

**APPENDIX I**  
**EVALUATION TABLE FOR THE**  
**PREFERRED GROWTH OPTION (OPTION D)**

## Region of Niagara Growth Management Strategy

### Phase 4 – A Preferred Growth Option for Niagara

## *Evaluation Table*

November 2008

### **Dillon Consulting Limited**

Watson & Associates  
Associated Engineering  
Clara Consulting  
EDP Consulting

### **Purpose of the evaluation process**

Phase 3 of the Niagara GMS evaluated three alternative population, household and employment options for Niagara. The evaluation was intended to inform the creation of a preferred growth option in Phase 4. The purpose of the evaluation process is to examine a variety of implications and impacts associated with the growth options.

The following evaluation table features a mix of 58 individual qualitative and quantitative measures which are intended to highlight some of the economic, social, fiscal and environmental implications associated with urban growth. The evaluation table compares Options A, B, C and D.

### **How to read the evaluation table**

The evaluation table is divided into eight categories:

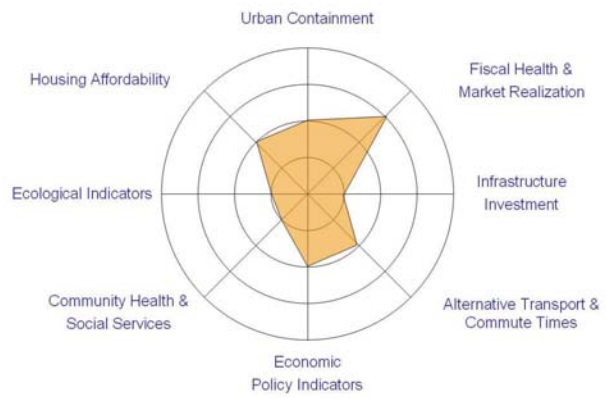
- Urban containment;
- Housing affordability;
- Ecological indicators;
- Community health and social services;
- Economic policy indicators;
- Fiscal health and market realization;
- Infrastructure investment; and,
- Alternative transport and commute times;

Each category contains a set of indicators. Each indicator features one or more measures. The overall rankings for each category are dependant on qualitative rankings of the individual measures and indicators. The options are ranked on qualitative scale, depending on how well the option supports a given indicator. The ranking scale is:

- Very Well;
- Well;
- Somewhat well; and,
- Not very well.

The overall rankings are graphically illustrated in the four circle diagrams on the following page. Options which cover a larger surface area reflect positive outcomes in the detailed evaluation. The diagrams are intended to provide a simple means for understanding the various strengths and weaknesses of each option.

**Option A: Current Trends**



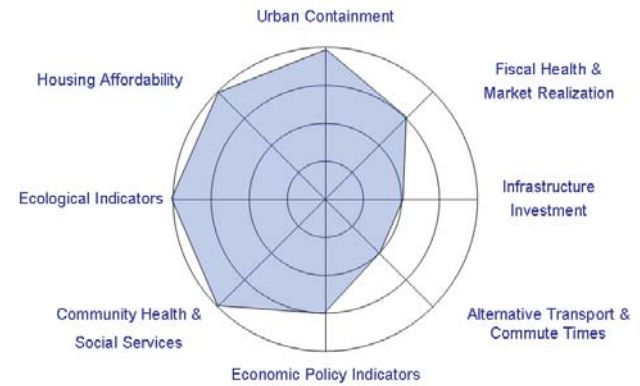
**Option C: Multi-Nodal**



**Option B: Grow South**



**Option D: Preferred Option**



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
<b>Urban Containment</b>					
<ul style="list-style-type: none"> <li>How well does the option support the Places to Grow targets?</li> </ul>	<ul style="list-style-type: none"> <li>The 40% intensification target</li> <li>The 50 people and jobs per hectare target for greenfield development<sup>1</sup></li> </ul>	<ul style="list-style-type: none"> <li>Option A assumes a residential intensification target of 40%, achieving the Provincial target across the Region.</li> <li>Option A is based on the upper limits of Official Plan densities and achieves an estimated 51 people and jobs per hectare on greenfield lands. Option A meets the Province's 50 people and jobs per hectare on greenfield lands target.</li> </ul>	<ul style="list-style-type: none"> <li>Option B assumes a residential intensification target of 45% across the Region, exceeding the Province's target of 40%.</li> <li>Option B is based on higher densities on greenfield lands and achieves an estimated 56 people and jobs per hectare on greenfield lands. Option B meets the provincial target of 50 people and jobs per hectare on greenfield lands.</li> </ul>	<ul style="list-style-type: none"> <li>Option C assumes a residential intensification target of 41% across the Region, exceeding the Province's target of 40%.</li> <li>Option C is based on higher densities on greenfield lands and assumes a higher level of brownfield redevelopment in Niagara Falls and achieves an estimated 60 people and jobs per hectare on greenfield lands. Option C meets the provincial target of 50 people and jobs per hectare on greenfield lands.</li> </ul>	<ul style="list-style-type: none"> <li>Option D assumes a residential intensification target of 42% across the Region, slightly exceeding the Places to Grow target of 40%.</li> <li>Option D is based on the upper limits of Official Plan densities and is planned to achieve 50 people and jobs per hectare across the Region.</li> </ul>
		<i>Very Well</i>	<i>Very Well</i>	<i>Very Well</i>	<i>Very Well</i>
<ul style="list-style-type: none"> <li>How well does the option contain urban growth</li> </ul>	<ul style="list-style-type: none"> <li>Requirement for Urban Area Boundary expansion</li> </ul>	<ul style="list-style-type: none"> <li>Option A requires urban boundary expansions for residential land in Niagara Falls and Smithville.</li> </ul>	<ul style="list-style-type: none"> <li>Option B requires an urban boundary expansion for employment land purposes in Fort Erie.</li> </ul>	<ul style="list-style-type: none"> <li>Option C requires an urban boundary expansion for residential purposes in Smithville.</li> </ul>	<ul style="list-style-type: none"> <li>Based on forecast demand and supply, Option D does not require any immediate urban boundary expansions.</li> </ul>
		<i>Not Very Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>	<i>Very Well</i>
<ul style="list-style-type: none"> <li>How well does the option support the Urban Growth Centre, Gateway Economic Zone/Centre concepts?</li> </ul>	<ul style="list-style-type: none"> <li>By directing growth (people and units) to the Zone and Centres. For the purposes of this measure, the Gateway Zone is defined as Niagara Falls and Fort Erie and the Gateway Centre is defined as Welland and Port Colborne.</li> </ul>	<ul style="list-style-type: none"> <li>Option A directs 57,057 people and 20,733 units to the Gateway Zone and Centre over the forecast period (2006-2031).</li> </ul>	<ul style="list-style-type: none"> <li>Option B directs 80,470 people and 28,693 units to the Gateway Zone and Centre over the forecast period (2006-2031).</li> </ul>	<ul style="list-style-type: none"> <li>Option C directs 65,266 people and 23,673 units to the Gateway Zone and Centre over the forecast period (2006-2031).</li> </ul>	<ul style="list-style-type: none"> <li>Option D directs 62,850 people and 22,815 units to the Gateway Zone and Centre of the forecast period (2006-2031).</li> </ul>
		<i>Somewhat Well</i>	<i>Very Well</i>	<i>Well</i>	<i>Well</i>
<ul style="list-style-type: none"> <li>How well does the option support the Niagara 'Grow South' strategy?</li> </ul>	<ul style="list-style-type: none"> <li>By directing growth (people and units) along the Niagara Falls/Fort Erie and</li> </ul>	<ul style="list-style-type: none"> <li>Option A directs 66,386 people and 24,050 units to the five "Grow South" municipalities. 50% of all</li> </ul>	<ul style="list-style-type: none"> <li>Option B directs 102,266 people and 35,942 units to the five "Grow South" municipalities.</li> </ul>	<ul style="list-style-type: none"> <li>Option C directs 75,834 people and 27,422 units to the five "Grow South" municipalities.</li> </ul>	<ul style="list-style-type: none"> <li>Option directs 73,311 people and 26,490 units to the five "Grow South" municipalities. 56% of all</li> </ul>

**Draft Evaluation Table – Phase 3, A Range of Options**  
 Region of Niagara Growth Management Strategy



Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
	Thorold/Port Colborne axes <sup>2</sup> .	urban population growth and 49% of unit growth is allocated to the Growth South municipalities.	77% of all urban population growth and 74% of unit growth is allocated to the Growth South municipalities.	57% of all urban population growth and 56% of unit growth is allocated to the Growth South municipalities.	urban population and 55% of unit growth is allocated to the “Growth South” municipalities.
		<i>Somewhat Well</i>	<i>Very Well</i>	<i>Well</i>	<i>Well</i>
<ul style="list-style-type: none"> <li>How well does the option conform to the Provincial Policy Statement?</li> </ul>	<ul style="list-style-type: none"> <li>By directing growth to fully-serviced settlement areas</li> <li>By promoting intensification opportunities including brownfields and greyfields?</li> <li>By promoting compact form and settlement patterns</li> <li>By providing a focus on downtowns</li> </ul>	<ul style="list-style-type: none"> <li>The overwhelming majority (94%) of projected future household growth is allocated to fully serviced settlement areas.</li> <li>Option A achieves residential intensification target of 40%, including some brownfield and greyfield redevelopment.</li> <li>Option A assumes existing Official Plan densities on greenfield lands. In some municipalities this promotes compact urban form and settlement patterns, but not in all. Option A is planned to achieve a region wide greenfield density of 24 units per gross hectare<sup>3</sup>.</li> <li>Niagara is home to 29 different fully serviced, urban settlement areas. The ability to shift portions of growth into the downtowns of the 29 settlement areas is influence, in part, by intensification targets assumed under each option. Option A assumes an overall residential intensification target of 40%.</li> </ul>	<ul style="list-style-type: none"> <li>The overwhelming majority (94%) of projected future household growth is allocated to fully serviced settlement areas.</li> <li>Achieves residential intensification target of 45%, including a higher portion of brownfield redevelopment in Niagara Falls.</li> <li>Option B assumes higher densities on greenfield lands. Promotes the compact urban development in all municipalities. Is planned to achieve a region wide average greenfield gross density of 25 units per hectare.</li> <li>Niagara is home to 29 different full serviced, urban settlement areas. The ability to shift portions of growth into the downtowns of the 29 settlement areas is influence, in part, by intensification targets assumed under each option. Option B assumes an overall residential intensification target of 45%.</li> </ul>	<ul style="list-style-type: none"> <li>The overwhelming majority (94%) of projected future household growth is allocated to fully serviced settlement areas.</li> <li>Achieves residential intensification target of 41%, including some brownfield and greyfield redevelopment.</li> <li>Option C assumes higher densities on greenfield lands. Promotes the compact urban development in all municipalities. Is planned to achieve a region wide average greenfield gross density of 26 units per hectare.</li> <li>Niagara is home to 29 different full serviced, urban settlement areas. The ability to shift portions of growth into the downtowns of the 29 settlement areas is influence, in part, by intensification targets assumed under each option. Option C assumes an overall residential intensification target of 41%.</li> </ul>	<ul style="list-style-type: none"> <li>The overwhelming majority (94%) of projected future household growth is allocated to fully serviced settlement areas.</li> <li>Achieves residential intensification target of 42%, including some brownfield and greyfield redevelopment.</li> <li>Option D assumes higher densities on greenfield lands at the upper limits of existing designations in most municipalities. Promotes the compact urban development in all municipalities. Is planned to achieve a region wide average greenfield gross density of 19 units per hectare.</li> <li>Niagara is home to 29 different full serviced, urban settlement areas. The ability to shift portions of growth into the downtowns of the 29 settlement areas is influence, in part, by intensification targets assumed under each option. Option D assumes an overall residential intensification target of 42%.</li> </ul>
		<i>Well</i>	<i>Very Well</i>	<i>Well</i>	<i>Well</i>

