Looking Out To Focus In
Fostering an Environment for Economic Prosperity

Niagara Region
EXECUTIVE SUMMARY

In response to discussions with returning and incoming Regional Councillors, and with provincial officials, local municipal colleagues, the business community and municipal colleagues in the GTA, this document was developed to support Regional Council in determining strategic directions for the 2014-2018 term.

Part I of this document outlines global, national, and provincial forces that affect Niagara’s economic success. Part I also includes an assessment of how Niagara is performing on key economic prosperity performance indicators, including some forecasts for the future if status quo approaches are maintained. The research suggests that, while Niagara has fared well on indicators related to taxes, other economic prosperity indicators for growth, employment, investment, infrastructure and overall community well-being are performing below average levels.

Part II of this document offers ideas for Council’s consideration that will support economic prosperity and make Niagara more competitive. In order to “bend the curve” and improve Niagara’s performance, a two-pronged approach will help us move from good to great and become the benchmark for our sector:

- **Foster an environment for economic prosperity** through strategies that target results in four key areas: moving people and goods; investment, innovation and entrepreneurship; building a workforce ready labour market; and positioning Niagara globally;

- **Implement transformative changes to the way we do business** through greater focus, enhanced government relations, core business transformation, improved revenue generation and results-oriented project teams

All ideas have been suggested with the understanding that, given opportunities at the federal and provincial levels, the high degree of cooperation among local municipalities, and a growing foundation of trust and confidence in our organization, the time for Niagara is now. We hope these ideas assist Council in determining strategic directions for the coming term and welcome feedback on how staff can best support Council in reaching decisions. We are seeking Council’s direction on the suggested process outlined in the conclusion of this document.
<table>
<thead>
<tr>
<th>TABLE OF CONTENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTRODUCTION ................................................................................................</td>
</tr>
<tr>
<td>PART I- BACKGROUND RESEARCH ....................................................................</td>
</tr>
<tr>
<td>LOOKING OUT: GLOBAL, NATIONAL, PROVINCIAL CONSIDERATIONS ......................</td>
</tr>
<tr>
<td>Global Context ..........................................................................................</td>
</tr>
<tr>
<td>National Considerations ...........................................................................</td>
</tr>
<tr>
<td>Provincial Priorities ...............................................................................</td>
</tr>
<tr>
<td>“Jobs Without People, People Without Jobs” ...........................................</td>
</tr>
<tr>
<td>HOW IS NIAGARA DOING? ...........................................................................</td>
</tr>
<tr>
<td>Taxes .........................................................................................................</td>
</tr>
<tr>
<td>Growth ......................................................................................................</td>
</tr>
<tr>
<td>Employment ..............................................................................................</td>
</tr>
<tr>
<td>Investment ................................................................................................</td>
</tr>
<tr>
<td>Infrastructure .........................................................................................</td>
</tr>
<tr>
<td>Community Symptoms ...............................................................................</td>
</tr>
<tr>
<td>Economic Prosperity: Summary of Niagara’s Performance ........................</td>
</tr>
<tr>
<td>PART II – SUGGESTED IDEAS FOR COUNCIL CONSIDERATION ......................</td>
</tr>
<tr>
<td>FOSTERING AN ENVIRONMENT FOR ECONOMIC PROSPERITY: POTENTIAL IDEAS FOR 2014-2018</td>
</tr>
<tr>
<td>Moving People and Goods .........................................................................</td>
</tr>
<tr>
<td>Investment, Innovation and Entrepreneurship ..........................................</td>
</tr>
<tr>
<td>Build a Workforce-ready Labour Market ..................................................</td>
</tr>
<tr>
<td>Position Niagara Globally ........................................................................</td>
</tr>
<tr>
<td>“GAME CHANGERS”- DOING BUSINESS DIFFERENTLY ................................</td>
</tr>
<tr>
<td>Narrow Focus to Achieve Results .............................................................</td>
</tr>
<tr>
<td>Niagara Week is Every Week ....................................................................</td>
</tr>
<tr>
<td>Faster Decision Making ...........................................................................</td>
</tr>
<tr>
<td>Core Business Transformation ..................................................................</td>
</tr>
</tbody>
</table>
INTRODUCTION

During the summer of 2014, the Chief Administrative Officer (CAO) met with Regional Councillors to get feedback on past strategic planning processes and solicit suggested improvements for the 2014-2018 term of Council. Through these discussions we heard the following:

- Past business plans have been too broad so it will be important for Council to build consensus to focus on a select few strategic directions where there will be the greatest community impact. In other words, “move miles on a few instead of inches on all”
- There is recognition that results-oriented strategic directions need to be developed quickly to leverage momentum after the municipal election and increase Niagara’s ability to compete for provincial and federal funding opportunities
- Niagara needs to develop a more effective presence externally, particularly among federal and provincial officials. In other words, “Niagara Week is every week.”

Subsequently, the CAO met with newly elected Councillors following the municipal election which validated the above directions to better inform goals and objectives for the 2014-2018 term.

The CAO has been meeting face-to-face with Deputy Ministers at the provincial level in the Ministries of Transportation, Municipal Affairs and Housing, Economic Development, Employment and Infrastructure, Tourism, Culture and Sport. Additionally he has met with the President of Metrolinx, the General Manager of the Niagara Peninsula Conservation Authority, Presidents from both Brock University and Niagara College, the former General Manager of Niagara Regional Housing, as well as the Niagara Regional Police Service Chief of Police. Regular meetings have been held with local economic development officers, area CAOs, CAOs from municipalities in the Greater Toronto and Hamilton Area, and several chambers of commerce in Niagara.

To further understand this feedback, extensive research and consultation was conducted, including a review of:

- Key documents released by national and international agencies
- Federal government documents and policy papers
- Provincial budget
- Ministerial mandate letters from the Premier of Ontario
- Discussions with competitive Greater Toronto Area (GTA) municipalities
- Input from Niagara residents over the past four years (including pre-budget consultations, Imagine Niagara surveys, and inter-municipal transit survey)
- Strategic plans from local area municipalities
- Key documents released by local agencies
- Review of major data and research projects across the corporation

Economic prosperity emerges as the prominent theme throughout the national, provincial and local agendas. And, while it is the private sector that generates wealth for the economy and creates jobs, governments can play a key role in fostering the conditions for economic competitiveness through investments in sound infrastructure, seamless transportation networks, highly skilled labour markets and favourable trade conditions. The research suggests that a narrow focus on supporting economic prosperity in Niagara is our best opportunity to deliver the greatest community impact over the next few years.
PART I

BACKGROUND RESEARCH
LOOKING OUT: GLOBAL, NATIONAL AND PROVINCIAL CONSIDERATIONS

Municipalities are influenced by global, national and provincial trends and Niagara's success strongly depends on our ability to seize opportunities and overcome challenges at the global, federal, provincial, and local levels. This section outlines global, national and provincial considerations and highlights key opportunities for Niagara to achieve measured results with the greatest potential for positive community impact.

GLOBAL CONTEXT

GLOBAL ECONOMIC LANDSCAPE IS CHANGING

Since 2008, the pace of the global economy has changed. Business and jurisdictional competition is intense and private and public sector resources are limited.

Major markets are emerging that are different from the past. The United States (US) currently has the largest share of the world's Gross Domestic Product (GDP) with 19.31%, followed by China with 15.40%, India at 5.83%, Japan with 5.40%, and Germany at 3.72%.\(^1\) By comparison, KPMG reports that by 2030 India and China will account for 35% of the world population and 25% of global GDP, with the developing world accounting for 57% of GDP.

To compete in this shifting economic landscape, governments must be prepared to attract direct foreign investment, adapt to changes to national economies, and implement strategies to compete for inward investment.

---

\(^1\) International Monetary Fund.
It is essential for Canada to keep pace with current and emerging markets to remain competitive. Canada’s current unemployment rate is the 8th highest in the G20 at 6.5%. Canada’s GDP growth for 2014 so far is 2.3%, which ranks 10th of all G20 countries. Projections for 2015 have Canada at 2.5% growth and ranked 11th among G20 countries. Canada’s Industrial projection, as a percentage increase from last year, is 3.2% and ranks 6th in the G20.

Canada’s GDP has closely mirrored US GDP and this trend is forecasted to continue. The US economy has recovered from the 2009 recession and shows promise for steady growth, which is positive for Canada. Figure 2 demonstrates the close interrelationship between Canadian and US GDP.
**CLOSE RELATIONSHIP TO UNITED STATES ECONOMY**

As a border community, Niagara depends strongly on economic and political relationships between Canada and the United States. With the US as our closest foreign market and largest trading partner, the value of the Canadian dollar and the strength of the US economy are key factors to our success. The Canadian dollar has been trending down in relation to the rising US dollar. This provides opportunities for exporting but increases the cost of importing goods for Canadian businesses and consumers\(^2\).

---

\(^2\) Conference Board of Canada.
Niagara has four international border crossings, providing a significant connection to the US economy through multi-modal transportation networks (road, rail, marine, air) which support international movement of people and goods. Three of these crossings are within close proximity to each other and provide commercial traffic with multiple options, which is particularly attractive for logistics and supply chain operations. This strategic advantage presents opportunities to support a Foreign Trade Zone and leverage the strategic location as a significant trade corridor between the GTA and the US eastern seaboard.
The volume of goods crossing US borders in Niagara is significant, amounting to $82 billion US in 2011. That same year the number of people crossing these borders – including pedestrians, trains, buses, and automobiles – was 13.7 million. This ranks second in Canadian border for commercial traffic flow.

Proximity to the US border also means that Niagara is closely linked to the economy of Western New York. New York State is investing significantly in economic development, offering a $1 billion package to improve business conditions in Buffalo. According to the New York State Department of Labour, the Western New York region (including Allegany, Cattaraugus, Chautauqua, Erie and Niagara counties) have been steadily growing. This area has experienced year-over-year private sector job growth every month since April 2010 and has recovered all but 400 jobs lost during the recession. While Western New York has been seen as a competitor, when it comes to attracting and retaining industries, there are opportunities to leverage their work through partnerships that will allow our collective regions to compete with larger competitors throughout the US and world-wide.

---

4 New York State Department of Labour.
NATIONAL CONSIDERATIONS

National economic forecasts provide insight into household debt burden and consumer demand which directly affect businesses in Niagara and across the country. Interest rates are forecasted to remain steady through 2015 with upward pressure predicted to gradually occur starting in 2016 (see figure 5). In the short term, low interest rates provide some opportunity for low borrowing rates for consumers, businesses and municipalities (debentures). Low interest rates can encourage consumer spending on significant expenditures, and will be reflected in increased housing prices and housing sales.

Figure 5: Interest Rates in Canada and the United States (2000-2016)
Source: Haver Analytics. Forecast by TD Economics as of September 2014
INFRASTRUCTURE GAP

Over the past decade the federal government has paid some attention to the urgency of rehabilitating and replacing municipal infrastructure.

- The $2 billion annual federal gas tax transfer provides funding for municipal infrastructure channeled through provincial and territorial governments.
- The current government has focused on implementation of Canada’s Economic Action Plan, targeting economic development, job creation, and building infrastructure to stimulate the economy during economic downturn.
- The Building Canada Fund, valued at $14 billion was recently expanded to increase flexibility for municipalities to meet local infrastructure needs.\(^5\)

Despite investments by all orders of government, more funding will be required to address the national infrastructure deficit, which in 2012 was valued at $123 billion.\(^6\) In Ontario alone, the Association of Municipalities of Ontario (AMO) has estimated a $60 billion municipal infrastructure gap (as of 2008).

Investments in infrastructure have significant impact on economic prosperity. Infrastructure investment has the capacity to drive economic stimulus, with every $1 million invested in infrastructure increasing GDP by approximately $1.6 million.\(^7\) This outperforms every other form of public investment in our economy.

PROVINCIAL PRIORITIES

The provincial government has placed a large emphasis on transportation and transit in their recent budget, with a total incremental commitment of $29 billion. Of this commitment, $15 billion is earmarked for the Greater Toronto and Hamilton area and the remaining $14 billion was earmarked for the rest of the province – including Niagara. A more recent provincial announcement committed $1 billion of the $14 billion to the development of infrastructure needs surrounding the “Ring of Fire” (Northwestern Ontario area rich in mineral deposits), however this is contingent upon matching federal dollars which have not yet been committed. There is a high level of competition for the remaining $13 billion, and there are indications that municipal requests far exceed available funding. In discussions with the Deputy Minister of

---


Transportation, it was suggested that three times the amount of funding would be required to satisfy all requests for infrastructure support.

