

Clause No. 7 in Report No. 4 of the Planning and Economic Development Committee was adopted, without amendment, by the Council of The Regional Municipality of York at its meeting on April 19, 2007.

7
PLANNING FOR TOMORROW
PART 2
2031 YORK REGION LAND REQUIREMENTS

The Planning and Economic Development Committee recommends the following:

1. **The presentation by Paul Bottomley, Manager, Growth Management, Economy and Information Research, Long Range and Strategic Planning, relating to Clauses 6 to 10 in this Committee Report be received;**
2. **A Regional or Local Councillor from each local municipality be requested to “champion” the *Planning for Tomorrow* series to raise awareness in their communities; and**
3. **The following recommendations contained in the report dated April 4, 2007, from the Commissioner of Planning and Development Services be adopted:**

1. RECOMMENDATIONS

It is recommended that:

1. Regional Council direct staff to work with the area municipalities to refine the forecast and land budget model.
2. The Regional Clerk distribute this staff report to the Ministry of Public Infrastructure Renewal (PIR), the Ministry of Municipal Affairs and Housing, and the area municipalities for information purposes.

2. PURPOSE

The purpose of this report is to outline preliminary land requirements and options to accommodate future growth in York Region. The land requirements are based on four forecast scenarios. These include 30% and 40% intensification scenarios that are based upon the Provincial Places to Grow forecasts, a 2051 forecast and the current Regional Official Plan forecast extended to 2031. These forecasts and land requirements will be used as a basis for discussion, review and evaluation with Regional Council, local municipalities, public agencies, school boards, etc. and the Province, as we continue to refine and develop a preferred scenario.

This report is Part 2 in the series of *Planning for Tomorrow* reports being brought forward for information and discussion in the spring of 2007. The reports in the series are:

1. York Region Population and Employment Forecasts
2. 2031 York Region Land Requirements
3. York Region Residential Intensification Strategy
4. York Region Residential Area Analysis - Preliminary Report
5. Phase 2 - Public Engagement and Consultation

All five reports are to be considered at the Planning and Economic Development Committee meeting of April 4, 2007 and should be read in the order in which they are listed above.

3. OVERVIEW

Key findings from the land budget exercise include:

- Four land use scenarios have been prepared.
- Existing designated development lands will last until approximately 2017 for residential lands and 2020 for employment lands.
- Expansion into the Whitebelt lands will be required to satisfy land demands.
- The Whitebelt Areas will accommodate significant residential and employment growth beyond the 2031 horizon.
- The 40% Intensification Scenario will require approximately 66% of Whitebelt lands to the year 2031 for residential and employment growth.

4. BACKGROUND

On January 16, 2006 the Ministry of Public Infrastructure Renewal (PIR) released the Growth Plan for the Greater Golden Horseshoe. The Growth Plan includes policies which support the development of more compact, vibrant, transit-supportive communities. Key policies in the Growth Plan include:

- Updated population and employment forecasts to the year 2031.
- The intention to create a built boundary, which will define the built-up area as of June 16, 2006.
- Intensification policies which stipulate that by the year 2015 and for each year thereafter, a minimum of 40 per cent of all residential development occurring annually will be within the built-up area, at the regional scale.
- The remaining 60% of residential development may occur outside of the built-up areas, in designated greenfield areas.
- A greenfield density target of not less than 50 residents and jobs combined per hectare at the regional scale. This density will be net of select environmental features, as defined in the Plan.

- The identification of urban growth centres, four of which are in York Region (Markham Centre, Newmarket Centre, Richmond Hill/Langstaff Gateway Centre, and Vaughan Corporate Centre).
- The York Region Urban Growth Centres should be planned to achieve a minimum gross density target of 200 residents and jobs combined per hectare.