**Draft Evaluation Table – Phase 3, A Range of Options**  
 Region of Niagara Growth Management Strategy



Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
<i>Overall Ranking – Urban Containment Indicators</i>		<b>Somewhat Well</b>	<b>Very Well</b>	<b>Well</b>	<b>Very Well</b>
<b>Housing Affordability Indicators</b>					
<ul style="list-style-type: none"> <li>How well does the option provide a range of housing choices?</li> </ul>	<ul style="list-style-type: none"> <li>Estimated housing mix</li> <li>Assessment of affordable housing potential based on PPS definition of “affordable housing” (10% below the average resale price in regional market area)<sup>1</sup>.</li> </ul>	<ul style="list-style-type: none"> <li>Region-wide housing mix is considered to be proactive and encourages a shift from historic trends. The Region-wide housing mix is the same for all options:                             <ul style="list-style-type: none"> <li>64% Low density (singles, semi);</li> <li>24% Medium (towns and multiples); and,</li> <li>12% High (apartments).</li> </ul> </li> <li>The above noted unit mix may help to provide for a greater range of affordable housing options throughout Niagara.</li> <li>Under the PPS definition of affordable housing, Port Colborne and Welland are considered to be the two municipalities which offer affordable housing options within Niagara. Option A allocates 4,571 new singles to the Region’s two “affordable” housing markets.</li> </ul>	<ul style="list-style-type: none"> <li>Region-wide housing mix is considered to be proactive and encourages a shift from historic trends. The Region-wide housing mix is the same for all options:                             <ul style="list-style-type: none"> <li>64% Low density (singles, semi);</li> <li>24% Medium (towns and multiples); and,</li> <li>12% High (apartments).</li> </ul> </li> <li>The above noted unit mix may help to provide for a greater range of affordable housing options throughout Niagara.</li> <li>Under the PPS definition of affordable housing, Port Colborne and Welland are considered to be the two municipalities which offer affordable housing options within Niagara. Option B allocates 10,170 new single to the Region’s two “affordable” housing markets. It is also worth noting that in the long run this magnitude of growth may have the affect of reducing affordability in Port Colborne and Welland.</li> </ul>	<ul style="list-style-type: none"> <li>Region-wide housing mix is considered to be proactive and encourages a shift from historic trends. The Region-wide housing mix is the same for all options:                             <ul style="list-style-type: none"> <li>64% Low density (singles, semi);</li> <li>24% Medium (towns and multiples); and,</li> <li>12% High (apartments).</li> </ul> </li> <li>The above noted unit mix may help to provide for a greater range of affordable housing options throughout Niagara.</li> <li>Under the PPS definition of affordable housing, Port Colborne and Welland are considered to be the two municipalities which offer affordable housing options within Niagara. Option C allocates 5,711 new single to the Region’s two “affordable” housing markets.</li> </ul>	<ul style="list-style-type: none"> <li>Region-wide housing mix is considered to be proactive and encourages a shift from historic trends. The Region-wide housing mix is the same for all options:                             <ul style="list-style-type: none"> <li>64% Low density (singles, semi);</li> <li>24% Medium (towns and multiples); and,</li> <li>12% High (apartments).</li> </ul> </li> <li>The above noted unit mix may help to provide for a greater range of affordable housing options throughout Niagara.</li> <li>Under the PPS definition of affordable housing, Port Colborne and Welland are considered to be the two municipalities which offer affordable housing options within Niagara. Option D allocates 6,225 new single to the Region’s two “affordable” housing markets. Option D allocates add additional 514 units to Niagara’s two affordable market places (compared to Option C).</li> </ul>
		<i>Somewhat Well</i>	<i>Well</i>	<i>Well</i>	<i>Very Well</i>
<ul style="list-style-type: none"> <li>How well does the option</li> </ul>	<ul style="list-style-type: none"> <li>Location and extent of</li> </ul>	<ul style="list-style-type: none"> <li>Land needs assessment assigns</li> </ul>	<ul style="list-style-type: none"> <li>Land needs assessment assigns</li> </ul>	<ul style="list-style-type: none"> <li>Specific intensification areas to</li> </ul>	<ul style="list-style-type: none"> <li>Specific intensification areas to</li> </ul>

Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
support opportunities for residential intensification?	potential intensification areas	specific residential intensification targets to each lower tier municipality. Option A is planned to achieve the 40% residential intensification across the Region.	specific residential intensification targets to each lower tier municipality. Option B is planned to achieve 45% residential intensification across the Region.	be defined by local municipalities. Option C assumes 41% residential intensification across the Region	be defined by local municipalities through local strategies. Option D assumes 42% residential intensification across the Region.
		<i>Well</i>	<i>Well</i>	<i>Well</i>	<i>Well</i>
<i>Overall Ranking – Housing Affordability Indicators</i>		<b>Somewhat Well</b>	<b>Well</b>	<b>Well</b>	<b>Very Well</b>
Ecological Indicators					
<ul style="list-style-type: none"> <li>How well does the option protect Niagara’s natural heritage system?</li> </ul>	<ul style="list-style-type: none"> <li>Estimated area of Core Natural Heritage System containing or immediately adjacent to new urban land<sup>5</sup></li> <li>Estimated number of Potential Natural Heritage Corridors immediately adjacent to by new urban land</li> </ul>	<ul style="list-style-type: none"> <li>Option A includes two urban boundary expansions, one in Smithville and the second in Niagara Falls. Conceptual expansions contain or are immediately adjacent to 40 hectares of the Core Natural Heritage System (including new Provincially Significant Wetlands).</li> <li>The conceptual urban expansion area is not immediately adjacent to any of the Potential Natural Heritage Corridors.</li> </ul>	<ul style="list-style-type: none"> <li>Option B includes one urban boundary expansion for employment purposes in Fort Erie. Conceptual expansion is immediately adjacent to 10 hectares of Core Natural Heritage System.</li> <li>The conceptual expansion area is immediately adjacent to one Potential Natural Heritage Corridor.</li> </ul>	<ul style="list-style-type: none"> <li>Option C includes one urban boundary expansion for residential purposes in Smithville. This conceptual expansion is adjacent to 0 hectares of the Core Natural Heritage System.</li> <li>The conceptual urban expansion area is not immediately adjacent to any of the Potential Natural Heritage Corridors.</li> </ul>	<ul style="list-style-type: none"> <li>Based on the forecast demand and supply analysis, Option D does not require any immediate urban boundary expansions.</li> </ul>
		<i>Not Very Well</i>	<i>Somewhat Well</i>	<i>Well</i>	<i>Very Well</i>
<ul style="list-style-type: none"> <li>How well does the option protect Niagara’s agricultural areas?</li> </ul>	<ul style="list-style-type: none"> <li>Estimated area of prime agricultural land lost to new urban land</li> </ul>	<ul style="list-style-type: none"> <li>Option A includes urban boundary expansions in Smithville and Niagara Falls. The conceptual expansion could result in the loss of 390 hectares of good general agricultural land.</li> </ul>	<ul style="list-style-type: none"> <li>Option B includes an urban boundary expansion for employment purposes in Fort Erie. The conceptual expansion could result in the loss of 20 hectares of good general agricultural land.</li> </ul>	<ul style="list-style-type: none"> <li>Option C includes an urban boundary expansion for residential purposes in Smithville. The conceptual expansion could result in the loss of 35 hectares of good general agricultural land.</li> </ul>	<ul style="list-style-type: none"> <li>Based on forecasted demand and supply, Option D does not require any major urban boundary expansions in Niagara.</li> </ul>
		<i>Not Very Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Very Well</i>
<ul style="list-style-type: none"> <li>How well does the option maintain the protection of Niagara’s groundwater?</li> </ul>	<ul style="list-style-type: none"> <li>Estimated area of new urban land which falls within NPCA’s high intrinsic</li> </ul>	<ul style="list-style-type: none"> <li>15 hectares of the conceptual urban expansion area fall within areas of high intrinsic</li> </ul>	<ul style="list-style-type: none"> <li>0 hectares of the conceptual urban expansion area fall within areas of high intrinsic</li> </ul>	<ul style="list-style-type: none"> <li>0 hectares of the conceptual urban expansion area fall within areas of high intrinsic</li> </ul>	<ul style="list-style-type: none"> <li>Based on forecasted demand and supply, Option D does not require any major urban</li> </ul>