Metrolinx, an agency of the Government of Ontario, plays a large role in determining when and where transit projects will be implemented. Their central plan, The Big Move, plans for expansion of transit and transportation infrastructure to decrease congestion on transportation corridors.

![Figure 7: The Big Move: 25-year Plan for the Regional Rapid Transit and Highway Network](image)


Niagara is not considered as part of initial Big Move plan, and more work will be required to demonstrate how expansion of GO Rail to Niagara is integrated with community plans and how it provides broader benefits the provincial economy.

Niagara is currently partnering with Halton, Hamilton, Peel, and Waterloo Region to create the Western Golden Horseshoe Municipal Network (WGHN). The network’s ultimate goals are to see an integrated multi-modal transportation network that:

- Addresses existing highway capacity issues
- Maximizes the potential of air, rail and marine goods movement
- Provides efficient connections to hubs, employment lands, local and international markets.
Foremost is the recognition that a “regional benefits focus” approach for a transportation and trade network is important to strengthen both Ontario and Canada’s competitiveness. As Niagara’s economy is a derivative of prosperity of the GTA and Greater Golden Horseshoe, this approach supports broader provincial economic prosperity, which will also benefit Niagara.

Figure 8: Economic Logistics and Goods Movement Corridor Vision
Source: Niagara Region, 2013

To move these goals forward, capital investment strategies are needed in both transit and road-based transportation, in an area larger than that covered by “The Big Move” to keep pace with growth. Niagara is advocating for the creation of an alternative route (commonly referred to as the Niagara-GTA Corridor) connecting the eastern seaboard of the United States, and the significant population and goods markets that are located in major US centres, including New York City, Boston and Washington D.C. to the provincial market and Greater Toronto Area. This would capitalize on new investments made at a number of international Niagara borders as
well as planned investments that will assist in the movement of trade, goods and services through that international border crossing.

New infrastructure is required to complete this plan and support the growth in population and employment projected in the Places to Grow plan. This infrastructure needs to:

- Provide capacity within the Provincial network to address congestion issues such as the off-loading traffic onto Highway 401 from the future GTA West corridor.
- Provide regular inter-regional transit connections to neighbouring municipalities outside of the GTHA.
- Improve connections to multi-modal terminals.
- Address market access constraints.
Initial plans from the province are at odds with the direction of the Western Golden Horseshoe Network. The province is considering the widening of the QEW to eight lanes (including high-occupancy vehicle lanes) from Burlington/Hamilton to St. Catharines, to address traffic volume growth projections into 2031. The estimated infrastructure investment in this area is anticipated

---

8 Niagara To GTA Corridor Planning and Environmental Assessment Study: Transportation Development Strategy Executive Summary; September 2013.
to be between $1 billion and $1.5 billion, which is the same estimated cost for the proposed new corridor. It is recognized beyond 2031, the eight lane cross section may not be sufficient to meet traffic demands.

Additionally, the study recommends that a four lane highway corridor be defined as connecting Highway 406 south of Welland to the QEW near Fort Erie, in addition to improvements to the Highway 406/140 corridor. Exact routing for the corridor will be determined through a future route planning exercise, which has no current schedule for completion. While this recommendation seeks to support the Growth Plan objective for the Gateway Economic Centre and Zone, it is not the preferred siting for alignment of economic opportunities that the Niagara-GTA corridor would support.

Sound infrastructure is a critical component of the provincial government's strategy to increase economic competitiveness in Ontario. Beyond significant financial commitments, this strategy is further validated through the creation of a combined Ministry of Economic Development, Employment and Infrastructure in 2014. The Ministry of Transportation has also become an integral part of the current provincial economic agenda. It is also significant that all ministry mandate letters cite economic prosperity as a core element in the provincial priorities. Across the provincial government, there is a combined investment of over $130 billion over the next 10 years for infrastructure\(^9\).

“This is our chance to fix transit and infrastructure for now and for the future and help every part of Ontario grow. We need to act now, and do everything in our power to fire up our economy and create jobs for today and jobs for tomorrow.”

Premier Kathleen Wynne, April 14, 2014

---

There are other strategies to improve economic competitiveness that will be employed at the provincial level, as outlined in the Ontario Premier’s mandate letters to all Ministers:

- The Jobs and Prosperity Fund includes $2.5 billion over 10 years to spur economic growth in Ontario. This includes $40 million earmarked for the agri-food and agri-processing sector.
- New investments of $250 million over next three years to maintain and strengthen the Ontario Research Fund
- Labour Market Development Agreements totalling $1.2 billion over six years to help those on employment insurance not eligible for training dollars
- Going Global Trade Strategy that supports the development of new trade and exporting
- Youth Investment Accelerator Fund
- Encourage entrepreneurship through Ontario Network of Entrepreneurs
- Deliver sector strategies – focus on sectors with a culture of innovation such as life sciences, advanced manufacturing, clean technology and information and communications technology
- Increase innovation within the public service and broader public sector - improving the effectiveness of the government procurement system, open government and implementation of the Youth Jobs Strategy

In addition to the above strategies, there are a number of provincial policy plans up for renewal in the near future. These plans include the Greenbelt Act and Places to Grow which are both up for renewal in 2015. Next year is also the timeframe for the review of the Niagara Escarpment Plan, currently being undertaken through a collaborative partnership between Niagara Region and the City of Hamilton. The Municipal Comprehensive Review (MCR) has already been initiated and is expected to be complete by mid-2016 and will subsequently result in amendments to the Regional Official plan and Local Official Plans. These reviews present an opportunity to influence these plans so they support economic growth in Niagara. (refer to pg. 57)

There is considerable pressure provincially to deliver economic gains while managing to balance budgets. An economic update issued by the Minister of Finance in November 2014 showed provincial government revenues down by over $500 million and the economy projected to grow more slowly than initially projected. This could mean that the province will either have to redouble its efforts to control spending or hike taxes as it struggles to erase a $12.5 billion
The provincial government has indicated it will be focused on initiatives that can be implemented quickly and will deliver maximum economic impact. For Niagara, it will be essential to demonstrate broader provincial benefits for any significant infrastructure investment requests.

With the GTA expanding outward and pent up demand for growth, there are opportunities for Niagara to satisfy these growth-related demands. Further efforts will be required to ensure the availability of serviced, development-ready land and efficient transportation networks to make the region more attractive for potential investors and developers. This means that Niagara will need to be ready and responsive to opportunities as they arise.

The current municipal term of Council (2014-2018) provides some close alignment with the current provincial majority government. This is a particularly significant opportunity that has rarely existed at any other time within the last 25 years. This alignment provides a higher degree of certainty about provincial directions, mandates and policy changes that might impact or benefit Niagara. Moving forward, it will be important to understand Niagara’s priorities in the context of provincial budgets and opportunities for provincial support.

**Figure 10: Federal, Provincial and Municipal Elections 1987-2018**


**“JOBS WITHOUT PEOPLE, PEOPLE WITHOUT JOBS”**

Labour market shifts are presenting challenges for Canada’s economic competitiveness.

---

Research suggests that leading up to 2031 there will be an increasing shortage of skilled labour paired with an increasing surplus of unskilled labour – a situation that has been called “people without jobs, jobs without people.” This research further demonstrates that even if the unskilled labour market in Canada became trained with the necessary skills, there would still be a national labour shortage. This highlights the critical importance of in-migration and immigration as a tool to address labour market needs. However, Canada faces intense competition for talent as most of the world is facing similar demographic shifts.

Figure 11: Medium Estimates for the Skill Shortage in Canada.
Source: Adapted from Rick Miner. “Jobs without People, People without Jobs.”

Immigration strategies are essential to addressing the shortage of labour in Canada. It is anticipated that by 2030 immigration will be Canada’s only source of population growth, and will not keep pace with current population growth (see figure 12).
The federal government is attempting to increase competitiveness through changes to current immigration policies. Immigration policy changes that come into effect on January 1, 2015 focus on attracting immigrants who possess specific skills that Canadian employers require as well as specific requirements related to education, work experience and language ability. This new Express Entry program will allow government to match skilled immigrants with employers. Canada aims to welcome as many as 285,000 new permanent residents in 2015. Therefore, Niagara will need to leverage itself as a point of entry for new immigrants, providing an opportunity to retain and employ new talent in the region.

Niagara’s growth projections remain lower than GTA municipalities (see page 28). However, there are strategies that Niagara Region can pursue to mitigate these population trends by working with local post-secondary institutions to address demands for skilled labour (see page 21) and better position Niagara in the global marketplace for talent.

Even for employers who successfully attract and retain employees, the level of employee engagement remains an issue. Employee engagement scores are a measure of employees’ job satisfaction, control, decision making and ability to contribute to company goals. A US study conducted by the Gallup Organization reports that approximately 20% of employees are disengaged and the cost to the American economy is approximately half a trillion dollars each year.

---

Figure 12: Migratory and natural increase of the Canadian population, 1956 to 2056
Source: Statistics Canada, 2007

---

11 Globe and Mail. “Canada to open the door wider to higher caliber of immigrants” Oct. 31, 2014
year. In line with those findings, a 2013 engagement survey published by AON Hewitt found that 2 out of 10 employees are actively disengaged, and that average companies have engagement scores around 60%. By contrast the top 25% of companies have engagement scores averaging 79%, and report sales at levels between 10-12% higher than the average company.

Telus is an example of a company that has experienced positive results. They placed a high priority on improved employee engagement over the past seven years and are seeing the following results.

- Their engagement scores have increased from 53% in 2007 to 85% in 2014.
- While industry-wide complaints were up 26%, Telus saw a 27% decrease.
- Stock has risen in value approximately 95% since 2008.\textsuperscript{12}

\begin{quote}
\textbf{“An organization that isn’t investing in its people is an organization that doesn’t get the equation that employee engagement can equal customer satisfaction.”}
\end{quote}

Dan Pontefract, Head of Telus’s transformation office

There are additional challenges for employers in the public sector to attract and retain talent. In the Ontario municipal sector, over 50% of senior leaders are eligible for retirement over the next five years\textsuperscript{13} and there is increasing urgency to establish succession planning measures. In light of challenges to recruitment, retention and engagement in the public sector, Niagara Region has developed a People Strategy to position the organization as an employer of choice and build a best-in-class organization, described in further detail on page 70.

\textsuperscript{12} Jared Lindzon. “How employee engagement can boost the bottom line” Globe and Mail: Wednesday, December 3, 2014

\textsuperscript{13} OMERS as cited in Leadership Excellence Advancement Pilot Project Presentation to AMCTO:
HOW IS NIAGARA DOING?

To better understand what investments might be necessary to support a more competitive local economy, a preliminary economic prosperity dashboard has been developed that tracks Niagara’s economic performance. Staff continues to research how others measure economic prosperity, including major national and international Non-Governmental Organizations (NGO), major consulting firms, colleagues in the Ontario Municipal Benchmarking Initiative (OMBI), and competitive municipalities in the GTA. Staff is also working closely with local economic development officers on focused research to identify strengths and weaknesses in current data to obtain a more comprehensive picture of Niagara, benchmarking against competing jurisdictions.

More research and analysis will be required in order to complete a comprehensive dashboard, however preliminary key performance indicators fall under six general areas:

- Taxes
- Growth
- Employment
- Investment
- Infrastructure
- Community Symptoms

Niagara Region’s strengths and weaknesses in each of these areas are described below. Preliminary data suggests that, while tax indicators are showing steady improvements in performance, other indicators related to economic prosperity are preforming at below average levels.

TAXES

- TAXPAYER AFFORDABILITY
- AVERAGE ANNUAL TAX INCREASE
- TAXES % OF HOUSEHOLD INCOME
- TAX BURDEN ON HOUSEHOLD INCOME

Above Average Performance

POOR

BEST
Over the past four years, Niagara has achieved its objective on taxpayer affordability, by reducing the amount paid by Niagara residents in taxes as a proportion to their household income. While Niagara experienced low/modest increases in household incomes during the past Council term, a concerted effort was made to keep property taxes at or below the rate of inflation. This was achieved over the last 5 years through an average annual regional property tax increase of 1.13 percent.

This taxpayer affordability approach, introduced in 2006, was successful in lowering the burden of property taxes as a portion of household income for both the Regional taxes and the combined Regional/municipal taxes. In 2013, Niagara residents paid an average 1.65% of their household income on regional taxes (excluding water and wastewater)\(^{14}\).

When combined with the 2013 property taxes of local area municipalities, the average percentage of household income spent on property tax in Niagara was 3.76% (excluding water and wastewater)\(^1\).