As a result of the Growth Plan, and other recent Provincial growth management and urban development initiatives, York Region is currently undertaking a comprehensive Growth Management Review and Official Plan update that includes a number of separate tasks in determining the amount of growth the Region will accommodate over the next 25 years and where and how this growth will occur. The key components of this work plan include:

- The preparation of an updated forecast for York Region and the nine local municipalities (refer to a separate staff report on this April 4, 2007 agenda).
- Refinement of the forecasts in collaboration with area municipalities.
- A vacant employment land inventory (refer to Sept. 05 staff report).
- A vacant residential unit supply inventory (refer to Feb. 06 staff report).
- An intensification analysis (refer to a separate staff report on this April 4, 2007 agenda as well as Nov. 05 and Oct. 06 staff reports).
- A land budget with development options.
- Residential and employment area analyses

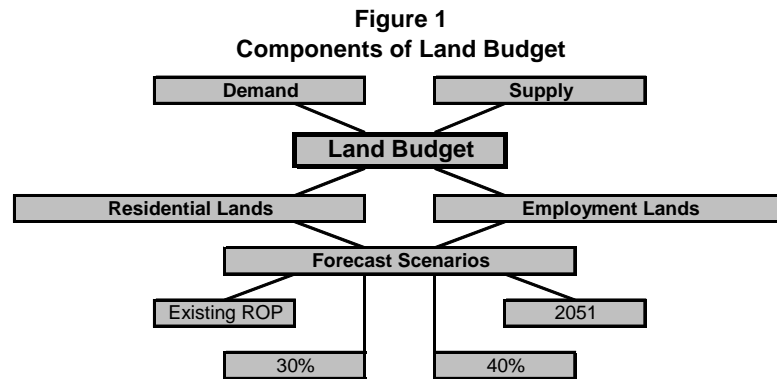
The land budget component of the work plan investigates additional land requirements to 2031 based on the updated forecast.

The estimated land requirements in the land budget will be used to plan for the efficient use of land and infrastructure in newly designated areas. The land estimates will help plan for and implement the Sustainability Strategy and Vision 2026. Also, the estimates will be incorporated into the Transportation and Water and Wastewater Master Plan updates.

5. ANALYSIS AND OPTIONS

5.1 Methodology

Land requirements are determined based on forecasted growth. Residential and employment area requirements are analyzed independent from one another and the area requirements are then combined in order to deduce overall requirements (see *Figure One*).



Source: York Region Planning and Development Services Department, April 2007.

The technical methodology used to calculate land requirements differs by land use, however the overall general approach is the similar:

1. Overall demand is determined (2031 Forecast)
2. Base year (2006) estimates are determined and subtracted from the forecast in order to determine growth requirements.
3. The vacant designated supply as of the base year (2006) is determined and subtracted from the growth requirements in order to determine additional requirements.
4. A density assumption is applied to the additional requirements in order to calculate additional land requirements above and beyond those already designated.

The base year for the land budget is July 1, 2006. This base relates well to both the Statistics Canada 2006 Census (May 2006) and the release of Places to Grow (June 16, 2006).

The “base year estimates” and “base year designated supply” calculated in steps 2 and 3 of the overall approach pertain to the portions of the Region that are currently designated for development. *Figure Two* displays the designated OPA approved status of York Region lands. Areas shaded gray are designated Urban or Town and Village in the Greenbelt Plan. It is the Region’s intention to update the Regional Official Plan land use designations to conform to the



Greenbelt Plan. The areas shaded dark gray are considered to be within built-up areas as of July 1, 2006 based on the York Region preliminary built boundary and are referred to as “intensification areas”. Areas shaded light gray are outside of the built-up areas as of July 1, 2006 and are referred to as “designated greenfield areas”. Areas shaded in black are designated built and vacant employment areas as of July 1, 2006.

The “additional land requirements” calculated in step 4 of the overall approach will be accommodated in the Whitebelt lands, which are the cross-hatched areas in *Figure 2*. The Whitebelt lands are the portion of the Region that is not currently designated Urban Area or Town and Village and is not protected by Oak Ridges Moraine or Greenbelt legislation. The lands in *Figure Two* that are not shaded or cross-hatched are protected by the Oak Ridges Moraine and Greenbelt, and are not considered for future development in this exercise.

5.2 Scenarios

York Region staff have updated the Region’s forecast model to prepare preliminary draft population, household and employment forecasts to 2031. Four separate forecast scenarios have been prepared:

- 30% intensification scenario
- 40% intensification scenario
- 2051 forecast
- The existing Regional Official Plan scenario to 2031