**Draft Evaluation Table – Phase 3, A Range of Options**  
 Region of Niagara Growth Management Strategy



Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
	susceptibility areas <sup>6</sup>	susceptibility.	susceptibility.	susceptibility.	boundary expansions in Niagara
		<i>Not Very Well</i>	<i>Very Well</i>	<i>Very Well</i>	<i>Very Well</i>
<ul style="list-style-type: none"> <li>How well does the option help to reduce the Region's carbon footprint?</li> </ul>	<ul style="list-style-type: none"> <li>Estimated carbon footprint</li> </ul>	<ul style="list-style-type: none"> <li>At a minimum estimating carbon footprint requires data on household energy consumption and vehicle kilometers traveled. Estimates for household energy consumption are primarily determined by unit type. Since all options result in the same overall unit mix, the outcomes of a carbon footprint analysis would show differences based on transportation related considerations, such as travel patterns, level of congestion and mode split. At the time of evaluation transportation modeling data was not available to estimate vehicle kilometers traveled. Based on the limitations described above, all options are considered to the same from a carbon footprint perspective.</li> </ul>	<ul style="list-style-type: none"> <li>At a minimum estimating carbon footprint requires data on household energy consumption and vehicle kilometers traveled. Estimates for household energy consumption are primarily determined by unit type. Since all options result in the same overall unit mix, the outcomes of a carbon footprint analysis would show differences based on transportation related considerations, such as travel patterns, level of congestion and mode split. At the time of evaluation transportation modeling data was not available to estimate vehicle kilometers traveled. Based on the limitations described above, all options are considered to the same from a carbon footprint perspective.</li> </ul>	<ul style="list-style-type: none"> <li>At a minimum estimating carbon footprint requires data on household energy consumption and vehicle kilometers traveled. Estimates for household energy consumption are primarily determined by unit type. Since all options result in the same overall unit mix, the outcomes of a carbon footprint analysis would show differences based on transportation related considerations, such as travel patterns, level of congestion and mode split. At the time of evaluation transportation modeling data was not available to estimate vehicle kilometers traveled. Based on the limitations described above, all options are considered to the same from a carbon footprint perspective.</li> </ul>	<ul style="list-style-type: none"> <li>At a minimum estimating carbon footprint requires data on household energy consumption and vehicle kilometers traveled. Estimates for household energy consumption are primarily determined by unit type. Since all options result in the same overall unit mix, the outcomes of a carbon footprint analysis would show differences based on transportation related considerations, such as travel patterns, level of congestion and mode split. At the time of evaluation transportation modeling data was not available to estimate vehicle kilometers traveled. Based on the limitations described above, all options are considered to the same from a carbon footprint perspective.</li> </ul>
		<i>Data Not Sufficient</i>	<i>Data Not Sufficient</i>	<i>Data Not Sufficient</i>	<i>Data Not Sufficient</i>
<ul style="list-style-type: none"> <li>How well does the option support the provision of 'green infrastructure' solutions?</li> </ul>	<ul style="list-style-type: none"> <li>Flexibility to incorporate 'green infrastructure' solutions. The term "green infrastructure" refers to</li> </ul>	<ul style="list-style-type: none"> <li>The ability to implement green infrastructure solutions is not perceived to differ from one option to the next. Control over</li> </ul>	<ul style="list-style-type: none"> <li>The ability to implement green infrastructure solutions is not perceived to differ from one option to the next. Control over</li> </ul>	<ul style="list-style-type: none"> <li>The ability to implement green infrastructure solutions is not perceived to differ from one option to the next. Control over</li> </ul>	<ul style="list-style-type: none"> <li>The ability to implement green infrastructure solutions is not perceived to differ from one option to the next. Control over</li> </ul>

<b>Draft Evaluation Table – Phase 3, A Range of Options</b> Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
	human-designed devices that mimic nature in function, or strive to reduce their impact on ecological systems and functions <sup>7</sup> .	the attributes of any one given solution occurs at a design scale and are not heavily influenced by the distribution of population and employment. Incorporating green infrastructure solutions could be features of any of the three options.	the attributes of any one given solution occurs at a design scale and are not heavily influenced by the distribution of population and employment. Incorporating green infrastructure solutions could be features of any of the three options.	the attributes of any one given solution occurs at a design scale and are not heavily influenced by the distribution of population and employment. Incorporating green infrastructure solutions could be features of any of the three options.	the attributes of any one given solution occurs at a design scale and are not heavily influenced by the distribution of population and employment. Incorporating green infrastructure solutions could be features of any of the three options.
		<i>Well</i>	<i>Well</i>	<i>Well</i>	<i>Well</i>
<i>Overall Ranking – Ecological Indicators</i>		<b>Not Very Well</b>	<b>Well</b>	<b>Well</b>	<b>Very Well</b>
<b>Social Services, Community Health, and Cultural Indicators<sup>8</sup></b>					
<ul style="list-style-type: none"> <li>How well does the option direct growth to locations with appropriate levels of social infrastructure and public service facilities?</li> </ul>	<ul style="list-style-type: none"> <li>Potential to maximize benefits from existing investments in facilities and services</li> </ul>	<ul style="list-style-type: none"> <li>The continued spread of population throughout the Region, as set out in Option A, creates a disconnect between spread of population and concentration of facility and service investments into urban centres and requires the Region and all local municipalities to replicate and distribute services and facilities throughout Niagara creating a financial burden that may not be sustainable.</li> </ul>	<ul style="list-style-type: none"> <li>Option B most closely links urban development to locales with concentrations of existing facilities, services and higher density/affordable housing, especially in St. Catharines and Welland.</li> </ul>	<ul style="list-style-type: none"> <li>In Option C, the focus of growth in urban centres along with 40% intensification requirement creates a moderate opportunity to maximize benefits of existing investments (i.e., taking advantage of existing investments in Niagara Falls is positive but expanding less well served centres such as Beamsville, Grimsby and Smithville offsets the advantage).</li> </ul>	<ul style="list-style-type: none"> <li>Option D closely links urban development to locales with concentrations of existing facilities and services. The Region will meet provincial requirements for urban intensification of residential uses with a significant increase in medium density development in all urban centres as well as a significant increase in higher density development in St. Catharines. A broader range of future housing needs can be met in this growth option. Regional efforts to create more affordable and accessible housing should continue to be targeted to urban centres offering the greatest access to community, health and social services as well as employment opportunities.</li> </ul>
		<i>Not Very Well</i>	<i>Very Well</i>	<i>Somewhat Well</i>	<i>Very Well</i>



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
	<ul style="list-style-type: none"> <li>Potential to use co-location of facilities to effectively serve residents and achieve cost efficiencies</li> </ul>	<ul style="list-style-type: none"> <li>Option A limits opportunities for and benefits of facilities re-use and makes co-location of small service units necessary but financially challenging.</li> </ul>	<ul style="list-style-type: none"> <li>This option offers greater potential for co-location of facilities and services in close proximity to residents.</li> </ul>	<ul style="list-style-type: none"> <li>Similarly to Option A, this option limits the opportunity for and the benefits of facilities re-use and makes co-location of small service units necessary but financially challenging.</li> </ul>	<ul style="list-style-type: none"> <li>This option offers the potential for co-location of facilities and services in close proximity to residents. Regional efforts to effectively use existing facilities and maximize cost efficiencies in the delivery of services should be continued.</li> </ul>
		<i>Somewhat Well</i>	<i>Very Well</i>	<i>Somewhat Well</i>	<i>Very Well</i>
	<ul style="list-style-type: none"> <li>Potential to make effective reuse of vacant and underutilized public service facilities for emerging and expanding community needs</li> </ul>	<ul style="list-style-type: none"> <li>The current level of opportunity will be extended into the future. See comment above on co-location.</li> </ul>	<ul style="list-style-type: none"> <li>Concentration of growth into St. Catharines, Welland and also Port Colborne and Fort Erie promotes co-location opportunities and greater use/reuse of underutilized facilities</li> </ul>	<ul style="list-style-type: none"> <li>There is a moderate positive impact achieved if the distribution of growth is limited to a smaller subset of urban centres (approx. 10) of the 28 urban settlement areas that exist in the Region.</li> </ul>	<ul style="list-style-type: none"> <li>Concentration of growth into St. Catharines, Welland, Grimsby, Port Colborne and Fort Erie promotes co-location opportunities and greater use/reuse of underutilized facilities. Effective reuse of these sites and facilities can enhance community and economic revitalization efforts in these communities.</li> </ul>
		<i>Not Very Well</i>	<i>Well</i>	<i>Well</i>	<i>Very Well</i>
	<ul style="list-style-type: none"> <li>Potential to improve access to existing transit, child care spaces, social housing, and nursing homes</li> </ul>	<ul style="list-style-type: none"> <li>This option limits the financial feasibility of transit and exacerbates accessibility issues for those who do not have transit available or can not afford personal automobile use.</li> <li>The 40% regional intensification target, that is included in all options, partially offsets the impacts noted above.</li> </ul>	<ul style="list-style-type: none"> <li>Concentrated urban development especially in a north-south corridor between Port Colborne and St. Catharines increases the opportunity for inter-city/regional transit as well as the feasibility of local transit in this corridor.</li> </ul>	<ul style="list-style-type: none"> <li>The ability to offer more regional transit is limited by the spread of urban population.</li> </ul>	<ul style="list-style-type: none"> <li>Concentrated urban development especially in the north-south corridor between Port Colborne and St. Catharines and the east-west corridor between St. Catharines and Grimsby increases the opportunity for inter-city/regional transit as well as the feasibility of increased local transit</li> </ul>
		<i>Not Very Well</i>	<i>Very Well</i>	<i>Not Very Well</i>	<i>Very Well</i>
<ul style="list-style-type: none"> <li>How well does the option promote healthy, active living?</li> </ul>	<ul style="list-style-type: none"> <li>Potential to offer opportunities to improve access to</li> </ul>	<ul style="list-style-type: none"> <li>Local municipalities will continue to maintain recreational facilities</li> </ul>	<ul style="list-style-type: none"> <li>In Option B, Regional and local governments will be able to</li> </ul>	<ul style="list-style-type: none"> <li>This option provides the median impact between</li> </ul>	<ul style="list-style-type: none"> <li>In Option D, Regional and local governments will be able to</li> </ul>