---

\(^{14}\) Niagara Region
For comparative purposes, Niagara also participates in the Annual BMA study, which provides municipal comparison data across a number of indicators, related to taxes. BMA categorizes municipalities in ranges of high, mid and low based on the study group. Niagara has strived to reduce the tax burden to reach the BMA mid category for property taxes as a percentage of income. The chart below captures the total tax burden (regional, municipal and water and wastewater costs) with the comparator municipalities from the BMA study.

Using the BMA data over the past several years, Niagara has improved its position from being in the high and top of mid-range at 5.3% in 2009 through a decline to the bottom of the mid-range in 2013 to 4.5%. This compares to the GTA average and BMA study average of 4.4% and 4.6% respectively.

* does not have water or wastewater charges
Although Niagara’s property tax as percent of income remains higher than the GTA average due to lower household incomes, Niagara’s property tax was $945 less than the GTA average and $239 less than the BMA study average cost in 2013 for providing the municipal services. Household income is further addressed in the community symptoms section of this report (see page 37).

Figure 16: Total Tax Burden as % of Household (HH) Income (2009-2013)

Source: Annual BMA Report (2013)

---

15 BMA Annual Report (2013)
16 Note: The BMA study data for regions and regional municipalities uses average measures of its respective municipalities instead of more detailed calculations. For that reason, sources citing Niagara Region have used extracted BMA data that provides a more accurate calculation and in some instances, has removed Hamilton data that is included in the Niagara/Hamilton indicators.
### Table 2: Total Tax Burden as % of Household (HH) Income (2009-2013)

Source: Annual BMA Report (2013)

<table>
<thead>
<tr>
<th></th>
<th>Niagara Average</th>
<th>GTA Average</th>
<th>BMA Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Tax Burden - (Taxes and Water/Wastewater)</td>
<td>$4,061</td>
<td>$5,006</td>
<td>$4,300</td>
</tr>
<tr>
<td>Average Household Income</td>
<td>$89,615</td>
<td>$115,517</td>
<td>$96,130</td>
</tr>
<tr>
<td>Percentage of Household Income</td>
<td>4.5%</td>
<td>4.4%</td>
<td>4.6%</td>
</tr>
</tbody>
</table>

Throughout the taxpayer affordability approach, Niagara Region has continued to maintain its Standard and Poors credit rating as AA stable, despite downgrading across the banking sector following the 2009 economic downturn. The strong credit position reflects Standard and Poor's expectations that Niagara's liquidity will not decline materially and that debt issuance will not significantly exceed projections within the two-year rating horizon. Maintaining a good credit rating allows the Region to make strategic investments through its ability to secure lower interest rate financing when required for projects.

**GROWTH**

- POPULATION GROWTH
- TYPE OF POPULATION GROWTH
- TAXABLE ASSESSMENT GROWTH
- NEW CONSTRUCTION ACTIVITY

Growth indicators in Niagara relate to a number of factors, including population growth, type of population growth, taxable assessment growth, and new construction activity (by number of building permits and value of new construction). Niagara Region has lagged behind all of the GTA comparators in terms of population growth, with an average growth of 0.21% since 2009.

---

17 Standard and Poors Credit Report (2013)
Niagara has not experienced organic growth, so it will need to rely on in-migration, immigration and unique strategies to improve its population growth trend. The 2011 census indicates the importance of immigration to the continued growth of Niagara: between the 2006 and 2011 census, the St. Catharines-Niagara CMA grew by 3,924 with 5,985 people arriving in Niagara as immigrants during this time. In other words, without immigration Niagara would have experienced negative growth during the census period. There are some positive signs in terms of in-migration growth to Niagara. Between 2007 and 2013, 53,468 new residents moved to Niagara, with the largest percentage (36%) coming in the 25-44 age category. Continued focus on in-migration from this demographic will be important to economic prosperity as it represents a growing labour market for employers.\textsuperscript{19}

\textsuperscript{18} Instances where the St. Catharines-Niagara CMA is used, a correction has to be made to include Grimsby and West Lincoln, which are not considered part of the St. Catharines-Niagara CMA by Statistics Canada.

\textsuperscript{19} Based on Statistics Canada customer dataset of in-migration used for Regional Chair’s 2014 State of the Region Address.
Figure 18: Niagara Region Population by Single Year of Age, 2006 and 2031

Assessment growth (i.e. historical growth in taxable assessment) from residential, commercial and industrial development has reflected a very modest increase in Niagara. Additional assessment from new development provides additional tax revenue to finance municipal services. More recently, the growth is modest in Niagara in part due to reductions in assessment from outstanding appeals.
In relation to the range of assessment growth experienced in the GTA (shaded in the figure above), assessment growth figures were lowest in Durham (averaging 1.26 percent), which is higher than those reported in Niagara (averaging 1.12 percent). Building permit activity (the precursor to assessment growth) is also monitored, and included in the investment section of this report (see page 32).

**EMPLOYMENT**

- **UNEMPLOYMENT RATE**
- **EMPLOYMENT PARTICIPATION RATE**
- **EMPLOYMENT RELATED TAX REVENUE**
- **YOUTH EMPLOYMENT RATE**

Employment metrics can provide an indicator of the level of employment or employment opportunities within the community. Measures such as the unemployment rate or participation rates (number of working-age population that is working) are commonly used. Analysis on the unemployment rate for Canada, Ontario and Niagara (using the St. Catharines-Niagara Census Metropolitan Area (CMA)) highlights that Niagara has experienced unemployment rates higher than the national and provincial averages since 2004. Even with factoring in the communities of
Grimsby and Lincoln (which are excluded from the CMA), the unemployment figures are not substantially altered for Niagara. Economists forecast that Niagara will continue to lag behind Ontario and Canada if status quo approaches to economic development are maintained.

Figure 20: Unemployment Forecasts for Canada, Ontario and St. Catharines-Niagara CMA.

Commuting trends suggest that there is talent in Niagara that is currently working outside the region. The Transportation Tomorrow Survey states that in 2011, 16.26% of people commute outside of Niagara, an increase of 2.9% since 1996. Niagara is growing in population that is commuting outside, however this population growth does not translate to employment growth, particularly in the western part of Niagara. Strategies to increase the proportion of development devoted to employment will help to create opportunities for these individuals and potentially increase the amount of in-bound commuters working in Niagara. The Regional Growth Plan cites the employment/residential ratio is one full time job per three residents, however since 2011 only 10% of building permits have been for employment related developments.

The graph below shows the proportion of Niagara’s 2014 tax revenue by each tax class. With efforts focused on economic prosperity and employment-related development, Niagara would benefit from a greater portion of its tax revenue being derived from employment related tax classes (specifically commercial and industrial).
Youth unemployment, an area highlighted in a number of provincial Minister’s letters is slightly higher in Niagara than the average from other Ontario census metropolitan areas. Given slow growth projections for the region and throughout Canada, this is a significant demographic to monitor as it relates to the future working population in Niagara (see page 28). Attracting and retaining youth through employment opportunities is essential to the future sustainability of Niagara’s labour force.
While forecasts have Niagara lagging behind the provincial and national averages for unemployment, there are some indications of slow and steady growth. Information from the Niagara Industrial Association in November 2014 indicates membership has expanded to over 200 members and more than 30 manufacturing firms have grown over the past year.

**INVESTMENT**

Working collaboratively with local Economic Development Officers, A Team Niagara – Economic Development Plan targets the development of key measures that will track:

- Employment Growth
- Building Permit Growth
- Regional Population Growth
- Number of New Businesses

There have been a number of completed investment projects, in-development projects and proposed developments in Niagara communities over the past few years, such as:

**Complete/Near Completion**

- $480 million General Motors Transmission and Engine Lines,
- $145 million Smart Centres Retail Development in St. Catharines and Niagara Falls,
- $120 million Cairns Bioscience Research Complex at Brock,
- $105 million Scotiabank Convention Centre in Niagara Falls,
- $101 million Marilyn I. Walker School of Fine and Performing Arts Centre
- $94 million The Outlet Collection at Niagara,
- $90 million Niagara College Campus Expansions and,
- $50 million The Meridian Centre in St. Catharines.
Infrastructure investment has the capacity to drive the economy, with every $1 million invested in infrastructure increasing GDP by approximately $1.6 million. This outperforms most every other form of public investment in our economy and as such public infrastructure has the ability to attract and stimulate private investment in the community.

Building permits are a positive indicator of investment in the community. Permits are issued when individuals or businesses are either building new or expanding existing facilities. The permit values dipped following the economic recession; however they have shown signs of recovery in 2012 and 2013.

Figure 23: Value of Building Permits Issued in Niagara 2009-2013.
Source: Niagara Region

Despite the recovering value of building permits in Niagara, the region continues to lag behind Hamilton in building permit values. Between 2009 and 2013, the City of Hamilton generated nearly 27% more permit value activity than Niagara. The majority of the permit value in Niagara is from residential development. And while significant public sector investments have been important for Niagara’s growth and stimulus, the St. Catharines-Niagara CMA ranks third amongst CMA’s in Canada with building permits driven by public sector activity. Hamilton is ranked ninth.

---


Together with local economic development officers, Niagara Region continues to work on economic research that creates strong market intelligence and benchmarks the Region going forward.

**INFRASTRUCTURE**

- **CAPITAL INVESTMENT**
- **CAPITAL REPLACEMENT DEMAND**
- **INFRASTRUCTURE DEFICIT**
- **INFRASTRUCTURE CONDITION RATINGS**

Niagara Region owns and operates over $7 billion in assets which includes roads, bridges, water and wastewater infrastructure and Regional facilities. These assets are essential for the movement of people and goods and the provision of services to Niagara residents, businesses and visitors. Between 2009 and 2013 Niagara Region invested $843 million in Regional infrastructure with more than 75% of the funds spent on Transportation and Water/Wastewater infrastructure.
With an estimated national infrastructure deficit of $123 billion (see page 12), most municipalities are challenged to fund infrastructure requirements and Niagara Region is no different. According to Federation of Canadian Municipalities, municipalities account for over 60% of all infrastructure while they collect only 8% of tax dollars. Maintenance and replacement requirements (maintenance, rehabilitation and replacement) of this infrastructure consume the largest proportion of the Region’s resources (an average of 82% of the capital budget commitments from 2009 to 2014). The table below outlines Niagara’s capital budget and the proportion of investments on maintenance and replacement for the past six years.

<table>
<thead>
<tr>
<th>Year</th>
<th>Gross Capital Budget ($M)</th>
<th>Maintenance and Replacement Share ($M)</th>
<th>Maintenance and Replacement as % of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>$207.9</td>
<td>$180.4</td>
<td>87%</td>
</tr>
<tr>
<td>2010</td>
<td>$132.5</td>
<td>$112.7</td>
<td>85%</td>
</tr>
<tr>
<td>2011</td>
<td>$135.2</td>
<td>$121.4</td>
<td>90%</td>
</tr>
<tr>
<td>2012</td>
<td>$149.0</td>
<td>$115.5</td>
<td>78%</td>
</tr>
<tr>
<td>2013</td>
<td>$218.3</td>
<td>$179.2</td>
<td>82%</td>
</tr>
<tr>
<td>2014</td>
<td>$220.0</td>
<td>$153.1</td>
<td>70%</td>
</tr>
</tbody>
</table>

Table 3: Proportion of Capital Budget Attributed to Maintenance and Replacement (2009-2014)
Source: Niagara Region
The 2014 Niagara Region Asset Management Plan found that the majority of Regional assets covered by the plan were rated in good condition. Continued investment is required to maintain, extend lifespan or replace assets. In order to better manage assets, the Region has consolidated the financial and strategy functions to improve the oversight of asset condition and maintenance costs. These efforts will continue to enhance full asset lifecycle assessment and planning, aligning capital spending to asset condition, risk and desired service levels. The capital funding requirements requested in the 2015 budget forecasts the Region’s 10-year capital requirements to be over $1.6 billion while the actual funding identified is less than $1.4 billion, resulting in an infrastructure funding gap of $235 million for Niagara Region.

If Niagara is to grow and prosper, investments must be made beyond the requirements needed to maintain the Region’s current asset base. A growing population and economy in Niagara will require expanded service requirements on existing assets, and additional key strategic investments, designed to significantly enhance prosperity in Niagara that will likely increase the current forecasted demand.

In future capital budgeting processes, business cases will need to clearly articulate the rationale for all capital investments, and address how the investment will result in maintaining or improving Niagara’s economic prosperity.

Not all assets required to improve economic competitiveness are managed by Niagara Region. Therefore, issues such as congestion on the QEW are being addressed collaboratively with Hamilton, Halton, Peel and Waterloo regions to advocate for a Niagara-GTA corridor and an alternate route connecting the GTA, through Fort Erie/Buffalo, to the U.S. market.