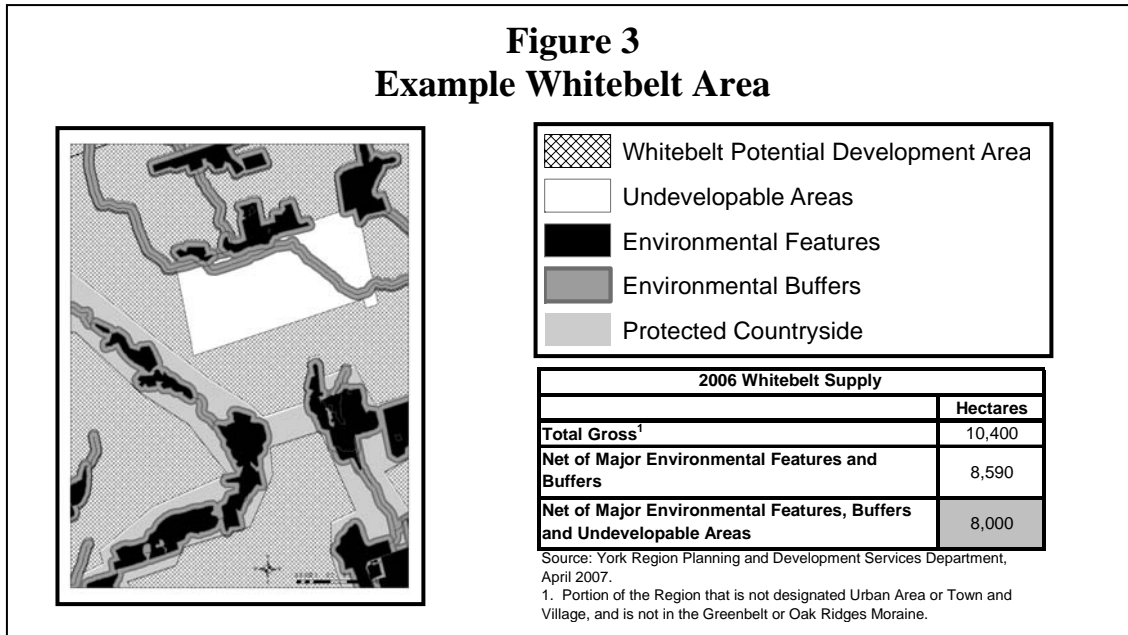
The 2051 forecast assumes the complete build-out of the whitebelt lands and a continuation of intensification. As part of the Regional Official Plan update exercise in 1999/2000, the forecast model was extended beyond the Council approved 2026 forecast horizon. The Regional Official Plan population and employment forecast scenario to 2031 is based on the work completed at that time. Each of the forecast scenarios result in different land area requirements. For this exercise, the updated 40% intensification scenario has been analyzed in depth and is shown graphically. The 30% intensification, 2051 and ROP forecast scenarios are commented on throughout the text of the report.

5.3 Whitebelt

Existing approved lands will accommodate residential development to approximately 2017 and employment growth to approximately 2020. To accommodate provincially forecasted growth to 2031 urban boundary expansions will be required. These expansions will be accommodated in the Whitebelt lands.

The total gross area of the York Region Whitebelt, excluding all greenbelt lands, is approximately 10,400 ha. When environmental features and buffers are removed, there are 8,590 hectares in the Whitebelt. When areas that are already developed, such as cemeteries and golf courses are removed, there are approximately 8,000 ha of developable lands in the Whitebelt in the Region.

Figure Three illustrates the Whitebelt land use breakdown.



The main sections of the Whitebelt are as follows:

- North Markham and south Whitchurch-Stouffville: approximately 2,915 developable ha.
- North Vaughan and south King: approximately 2,780 developable ha.
- East Gwillimbury: approximately 1,900 developable ha.

In addition to the main sections of Whitebelt, there are also portions found in Aurora (Aurora 2C), and Richmond Hill (North Leslie).

The amount of Whitebelt area required to accommodate growth to 2031 will be largely dependant on the demand scenario applied. A greater amount of intensification will result in fewer Whitebelt area requirements. Also, the density of development permitted will impact the requirements. More compact development will require less land area. Density of development can be a function of the building footprint, floor space, parking requirements, as well as the number of people.

5.4 Residential Land Budget

The York Region Household 40% intensification scenario is based on the Places to Grow population forecast, which calls for 1.5 million people in the year 2031.

5.4.1 Household Forecast to 2031

Staff have calculated that approximately 516,500 households will be required to meet the 40% intensification scenario (Figure 4).

Figure 4 2031 Household Forecast					
	Single Detached	Semi-Detached	Row	Apt.	Total
Household Forecast to 2031 ¹	293,300	32,600	75,600	115,000	516,500

Source: York Region Planning and Development Services Department, April 2007.