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
	recreational facilities, public spaces, trails, parks, and sports facilities	and offer recreational services throughout the Region.	concentrate new recreational investments consistent with the concentration of new growth.	Options A & B. Local municipalities will continue to maintain recreational facilities and offer recreational services throughout the Region.	concentrate new recreational investments consistent with the concentration of new growth.
		<i>Somewhat Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Very Well</i>
	<ul style="list-style-type: none"> <li>Potential to support pedestrian-oriented community design</li> </ul>	<ul style="list-style-type: none"> <li>This option necessitates greater time spent commuting to work, school, shopping and services which undermines an active lifestyle.</li> <li>Continued development of low density suburban neighbourhoods limits ability to achieve walkable communities and is not transit supportive.</li> </ul>	<ul style="list-style-type: none"> <li>This option provides the greatest potential for active transportation and public transit to offset use of private automobile and the greatest potential to increase live-work opportunities. There is a need to address issues of air quality in urban areas and in transit corridors.</li> </ul>	<ul style="list-style-type: none"> <li>Intensification targets may result in more walkable community design. Commuting to work, school, shopping and services will continue to undermine an active lifestyle.</li> </ul>	<ul style="list-style-type: none"> <li>This option provides the greatest potential for active transportation and public transit to offset use of private automobile as well as the greatest potential to increase live-work opportunities. There is a need to address issues of air quality in urban areas and in transit corridors.</li> </ul>
		<i>Not Very Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Well</i>
<ul style="list-style-type: none"> <li>How well does the option promote preservation of cultural heritage assets?</li> </ul>	<ul style="list-style-type: none"> <li>Potential to enhance Niagara as a destination for tourists</li> </ul>	<ul style="list-style-type: none"> <li>Continued urbanization based on current trends, as set out in Option A, undermines tourism potential in the Niagara Parkway and QEW corridors where factors such as traffic congestion and urban encroachment on tourism assets will continue.</li> </ul>	<ul style="list-style-type: none"> <li>Option B encourages growth in the southern tier of the Region while limiting the impact of urbanization on tourism assets in locales such as the Niagara Parkway and Niagara-on-the-Lake.</li> </ul>	<ul style="list-style-type: none"> <li>This option provides the median impact between Options A &amp; B. Option C, which distributes growth to a larger number of urban centres, may threaten tourism assets in locales such as the QEW and Niagara-on-the-Lake and undermine tourism potential.</li> </ul>	<ul style="list-style-type: none"> <li>Option D encourages growth in the southern tier of the Region while limiting the impact of urbanization on tourism assets in locales such as the Niagara Parkway and Niagara-on-the-Lake.</li> </ul>
		<i>Not Very Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Well</i>
	<ul style="list-style-type: none"> <li>Potential to protect Niagara's cultural heritage assets</li> </ul>	<ul style="list-style-type: none"> <li>Cultural heritage assets are more heavily concentrated in the northern portion of the Region and along the Niagara Parkway and the Canal. While many of these assets are designated</li> </ul>	<ul style="list-style-type: none"> <li>Option B directs development away from the northern portion of the Region where cultural assets are most heavily concentrated. While many of these assets are protected or</li> </ul>	<ul style="list-style-type: none"> <li>Cultural heritage assets are more heavily concentrated in the northern portion of the Region and along the Niagara Parkway. While many of these assets are protected or publicly</li> </ul>	<ul style="list-style-type: none"> <li>This option directs development away from the northern portion of the Region where cultural assets are most heavily concentrated. While many of these assets are protected or</li> </ul>

Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
		and/or publicly owned, the encroachment of urban development may be detrimental. Urban intensification also must have regard to these assets and ensure their protection.	publicly owned, the encroachment of urban development may be detrimental, especially in the three largest cities. Urban intensification also must have regard to these assets and ensure their protection.	owned, the encroachment of urban development may be detrimental. Urban intensification also must have regard to these assets and ensure their protection.	publicly owned, the encroachment of urban development may be detrimental, especially in the three largest cities. Urban intensification also must have regard to these assets and ensure their protection.
		<i>Not Very Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Well</i>
	<ul style="list-style-type: none"> <li>Potential to support diverse community identities</li> </ul>	<ul style="list-style-type: none"> <li>Community identities may be negatively affected in the smaller urban centres by the introduction of new residents accommodated in an urban form not consistent with their small town images and lifestyles.</li> </ul>	<ul style="list-style-type: none"> <li>This option promotes retention of small towns and villages across the Region.</li> </ul>	<ul style="list-style-type: none"> <li>Community identities may be negatively affected in the smaller urban centres by the introduction of new residents accommodated in an urban form not consistent with their small town images and lifestyles.</li> </ul>	<ul style="list-style-type: none"> <li>This option offers an approach to growth that is consistent with the needs of rural, small town and urban communities. The option meets the need for new urban growth by concentrating it in the serviced urban centres at a higher level of intensity. The Region's small towns and villages retain their current character through more limited and less intense development.</li> </ul>
		<i>Somewhat Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>	<i>Very Well</i>
<ul style="list-style-type: none"> <li>How well is the option supported by Niagara's residents and businesses?</li> </ul>	<ul style="list-style-type: none"> <li>Degree of favourable public response to option</li> </ul>	<ul style="list-style-type: none"> <li>At the community workshops held in May 2008, Option A was least favoured.</li> </ul>	<ul style="list-style-type: none"> <li>At the community workshops held in May 2008, Option B was most favoured by participants conditional upon addressing: increased attraction efforts for new industry and business to the South to match the intended increase in population; 'entice' buyers to the South with infrastructure and employment investments; ensure that location decisions favour the existing vacant,</li> </ul>	<ul style="list-style-type: none"> <li>At the community workshops held in May 2008, Option C was perceived as the compromise position between Options A &amp; B and was favoured by some participants, especially in West Niagara.</li> </ul>	<ul style="list-style-type: none"> <li>Option D is an effective response to comments received from the public at community workshops held in May 2008 and from a range of stakeholders including the local municipalities, community and business organizations and Regional advisory committees.</li> </ul>

Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
			serviced industrial land base over greenfield development; intensify existing employment lands; include growth in West Lincoln which is in the South; and, ensure that new growth is not sprawling in form and does not infringe on environmentally sensitive areas and cultural heritage assets.		
		<i>Not Very Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Very Well</i>
<i>Overall Ranking – Social Services, Community Health, and Cultural Indicators</i>		<b>Not Very well</b>	<b>Well</b>	<b>Somewhat Well</b>	<b>Very Well</b>
Economic Policy Indicators					
<ul style="list-style-type: none"> <li>▪ How well does the option support growth of the Urban Growth Centre, Gateway Economic Zone, and Gateway Economic Centre?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Location of job growth in applicable urban areas (number and percent of new jobs):                             <ul style="list-style-type: none"> <li>○ St. Catharines Urban Growth Centre;</li> <li>○ Gateway Economic Zone;</li> <li>○ Gateway Economic Centre; and,</li> <li>○ Total percent of overall job growth in St. Catharines, GEZ and GEC.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ St. Catharines, 8,507 jobs (17.9%);</li> <li>▪ Gateway Economic Zone, 13,901 jobs (29.2%);</li> <li>▪ Gateway Economic Centre 4,873 jobs (10.3%); and,</li> <li>▪ 57.40%.</li> </ul>	<ul style="list-style-type: none"> <li>▪ St. Catharines, 8,896 (18.7%);</li> <li>▪ Gateway Economic Zone, 15,733 jobs (33.1%);</li> <li>▪ Gateway Economic Centre 8,974 jobs (18.9%); and,</li> <li>▪ 70.70%.</li> </ul>	<ul style="list-style-type: none"> <li>▪ St. Catharines, 8,507 jobs (17.9%);</li> <li>▪ Gateway Economic Zone, 14,841 jobs (31.2%);</li> <li>▪ Gateway Economic Centre 5,859 jobs (12.3%); and,</li> <li>▪ 61.40%</li> </ul>	<ul style="list-style-type: none"> <li>▪ St. Catharines, 5,576 jobs (11.7%);</li> <li>▪ Gateway Economic Zone, 16,012 jobs (33.7%);</li> <li>▪ Gateway Economic Centre 6,697 jobs (14.1%); and,</li> <li>▪ 59.5%</li> </ul>
		<i>Somewhat Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>
<ul style="list-style-type: none"> <li>▪ How well does the option provide for projected employment numbers and sector trends?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Potential to accommodate trends, by sector growth</li> </ul>	<ul style="list-style-type: none"> <li>▪ Overall growth by sector in the Region is same for each option (e.g. industrial growth is 7,163 at regional level in each option), so each option performs equally well in terms of accommodating</li> </ul>	<ul style="list-style-type: none"> <li>▪ Overall growth by sector in the Region is same for each option so each option performs equally well. Each municipalities' share of sector growth is the same except for industrial (e.g. Fort</li> </ul>	<ul style="list-style-type: none"> <li>▪ Overall growth by sector in the Region is same for each option so each option performs equally well; each municipalities' share of growth is the same for Option within each</li> </ul>	<ul style="list-style-type: none"> <li>▪ Accommodates projected growth.</li> </ul>



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
		<p>projected employment growth. Each municipalities' share of sector growth is the same for Option A except for industrial (e.g. Fort Erie accounts for 8.2% of primary, 8.2% commercial, 8.2% institutional); Majority of new industrial growth is allocated to Fort Erie and St. Catharines (25% each), Niagara Falls (12%), and Welland (10%)</p>	<p>Erie accounts for 15.7% of primary, 15.7% commercial, 15.7% institutional, and 30% industrial). The key difference between this option and the others is the increased level of new employment growth in Welland and decreased role of Niagara Falls. Differs also for new industrial jobs: allocated a higher % of new industrial jobs to Welland (21%), Fort Erie (30%) and other southern urban areas (Thorold, Port Colborne), and lower portion to townships/small communities. Niagara Fall's share of new industrial employment is 4.5%. Option B is more suitable than the other two options taking into account sector trends/location factors - municipalities allocated a higher share of industrial employment are preferable to rural/small municipalities for additional industrial development; also lower levels of new industrial development in Niagara Falls may improve the attractiveness of the city for tourism.</p>	<p>municipality except for industrial (e.g. Fort Erie accounts for 8.7% of primary, 8.7% commercial, 8.7% institutional). Very similar to Option A: majority of new industrial growth is allocated to Fort Erie (25%) and St. Catharines (25%), Niagara Falls (12%) and Welland (11%).</p>	
		<i>Well</i>	<i>Very Well</i>	<i>Well</i>	<i>Well</i>
<ul style="list-style-type: none"> <li>How well does the option provide for employment areas in close proximity to support</li> </ul>	<ul style="list-style-type: none"> <li>Location of growth relative to existing transportation infrastructure (i.e. QEW, 406,</li> </ul>	<ul style="list-style-type: none"> <li>78.5% new employment growth in proximity to support infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>94.9% new employment growth in proximity to support infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>82.6% of new employment growth in proximity to support infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>84.3% new employment growth in proximity to support infrastructure</li> </ul>