Niagara municipalities are working together to actively pursue enhanced public transit and have received a commitment from the Premier of Ontario to complete the due diligence necessary to expand GO Rail service to Niagara. A team of area CAOs is actively working with the Premier’s office, Ministry of Transportation and Metrolinx to ensure Niagara delivers on its commitment to this project. Achieving region-wide unity on other related key programs such as the Transportation Master Plan and Mobility Hub Strategy (guiding transit supportive development and inter-municipal transit) is essential to building credibility with the Province in GO Rail negotiations.
In addition to the traditional prosperity indicators for taxes, growth, investment and infrastructure, it is important to concurrently focus on key community indicators that measure the human capital and social service demands as they have a direct link to economic prosperity in Niagara. These indicators, including early childhood development measures, social assistance caseloads, social housing, long term care waitlists, homelessness and mental health demands, are symptomatic of the economic prosperity measures described above and provide a more in-depth picture of well-being within the community.

**EARLY DEVELOPMENT INSTRUMENT**

The Early Development Instrument (EDI) is a universal measuring tool used every three years for senior kindergarten children to report on their development and overall readiness for school and life, specifically focused on five domains of development:

- Physical health and well-being
- Social knowledge and competence
- Emotional health/maturity
- Language and cognitive development
- General knowledge and communication skills

The following graph provides an overview of the percentage of children who are identified as vulnerable, based on the tool, across the five development domains. It can provide insight into areas where further effort and investment is required to support children in achieving future prosperity.
Niagara region has not seen significant improvements in vulnerability since we began implementing EDI in schools in 2005. The research shows that EDI improvements in a community can generate positive benefits in the following areas:

- A strong and productive workforce
- Poverty Reduction
- Chronic disease prevention
- Reduced spending on health and social services
- Crime reduction
Long term studies focusing on human capital policy programs have shown that the highest return per dollar invested occurs before age six in pre-school programming. The graph above depicts the relative return on investment based upon various age cohorts. The least amount of return is seen with post-school job training, a time when the children are long past the sensitive periods in early brain development and past when services have the greatest impact. In order to address future success and labour market needs, a long term perspective will be required to support a best start for our youngest population.

**HOUSEHOLD INCOME**

Income can be the most significant determinant of an individual’s health. Household incomes in Niagara have historically lagged behind the provincial average, with no immediate signs of closing the gap. Currently, 37,380, or 12.9%, of families in Niagara are living below the Low Income Cut Off.

Niagara’s household income has slowly begun to rise since the 2009 downturn in the economy, however remains lower than the median household income for Ontario.
Fostering an environment for economic prosperity will help to provide stable and well-paying jobs that allow families to earn above the low-income measures and close the earning gap with the rest of the province. This will provide families with improved opportunities to address basic needs, increase disposable incomes, and provide relief on income support programs and social assistance.

**SOCIAL ASSISTANCE**

Niagara Region is mandated to administer the provincial Ontario Works (OW) program. This program provides financial assistance and a range of employment supports to enable participants to access sustainable employment.

Since the economic downturn in 2009, Niagara’s social assistance caseload, composed of individuals and families, has increased from 8,902 to 10,681 (in 2014) which represents a change from 15,757 individuals to 21,771 individuals (2009 to 2014). Although economic recovery has provided renewed hope of creating jobs and reducing the Social Assistance and Employment Opportunities (SAEO) caseload, Niagara’s caseload is forecasted to continue to grow by 2.75%, 3% and 3% over the next three years.
Niagara is among a number of other regions/municipalities that face high social assistance caseloads. For 2013, Niagara’s average monthly caseload was nearly 1,000 cases higher than the median among municipalities participating in the Ontario Municipal Benchmarking Initiative.
Niagara Region works closely with clients, Niagara employers and educational institutions to assist with matching those with suitable skills to employment opportunities. However, the current provincial system for managing social assistance recipients does not include the necessary vocational assessment tools to assist case managers to capture, track and monitor the skills of existing recipients to effectively match their skills with opportunities in the local job market.

The current strategies and approaches to address caseload and support recipients back to gainful employment are not improving the caseload situation. Staff are exploring new ways to address the growing demand and explore unconventional and creative new ways to solve these challenges.

**SOCIAL HOUSING ASSETS**

As social assistance caseloads continue to rise, Niagara experiences a related challenge to address growing demand for social housing. As a result, the waitlist for service has continued to grow from 4,611 to 5,877 households, an increase of 1,266 (27%) from 2009 to 2014.

![Figure 31: Niagara’s Housing Waitlist (2009-2014)](image)

Source: Niagara Region

According the Ontario Non-Profit Housing Association 2014 Waitlist Survey, Niagara Region’s average time on the wait list is 3-5 years. This is comparable to Hamilton, Halton, Durham and Waterloo Region’s waitlist times. The City of Toronto, and Peel and York Regions have longer wait times, while Windsor and London have lower average wait times.

Between 2009 and 2014, the Region-owned social housing units increased by 122, contributing to the overall increase in the number of units by 38522.

---

22 Note: The social housing sector added 263 units during the same time period
Niagara Region has made substantial investments to support social housing with over $296 million gross or $154 million net in operating expenses and $27 million in capital investments through the budget process from 2009 to 2014.

<table>
<thead>
<tr>
<th>Year</th>
<th>Gross Operating Budget</th>
<th>Net Operating Budget</th>
<th>Capital Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>$46,937,440</td>
<td>$24,365,664</td>
<td>$3,460,450</td>
</tr>
<tr>
<td>2010</td>
<td>$47,693,082</td>
<td>$24,977,631</td>
<td>$3,276,946</td>
</tr>
<tr>
<td>2011</td>
<td>$48,618,442</td>
<td>$25,763,565</td>
<td>$3,576,050</td>
</tr>
<tr>
<td>2012</td>
<td>$49,306,075</td>
<td>$26,583,803</td>
<td>$8,190,850</td>
</tr>
<tr>
<td>2013</td>
<td>$50,910,862</td>
<td>$25,887,921</td>
<td>$4,145,052</td>
</tr>
<tr>
<td>2014</td>
<td>$52,602,747</td>
<td>$26,982,923</td>
<td>$4,480,172</td>
</tr>
<tr>
<td>Total Investment (2009-2014)</td>
<td><strong>$296,068,648</strong></td>
<td><strong>$154,561,507</strong></td>
<td><strong>$27,129,520</strong></td>
</tr>
</tbody>
</table>

Table 4: Niagara Region Social Housing Operating and Capital Budget Summary (2009-2014)

Source: Niagara Region Approved Budget Books, 2014

Reports suggest that the existing social housing stock is aging (the majority of the stock is approximately 30 years old) and will continue to demand increases in both operating and capital investments to sustain existing assets. Although the demand has begun to show signs of leveling, it is likely that forecasted social assistance caseload growth (see page 41) will place a continued upward demand on affordable housing.
LONG TERM CARE

A similar situation of demand outpacing supply is unfolding with the Long Term Care (LTC) sector in Niagara. As of October 31, 2014 the Community Care Access Centre (provincial placement agency) reports that waitlists for individual LTC homes in the Niagara Region range from six to 296 people. The chart below, which was part of recent demographic study, forecasts a declining ratio of LTC beds to residents 75 years or older. Between 2011 and 2031 seniors 65 years and older will account for 60% of the population growth in Niagara, demonstrating an increasing demand for seniors services.

Figure 33: Long Term Care Beds Per 100 Seniors (75+)
Source: Optimus SBR

As well, projections show increasing acuity levels (health conditions such as heart problems, high blood pressure, arthritis, diabetes, dementia or Alzheimers, thyroid conditions, etc.) in residents, given an estimated 72% increase in chronic condition prevalence rates by 2036\(^{23}\). In all, the projections point to increased pressure on Niagara’s health system as a result of these trends. While staff face the pressures of providing enough long term care home beds for our aging population, the challenge of providing beds, shelter and support for our homelessness population remains a priority for Niagara’s most vulnerable population.

HOMELESSNESS

The number of individuals homeless in Niagara is not readily available given the difficulty in quantifying such a number. Niagara’s social service agencies speculate that as many as 573 individuals/families on the social housing waitlist are homeless or at risk of becoming homeless (in that they are either relying on temporary, short-term housing from someone or they are living on the street). There is often other challenges aside from lack of housing such as mental health that creates significant barriers and challenges in serving this population.

\(^{23}\) Long Term Care Redevelopment Study, Optimus SBR, 2014
Niagara Region has been unsuccessfully advocating for a fair and equitable funding mechanism for homelessness since 2002. The chart below summarizes the existing funding disparity between Niagara and comparator municipalities with respect to homelessness funding relative to population and the Ontario Works (OW) and Ontario Disability Support Program (ODSP) caseloads. This disparity ranges from $3 million to $10 million, depending upon which comparator and specific government program is considered.

<table>
<thead>
<tr>
<th>CMSM</th>
<th>Population (2013)</th>
<th>Average OW and ODSP Caseload (as of Sept 2013)</th>
<th>Base Funding Allocation for 2013-2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waterloo CMSM</td>
<td>534,762</td>
<td>18,725</td>
<td>$5,688,565</td>
</tr>
<tr>
<td>Hamilton CMSM</td>
<td>545,585</td>
<td>30,027</td>
<td>$12,591,981</td>
</tr>
<tr>
<td><strong>Niagara CMSM</strong></td>
<td><strong>445,351</strong></td>
<td><strong>23,669</strong></td>
<td><strong>$2,690,957</strong></td>
</tr>
<tr>
<td>London CMSM</td>
<td>461,737</td>
<td>23,093</td>
<td>$5,630,764</td>
</tr>
<tr>
<td>Windsor CMSM</td>
<td>402,060</td>
<td>20,135</td>
<td>$6,087,324</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td><strong>485,875</strong></td>
<td><strong>20,060</strong></td>
<td><strong>$5,346,036</strong></td>
</tr>
</tbody>
</table>

Table 5: Comparative Provincial Base Funding Allocation for Homelessness (2013-2014)

Source: Niagara Region, 2013

The funding disparity is largely related to historical allocations that were set under pre-existing federal and provincial homelessness programs. Provincial funding has seen a number of programming consolidations leading to greater flexibility for communities to respond to homelessness but no significant increase in homelessness funding from the province to reflect changing conditions in Niagara. Advocacy to update funding formulas that better reflect service demands, based on population size, OW/ODSP caseloads or other relevant indicators of poverty would better distribute funding based on community needs. In 2014, Niagara will receive $476,470 in federal funding and $4,910,152 in provincial funding, for both base funding (historical based allocation) and needs-based funding. Currently, $2,690,957 of the total allocation received by Niagara is considered base funding, which is inconsistent with the population and related allocations shown for other Regions. Niagara Region needs to continue to advocate for an equitable funding mechanism that will provide necessary services to address homelessness.
MENTAL HEALTH

Niagara has experienced years of underfunding for mental health services, relative to population and geography, and as a result has insufficient community-based clinical mental health services to ensure that residents’ needs are being met.

“People with serious mental illness are disproportionately affected by homelessness. The consequences of homelessness tend to be more severe when coupled with mental illness. People with mental illnesses remain homeless for longer periods of time and have less contact with family and friends. They encounter more barriers to employment and tend to be in poorer health than other homeless people.”

(Canadian Mental Health Association)

The graph below represents the per capita spending on Community Mental Health and Addictions, recognizing that the Hamilton Niagara Haldimand Brant (HNHB) Local Health Integration Network ranks amongst the lowest in the province, with the larger community of Hamilton absorbing more of the funding.

Figure 34: Local Health Integration Network (LHIN) spending per capita comparison (2013)
Source: Niagara Region 2014

The lack of services creates expensive and unnecessary pressure on hospital services and although Niagara has previously been identified as needing three Assertive Community Treatment (ACT) teams to fulfill the needs in our community, there is only one ACT team in
Niagara that has maximized its funding and reached caseload capacity. This will help to fulfill the needs in our community where there is currently only one ACT team in Niagara that has maximized its funding and reached caseload capacity. The chart below shows a substantial decrease in the percentage of hospitalizations of those clients that benefitted from the Niagara ACT team from 2010-2013.

<table>
<thead>
<tr>
<th>ACT Hospitalization</th>
<th>Baseline (Pre-Treatment)</th>
<th>After Treatment</th>
<th>% Decrease in Hospitalizations</th>
<th>Estimated Cost Savings minus ACT costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010/2011</td>
<td>14946</td>
<td>1681</td>
<td>86</td>
<td>$14,007,810</td>
</tr>
<tr>
<td>2011/2012</td>
<td>15986</td>
<td>1794</td>
<td>89</td>
<td>$15,077,568</td>
</tr>
<tr>
<td>2012/2013</td>
<td>13939</td>
<td>2204</td>
<td>84</td>
<td>$12,242,190</td>
</tr>
</tbody>
</table>

Table 6: Assertive Community Treatment (ACT) performance summary 2010-2013
Source: Niagara Region 2014

At the time of printing: Approval was given for an additional Assertive Community Treatment Team (ACTT) for Niagara as well as enhanced resources to support Early Intervention services for youth. The LHIN board approved annualized based funding of up to $1,425,000 for the ACT Team and up to $400,000 for Early Intervention Services.