1. York Region Household Forecast to 2031, derived from Places to Grow Population Forecast.

5.4.2 2006-2031 Household Demand

The July 1, 2006 occupied housing stock has been estimated. The housing stock was calculated using 2001 census data and CMHC completion data. As of July 1, 2006 there were an estimated 277,987 occupied households in York Region. When the existing supply as of 2006 is subtracted from the 2031 forecast, 238,369 households are required to 2031.

For land budgeting purposes, intensification housing units must be analyzed distinctly from greenfield housing units. Intensification units are built in the built-up area and will not require any additional greenfield lands to be developed. Intensification units are not considered in the land budget exercise and only greenfield units are measured for land area requirements.

The built-up intensification areas used for this exercise are based on the Province's draft built-up areas analysis.

Figure 5 summarizes the forecasted greenfield household growth to 2031 based on the 40% intensification scenario. The 30% intensification scenario would require 166,361 greenfield households to 2031.

Figure 5 2006 - 2031 Household Growth					
	Single Detached	Semi-Detached	Row	Apt.	Total
Household Forecast to 2031 ¹	293,296	32,589	75,558	114,913	516,356
2006 Household Estimate ²	200,502	15,715	29,375	32,395	277,987
2006 - 2031 Household Growth ³	92,794	16,874	46,183	82,518	238,369
2006 - 2031 Intensification Growth ⁴	4,708	1,366	12,472	66,797	85,342
2006 - 2031 Greenfield Growth ⁵	88,086	15,509	33,711	15,721	153,027

Source: York Region Planning and Development Services Department, April 2007.

1. Figure 4

2. Derived from Statistics Canada and CMHC Completion data.

3. Households Demand to 2031 less 2006 Households Estimate.

4. Intensification required to meet 40% target.

5. Total household growth less intensification growth.

5.4.3 2006 Vacant Household Supply

The York Region Vacant Residential Unit Supply Inventory has identified 130,080 designated or approved households as of July 1, 2005. The residential inventory includes all areas designated Urban Area or Town and Village in Regional Official Plan as well as a very small number of units in the rural areas. The vacant residential supply has been updated to July 1, 2006 using building permit and subdivision data. As of July 1, 2006 the total vacant designated supply was 119,146 households.

Figure 6 2006 Designated Households by Category					
	Single Detached	Semi-Detached	Row	Apt.	Total
2005 Designated Households ¹	66,911	13,566	24,234	25,322	130,080
2006 Designated Households ²	62,084	11,803	21,517	23,742	119,146
2006 Intensification Households ³	4,707	1,364	4,028	8,323	18,424
2006 Designated Greenfield Households ⁴	57,377	10,439	17,489	15,419	100,723

Units that would be counted as intensification have been subtracted from the total. As of July 1, 2006, the total vacant designated greenfield supply was 100,723 households (Figure 6).

Source: York Region Planning and Development Services Department, April 2007.
 1. York Region Vacant Residential Units Supply Inventory (VRUSI)
 2. VRUSI updated based on subdivision and building permit data.
 3. VRUSI Intensification households based on York Region preliminary Built Boundary.
 4. VRUSI Greenfield households based on York Region preliminary Built Boundary.

5.4.4 Residential Whitebelt Requirements to 2031

When the vacant greenfield household supply as of 2006 is subtracted from the 2006-2031 greenfield Growth requirements, it is determined that 52,304 additional households in greenfield areas are required. The residential density assumption used for this exercise is 17 units per gross hectare. Gross density is defined as the total units divided by the total land area within plans

Figure 7 Residential Whitebelt Requirements to 2031					
	Single Detached	Semi-Detached	Row	Apt.	Total
2006 - 2031 Greenfield Growth ¹	88,086	15,509	33,711	15,721	153,027
2006 Designated Greenfield Households ²	57,377	10,439	17,489	15,419	100,723
Whitebelt Requirements to 2031 (Households) ³	30,709	5,070	16,223	302	52,304
Whitebelt Density Assumption (hhlds/ha) ⁴					17
Whitebelt Requirements to 2031 (Hectares) ⁵					3,077

Source: York Region Planning and Development Services Department, April 2007.
 1. Figure 5
 2. Figure 6
 3. 2006-2031 Greenfield Growth less 2006 Designated Greenfield Households
 4. Based on analysis of existing and planned communities in York Region
 5. Total Whitebelt Requirements to 2031 (Households) divided by Whitebelt Density Assumption
 6. Greenfield Apartment requirements to 2031 found in Aurora 2C and North Leslie lands.