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
infrastructure?	international bridge crossings etc.)				
		<i>Somewhat Well</i>	<i>Very Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>
<ul style="list-style-type: none"> <li>How well does the option support a ‘nodes’ approach to new development?</li> </ul>	<ul style="list-style-type: none"> <li>Location of growth relative to node development opportunities (i.e. number of major office jobs)</li> </ul>	<ul style="list-style-type: none"> <li>1,112 Major Office jobs: 603 in Niagara Falls and 509 in St. Catharines</li> </ul>	<ul style="list-style-type: none"> <li>1,084 Major Office jobs: 524 in Niagara Falls and 561 in St. Catharines.</li> </ul>	<ul style="list-style-type: none"> <li>1,169 Major Office jobs: 658 in Niagara Falls and 510 in St. Catharines.</li> </ul>	<ul style="list-style-type: none"> <li>1,220 Major Office jobs: 912 in Niagara Falls, 308 in St. Catharines.</li> </ul>
		<i>Somewhat Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>
<ul style="list-style-type: none"> <li>How well does the option support the Niagara Growth South Strategy?</li> </ul>	<ul style="list-style-type: none"> <li>Number and % of new jobs in Niagara Falls/Fort Erie Corridor</li> <li>Number and % of new jobs in the Thorold to Welland Corridor</li> <li>Total</li> </ul>	<ul style="list-style-type: none"> <li>13,901 (29.2%)</li> <li>9,402 (19.8%)</li> <li>23,303 (49%)</li> </ul>	<ul style="list-style-type: none"> <li>15,733 (33.1%)</li> <li>18,298 (38.5%)</li> <li>34,031 (71.6%)</li> </ul>	<ul style="list-style-type: none"> <li>14,841 (31.2%)</li> <li>11,431 (24.0%)</li> <li>26,272 (55.2%)</li> </ul>	<ul style="list-style-type: none"> <li>16,012 jobs (33.7%);</li> <li>12,173 (25.6%)</li> <li>28,185 (59.3%)</li> </ul>
		<i>Somewhat Well</i>	<i>Very Well</i>	<i>Well</i>	<i>Well</i>
<ul style="list-style-type: none"> <li>How well does the option provide for ‘complete communities’ from an economic perspective?</li> </ul>	<ul style="list-style-type: none"> <li>Ratio of total number of jobs projected for fixed places of employment in 2031 relative to projected population</li> <li>Location of economic growth relative to residential growth</li> </ul>	<ul style="list-style-type: none"> <li>The overall jobs to population ratio for 2031 is the same for each option: 0.44, which is slightly higher than the 2001 level. Generally regions/communities strive to a 0.50 level. Only two communities are projected at ratios of .50 or more: Niagara-on-the-Lake and St. Catharines. Niagara Falls projected employment to population ratio is 0.46. At the individual community level, not considerably better or worse than other options.</li> <li>Employment to population growth ratios are somewhat more balanced than in Option B, but</li> </ul>	<ul style="list-style-type: none"> <li>The overall jobs to population ratio is the same for each option: 0.44 in 2031, which is slightly higher than the 2001 level. Generally regions/communities strive to a 0.50 level. Only 2 communities are projected to be at the 0.50 ratio or over: St. Catharines at 0.51 and Niagara on the Lake at 0.69. Niagara Falls and Lincoln are 0.47. It is noted that the Niagara on the Lake employment to population ratio is .69 compared to .59 and .62 in Options A and C respectively (ratio in 2001 was 0.65). Ratios</li> </ul>	<ul style="list-style-type: none"> <li>The overall jobs to population ratio is the same for each option :0.44 in 2031, which is slightly higher than the 2001 level. Generally regions/communities strive to a 0.50 level. Only 2 communities at the 0.50 ratio or over: Niagara-on-the-Lake (0.62) and St. Catharines (.50) ; Niagara Fall's ratio is 0.46. .</li> <li>Employment to population growth ratios are somewhat more balanced than in Option B, but this levels out when total employment to total population growth is considered.</li> </ul>	<ul style="list-style-type: none"> <li>The overall jobs to population ratio is 0.43 for 2031, which is slightly higher than the 2001 level (0.41) and slightly lower than noted in Options A to C since the overall projected employment level has been decreased slightly (to take into account employment decreases from 2001 to 2006). Generally regions/communities strive to a 0.50 level. Only 1 community has a ratio of 0.50 or over: Niagara-on-the-Lake (0.62) . St. Catharines ratio is 0.47 and Niagara Fall's ratio is 0.49. In comparison with the 2001 ratios, the ratios for 2006 are</li> </ul>



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
		this levels out when total employment to total population growth is considered.	<p>of other municipalities are not significantly different from other options.</p> <ul style="list-style-type: none"> <li>Higher jobs growth than population growth for some communities (Grimsby, Lincoln, Pelham, West Lincoln and St. Catharines) over the planning period compared to other options, but not significant differences for overall employment to population ratios.</li> </ul>		slightly higher (.01 to .03 higher) for Fort Erie, Grimsby, Lincoln, Pelham, Port Colborne, St. Catharines, Wainsfleet, and Thorold. The ratio for Niagara Falls increases from 0.44 to 0.49. The ratio decreases from 0.67 to 0.62 for Niagara-on-the-Lake and from 0.40 to 0.39 for Welland. The most significant increase was noted for the Township of West Lincoln, where the employment to population ratio would increase from 0.25 to 0.36.
		<i>Somewhat Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>
<ul style="list-style-type: none"> <li>How well does the option support flexibility in employment opportunities?</li> </ul>	<ul style="list-style-type: none"> <li>Potential to accommodate 'off trend' employment</li> </ul>	<ul style="list-style-type: none"> <li>Cannot be determined at this level of analysis</li> </ul>	<ul style="list-style-type: none"> <li>Cannot be determined at this level of analysis</li> </ul>	<ul style="list-style-type: none"> <li>Cannot be determined at this level of analysis</li> </ul>	<ul style="list-style-type: none"> <li>Cannot be determined at this level of analysis</li> </ul>
		<i>Data Not Sufficient</i>	<i>Data Not Sufficient</i>	<i>Data Not Sufficient</i>	<i>Data Not Sufficient</i>
<ul style="list-style-type: none"> <li>How well does the option support Niagara as a destination for tourists?</li> </ul>	<ul style="list-style-type: none"> <li>Potential to accommodate tourism-related development</li> </ul>	<ul style="list-style-type: none"> <li>Tourism development is accounted for in the Commercial/Retail sector of the Employment forecast. Each municipalities share of this sector is the same as its share of other sectors with the exception of industrial - for example, Niagara Falls' share of new growth in the Commercial/Retail sector is the same as its share of growth in primary and institutional sectors: Niagara Fall's share is 19.7%</li> </ul>	<ul style="list-style-type: none"> <li>Tourism development is accounted for in the Commercial/Retail sector of the Employment forecast. Each municipalities share of this sector is the same as its share of other sectors with the exception of industrial - for example, Niagara Falls' share of new growth in the Commercial/Retail sector is the same as its share of growth in primary and institutional</li> </ul>	<ul style="list-style-type: none"> <li>Tourism development is accounted for in the Commercial/Retail sector of the Employment forecast. Each municipalities share of this sector is the same as its share of other sectors with the exception of industrial - for example, Niagara Falls' share of new growth in the Commercial/Retail sector is the same as its share of growth in primary and institutional</li> </ul>	<p>Will accommodate tourism development. Tourism development is accounted for in the Commercial/Retail sector of the Employment forecast. Communities with the highest share of projected commercial/retail growth are: Niagara Falls (29.8%), Welland (14.9%), St. Catharines (10.1%), and Fort Erie (8.2%). In particular, tourism related growth is expected in Niagara</p>



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
		(6,026); Niagara on the Lake's share is 8.2% (2,508); Fort Erie's share is 8.2% (2,508), and Port Colborne's share is 3.7% (1,146). No specific tourism development areas noted in Option.	sectors: Niagara Fall's share is 17.1% (5,237); Niagara on the Lake's share is 3.2% (977); Fort Erie's share is 15.7% (4,823), and Port Colborne's share is 5.9% (1,819) Greater concentration of retail/commercial (which includes tourism sector) in southern areas of Niagara Region may facilitate greater tourism development of area/spread of economic benefits to those areas. No specific tourism development areas noted in Option.	sectors: Niagara Fall's share is 21.5% (6,584); Niagara on the Lake's share is 6.8% (2,071); Fort Erie's share is 8.7% (2,663), and Port Colborne's share is 4.8% (1,480). No specific tourism development areas noted in Option.	Falls, Fort Erie and Welland.
		Well	Well	Well	Well
<i>Overall Ranking – Economic Policy Indicators</i>		<b>Somewhat Well</b>	<b>Very Well</b>	<b>Well</b>	<b>Well</b>
Alternative Transportation Choices & Commute Times					
<ul style="list-style-type: none"> <li>How well is the option likely to reduce commuting times?</li> </ul>	<ul style="list-style-type: none"> <li>Qualitative assessment of the option's impact on commuting<sup>9</sup></li> <li>Qualitative assessment of the option's impact on goods movement<sup>10</sup></li> </ul>	<ul style="list-style-type: none"> <li>Highest dispersion of population and employment growth of all options which increases need for auto use and potential for inter-city travel (poor live/work relationship).</li> <li>In this option, 86% of industrial growth occurs in municipalities with major highway corridors.</li> </ul>	<ul style="list-style-type: none"> <li>Highest concentration of population and employment growth in the three largest cities (St. Catharines, Welland, Niagara Falls). The rest concentrated in two neighbouring cities (Thorold, Fort Erie). These are well connected by the highway network and all have transit services. May create congestion issues on certain corridors.</li> <li>In this option, 91% of industrial growth in municipalities with major highway corridors.</li> </ul>	<ul style="list-style-type: none"> <li>Second highest concentration of population and employment growth in the three largest cities (St. Catharines, Welland, Niagara Falls), while the rest is dispersed in other municipalities. The remaining growth focused on other rural centres (ie. West Lincoln). Dispersion of traffic may reduce congestion if live-work relationships are formed.</li> <li>In this option, 86% of industrial growth in municipalities with major highway corridors.</li> </ul>	<ul style="list-style-type: none"> <li>Slightly lower concentrations of population and employment growth in the three largest cities (St. Catharines, Welland, Niagara Falls), compared to Option C. Dispersal of growth outside three primary centres is generally similar to Option C. Dispersion of traffic may reduce congestion if live-work relationships are formed.</li> <li>In this option, 81% of industrial growth in municipalities with major highway corridors.</li> </ul>



