9	Mount Forest	Northeast Mount Forest Employment Lands	Industrial	M1-24(H)	Industrial (Site-specific)	23.2	18.5
EA-10	Mount Forest	Northeast Mount Forest Employment Lands	Industrial	M1-24(H)	Industrial	19.1	15.3
EA-11	Mount Forest	Northeast Mount Forest Employment Lands	Industrial	M1	Industrial	0.5	0.5
EA-12	Mount Forest	Northeast Mount Forest Employment Lands	Industrial	M1-24(H)	Industrial	9.8	7.8
EA-13	Mount Forest	Northeast Mount Forest Employment Lands	Industrial	M1(H)	Industrial (Holding)	24.4	19.5
Total Mount Forest						100.3	80.7
Total						118.2	95.3

Source: County of Wellington Planning Department, summarized by Watson & Associates Economists Ltd., 2023.

Refer to map on next page.

Arthur Urban Centre – Employment Area Vacant Lands



Mount Forest Urban Centre – Employment Area Vacant Lands