People living with mental illness, who receive adequate treatment and support, have the potential to become fully contributing members of their community. The Ontario Early Psychosis Intervention Program Standards states that early intervention can prevent client problems from occurring, and improve long-term client outcomes. With the current funding and available mental health services, Niagara currently reports that:

- 40% of Niagara Early Psychosis Intervention (EPI) clients stay in work or school
- 12% of Niagara EPI clients were able to return to work or school after receiving help
ECONOMIC PROSPERITY: SUMMARY OF NIAGARA’S PERFORMANCE

Since 2007, there has been a concerted effort to maintain sustainable, affordable tax increases below inflation rates. Over the past five years, this affordability strategy has resulted in an average annual Regional tax increase of 1.13%. This had a positive impact on tax payers by reducing the burden of property taxes as a percentage of their household income, bringing Niagara within the average for the province. Despite efforts to address economic conditions, Niagara is performing at or below average on indicators related to economic prosperity, including growth, employment, investment, infrastructure and community well-being. If Niagara can dedicate the same level of energy and focus to these economic prosperity indicators as has been devoted to taxes, the region can outperform these forecasts the same way Council has “bent the curve” on affordability.

There is an opportunity for Council to set strategic directions for the next four years that are transformative and differentiate Niagara from our competition. We are building trust and confidence in area municipalities which in turn is earning credibility in the provincial government. We are working in cooperation with other jurisdictions, to leverage the collective benefits of improving the overall provincial economy and its access to the global marketplace. Niagara can provide key transportation linkages between the largest economic region in Canada (Greater Toronto Hamilton Niagara Area or GTHNA) and the US Eastern Seaboard, one of the largest economic regions of the US. Niagara benefits from its global brand and recognition, but also faces the uncertainties of global economic, social and political trends that can impact our economy directly and significantly.

Part II of this document suggests some ideas for Council’s consideration.
PART II

SUGGESTED IDEAS FOR COUNCIL CONSIDERATION
FOSTERING AN ENVIRONMENT FOR ECONOMIC PROSPERITY: POTENTIAL IDEAS FOR 2014-2018

Based on interviews with Councillors, we heard that there is an expectation for the CAO and Corporate Leadership Team to submit ideas for Council’s consideration that will result in high community impact between 2014 and 2018. Subsequently we followed up meetings with provincial Deputy Ministers, Brock University, Niagara College, several chambers of commerce, CAOs from other GTA municipalities and input from all Niagara economic development officers and CAOs; and completed research of key documents and reports at the global, national, and provincial levels, and conducted an analysis of how Niagara is performing on key economic prosperity indicators.

Based on these efforts, we are suggesting the following as ideas to assist Niagara Region in fostering an environment for economic prosperity:

- **Four pillars focused on results:**
  - Moving people and goods
  - Investment, innovation and entrepreneurship
  - Building a workforce ready labour market
  - Positioning Niagara globally

- **Doing business differently:** Core business transformations that could significantly change some of the ways our organization does business and move us toward best-in-class practices. We consider these transformative changes “game changers” that will enable us to surpass our competition.

- **Organizational excellence:** All of the above rest on a foundation of organizational excellence. This foundation is a prerequisite that directly affects our ability to deliver on Council directions.
These ideas are described further on the following pages for Council’s consideration.

It is proposed that a full scale review would be completed after two years of implementation to ensure that efforts remain relevant to Niagara’s needs and are achieving desired results.
MOVING PEOPLE AND GOODS

Transportation and transit are intrinsically linked to economic prosperity. The world’s most competitive regions support a competitive business environment by providing transportation systems that move people and goods as quickly and efficiently as possible.

There is a strong recognition of the role that transportation and transit play in supporting economic competitiveness, particularly at the provincial level. The Government of Ontario has committed $1 billion to the Ring of Fire area (Northwestern Ontario area rich in mineral deposits), and the remaining $13 billion over the next ten years to projects outside of the Greater Toronto and Hamilton area. There is a high degree of competition for funding, with requests far outweighing supply, and Niagara will need to be quick and ambitious in order to seize the opportunity for GO rail expansion and other transportation opportunities like the Niagara-GTA corridor.

The Transportation Master Plan is the basis for success in this area. Niagara Region is working collaboratively with area municipalities on this plan, providing a comprehensive multi-modal strategy for transportation in Niagara. This plan will also be integrated with key planning and economic development efforts to make sure the plan for transportation effectively serves strategic hubs for investment. The Transportation Master Plan is also central to Niagara’s credibility in GO rail expansion.

The following strategies are proposed in order to improve Niagara’s competitiveness in the field of transportation infrastructure and services:

- Work collaboratively with area municipalities on a Transportation Master Plan and Mobility Hub Strategy that will strategically focus Regional transportation investments and provincial/federal funding to community hubs most capable of fostering investment, innovation, entrepreneurship and promoting greater harmony with transportation networks elsewhere in the Greater Golden Horseshoe.
- Together with local area municipalities, work collaboratively with the Premier’s Office, Ministry of Transportation and Metrolinx on the necessary due diligence to expand GO rail service to Niagara.
- Work toward triple majority support for a formal Regional role in facilitating and supporting an integrated region-wide inter-municipal transit network, using the long term concept plan (approved October 2014) as the basis for further consultation.
- Working in co-operation with Hamilton, Halton, Peel and Waterloo, advocate for a Niagara-GTA corridor as an alternative route to the QEW, connecting Fort Erie to the GTA through south Niagara.
DESIRED OUTCOMES FOR 2014-2018

- Provincial commitment in 2015 to implementing GO rail expansion to Niagara
- Completion of a Mobility Hub Study in 2016, with construction commencing on at least one Mobility Hub in 2018
- Transportation Master Plan completed and approved in 2017
- In co-operation with local area municipalities, completion of a 10 year capital plan by 2018 for works associated with bringing GO to Niagara
- Triple majority support in 2015 for a Regional role in facilitating and supporting region-wide inter-municipal transit connections and, pending support from area municipalities, priority routes implemented to connect GO rail stations and other strategic community hubs.
- Achieve provincial commitment to a Niagara-GTA corridor in 2016.

“NIAGARA WEEK IS EVERY WEEK”

In 2014-2018 the following Government Relations Strategies are required to more effectively move people and goods in Niagara and throughout the Golden Horseshoe:

- Work with Metrolinx, MTO and Premier’s Office on the necessary technical studies to make GO rail expansion to Niagara happen
- Obtain access to $13 billion non-GTA transportation investments from the Government of Ontario
- Advocate for a Niagara-GTA corridor with support from Hamilton, Halton, Peel and Waterloo
INVESTMENT, INNOVATION AND ENTREPRENEURSHIP

Indicators on GDP, employment and income levels directly relate to the ability to attract wealth by supporting innovation and entrepreneurship. Niagara Region is working with local Economic Development Officers on strategies to promote these activities and leverage federal and provincial funding programs.

The majority of work proposed to be undertaken in economic development over the next four years, through cooperation between the Region, local Economic Development Officers and Chief Administrative Officers, relates to investment, innovation and entrepreneurship. These strategies channel resources and partnerships toward opportunities that are most likely to generate wealth and jobs in Niagara.

The following strategies are proposed over the next four years to improve Niagara’s outlook related to investment, innovation and entrepreneurship:

- Develop, approve and implement a **Joint Economic Development Action Plan** that emphasizes: investment attraction and leads generation; economic research and analysis; and advocacy with other orders of government.

- Establish an **expedited process** that will facilitate faster decision making at Niagara region, including: eliminating unnecessary delays in the approval process; implementing a proactive approach for projects of major economic significance; recommend improvements to the procedural by-law and complete a review of standing committees that will allow Council to reach decisions in a more timely manner

- Work collaboratively with area municipalities to identify strategic **regional centres and corridors** as places to focus new investment and development, and ensure our participation in review of provincial plans, such as the Greenbelt Act and Places to Grow, support these efforts

- Work with Economic Development Officers to enhance Niagara’s marketing strategies, including better integrating the full suite of incentives that are available and obtaining consistent data and analysis as evidence of Niagara’s strengths

- Establish a **Community Investment Fund** within the 2016 budget that will allow Niagara Region to make strategic investments when opportunities with high economic impact arise (past examples include investments in Vineland Research and Innovation Centre and Brock University BioLinc). This fund would be made possible through revenue generation opportunities described on page 67, and program criteria with reporting requirements would be developed to ensure accountability and high return on Regional investments.
DESIRED OUTCOMES FOR 2014-2018

- Joint Economic Development Action Plan with local Economic Development Officers completed and approved in 2015
- Improved performance over the next four years in the following areas as part of the draft Joint Economic Development Action Plan with local Economic Development Officers and CAOs:
  - Increase in employment rates
  - Value of building permits to increase
  - Increased number of new investment dollars
  - Increased number of new entrepreneurs
  - Increased number of new industry innovations
- Increase the amount of new development for employment into 2018 (target to be determined, as an example, 33% of Milton’s building permits are commercial or industrial related, equalling one job for every three houses).
- In 2016, leverage revenue generation opportunities (described on page 67) to establish a $1 million Community Investment Fund for Regional contributions to community projects with high economic impact.

“NIAGARA WEEK IS EVERY WEEK”

In 2014-2018 the following government relations strategies are required to advance investment, innovation and entrepreneurship in Niagara:

- Leverage opportunities through the provincial Jobs and Prosperity Fund ($2.5 billion over 10 years)
- Pursue advocacy with local EDOs and CAOs through the Economic Development Action Plan. In addition to GO rail expansion, advocacy includes mitigating negative effects of policies on electrical energy and provincially significant wetlands legislation
BUILD A WORKFORCE READY LABOUR MARKET

Labour shortages mean that businesses and communities will need to be leading edge in their development, recruitment and retention strategies.

Niagara’s unemployment levels are higher than those in the rest of Ontario and Canada, yet local and prospective employers have raised concerns regarding their ability to fill jobs with people who have the skills they require. This is consistent with national trends of “jobs without people, people without jobs” (see page 20).

Over the next four years it is proposed that the organization explore new ways to better equip Niagara residents for current and future career opportunities and attract/retain those with the skills that are currently lacking to attract major firms.

The following strategies are proposed to help build a workforce ready labour market in Niagara in 2014-2018:

- In the short term: help current Ontario Works clients to access employment by investing in a skills inventory that will match Ontario Works clients to prospective local labour market needs as quickly as possible; and, proactively develop programs and coordinate supports to help working poor to avoid the need for assistance through Ontario works.

- Work with the provincial government to provide all Niagara residents with coordinated and effective one-stop shopping for employment supports.

- Develop new partnerships with school boards, post-secondary institutions and industry representatives focused on youth retention, using potential pilot programs as a catalyst for increased partnership. Potential pilots could include partnering on an apprenticeship program for skills training in trades and partnering on a para-medicine program.

- Work collaboratively with post-secondary institutions, local area municipalities, and local business to create world-class post-secondary districts in order to attract top talent to Niagara.

- Focus on longer term capacity of our local labour market through increased attention to young children’s physical health, social competence, emotional maturity, cognitive development and communications through the Early Development Instrument.
DESIRED OUTCOMES FOR 2014-2018

- Plateau and bend the curve in Ontario Works caseloads from 2014 levels by 2018
- Increased mental health funding committed from the provincial government by 2016.
- Increased homelessness funding committed from provincial government by 2018.
- Joint strategy on youth retention developed with post-secondary institutions by 2017.

"NIAGARA WEEK IS EVERY WEEK"

In 2014-2018, the following government relations strategies are required to advance a workforce ready labour market in Niagara:

- Dedicate resources to advocacy with the provincial government to ensure equitable funding in Niagara and enable more proactive approaches to reducing caseloads
- Advocate for more equitable resources for Niagara in social services (homelessness) and mental health
POSITION NIAGARA GLOBALLY

Globally, traditional strong markets will lose their share of global GDP to India, China and the developing world. Communities in North America and Europe will need to be attractive in the international marketplace to remain competitive (see page 5).

With a close proximity to the US border, there are opportunities to leverage global markets if international trade and accessible border issues are resolved. Existing transportation networks link Canadian markets to the eastern seaboard of the United via upstate New York with relative ease, and Niagara could enjoy increased prospects for associated industries, such as supply chain and logistics, through designation of Niagara as a Foreign Trade Zone.