**Draft Evaluation Table – Phase 3, A Range of Options**  
 Region of Niagara Growth Management Strategy



Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
		<i>Somewhat Well</i>	<i>Very Well</i>	<i>Well</i>	<i>Somewhat Well</i>
<ul style="list-style-type: none"> <li>▪ How well does the option support a range of transportation choices?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Potential to support a land use pattern, density and mix of uses that minimizes the length and number of vehicle trips<sup>11</sup></li> <li>▪ Potential to support public transit and other alternative transportation modes, including commuter rail, bus, cycling and walking. Potential to support these initiatives is based on a number of factors, including:                             <ol style="list-style-type: none"> <li>1. Distribution of medium and high density development (particularly in municipalities with existing transit service);</li> <li>2. Level of intensification as opposed to greenfield development;</li> <li>3. Level of development occurring close to a potential commuter rail corridor (identified as the rail corridor connecting the City of Hamilton and Niagara Falls (including Grimsby, Lincoln, St. Catharines); and,</li> <li>4. Concentration of population/ employment (live-work) in the three largest municipalities. The theory is that in larger municipalities, there is more opportunity to work</li> </ol> </li> </ul>	<ul style="list-style-type: none"> <li>▪ 49% of the population growth and 47% of employment is allocated to municipalities with established transit systems.</li> <li>▪ 57% of the high and 55% of the medium density unit growth is allocated to municipalities with established transit systems.</li> <li>▪ Option A is planned to achieve a region wide intensification target of 40%.</li> <li>▪ Commuter Rail – 50% of population growth on potential commuter rail corridor.</li> <li>▪ Lowest concentration of live-work in three largest municipalities supports least amount walking and cycling trips.</li> </ul>	<ul style="list-style-type: none"> <li>▪ 57% of the population growth and 55% of employment is allocated to municipalities with established transit systems.</li> <li>▪ 83% of the high and 74% of the medium density unit growth is allocated to municipalities with established transit systems.</li> <li>▪ Option B is planned to achieve a region wide intensification target of 45%.</li> <li>▪ Commuter Rail – 40% of population growth on potential commuter rail corridor.</li> <li>▪ Highest concentration of live-work in three largest municipalities supports more walking and cycling trips.</li> </ul>	<ul style="list-style-type: none"> <li>▪ 54% of the population growth and 59% of employment is allocated to municipalities with established transit systems.</li> <li>▪ 61% of the high and 59% of the medium density unit growth is allocated to municipalities with established transit systems.</li> <li>▪ Option C is planned to achieve a region wide intensification target of 41%.</li> <li>▪ Commuter Rail – 50% of population growth on potential commuter rail corridor.</li> <li>▪ Second highest concentration of live-work in three largest municipalities supports more walking and cycling trips.</li> </ul>	<ul style="list-style-type: none"> <li>▪ 52% of the population growth and 49% of employment is allocated to municipalities with established transit systems</li> <li>▪ 67% of the high and 62% of the medium density unit growth is allocated to municipalities with established transit systems.</li> <li>▪ Option D is planned to achieve a region wide intensification target of 42%.</li> <li>▪ Commuter Rail – 51% of population growth on potential commuter rail corridor.</li> <li>▪ Slightly lower concentrations of live-work in three largest municipalities supports fewer walking and cycling trips.</li> </ul>

<b>Draft Evaluation Table – Phase 3, A Range of Options</b> Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
	near where you live (high choice of jobs), facilitating walking, cycling and transit use.				
		<i>Somewhat Well</i>	<i>Well</i>	<i>Well</i>	<i>Well</i>
<ul style="list-style-type: none"> <li>▪ How well does the option support integration of existing transit systems?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Relative proximity of residents and employment to existing and future transit opportunities. Based on proposed growth (population and employment) in municipalities with:                             <ol style="list-style-type: none"> <li>1. Established transit service (St. Catharines, Niagara Falls, Welland)</li> <li>2. Limited Transit service (Fort Erie, Port Colborne, Thorold, NOTL)</li> <li>3. No transit services (West Lincoln, Grimsby, Lincoln, Wainfleet, Pelham)</li> </ol>                             Options with a higher percentage of growth in municipalities with transit were ranked favourably.                         </li> </ul>	<ul style="list-style-type: none"> <li>▪ Distribution of population growth to municipalities with:                             <ul style="list-style-type: none"> <li>○ Established Transit: 49%</li> <li>○ Limited Transit: 26%</li> <li>○ No Transit: 25%</li> </ul> </li> <li>▪ Distribution of employment growth to municipalities with:                             <ul style="list-style-type: none"> <li>○ Employment Growth:                                     <ul style="list-style-type: none"> <li>○ Established Transit: 47%</li> <li>○ Limited Transit: 27%</li> <li>○ No Transit: 26%</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Distribution of population growth to municipalities with:                             <ul style="list-style-type: none"> <li>○ Established Transit: 57%</li> <li>○ Limited Transit: 39%</li> <li>○ No Transit: 4%</li> </ul> </li> <li>▪ Distribution of employment growth to municipalities with:                             <ul style="list-style-type: none"> <li>○ Employment Growth:                                     <ul style="list-style-type: none"> <li>○ Established Transit: 55%</li> <li>○ Limited Transit: 33%</li> <li>○ No Transit: 12%</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Distribution of population growth to municipalities with:                             <ul style="list-style-type: none"> <li>○ Established Transit: 54%</li> <li>○ Limited Transit: 27%</li> <li>○ No Transit: 19%</li> </ul> </li> <li>▪ Distribution of employment growth to municipalities with:                             <ul style="list-style-type: none"> <li>○ Employment Growth:                                     <ul style="list-style-type: none"> <li>○ Established Transit: 59%</li> <li>○ Limited Transit: 19%</li> <li>○ No Transit: 22%</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Distribution of population growth to municipalities with:                             <ul style="list-style-type: none"> <li>○ Established Transit: 52%</li> <li>○ Limited Transit: 28%</li> <li>○ No Transit: 20%</li> </ul> </li> <li>▪ Distribution of employment growth to municipalities with:                             <ul style="list-style-type: none"> <li>○ Established Transit: 49%</li> <li>○ Limited Transit: 30%</li> <li>○ No Transit: 21%</li> </ul> </li> </ul>
		<i>Not Very Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>
<ul style="list-style-type: none"> <li>▪ How well does the option support transit supportive densities and/or a ‘nodes and corridors’ approach to development?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Potential to provide a land use system integrated with transit options. Based on percentage of high, medium, and low density development in cities with established transit services (St. Catharines,</li> </ul>	<ul style="list-style-type: none"> <li>▪ Distribution of density in established transit municipalities:                             <ul style="list-style-type: none"> <li>○ High: 15%</li> <li>○ Medium: 29%</li> <li>○ Low: 56%</li> </ul> </li> <li>▪ Unit mix summary for established transit municipalities:</li> </ul>	<ul style="list-style-type: none"> <li>▪ Distribution of density in established transit municipalities:                             <ul style="list-style-type: none"> <li>○ High: 19%</li> <li>○ Medium: 33%</li> <li>○ Low: 48%</li> </ul> </li> <li>▪ Unit mix summary for</li> </ul>	<ul style="list-style-type: none"> <li>▪ % Density in Established Transit municipalities                             <ul style="list-style-type: none"> <li>○ High: 15%</li> <li>○ Medium: 27%</li> <li>○ Low: 58%</li> </ul> </li> <li>▪ Unit mix summary for established transit</li> </ul>	<ul style="list-style-type: none"> <li>▪ % Density in Established Transit municipalities                             <ul style="list-style-type: none"> <li>○ High: 17%</li> <li>○ Medium: 30%</li> <li>○ Low: 53%</li> </ul> </li> <li>▪ Unit mix summary for established transit</li> </ul>



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
	Niagara Falls, Welland). Cities without transit service were not evaluated as high densities would have little impact on existing transit options.	<ul style="list-style-type: none"> <li>o High: 3,577</li> <li>o Medium: 6,842</li> <li>o Low: 13,498</li> </ul>	established transit municipalities: <ul style="list-style-type: none"> <li>o High: 5,209</li> <li>o Medium: 9,152</li> <li>o Low: 13,333</li> </ul>	municipalities: <ul style="list-style-type: none"> <li>o High: 3,797</li> <li>o Medium: 7,249</li> <li>o Low: 15,003</li> </ul>	municipalities: <ul style="list-style-type: none"> <li>o High: 4,178</li> <li>o Medium: 7,651</li> <li>o Low: 13,220</li> </ul>
		<i>Not Very Well</i>	<i>Very Well</i>	<i>Somewhat Well</i>	<i>Well</i>
<ul style="list-style-type: none"> <li>▪ Does the option support closer live-work connections?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Qualitative assessment of impact of intensification opportunities. Based on intensification target of each option<sup>12</sup>.</li> <li>▪ Qualitative assessment of location of any new employment lands relative to existing or planned residential areas. Based on concentration of population/ employment (live-work) in the three largest municipalities<sup>13</sup>.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Intensification targets:                             <ul style="list-style-type: none"> <li>o Region-wide, 40%</li> <li>o St. Catharines, 95%</li> <li>o Niagara Falls, 40%</li> <li>o Welland, 40%</li> </ul> </li> <li>▪ Lowest concentration of live-work in three largest municipalities supports least amount walking and cycling trips.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Intensification targets:                             <ul style="list-style-type: none"> <li>o Region-wide, 45%</li> <li>o St. Catharines, 95%</li> <li>o Niagara Falls, 45%</li> <li>o Welland, 45%</li> </ul> </li> <li>▪ Highest concentration of live-work in three largest municipalities supports more walking and cycling trips.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Intensification targets:                             <ul style="list-style-type: none"> <li>o Region-wide, 41%</li> <li>o St. Catharines, 95%</li> <li>o Niagara Falls, 40%</li> <li>o Welland, 40%</li> </ul> </li> <li>▪ Second highest concentration of live-work in three largest municipalities supports more walking and cycling trips.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Intensification targets:                             <ul style="list-style-type: none"> <li>o Region-wide, 40%</li> <li>o St. Catharines, 95%</li> <li>o Niagara Falls, 40%</li> <li>o Welland, 40%</li> </ul> </li> <li>▪ Slightly lower concentrations of live-work in three largest municipalities supports fewer walking and cycling trips.</li> </ul>
		<i>Somewhat Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>
<i>Overall Ranking: Alternative Transportation Choices &amp; Commute Time Indicators</i>		<b>Not Very Well</b>	<b>Well</b>	<b>Somewhat Well</b>	<b>Somewhat Well</b>
Infrastructure Investment					
<ul style="list-style-type: none"> <li>▪ How well can the option be serviced using existing systems?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Ability to use existing systems</li> <li>▪ Estimated cost of new services to support the option (costing and capacity information is provided in Appendix B)<sup>14</sup></li> </ul>	<ul style="list-style-type: none"> <li>▪ Water – The existing water system, as a whole, is capable of meeting the long term demands with minimum investment in the treatment facilities. Distribution system may require some upgrades.</li> <li>▪ Wastewater – Significant</li> </ul>	<ul style="list-style-type: none"> <li>▪ Water – The existing water system, as a whole, is capable of meeting the long term demands. Distribution system may require some upgrades.</li> <li>▪ Wastewater – Significant investment</li> </ul>	<ul style="list-style-type: none"> <li>▪ Water – The existing water system, as a whole, is capable of meeting the long term demands. Distribution system may require some upgrades.</li> <li>▪ Wastewater – Significant investment</li> </ul>	<ul style="list-style-type: none"> <li>▪ Water – The existing water system, as a whole, is capable of meeting the long term demands with minimum investment in the treatment facilities. Distribution system may require some upgrades.</li> <li>▪ Wastewater – Significant investment is required in the</li> </ul>