of subdivision. The total area excludes non-developable land outside the land being subdivided which may include major valley lands, woodlots, highways, hydro easements, etc. This density is based on the assumption that Whitebelt growth to 2031 will consist primarily of ground related units. It is further assumed that 5% of the Whitebelt will be reserved for apartments, the majority of which will be built beyond 2031. When the density assumption is applied to the household growth requirement, it is determined that 3,077 hectares of Whitebelt lands are required to meet the 40% intensification scenario (Figure 7). When the same calculation is applied to the 30% intensification scenario, 3,861 hectares of Whitebelt lands would be required. When the calculation is applied to the current ROP forecast model, a total of 1,762 hectares of Whitebelt lands would be

required. For the ROP forecast analysis it is assumed that 30% intensification would be achieved throughout the plan period.

5.5 Employment Land Budget

The York Region employment forecast uses a higher forecast than the Places to Grow employment forecast of 780,000 jobs for the year 2031. The York Region 40% Intensification scenario forecasts 801,400 jobs to the year 2031; approximately 20,000 more jobs than are forecasted in the Growth Plan. Staff have evaluated the Places to Grow employment forecast in the context of the local municipal population forecasts and activity rates. The activity rate is defined as the percentage of total jobs to the total number of residents (based on the census population). The Region’s overall activity rate is forecast to increase from 51% in 2006 to 55% in 2031.

The employment forecast is divided into three land use based categories:

- Major Office – employment in freestanding office buildings 20,000 square feet or greater.
- Population Related – employment which serves the local population.
- Employment Lands – occurs in employment areas (i.e. industrial or business parks) and does not include employment already classified in the other two categories. This type of employment generally requires new vacant greenfield land for development.

From a land budgeting perspective, only the employment lands portion of the forecast is analyzed. Major office type employment takes very little land and often occurs as intensification in the centres and corridors. Population related employment is typically included in community area land requirements.

5.5.1 Employment Land Employment Forecast to 2031

The York Region 2031 employment forecast is separated into the three land use based categories as illustrated in *Figure 8*.

Figure 8 2031 Employment Forecast				
	Major Office	Population Related	Employment Land	Total
2031 Jobs	126,000	284,275	391,125	801,400

Source: York Region Planning and Development Services Department, April 2007.

1. York Region Employment Forecast to 2031.

5.5.2 2006-2031 Employment Land Demand

An estimate of employment land employment as of July 1, 2006 has been calculated for forecasting purposes. The employment lands employment estimate was calculated using 2004 and 2006 Employment Survey data. As of July 1, 2006 there were an estimated 208,927 employment land jobs in York Region. When the 2006 existing estimate is subtracted from the forecast, 182,198 employment land jobs are required to 2031 (*Figure 9*).

Figure 9 2006 - 2031 Employment Land Job Growth			
	2031 Employment Land Forecast ¹	2006 Employment Land Jobs ²	2006 - 2031 Employment Land Job Growth ³
Employment Land Jobs	391,125	208,927	182,198

Source: York Region Planning and Development Services Department, April 2007.

1. Figure 8

2. Estimate derived from York Region Employment Survey data.

3. Employment Land Demand to 2031 less 2006 Employment Land Estimate.

5.5.3 2006 Vacant Employment Land Supply

The Vacant Employment Land Inventory identified 2,862 net ha (7,073 net acres) of vacant employment lands, as of December 31, 2004. Net hectares are defined as the sum of private lot areas net of major environmental features. Of the total supply, 212 net ha are approved for industries on private services (IPS) only.

The vacant employment land supply has been updated to July 1, 2006 using employment survey and subdivision data. The Highway 404 North Employment Lands in Markham were approved in July of 2005 and provide an additional 108 net ha, which are also included in the update. As of July 1, 2006 the total vacant employment land supply is 2,703 net ha and provides for 103,678 jobs (*Figure 10*).

Figure 10 2006 Designated Employment Lands and Job Potential		
	Hectares	Jobs
2004 Vacant Employment Land Inventory	2,862	
2006 Vacant Employment Lands	2,703	103,678

Source: York Region Planning and Development Services Department, April 2007.