The Greater Toronto and Hamilton Area (GTHA) has become a region of economic significance at the global level. It is important for Niagara to leverage our close proximity to the GTHA in order to share in growth opportunities through more coordinated economic, growth and transportation planning across the Golden Horseshoe.

In addition to leveraging the economic strengths of the GTA, work needs to be done to understand Niagara’s strengths and weakness from the perspective of those outside of Canada. One of the best opportunities to reach out to global networks is through engaging new Canadians who currently reside in Niagara—these individuals have networks and strategic advice to improve Niagara’s attractiveness to prospective residents, businesses, investors and industries from across the world.

The following strategies are proposed to begin to position Niagara globally in 2014-2018:

- Engage local businesses with global networks in the development of a strategy to make Niagara more attractive in the global marketplace for investment, including the pursuit of Foreign Trade Zone designation.
- Create windows to emerging global markets by establishing an international presence in Niagara for financial institutions or other key industries.
- Engage students and organizations that support newcomers to better understand what Niagara can do to attract talent for other parts of the world.
- Together with local Economic Development Officers, participate in strategic investment and trade missions the leverage opportunities in advanced manufacturing and energy sectors.
- Leverage internationally recognized assets, like Niagara Falls, and international events, such as the Pan/Parapan American Games and World Dragonboat Racing Festival to attract foreign investment to Niagara.
DESIRED OUTCOMES IN 2014-2018

- Strategy to improve Niagara’s global attractiveness complete in 2016, with net new population growth of 10,000 by 2018.
- At least one foreign financial institution to establish a presence in Niagara by 2018.
- Increase in leads generated through four trade missions annually that market Niagara’s strengths.
- Federal commitment to implement a Foreign Trade Zone in Niagara in 2015.

“NIAGARA WEEK IS EVERY WEEK”

In 2014-2018, the following government relations strategies are required to position Niagara globally.

- Advocate for a Foreign Trade Zone in Niagara in 2015 and participate in resolving international trade and accessible border issues.
“GAME CHANGERS” - DOING BUSINESS DIFFERENTLY

Niagara’s performance on the indicators described in Part I of this document can be improved through transforming the way we do business and bending the curve on some of the forecasts that predict below average performance from Niagara. While complementary to continuous improvement, these transformations would move us far beyond continuous improvement and involve significant departures from past approaches.

Over the past five years the organization has made significant gains through continuous improvement. The Responsive Region Improvement Team (RRIT) has trained hundreds of employees in continuous improvement tools like Lean Six Sigma. Continuous improvement has now been embedded in much of the organization and is becoming part of everything we do.

There are forecasts in some of our services that continuous improvement alone will not be able to change. In some instances, a fundamental change in thinking an approach are required in order to bend the curve on some of our forecasts. We consider these ideas “game changers” and a few ideas are listed below for Council’s consideration.

NARROW FOCUS TO ACHIEVE RESULTS

When asked about the strengths and weaknesses of previous Council Business Planning exercises at Niagara Region, the strongest comment from returning Regional Councillors was that past business plans have been too broad and this has negatively affected the organization’s ability to focus on opportunities that are more strategic in nature. We heard that there needs to be consensus on a select few strategic directions where there will be the greatest community impact, and that a short list of priorities is what we need to achieve real results. In other words, we need to “move miles on a few items instead of inches on everything.”

A narrower focus on strategic directions will allow the organization to focus on results, rather than activities or processes. This kind of clear direction would allow us to devote the necessary attention to identifying desired outcomes, charting the milestones required to achieve success, and mobilizing the resources required to get there.

NIAGARA WEEK IS EVERY WEEK

Another common theme in discussions with both returning and incoming Regional Councillors is the need for a higher presence and more effective working relationships with the federal and provincial governments. There is a high level of satisfaction with efforts undertaken during Niagara Week at Queen’s Park each spring and we heard that we need to move toward more
continuous, concerted effort to advance local concerns at the federal and provincial levels. Given that this municipal term of office coincides with that of a majority provincial government and the term of the federal government (see page 19), there is a window of opportunity for those municipalities that quickly establish their relationship with other orders of government and compete for resources.

One example of success with this approach is the cooperative efforts between Niagara municipalities to attain provincial commitment to GO rail expansion to Niagara. External expertise was secured to advise local Mayors and CAOs on strategies to advance the issue during the provincial election and considerable resources are necessary to ensure that Niagara’s interactions with the Premier’s Office, Ministry of Transportation and Metrolinx are effective and credible. Because consensus was achieved among municipalities and all 31 Councillors on a targeted strategy, Niagara has been able to advance this issue much further than previous efforts.

The preliminary success achieved through the GO rail advocacy could be replicated through dedicated resources in other areas, such as dedicating resources to resolve inequities in social assistance through base allocations for homelessness funding and to resolve provincial disparities in funding for mental health.

This does not mean that Niagara alone needs to bear the full burden for advocacy on every issue we face with provincial and federal governments. In many cases, advocacy is undertaken as part of collective effort with neighbouring municipalities and provincial and national municipal associations. For example, Niagara Region is currently working in “co-opetition” with Hamilton, Halton, Peel and Waterloo on provincial commitment to a Niagara-GTA corridor in 2016. Niagara municipalities are working with colleagues in Large Urban Mayor’s Caucus of Ontario (LUMCO) and the Association of Municipalities of Ontario (AMO) on other issues such as interest arbitration and fine collection under the Highway Traffic Act. While there are some areas where Niagara Region needs to take the lead and employ its own resources, this is not always the case.

A list of current advocacy initiatives underway, targets and partners is included under Appendix 1 for Council’s consideration.

**FASTER DECISION MAKING**

Niagara Region can also foster an environment for economic prosperity by re-examining current processes so our organization can reach decisions as quickly as possible while continuing to recognize the need for accountability and transparency. Lengthy approvals processes can be costly and burdensome and we would like to minimize unnecessary delays to the greatest extent possible to support growth in Niagara.
In partnership with local area municipalities, we are examining current planning and development approvals to develop solutions that will result in a more expedited process for investors and developers who want to locate or grow in Niagara. For major projects of strategic significance, we will work to establish a proactive approach that goes beyond just expediting so that Niagara Region and our partners can aggressively pursue projects that are most likely to generate wealth in the community.

In order for these accelerated processes to be successful, we would also like to recommend options to Council that will enable more timely decision making. These options could include changes to the procedural by-law and opportunities to work more collaboratively so that Council representatives are involved in developing solutions.

**CORE SERVICE TRANSFORMATIONS**

Over the next four years the organization will be investigating our $7 billion in corporate assets and developing innovative approaches that will adopt industry leading practices for managing these assets going forward.

It is clear from a preliminary assessment of our infrastructure that resolving current challenges using traditional approaches is not likely to be sustainable, requiring a $1.6 billion capital investment over the next ten years unless new ways of delivering services are explored. For example, Niagara’s social housing assets are aging and current investments are not closing the gap between the demand for units and supply. Another example relates to the mandated redevelopment of existing long term care spaces which will require upfront capital investment. From a service level viewpoint, the gap between available long term care spaces and projected demand also continues to widen. A review of the recent Auditor General’s report is being done to understand a number of issues that were reviewed, including Public Private Partnerships.

Infrastructure replacement and competing demands for new infrastructure, combined with operational investment in assets and services required in order to meet new or evolving needs, are all causes of significant pressure on the Region. Like other governments around the world, the Region requires better methods to leverage capital, technology, specialized skills and expertise in order to address complex social and operational problems and achieve superior outcomes. Governments at all levels are looking at non-traditional or Alternative Service Delivery (ASD) methods to transform the services that they provide. The following are three

---

24 Ontario Auditor General’s Annual Report, 2014
25 According to the Ontario Chamber of Commerce, “ASD is a means by which governments can leverage the capital, technology, and specialized skills of its partners in order to meet specific public policy objectives, address complex social problems and achieve better outcomes for their populations.” *(Unlocking Ontario’s Public Service Economy).*
examples from various jurisdictions that have deployed ASD methods to address a wide range of items:

- In Ontario, the provincial government entered into an agreement in 1991 to have a third party operate and maintain its Electronic Land and Registration System. In 2010 this agreement was extended for 50 years, with the provincial government receiving fees and a royalty stream, while still maintaining control over fee increases. Due to the success of this initiative the Province of Manitoba has also undertaken an ADS solution for this service.

- In Australia, the private sector provided IT security and support through a DBOM (design, build, operate and monitor) model to their Court Facilities operations and management.

- The Province of Nova Scotia entered into a 10 year agreement with a private partner to provide Information Technology services in connection with application management for its Health Administrative Services Program.

Staff have identified more than $1 billion in assets and planned future capital spend that should be reviewed with an “ASD lens”. The areas identified include: 1) Long Term Care facilities, 2) Facilities, 3) Housing, and 4) Public Works infrastructure. Should Council wish to move forward on these opportunities, we would propose that options for two of these options commence by Q2 2015, and that Long-Term Care homes be the first area of exploration, given the tight timelines associated with redevelopment of three sites if traditional capital planning methods are pursued.

To close the gaps on some of the forecasts outlined in Part I of this document, the Region is looking at a wide range of options for ASD including, but not limited to, the following approaches and strategies: Public / Public partnerships - partnering with other public sector agencies (for example other municipalities or not-for-profits) to develop an asset or provide a service

- **Public / Private partnerships** - encompasses a wide range of arrangements with a private sector participant to develop an asset or perform a service.

- **Joint Ventures** - a partnership that shares the risks and rewards of an asset or service.

- **Availability Contracts** - a form of output contracting where the Region of Niagara would pay for access or use of facility or equipment rather than acquiring ownership.

- **Social Impact Bonds** - is a form of contracting where the Region would pay for the attainment of predetermined targets or goals. The structure encourages independence and innovation in areas of difficult social issues.
These approaches could see the Region take significantly different approaches to our traditional “develop, own and operate” approach. Using various ASD approaches will allow us to explore selling some assets outright, sell and lease back other assets, or have other parties undertake some combination of developing, operating and maintaining the assets. Alternative procurement methods would see the Region request proposals from multiple vendors and solicit many options as opposed to identifying one consultant and only receiving a few options. This strategic approach to procurement lends flexibility to the process and generates significant options at no added cost. The Region has already started to develop tools and approaches to identify and rank opportunities within the Region’s operations.

While the Region continues to complete and submit provincially mandated asset management plans, we will continue to compare our asset management approach to those in the private sector and determine how new partnerships and innovative arrangements can help to ease financial burden and increase service levels associated with our assets.

**REVENUE GENERATION**

Over the next four years the Region will consider various revenue generating opportunities such as the strategic acquisition of property by considering “the best available” for what is required, contrary to identifying the “best of what we currently have”. This may mean acquiring additional assets in excess of what is actually required in order to secure best case scenario options and repositioning the surplus acquisition of assets for another initiative. The Region currently owns the properties at two of three Long Term Care Homes being considered for redevelopment. Additional real estate revenues exist in this scenario by minimizing sprawl and building up on these properties. The direct results would create operational efficiencies for public or private operation as well as create surplus land areas that could also be repositioned as saleable assets.

There are also opportunities to leverage value advertising and sponsorship initiatives by identifying assets that have the potential to generate revenues and subsequently ascertaining valuation estimates. Though the revenue potential is not substantial, opportunities do exist. For example, revenues from Rogers, TELUS and Bell cellular towers, outdoor media where the Region leases space that is subsequently used for billboard advertising as well as other leases of office space and easement rights, totals of approximately $867,000 directly from Region-owned assets. Other similar opportunities could be explored.

The Region is continuing to work with local area municipalities to better understand the existing payment-in-lieu revenues received from provincial and federal crown agencies. In total, they account for approximately $8.5 million in revenue, but have not substantially appreciated, despite inflation and significant capital investments and improvements to these land holdings. There is an opportunity to work collaboratively with the municipal tax departments to challenge
the existing payment-in-lieu (PIL) for key properties. Some specific examples include the Upper Canada Lodge long term care home property lease and corresponding Parks Canada PIL and hydro-electric/transmission line corridors.

Should Council wish to proceed with these opportunities for new revenue, we are committed to exploring these and other opportunities with a target of achieving a $1 million in additional revenues by 2016. We are proposing that this capacity be allocated to a Community Investment Fund that would allow the Region to contribute to community projects with high economic impact (see page 54).