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
		investment is required in the wastewater treatment facilities to meet future demand. <ul style="list-style-type: none"> <li>Water facility upgrade cost &lt; \$2M</li> <li>Wastewater facility upgrade cost &gt; \$54M</li> </ul>	is required in the wastewater treatment facilities to meet future demand. <ul style="list-style-type: none"> <li>Water facility upgrade cost N/A</li> <li>Wastewater facility upgrade cost &gt; \$40M</li> </ul>	is required in the wastewater treatment facilities to meet future demand. <ul style="list-style-type: none"> <li>Water facility upgrade cost N/A</li> <li>Wastewater facility upgrade cost &gt; \$46M</li> </ul>	wastewater treatment facilities to meet future demand. <ul style="list-style-type: none"> <li>Water facility upgrade cost &lt; \$100,000</li> <li>Wastewater facility upgrade cost &gt; \$53M</li> <li>No short-term wastewater investment, minimal water investment</li> </ul>
		<i>Not Very Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>
<ul style="list-style-type: none"> <li>How well does the option provide phasing opportunities for long-term investment?</li> </ul>	<ul style="list-style-type: none"> <li>Investment required in 10/20/30 year capital programs based on water and waste water treatment plant capacities</li> <li>Impact on debt capacity and 'affordability'</li> </ul>	<ul style="list-style-type: none"> <li>Water – Investment is required in the long term to upgrade capacity at the Grimsby water treatment plant. 5yr N/A 10 yr N/A 25 yr &lt;\$2M</li> <li>Wastewater – Immediate, intermediate and long term investment is required to meet future demands. 5yr &lt; \$0.7M 10 yr &gt; \$7M 25yr &gt; \$54M</li> </ul> <p>Option A has the highest short term and intermediate costs for wastewater infrastructure investment (\$.7-7\$ million).</p>	<ul style="list-style-type: none"> <li>Water – Investment is not required to meet long term needs. 5yr N/A 10 yr N/A 25 yr N/A</li> <li>Wastewater – Immediate, intermediate and long term investment is required to meet future demands. 5yr &lt; N/A 10 yr &lt;\$2M 25yr &gt; \$40M</li> </ul> <p>Option B has the lowest short term and intermediate costs (\$0-\$2 million) for wastewater infrastructure, allowing more flexibility for financing the long term improvements.</p>	<ul style="list-style-type: none"> <li>Water – Investment is not required to meet long term needs. 5yr N/A 10 yr N/A 25 yr N/A</li> <li>Wastewater – Immediate, intermediate and long term investment is required to meet future demands. 5yr N/A 10 yr &lt; \$5M 25yr &gt; \$46M</li> <li>Option C has no short term costs and the second highest intermediate costs (\$5 million) for wastewater infrastructure, providing for limited flexibility for financing the long term improvements.</li> </ul>	<ul style="list-style-type: none"> <li>Water – Investment is required in the long term to upgrade capacity at the Grimsby water treatment plant. 5yr N/A 10 yr N/A 25 yr &lt;\$100,000</li> <li>Wastewater –Intermediate and long term investment is required to meet future demands. 5yr N/A 10 yr &gt; \$5M 25yr &gt; \$53M</li> </ul> <p>Option D is comparable to Option C for short term and intermediate costs for wastewater infrastructure investment (\$.7-7\$ million). Since there is no short term investment required, this Option D is rated better than Option A, even though the long-term costs are comparable.</p>



**Draft Evaluation Table – Phase 3, A Range of Options**  
 Region of Niagara Growth Management Strategy



Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
		<i>Not Very Well</i>	<i>Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>
<ul style="list-style-type: none"> <li>How does the option impact water/wastewater systems?</li> </ul>	<ul style="list-style-type: none"> <li>Estimated average annual residential water use (based on unit mix)</li> </ul>	<ul style="list-style-type: none"> <li>All options are considered the same. Estimated total residential demand is 251ML/d. The geographic location of population is not considered to be a major factor related to residential water consumption. Other factors such as residential water rates, metering, conservation education and rainfall can have significant impacts on volume of water consumed. Wastewater volumes are related to water consumption as well as the integrity of the collection system. Aggressive I&amp;I reduction programs will reduce wet weather flows significantly.</li> </ul>	<ul style="list-style-type: none"> <li>All options are considered the same. Estimated total residential demand is 251ML/d. The geographic location of population is not considered to be a major factor related to residential water consumption. Other factors such as residential water rates, metering, conservation education and rainfall can have significant impacts on volume of water consumed. Wastewater volumes are related to water consumption as well as the integrity of the collection system. Aggressive I&amp;I reduction programs will reduce wet weather flows significantly.</li> </ul>	<ul style="list-style-type: none"> <li>All options are considered the same. Estimated total residential demand is 251ML/d. The geographic location of population is not considered to be a major factor related to residential water consumption. Other factors such as residential water rates, metering, conservation education and rainfall can have significant impacts on volume of water consumed. Wastewater volumes are related to water consumption as well as the integrity of the collection system. Aggressive I&amp;I reduction programs will reduce wet weather flows significantly.</li> </ul>	<ul style="list-style-type: none"> <li>All options are considered the same. Estimated total residential demand is 251ML/d. The geographic location of population is not considered to be a major factor related to residential water consumption. Other factors such as residential water rates, metering, conservation education and rainfall can have significant impacts on volume of water consumed. Wastewater volumes are related to water consumption as well as the integrity of the collection system. Aggressive I&amp;I reduction programs will reduce wet weather flows significantly.</li> </ul>
		N/A	N/A	N/A	N/A
<ul style="list-style-type: none"> <li>How does the option impact waste management systems?</li> </ul>	<ul style="list-style-type: none"> <li>Qualitative assessment of impact on waste collection and diversion rates</li> </ul>	<ul style="list-style-type: none"> <li>The Niagara-Hamilton Waste Plan identifies a diversion target of 65%. Niagara is currently achieving a rate of 47% diversion. With region-wide recycling services in all municipalities and the same overall unit mix for each option, the ability to meet the 65% diversion target is not perceived to significantly alter amongst the three options. Meeting the diversion target is dependent upon a variety of</li> </ul>	<ul style="list-style-type: none"> <li>The Niagara-Hamilton Waste Plan identifies a diversion target of 65%. Niagara is currently achieving a rate of 47% diversion. With region-wide recycling services in all municipalities and the same overall unit mix for each option, the ability to meet the 65% diversion target is not perceived to significantly alter amongst the three options. Meeting the diversion target is</li> </ul>	<ul style="list-style-type: none"> <li>The Niagara-Hamilton Waste Plan identifies a diversion target of 65%. Niagara is currently achieving a rate of 47% diversion. With region-wide recycling services in all municipalities and the same overall unit mix for each option, the ability to meet the 65% diversion target is not perceived to significantly alter amongst the three options. Meeting the diversion target is</li> </ul>	<ul style="list-style-type: none"> <li>The Niagara-Hamilton Waste Plan identifies a diversion target of 65%. Niagara is currently achieving a rate of 47% diversion. With region-wide recycling services in all municipalities and the same overall unit mix for each option, the ability to meet the 65% diversion target is not perceived to significantly alter amongst the three options. Meeting the diversion target is dependent upon a variety of other factors external to population and</li> </ul>

Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
		other factors external to population and employment distribution patterns <sup>15</sup> .	dependent upon a variety of other factors external to population and employment distribution patterns.	dependent upon a variety of other factors external to population and employment distribution patterns.	employment distribution patterns.
		<i>Well</i>	<i>Well</i>	<i>Well</i>	<i>Well</i>
<i>Overall Ranking: Infrastructure Investment Indicators</i>		<b>Not Very Well</b>	<b>Well</b>	<b>Somewhat Well</b>	<b>Somewhat Well</b>
Fiscal Health Indicators					
<ul style="list-style-type: none"> <li>How well does the option support improved fiscal health?</li> </ul>	<ul style="list-style-type: none"> <li>Region-wide per capita costs for new water and waste water infrastructure for new growth (total infrastructure cost/ total 2031 population)</li> <li>Region-wide per new household cost for new water and waste water infrastructure for new growth (2006-2031 household growth/ total infrastructure costs)<sup>16</sup></li> </ul>	<ul style="list-style-type: none"> <li>Region-wide per capita costs for new water and wastewater services is \$102 per person or \$251 per household.</li> <li>Region wide per capita cost for each new household unit is \$1,070.</li> </ul>	<ul style="list-style-type: none"> <li>Region-wide per capita costs for new water and wastewater services is \$73 per person or \$181 per household.</li> <li>Region wide per capita cost for each new household unit is \$773.</li> </ul>	<ul style="list-style-type: none"> <li>Region-wide per capita costs for new water and wastewater services is \$85 per person or \$209 per household.</li> <li>Region wide per capita cost for each new household unit is \$891.</li> </ul>	<ul style="list-style-type: none"> <li>Region-wide per capita costs for new water and wastewater services is \$99 per person or \$243 per household.</li> <li>Region wide per capita cost for each new household unit is \$1,037.</li> </ul>
		<i>Not Very Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>	<i>Somewhat Well</i>
<ul style="list-style-type: none"> <li>How well does the option match growth with perceived market demand? (In light of the identified growth drivers in Niagara Region, what is an acceptable “threshold test” with respect to forecast demand in comparison historical trends)</li> </ul>	<ul style="list-style-type: none"> <li>Compares historical vs. forecasted housing and employment growth. Based on historical trends (1981 to 2006) a 50% to 100% increase in annual housing and employment growth over then next 25 years has been identified as the “maximum threshold” for future growth to “South Niagara”. Appendix C provides additional detail.</li> </ul>	<ul style="list-style-type: none"> <li>Option A balances historic household demand with future household growth in accordance with the identified economic and demographic drivers for Niagara Region. Grimsby is the only municipality receiving less than its historic rate of growth, reflecting the limited availability of greenfield land.</li> </ul>	<ul style="list-style-type: none"> <li>Option B would require Fort Erie, Thorold Welland and Port Colborne to achieve significantly higher rates of annual household growth (1981-2006 vs. 2006 to 2031). On annual basis each of these municipalities would see the following increases in household growth beyond historic levels:                             <ul style="list-style-type: none"> <li>Fort Erie - 125%</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Option C would require Fort Erie, Thorold, Welland and Port Colborne to achieve higher rates of annual household growth (1981-2006 vs. 2006 to 2031). On annual basis each of these municipalities would see the following increases in household growth beyond historic levels:                             <ul style="list-style-type: none"> <li>Fort Erie - 24%</li> <li>Port Colborne -</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Similar to Option C, Option D provides a more balanced distribution of household growth in comparison to Option B, with a significant increase in housing share allocated to South Niagara. In comparison to historical trends (1981 to 2006)), annual housing growth for South Niagara is forecast to increase by 53%. While this represents an aggressive</li> </ul>