1. Update based on York Region Employment Survey data.

Note: Jobs calculation includes a 10% vacancy assumption

5.5.4 Employment Land Whitebelt Requirements to 2031

When the 2006 Vacant Employment Lands jobs are subtracted from the 2006-2031 Employment Land growth requirements, it is determined that 78,520 additional employment lands jobs are required. The employment lands greenfield density assumption used for this exercise is 51 jobs per net hectare. This is based on an analysis of densities for each local municipality, averaged across the Region. Staff are reviewing this density assumption in the context of the Places to Grow definition. Staff are also reviewing the density assumption with regard to the location of retail employment within the employment areas and the general community.

When the density assumption is applied to the growth requirement, it is determined that 1,540 net hectares of Whitebelt lands are required. When converted to gross area, it is determined that 2,200 hectares of Whitebelt lands are required. (*Figure 11*). It is assumed that net employment land requirements are 70% of gross developable land requirements. The net to gross adjustment includes an estimate for roads, open space, storm water management and a vacancy assumption. Under the 30% scenario it is assumed that the employment land employment requirements are the same as under the 40% scenario. When the calculation is applied to the existing ROP scenario, 3,151 hectares of Whitebelt lands would be required based on the Regional Official Plan Employment Land Employment forecast of 425,100 jobs.

	Employment Land Jobs
2006 - 2031 Employment Land Job Growth¹	182,198
2006 Vacant Employment Lands²	103,678
Whitebelt Requirements to 2031 (Jobs)³	78,520
Whitebelt Density Assumption (jobs/ha)⁴	51
Whitebelt Requirements to 2031 (Net Ha)⁵	1,540
Whitebelt Requirements to 2031 (Gross Ha)⁵	2,200

Source: York Region Planning and Development Services Department, April 2007.

1. Figure 9
2. Figure 10
3. 2006-2031 Employment Land Job Growth less 2006 Vacant Employment Land job potential
4. Based Employment Survey analysis
5. Whitebelt Requirements to 2031 (Jobs) divided by Whitebelt Density Assumption
6. Assumes that net is 70% of gross.

5.6 Total Whitebelt Requirements

The greater the rate of intensification, the less the Whitebelt land requirements to 2031.

The 40% forecast scenario would require 5,227 ha of Whitebelt for development to the year 2031, leaving 34.0% of the area for future development. The 30% forecast scenario would require 6,061 ha of Whitebelt for development to the year 2031, leaving 24.2% of the area for future development. The ROP forecast scenario would require 4,913 ha of Whitebelt for development to the year 2031, leaving 38.6% of the area for future development (See *Figure 12*, page 11).

In order to maintain the 40% intensification target to 2031 a significant amount of land in the Whitebelt that is available for ground related development will remain vacant. The 40% scenario assumes that 38% of the Whitebelt will be consumed for residential purposes by 2031. There is a risk that the market demand for ground related units will outpace the ground related household forecast identified in the 40% intensification scenario.

Figure 12 Overall Whitebelt Land Area Requirements						
Forecast Scenario	Whitebelt Requirements (ha) ¹			Whitebelt Supply (ha) ²	Whitebelt Remaining in 2031 (ha) ³	Whitebelt Remaining in 2031 (%) ⁴
	Resident'l	Employ'm't	Total			
ROP Whitebelt Requirement	1,762	3,151	4,913	8,000	3,087	38.6%
30% Whitebelt Requirement	3,861	2,200	6,061	8,000	1,939	24.2%
40% Whitebelt Requirement	3,077	2,200	5,277	8,000	2,723	34.0%