**PROJECT TEAMS**

The multi-disciplinary project team method has proven effective and will become even more prevalent over the next few years. The ambulance dispatch model in 2002 is a good example of how a project team with the right expertise, resources, and a high degree of accountability can deliver results that are far outside normal business practices. In this model Niagara Region aggressively pursued the opportunity to provide a state-of-the-art ambulance communication (dispatch) centre by responding to a Ministry of Health and Long-term Care Request for Proposal for a 5-year pilot project. Niagara’s RFP submission proposed the creation of an innovative, communications centre built on the best and leading industry practices and provided a “framework for ambulance dispatch in the province”. A project team was formed with key staff (senior management from all affected departments, technical and staff) with a private sector emergency services consultant providing industry and technical expertise.

Building on the success of the ambulance dispatch model, in 2015 we are proposing a dedicated project team with internal and external expertise, including expertise from local area municipalities, to deliver on the necessary due diligence required to make GO rail expansion to Niagara happen. In discussions with senior officials in the Ministry of Transportation and Metrolinx, it is clear that a high degree of effort will be required, not just to demonstrate technical feasibility of GO rail expansion to Niagara but also how expansion ties directly to the NGTA Corridor, social assistance funding, a transportation master plan and economic development action plan. Delivering on these expectations will require the full attention of a project team with clear accountabilities.

Project teams have also been established for key corporate initiatives that are underway, as outlined in Table 7.
<table>
<thead>
<tr>
<th>Project</th>
<th>Budget</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Police Headquarters Building (Niagara Falls) and Police District 1 (St. Catharines)</td>
<td>$83M</td>
<td>Q4 - 2017</td>
</tr>
<tr>
<td>Wastewater Treatment Facility (Niagara-on-the-Lake)</td>
<td>$46.8M</td>
<td>Q1 - 2017</td>
</tr>
<tr>
<td>Court Services Facilities (St. Catharines and Welland)</td>
<td>$23.8M</td>
<td>Q4 - 2017</td>
</tr>
<tr>
<td>Enhanced Financial Management System (Region)</td>
<td>$12.9M</td>
<td>Q1 - 2017</td>
</tr>
</tbody>
</table>

Table 7: Significant Regional Capital Project Underway - Budget and Targeted Completion
Source: Niagara Region

While multi-disciplinary project teams are not new to the organization, we are ramping up their use and asking non-traditional members to join the team. For example, we would like to invite representatives from local area municipalities to participate directly on what might have previously been considered internal working groups.
FOUNDATION FOR SUCCESS: ORGANIZATIONAL EXCELLENCE

In order to advance any strategic directions that may be determined by Council, our ability to deliver results is directly related to investments in organizational excellence.

Over the past year the organization has been focused on establishing a One Team model, building trust and confidence internally in order to build trust and confidence with our partners. There have been a number of major initiatives designed to break down organizational silos and flatten traditional hierarchies:

- Leaders across the organization are assessed and developed for their ability to function as an engaged member of One Team, demonstrate a positive attitude and deliver results. Top talent from the private and public sectors has been recruited to bring fresh perspectives to the way we do business.

- Structural changes have been completed that consolidated finance staff previously working in individual departments to a single unit in Financial Management and Planning, and consolidated strategy and performance management staff previously working in individual departments to an objective Organizational Performance and Accountability unit within the CAO’s office.

- Overall cultural changes are underway that promote a flatter organization, reducing hierarchies and encouraging collaboration across departments and employee groups. Objectives for organizational culture are included under Appendix 3 and, while we have begun to implement these objectives, there is significant work left to be done to ensure these behaviours and actions drive the entire organization.

While these changes have been relatively intensive, they represent only the beginning of how Niagara Region can move to best-in-class organizational practices. Building on the work of the past year, the following work will be required over the next four years in order to build greater capacity to deliver on Council priorities:

PEOPLE STRATEGY

Niagara Region developed a People Strategy to differentiate ourselves as an employer and region of choice and is our plan to overcome the challenges associated with attracting, recruiting top talent in the public sector (see page 21).

The People Strategy is a critical part of building a best in class organization that can adapt to new challenges, perform in a competitive economic environment, and deliver on Council priorities. With
over 50% of senior managers in Ontario’s municipalities eligible for retirement within the next five years, there will be intense competition for top talent in the public sector in the years ahead and we need to seize every opportunity to obtain a competitive advantage when it comes to recruiting and retaining top talent.

Niagara Region’s People Strategy models common attributes of high performing organizations, as found in leading national and international research, including the Corporate Leadership Council, Hay Group, Mercer, and Canada’s Top 100 Employers. Through the People Strategy, we are committed to concerted action on each of the following:

- Developing leaders and talent
- Fostering a healthy and well organization
- Recruiting and retaining for fit
- Recognizing and rewarding employees
- Investing in employee development
- Driving employee engagement

The People Strategy recognizes that investments in people are just as important, if not more important, than investments in the organization’s physical assets and key to helping the region become more competitive.

Employee engagement is the cornerstone of Niagara Region’s People Strategy. At the end of 2012, the Niagara Region, in partnership with Metrics @ Work, conducted an Employee Engagement survey, which resulted in an overall engagement score of 67.1%, pegging the Region as approximately average based on benchmarks included in the Metrics @ Work database. Of the organizations included in that database, municipalities averaged 67.8%, while private sector organizations averaged 64.7%. A 2013 AON Hewitt survey\(^\text{26}\) of world-wide engagement scores report an average score of 79% for top quartile (best 25%) companies.

\(^\text{26}\) AON Hewitt, 2013 Trends in Global Employee Engagement
Employee engagement is critical to our productivity, and we are committed to ensuring each and every employee comes to work each day understanding their role in the larger organization, and that everyone one of us plays a role in fostering an environment for economic prosperity. To this end we have set a stretch target to increase employee engagement levels to 80% by 2019 from engagement levels of 67% in 2012. This target will take us from an average classification and put us on par with the top quartile of organizations world-wide.

These initiatives are prerequisites that lay a foundation for our organization to move from good to great, and enable substantive progress on more outward facing results with high community impact. This framework for organizational excellence will substantially increase staff’s ability to deliver results on any strategic directions that Council may determine.

**CUSTOMER SERVICE**

Customer service is another high priority area over the next four years. While structurally and culturally the organization is moving toward a One Team model, a legacy of silos has left a confusing maze of access points for our customers. Niagara Region manages four external websites, one internal intranet site, provides support for four additional websites, and manages six social media channels. There are 16 commonly called phone numbers that are actively advertised by our organization and that citizens rely on to access our services. There are 35
reception areas or walk-up counters across the corporation all with a different look, feel and service standard.

As a first step to making access easier for customers, the organization implemented telephone voice recognition software and an easy to remember telephone number in October 2014. This small step is only the beginning of an integrated customer service model that considers all potential ways our customers may access our services now – through telephone, website, walk-in counters, mail, social media – and in the future.

There is a distinct recognition that the more engaged a workforce, the greater level of customer satisfaction and loyalty, organizational productivity and revenue. It is essential that there is a common commitment around high service standards for our customers.

ENHANCED FINANCIAL MANAGEMENT SYSTEM

The Enhanced Financial Management System (EFMS) is a $12.9 million corporate investment that will, through modern business practices, improve the way Niagara Region operates and replace the multiple applications that are currently operating with a corporate-wide enterprise resource planning system. Building on the structural consolidation of finance staff that occurred in Q2 2013, the EFMS project is an essential investment that will result in better line of sight for our investments and assets across the corporation and build the foundation necessary to explore innovative new approaches and new revenue streams through consolidated procurement.

The EFMS project is a significant corporate initiative, and over 20 employees have been seconded full time to implement the project by January 1, 2017 and deliver on the benefits outlined. The initiative will replace over 100 processes currently operating at Niagara Region with a single consolidated approach.
CONCLUSION: SEEKING COUNCIL DIRECTION

We have heard from Councillors that, in order to be successful during the 2014-2018 term, Niagara Region must come out quickly with a plan that is narrowly focused on improving the local economy and engages provincial and federal governments. The CAO and corporate leadership team has been collecting information from Councillors, area municipalities and economic development offices, other GTA municipalities, and have conducted research to propose potential ideas for Council's consideration with the objective to foster an environment for economic prosperity.

Through this process we have uncovered that, while our performance is below average in a number of key performance indicators on economic prosperity, there are opportunities to bend the curve if we do business differently. These are game changers that will not only help us catch up to our competitors, but surpass them through best-in class business practices that set the benchmark for our sector.

Councillors are invited to provide input and request clarification in the coming weeks. We are recommending that this feedback be consolidated and distributed within the next month, and a facilitated session be scheduled to assist Council in determining if you wish to pursue these strategic directions, modify them, or determine entirely different strategic directions. We are proposing rapid timelines so that any outcomes determined by Council can be integrated in the 2015 budget process.

The proposed timelines are as follows:

- December 18: CAO presents consolidated input and research.
- December 19 to January 12: Requesting Councillors feedback on proposed ideas.
- January 12: Results of all Councillor feedback distributed to Regional Council.
- January 22: Facilitated Committee of the Whole session to determine strategic priorities.
- February 19 (tentative): Additional facilitated Council session scheduled if required.

Any suggestions on how staff can support Council in this process are welcome and appreciated.
# Table of Figures

<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Figure 1</td>
<td>Map of Global Emerging Markets for Canada</td>
<td>6</td>
</tr>
<tr>
<td>Figure 2</td>
<td>Canadian and US GDP Rates 1982-2015</td>
<td>7</td>
</tr>
<tr>
<td>Figure 3</td>
<td>Canadian Dollar versus US Dollar Value 10 year Trend</td>
<td>8</td>
</tr>
<tr>
<td>Figure 4</td>
<td>Atlantic Gateway Access Vision, Niagara Region</td>
<td>9</td>
</tr>
<tr>
<td>Figure 5</td>
<td>Interest Rates in Canada and the United States (2000-2016)</td>
<td>10</td>
</tr>
<tr>
<td>Figure 6</td>
<td>Federal, Provincial and Local Investment Shares in Infrastructure, 1955-2011</td>
<td>11</td>
</tr>
<tr>
<td>Figure 7</td>
<td>The Big Move: 25-year Plan for the Regional Rapid Transit and Highway Network</td>
<td>13</td>
</tr>
<tr>
<td>Figure 8</td>
<td>Economic Logistic and Goods Movement Corridor Vision</td>
<td>15</td>
</tr>
<tr>
<td>Figure 9</td>
<td>MTO’s Recommendation GTA-West/NGTA Highway Expansion</td>
<td>16</td>
</tr>
<tr>
<td>Figure 10</td>
<td>Federal, Provincial and Municipal Election 1987 – 2018</td>
<td>19</td>
</tr>
<tr>
<td>Figure 11</td>
<td>Medium Estimates for the Skill Shortage in Canada</td>
<td>20</td>
</tr>
<tr>
<td>Figure 12</td>
<td>Migratory and natural increase of the Canadian population, 1956 to 2056</td>
<td>21</td>
</tr>
<tr>
<td>Figure 13</td>
<td>Average Regional Taxes as a Percentage of Household Income</td>
<td>24</td>
</tr>
<tr>
<td>Figure 14</td>
<td>Average Regional and Local Area Municipal Taxes as Percentage of Household Income</td>
<td>24</td>
</tr>
<tr>
<td>Figure 15</td>
<td>Property Taxes as a Percentage of Income (2013) – including Water/Wastewater</td>
<td>25</td>
</tr>
<tr>
<td>Figure 16</td>
<td>Total Tax Burden as % of Household (HH) Income (2009-2013)</td>
<td>26</td>
</tr>
<tr>
<td>Figure 17</td>
<td>Population growth comparison between Greater Toronto Area and Niagara</td>
<td>28</td>
</tr>
<tr>
<td>Figure 18</td>
<td>Niagara Region Population by Single Year of Age, 2006&amp; 2031</td>
<td>29</td>
</tr>
<tr>
<td>Figure 19</td>
<td>Assessment Growth in Niagara (2009-2013)</td>
<td>30</td>
</tr>
<tr>
<td>Figure 20</td>
<td>Unemployment Forecasts for Canada, Ontario and St. Catharines-Niagara CMA</td>
<td>30</td>
</tr>
<tr>
<td>Figure 21</td>
<td>Percentage of Total Assessment per Tax Category, 2014</td>
<td>32</td>
</tr>
<tr>
<td>Figure 22</td>
<td>Ontario’s CMAs Youth (age 15-24) Annual Average Unemployment Rate (2013/14)</td>
<td>32</td>
</tr>
<tr>
<td>Figure 23</td>
<td>Value of Building Permits Issued in Niagara 2009-2013</td>
<td>34</td>
</tr>
<tr>
<td>Figure 24</td>
<td>Comparison of Niagara and Hamilton Building Permit Values</td>
<td>35</td>
</tr>
<tr>
<td>Figure 25</td>
<td>Total Regional Capital Budget Investment for 2009-2013 by Program Area</td>
<td>36</td>
</tr>
<tr>
<td>Figure 26</td>
<td>Niagara Region Early Development Instrument Scores by Development Domain</td>
<td>39</td>
</tr>
<tr>
<td>Figure 27</td>
<td>Median Household Income for St. Catharines-Niagara CMA and Ontario</td>
<td>40</td>
</tr>
<tr>
<td>Figure 28</td>
<td>Average Monthly SAEO Case Loads (2009-2014) and Provincial Forecasts (2015-17)</td>
<td>41</td>
</tr>
<tr>
<td>Figure 29</td>
<td>Comparative Social Assistance Average Monthly Caseloads by Region/Municipality (2009-2013)</td>
<td>42</td>
</tr>
<tr>
<td>Figure 30</td>
<td>Niagara’s Housing Waitlist (2009-2014) and Forecasted Trend (2015-2017)</td>
<td>43</td>
</tr>
<tr>
<td>Figure 31</td>
<td>Niagara Region Owned Social Housing Units (2009-2014) and Forecast (2015-2017)</td>
<td>44</td>
</tr>
<tr>
<td>Figure 32</td>
<td>Long Term Care Beds Per 100 Seniors (75+)</td>
<td>45</td>
</tr>
</tbody>
</table>
Figure 34: Local Health Integration Network (LHIN) spending per capita comparison (2013) ........ 47
Figure 35: Niagara Region Engagement Scores versus Benchmarks .............................................. 72