**Draft Evaluation Table – Phase 3, A Range of Options**  
 Region of Niagara Growth Management Strategy



Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
			<ul style="list-style-type: none"> <li>o Port Colborne - 199%</li> <li>o Welland - 96%</li> <li>o Thorold - 284%</li> <li>o Total South Niagara - 146%</li> </ul> <p>Several municipalities also receive less than historic rates, including Grimsby, Lincoln, West Lincoln, Niagara on the Lake, Pelham and Wainfleet. Similar development patterns are also identified for the non-residential sector.</p>	<p>144%</p> <ul style="list-style-type: none"> <li>o Welland - 33%</li> <li>o Thorold - 105%</li> <li>o Total South Niagara - 52%</li> </ul> <p>Option C provides a more balanced distribution of household growth in comparison to Option B; albeit South Niagara would still receive a significant increase in annual growth in comparison to historical trends. Grimsby, and to a lesser extent, St. Catharines would experience less than historic growth rates. Similar development patterns are also identified for the non-residential sector.</p>	<p>increase, it is within a reasonable range given historical trends in housing activity, future economic prospects for this area, as well as Regional and Provincial policy direction.</p> <ul style="list-style-type: none"> <li>▪ Option D also allocates higher levels of annual housing growth to the Region’s more populated municipalities of Niagara Falls and St. Catharines in comparison to historical trends.</li> <li>▪ Niagara-on-the-Lake and West Lincoln are the only two municipalities which are forecast to experience a lower level of average annual housing activity in comparison to historical trends due to development constraints. However, for both of these municipalities, industrial employment growth under Option D is relatively higher than the other growth Options based on historical trends and future prospects.</li> </ul>
		<i>Very Well</i>	<i>Not Very Well</i>	<i>Well</i>	<i>Well</i>
<ul style="list-style-type: none"> <li>▪ How well does the option support fiscal health and sustainability?</li> </ul>	<ul style="list-style-type: none"> <li>▪ Qualitative assessment of ability to finance each option. Each option is subject to similar financial sources associated with funding new development (i.e. development charges, taxes, other senior</li> </ul>	<ul style="list-style-type: none"> <li>▪ Per capita/household infrastructure costs associated with this development option are greater than Option B and C. However, perceived financial challenges and risks associated with this option are comparatively</li> </ul>	<ul style="list-style-type: none"> <li>▪ Option B would require significant policy intervention (assuming the policies are effective) in order to achieve long-term growth levels allocated to South Niagara. Significant challenges exist</li> </ul>	<ul style="list-style-type: none"> <li>▪ Option C would pose relatively less challenges and risks associated with financial sustainability in comparison with Option B, given its more balanced growth allocation by local municipality.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Similar to Option C, Option D would pose relatively less challenges and risks associated with financial sustainability in comparison with Option B, given its more balanced growth allocation by local municipality.</li> </ul>

Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
	<p>government sources of financing, etc.). For each scenario, market demand is considered to be the single most important factor in evaluating fiscal viability. It is important to note that a detailed fiscal impact analysis which quantifies the magnitude of difference between each of the three Growth Options has not been completed. Furthermore, an analysis of Regional vs. local fiscal impacts associated with each Growth Option has not been provided.</p>	<p>lower given the balance between the growth allocations and the perceived market demand for growth by local municipality.</p>	<p>under Option B “Growth South” with respect to the market realization of growth and the associated fiscal impacts. These include, but are not limited to, the following:</p> <ul style="list-style-type: none"> <li>o Limitations of Development Charges to Finance Growth-Related Capital Costs - Under the Development Charges Act, 1997, the private sector is generally required to pay for internal infrastructure associated with new development i.e. local roads, sewers, stormwater, and other soft services. Municipalities are generally required to finance “external” infrastructure i.e. water and sewer trunk mains, improvements to arterial roads, etc. Under Option B, achieving the aggressive growth targets in South Niagara may pose increased fiscal challenges/risks for municipalities which and have a smaller assessment base and are more fiscally sensitive with to funding “external” infrastructure.</li> <li>o Front-End Financing Sources – DC’s can provide a potential stream of revenue, however; they do</li> </ul>	<p>Comparatively, Option C may pose relatively greater challenges relative to Option A associated with financing new development given the higher proportion of growth allocated to the municipalities of South Niagara because Option C still provides higher than historic levels of growth in South Niagara.</p>	<p>Comparatively, Option D may pose relatively greater challenges relative to Option A associated with financing new development given the higher proportion of population and employment growth allocated to the municipalities of South Niagara.</p>



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
			<p>not provide a source of front-end financing. As such, municipalities generally debenture to pay for growth-related capital which is not DC eligible. Alternatively, a municipality may enter into front-end financing agreements with the private sector to pay for infrastructure associated with new development. Under Option B, the risk associated with public or private front-end financing arrangement would be greatest for the municipalities of South Niagara. If actual growth levels in South Niagara are significantly lower than forecast, these municipalities would not fully realize the DC revenues required to recover the capital costs associated with residential and non-residential growth. Furthermore, given the perceived weaker market for residential and non-residential development, it is questionable whether adequate opportunities would exist for public-private partnerships to fund required infrastructure</p>		



Draft Evaluation Table – Phase 3, A Range of Options Region of Niagara Growth Management Strategy					
Indicator	Measure	Option A: Current Trends	Option B: Growth South	Option C: Multi-Nodal	Option D
			improvements.		
		<i>Well</i>	<i>Not Very Well</i>	<i>Well</i>	<i>Well</i>
<i>Overall Ranking – Fiscal Health Indicators</i>		<b>Well</b>	<b>Not Very Well</b>	<b>Well</b>	<b>Well</b>



<sup>1</sup> Refer to Appendix H for a detailed summary of the 50 people and jobs calculation.

<sup>2</sup> Section 3.3 of the Region’s Policy Plan encourages development along “two discontinuous development corridors, one between Thorold and Port Colborne and the other between Niagara Falls and Fort Erie, through enabling public policies”. For the purposes of this measure, these corridor municipalities are intended to represent “Grow South”.

<sup>3</sup> Net of any significant environmental features. Gross density includes unit, parcel, minor roads, servicing and neighbourhood parks. Population related employment land needs are treated separately.

<sup>4</sup> The Provincial Policy Statement identifies criteria for defining affordability stating that affordability means “ in the case of ownership housing, the least expensive of: (a). housing for which the purchase price results in annual accommodation costs which do not exceed 30 percent of gross annual household income for low and moderate income households; or (b) housing for which the purchase price is at least 10 percent below the average purchase price of a resale unit in the regional market area”. Using the latter interpretation, Port Colborne and Welland are the only municipalities in Niagara with an average purchase price which is 10 percent below the regional average. Calculations based on 2005 sales data.

<sup>5</sup> The Core Natural Heritage System is defined by the Region of Niagara through Amendment 187 to Region Policy Plan. Impacts are determined to be any feature within the Core Natural Heritage System which intersects with the conceptual urban boundary expansion area.

<sup>6</sup> Areas of High Intrinsic Susceptibility are based on Niagara Peninsula Conservation Authority Groundwater Study, Figure 3-1 “Shallow Intrinsic Susceptibility”.

<sup>7</sup> For clarification purposes some examples of green infrastructure solutions are provided in this note. Examples of what would be considered green infrastructure solutions related to site development would be, but are not limited to the following: on-site power generation, district energy, green building certification through an accredited program such as LEED, green roofs and other heat island reduction measures, use of materials which increase site permeability and reduce run-off and the use of native species and plantings.

<sup>8</sup> Health and social services and facilities are concentrated in the urban centres with a greater proportion of specialized and higher level services being located in the three cities of St. Catharines, Niagara Falls and Welland.

Similarly, publicly-funded educational services and facilities – especially, secondary schools, specialized services and post-secondary opportunities - are concentrated in the urban centres. School facilities that may become available for reuse or co-location are also more prevalent in the urban centres. A greater range and mix of housing as well as affordable and rent-geared-to-income housing is found in the urban centres. Cultural heritage sites, facilities and businesses/industries are heavily concentrated in the northern portion of the Region. Local social service agencies have noted accessibility issues associated with the limited availability of transit in the Region and the cost of personal automobile use or taxi. The health of Niagara residents has been recognized as a key issue and significant efforts are underway to promote a healthy, active lifestyle. Facility investments such as the Niagara Circle trail system are noted. The Region is well served with recreational, cultural and tourist facilities owned and operated by all levels of government and are found throughout the Region.

<sup>9</sup> A more detailed assessment on commuting times using the Region’s transportation model would take into account existing and projected travel demand and capacity, average speed, and level of congestion. The following represents a qualitative assessment based on the theoretical impact of land use patterns on transportation demand and mode share.

<sup>10</sup> Impact on goods movement was assessed based on access of new industrial lands to the 400 series highways. The assessment is based on the fact that higher levels of industrial development along highways reduces overall travel length and therefore time.

<sup>11</sup> Much of this is dependant on urban design and must be evaluated at the secondary and site plan level. From a broader perspective, ability to support transportation choices is based on ability to walk/cycle to destinations, a transit stop, or share a ride. This is based on overall level and density of development, level of intensification, and live/work relationship. Therefore, this category is measured based on:

1. Amount of development in established transit municipalities (St. Catharines, Welland, Niagara Falls);
2. Density in established transit municipalities (St. Catharines, Welland, Niagara Falls); and,
3. Level of intensification.

<sup>12</sup> Higher intensification targets reflect more development in built up areas with access to employment and amenities. This gives residents a higher opportunity to walk to their destination. Higher intensification targets in cities with transit (St. Catharines, Welland, Niagara Falls) also allows for easier transit use (which support closer live-work connections).

---

<sup>13</sup> It is perceived that larger municipalities provide a greater opportunity for live-work developments.

<sup>14</sup> Note that revised costing information does not include planned upgrades to the Baker Road Wastewater Treatment plant.

<sup>15</sup> Consumer preferences, program design and implementation and education are some of the factors which will influence Niagara's ability to meet its diversion targets.

<sup>16</sup> Note that costs for improvements are limited to plant explanations and upgrades. Additional analysis for new trunks is to be provided.