Source: York Region Planning and Development Services Department, April 2007

1. Whitebelt requirements - Figures 7 and 11

2. Whitebelt supply (Figure 3)

3. Whitebelt Supply less Total Whitebelt Requirements.

4. Percent of Whitebelt remaining in 2031 (2031 Whitebelt/Whitebelt Supply)

5.7 2051 Forecast

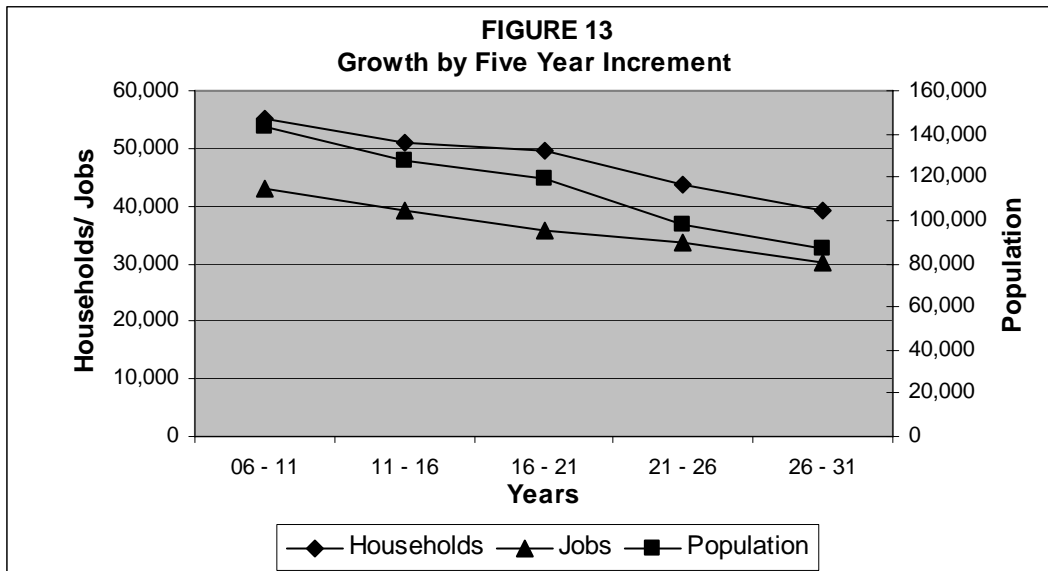
The 2051 Forecast assumes that all Whitebelt lands will be developed for residential and employment purposes. The Whitebelt Areas will accommodate significant growth beyond the 2031 horizon.

The 2051 forecast will assist staff with long range land use and infrastructure planning for the Region. The Growth Plan stipulates that urban boundary expansions may only occur when it has been demonstrated that “the expansion makes available sufficient lands for a time horizon not exceeding 20 years...” (*Places to Grow Policy 2.2.8.2(b)*). The Places to Grow 20-year planning period would extend to 2026. In order to take a comprehensive planning approach, Regional staff will take a long term view to plan efficiently for environmental, infrastructure and development requirements.

The 20-year timeframe will also limit our ability to preserve lands for employment uses. It is essential that future employment lands are protected for employment uses as these uses have locational and site-specific requirements; many of which are also attractive to residential developers. Employment lands must have reasonable proximity to major transportation corridors, must be serviced, and, in some cases, must be physically separated from non-compatible uses. Additionally, in order to attract a diverse employment base, the supply of vacant lands must include a variety of parcel sizes. Some major manufacturers require large swaths of land in order to operate effectively while others may only require small parcels of land.

5.8 Pace of Growth

It is assumed that, although it declines slightly, the pace of growth will remain high throughout the plan period (*Figure 13*, page 12). The 40% intensification scenario forecasts 55,035 new residential units in the 2006-2011 timeframe and 39,150 new residential units in the 2026-2031 timeframe. This represents a decrease of more than 3,000 growth units annually over the plan period. This assumed decrease in demand is anticipated largely due to demographic trends such as the aging population.



It is notable that the population growth declines at a proportionately greater rate than the household growth. The reason for this is that it is anticipated that the persons per unit (PPU) will decline over time; therefore more homes will be required to house the 1.5 million people anticipated to be living in the Region in 2031.

5.9 Key Observations

Key observations from the forecast and land budget exercise include:

- Growth is strongest in the first 10-15 years then moderates slightly to 2031.
- The pace of growth remains high: 11,000 households per year from 2006 to 2011, declining to 7,830 households per year from 2026 to 2031.
- The forecast calls for job creation to match labour force growth throughout the plan period.
- A continuing dramatic shift to townhouses/apartments is required to meet provincial forecasts.
- A longer term perspective (i.e. 2051) is required to plan for infrastructure, urban form, natural environment and employment lands.
- Achieving 40% intensification will be challenging, requiring a detailed intensification strategy for each area municipality.
- At our current pace currently designated residential lands will run out in 2017 and designated employment lands will run out in 2020.
- Designations on additional lands in the “Whitebelt” will be required.
- Planning for employment lands should be a priority and needs to take a long term perspective.
- The infrastructure investment (roads, water, wastewater and human services) is very significant and will require a different municipal fiscal model.