Table 1: Federal and Provincial Infrastructure Contributions ......................................................... 12
Table 1: Total Tax Burden as % of Household (HH) Income (2009-2013) .................................... 27
Table 2: Proportion of Capital Budget Attributed to Maintenance and Replacement (2009-2014) .. 36
Table 3: Niagara Region Social Housing Budgets 2009-2014 ......................................................... 44
Table 4: Comparative Regional Base Funding Allocation for Homelessness (2013-2014) .......... 46
Table 5: Assertive Community Treatment (ACT) performance summary 2010-2013 ................. 48
Table 7: Significant Regional Capital Project Underway - Budget and Targeted Completion .... 69
### APPENDIX I - CURRENT ADVOCACY INITIATIVES

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Objective</th>
<th>Partners</th>
<th>Lead Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO rail expansion to Niagara</td>
<td>Twice daily GO rail commuter service to Niagara Falls by summer 2015</td>
<td>All 12 local area municipalities and post-secondary institutions, with support from community stakeholders</td>
<td>Niagara Councils and CAOs working group</td>
</tr>
<tr>
<td>Funding for social assistance and mental health</td>
<td>Address inequities in base funding allocations to ensure Niagara’s funding is consistent with comparable municipalities</td>
<td>Support from community-based organizations and LIHN</td>
<td>Niagara Region</td>
</tr>
<tr>
<td>Advocacy through Joint Economic Development Action Plan</td>
<td>Foreign Trade Zone in Niagara by 2015 Mitigated impacts of policies on electrical energy and Provincially significant wetlands legislation</td>
<td>Local Economic Development Officer and area CAOs</td>
<td>Team Niagara</td>
</tr>
<tr>
<td>Niagara-GTA Corridor</td>
<td>Provincial commitment to a Niagara-GTA corridor in 2016, as an alternative to QEW widening</td>
<td>Joint charter signed by Regional Council as well as Councils in Hamilton, Halton, Peel and Waterloo Region</td>
<td>Niagara Region in partnership with Hamilton, Halton, Peel and Waterloo Region</td>
</tr>
<tr>
<td>Interest arbitration</td>
<td>Mitigated impacts of settlements for Emergency Services</td>
<td>Advocacy through Regional and Single Tier CAOs (RSTCAO), Large Urban Mayors Caucus of Ontario (LUMCO) and the Association of Municipalities of Ontario (AMO)</td>
<td>Provincial municipal associations</td>
</tr>
<tr>
<td>Fine collection through the Highway Traffic Act (POA fines)</td>
<td>Prohibit vehicle permit renewals unless outstanding fines are paid-approximate value to Niagara is $3 million</td>
<td>Advocacy through AMO, Mayors and Regional Chairs of Ontario (MARCO), Municipal Finance Officers Association, Ontario Municipal Tax and Revenue Association</td>
<td>Provincial municipal associations</td>
</tr>
</tbody>
</table>
APPENDIX 2- PURPOSE STATEMENT AND VALUES

The following corporate purpose statement and values were supported by Regional Council in 2004. The vision and values were developed based on a review of best practices with regional businesses and municipalities. The value statements were a result of internal surveys of how employees view the work they do and how we want to be viewed by the community we serve.

VISION STATEMENT
Niagara Region is a unified community of communities with diverse opportunities and qualities - together we strive for a better tomorrow.

MISSION STATEMENT
Niagara Region will serve its residents, businesses and visitors through leadership, partnership and the provision of effective and community focused services.

PURPOSE STATEMENT

CORPORATE VALUES

RESPECT
We treat everyone equitably with compassion, sensitivity and respect.

SERVE
We serve Niagara with pride, care and excellence.

HONESTY
We value honesty, integrity and trust.

CHOICE
We believe in social, environmental and economic choices and support our diverse community.

PARTNERSHIPS
We foster collaboration and value partnerships
APPENDIX 3- OBJECTIVES FOR ORGANIZATIONAL CULTURE CHANGE
APPENDIX 4 - GLOSSARY OF KEY TERMS

**Assertive Community Treatment** - intensive support services for individuals with serious mental illness who have very complex needs, and who find it difficult to engage with other mental health services.

**Alternate Service Delivery (ASD)** – methods of public sector restructuring used to increase the efficiency and effectiveness of the services provided

**Association of Municipalities of Ontario (AMO)** – an organization which supports and enhances strong and effective municipal government in Ontario primarily through advocacy work to the provincial government

**BMA** – a public consulting firm which creates an annual municipal competitiveness study

**CANSIM** – a Canadian socioeconomic database information management system operated by Statistics Canada

**Chief Administrative Officer (CAO)** – the most senior municipal public servant who is responsible for the administrative management of the municipality

**Census Metropolitan Area (CMA)** - a grouping of census subdivisions comprising a large urban area and those surrounding "urban fringes" with which it is closely integrated

**Community Prosperity** – a study of the wellbeing of the area using the criteria including, but not limited to economic prosperity

**Consumer Price Index (CPI)** – a measure of inflation which looks at the changes in price level of a market basket of consumer goods and service for a household

**Early Development Instrument (EDI)** – a measurement tool used every three years to assess Niagara children’s readiness for a prosperous and healthy life

**Economic Development Officers** – an individual or individuals responsible for attracting and retaining economic development to a specific municipality. Only five municipalities have economic development officers in Niagara. The remainder uses their CAO or designate as a contact.

**Edelman Trust Barometer** – an measurement tool created and calculated by the Edelman group. It is calculated by information pulled by a variety of sources and demonstrates the difference in level of trust between different types of organizations including government and business.
Employee Engagement - Employee engagement scores are a measure of employees' job satisfaction, control, decision making and ability to contribute to company goals.

Enhanced Financial Management System (EFMS) – an upgraded system being implemented at the Niagara Region with the intention of improved functionality for financial management.

Foreign Trade Zone (FTZ) - a specific designated location within a country that is eligible for duty and tax exemptions with respect to the purchase or importation of inputs or finished goods.

Gallup Organization – a data-driven research firm based in the U.S. They are known for their U.S. and world polls, daily tracking and public opinion surveys.

Gross Domestic Product (GDP) – a measure of production equal to the sum of the gross values added of all resident institutional units engaged in production.

Greater Toronto Area (GTA) - the city of Toronto, and the four regional municipalities that surround it: Durham, Halton, Peel, and York.

Homeless - persons without a home as well as, those in imminent danger of having no accommodation. i.e. those in shelters, halfway houses, transitional housing, hostels.

In-migration - movement of people into an area or region from other areas.

KPMG - one of the big four auditors and one of the largest professional services companies in the world.

Large Urban Mayor's Caucus of Ontario (LUMCO) – a sub-group of the Association of Municipalities of Ontario that represents 67% of Ontario’s population, their main objective is to support and enhance strong and effective large urban governments.

Local Health Integration Networks (LHIN) – a regional health authority created by the Province of Ontario to plan, integrate and fund local health care, improving access and patient experience.

Metrolinx - an agency of the Government of Ontario responsible for transportation infrastructure in the Greater Toronto Area including GO-Transit.

Mobility Hub Strategy – an initiative of the Province of Ontario where major transit stations and the surrounding areas come together seamlessly, where there is an intensive concentration of working, living, shopping and/or playing.
Multi-modal Transportation Network – a plan to ease traffic congestion, and facilitate the movement of people and goods use different forms of transportation, including road, rail, marine and air

Niagara Greater Toronto Area (NGTA) – an area that includes Niagara, Hamilton and the GTA

Non-Government Organization (NGO) – a citizen-created organization which is not part of the for-profit, or government sectors

Niagara Regional Police Services (NRPS) – a police force which provides services to the 12 local municipalities in Niagara

Niagara Regional Housing (NRH) – the administrator of affordable housing for Niagara Region

Niagara Peninsula Conservation Authority (NPCA) – an authority created by the Province of Ontario to establish and undertake programs designed to further the conservation, restoration, development and management of natural resources within the Niagara River watershed

Niagara Week – an annual event where members of Regional Council and senior management travel to Queen’s Park in Toronto to present businesses cases and discuss regionally significant issues with provincial politicians and senior civil servants

Ontario Works (OW) – the municipality-administered, provincially-funded social assistance program delivered based on an individual’s financial need

Ontario Disability Support Program (ODSP) – the provincial disability social assistance program also based on income and disability

Ontario Municipal Benchmarking Initiative (OMBI) – a annual report and data collection across participating municipalities (including Niagara) created to foster and support a culture of service excellence in municipal government by creating new ways to measure, share and compare performance data and operational practices

Regional and Single Tier CAO’s (RST CAO) – a group of senior executives in the municipal public service in Ontario whose jurisdictions deliver cost shared programs on behalf of the province

Social Assistant Employment Opportunities (SAEO) – a division of Community Services which provides income programs and employment programs
**Standard and Poors** – an American financial services company that publishes financial research and analysis

**Transportation Master Plan** – a Regional document which identifies transportation facilities services and policies currently in place and required for the future
LIST OF SOURCES


Centre for Policy Alternatives. “Canada’s Infrastructure Gap” Published 2013.


City of Pittsburgh “Pittsburgh Strategic Plan” Available: http://planpgh.com/

City of Thorold. “Strategic Plan 2012-2015” Available:
http://thorold.iwebez.com/files/7B5D9FEFBE-A4C7-4BD5-B5CC-B5220E069920%7DCity%20of%20Thorold%20Strategic%20Plan%202012-2015.pdf

City of Welland. “Official Plan” Available:

Conference Board of Canada. 2014 Economic Outlook. Published October 2014.


Globe and Mail. “Canada to open the door wider to higher caliber of immigrants” October, 31, 2014


Lindzon, Jared. “How employee engagement can boost the bottom line” Globe and Mail: Wednesday, December 3, 2014


Niagara Falls Review. “Niagara’s poor rate housing unacceptable” Monday, December 8, 2014


Niagara Region Economic Development “Economic Development Quarter 1 Report” Published 2014

Niagara Region Economic Development “Quarterly Presentation” Published July 24, 2014


Niagara Region. “Economic Logistics & Goods Movement Corridor Vision” Published 2014


Niagara Region. “Growth Management Indicators” Published 2014


Niagara Region. “MOH Performance Indicators” Published 2012

Niagara Region. “MTO’s Recommendation GTA-West/ GTA Highway Expansion” Published 2014


Niagara Region. “Public Health Customer Service Charter” Published 2014


“Niagara to GTA Corridor Planning and Environmental Assessment Study: Transportation Development Strategy Executive Summary” Published September 2013


Optimus SBR. “Long Term Care Redevelopment Study” Published 2014.


Statistics Canada. “Migratory and natural increase of the Canadian population, 1956 to 2056” Published 2007


TD Economics. “Presentation to the Welland-Pelham Chamber of Commerce” Presented on Wednesday October 22, 2014
The Battleford News-Optimist. “Many Ontario communities on government life support”
November 11, 2014

Town of Fort Erie. “Strategic Plan 2011-2014” Available:

Town of Niagara on the Lake. “Strategic Plan” Available:


World Health Organization. “Health in All Policies” Available:
http://www.who.int/healthpromotion/conferences/previous/adelaide/en/index1.html