5.10 Risk Management

Accuracy of the forecasts may decline for longer forecast periods. There are risks associated with the forecasts. Careful monitoring and management of risks will be a key part of the growth management strategy. This forecast supply/demand and land budget exercise involves a considerable number of assumptions. These assumptions are based on our economy, market trends, Federal immigration rates, and a host of other factors.

Key risks identified include:

- There is a possibility that the pace of growth could spike higher than the forecast, especially for ground related housing units. An increased demand in the market place for ground related units will have implications for the land budget.
- Matching job creation to population growth is critical and will require long term identification and protection of employment lands.
- Stronger policies to control the pace, phasing and sequencing of growth will be required.
- It will be a challenge to construct infrastructure to match the pace of growth, especially transportation, water, wastewater and human services.
- The magnitude and timing of infrastructure investment will require significant provincial/federal investment and a new municipal fiscal model.

5.11 Critical Decisions

The above analysis of Whitebelt land area requirements to the year 2031, highlights a number of key decisions that must be considered:

- Are we prepared to accept and endorse the Provincial forecast of 1.5 million people at this time?
- Is the 40% Intensification target achievable? Is it desirable?
- Are we prepared to accept and endorse the pace of growth as it is forecasted? This includes both the number of households and the greenfield take-up proposed.
- How do we want our Whitebelt Areas to be developed? How will infrastructure and the natural heritage system be integrated?
- To meet the Province's forecast boundary expansions in some municipalities will have to be considered as part of this Growth Management exercise.
- How will Whitebelt development be phased across the region?
- Are we able to meet the proposed forecasts while maintaining fiscal responsibility?
- How will we monitor growth?
- How will we measure intensification?

As staff delves into the forecasts in more detail, further information will be provided to Council to help facilitate this decision making.

5.12 Next Steps

In order to incorporate the forecasts and land budget into regional policy, next steps include:

- Extensive consultations with our local municipal partners.

- Public and stakeholder engagement.
- Integration with the transportation, water and wastewater master plans.
- A fiscal impact analysis.
- An analysis of preferred phasing options (Fall 2007).
- A Regional Official Plan update (2008).

5.13 Relationship to Vision 2026

The decisions made around the forecast and land budget will impact every goal area in Vision 2026:

- Quality Communities for a Diverse Population
- Enhanced Environment, Heritage and Culture
- A Vibrant Economy
- Responding to the Needs of Our Residents
- Housing Choices for Our Residents
- Managed and Balanced Growth
- Infrastructure for a Growing Region
- Engaged Communities and a Responsive Region.

New Whitebelt designations and development will provide the opportunity to implement each of the goal areas and to achieve our Vision.

6. FINANCIAL IMPLICATIONS

The York Region forecast and land budget has been conducted within the existing Planning and Development Services Department staff complement and within approved budget allocations.

In order to meet the 40% Intensification Forecast Scenario, investment from all levels of government will be required. Timely improvements and expansions to both hard and soft infrastructure will be mandatory in order to accommodate the degree and pace of growth identified in the forecasts.

A fiscal impact analysis will be conducted for each of the forecast scenarios through the spring and summer of this year and will be reported to Committee and Council in the fall of 2007.

7. LOCAL MUNICIPAL IMPACT

Municipal consultation and coordination are integral components of the Region's forecast work. A local municipal technical advisory committee has been established and on-going consultations will continue. It is intended that detailed technical work, policy

implementation and growth management options will involve full collaboration with Areas Municipalities.

8. CONCLUSION

Four preliminary forecast scenarios have been prepared and analyzed for land requirements to 2031. The Whitebelt Area land requirements vary by forecast scenario. The variance in land requirements is in part a function of the levels of residential intensification applied. Lower levels of intensification require more Whitebelt lands to develop and provide for lower density development. The less intensification and the lower the density of development, the greater the demand for both hard and soft infrastructure will be.

It is projected that the existing designated supply will accommodate growth to 2017 for residential lands and to 2020 for employment lands.

Based on the 2051 forecast, the Whitebelt Areas will accommodate significant residential and employment growth beyond the 2031 horizon.

The forecast and land budget work presented in this report is preliminary. The work will be refined in consultation with the local municipalities and other key stakeholders.

For further information about this staff report, please contact Paul Bottomley, Manager of Growth Management, Economy & Information Research at 905-830-4444 extension 1530 or paul.bottomley@york.ca.

The Senior Management Group has reviewed this report.