



City of Kawartha Lakes

Growth Management Strategy

May 2011 Update



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May 18, 2011

Mr. Michael Benner
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City of Kawartha Lakes, Development Services
180 Kent Street West
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Dear Mr. Benner

RE: City of Kawartha Lakes Growth Management Strategy - ADDENDUM

This addendum has been prepared to recognize that since approval of the City of Kawartha Lakes Growth Management Strategy, the Province has approved alternative density and intensification targets for the City of Kawartha Lakes and the Northwest Trunk Servicing Study for Lindsay has been completed. This addendum addresses these significant initiatives and the impact on the Growth Management Strategy.

In March 2011, the Ministry of Infrastructure approved the City of Kawartha Lakes request for an alternative intensification target and an alternative designated greenfield density target. The table below shows the intensification and density targets that are required by the Provincial Growth Plan, the targets that were recommended by the Growth Management Strategy and the targets approved by the Ministry.

	Required by the Greater Golden Horseshoe Growth Plan	Recommended by the City of Kawartha Lakes Growth Management Strategy	Approved by the Ministry of Infrastructure
Residential Intensification Target	By 2015, a minimum of 40% of all residential development occurring annually will be within the built-up area.	By 2015, a minimum of 30% of all residential development occurring annually will be within the built-up area.	By 2015, a minimum of 30% of all residential development occurring annually will be within the built-up area.
Designated Greenfield Area Density Target	50 people and jobs combined per hectare	40 people and jobs per hectare for residential greenfields and 30 people and jobs per hectare for employmentgreenfields	40 people and jobs combined per hectare

As a result of the Minister's approval, the city's designated greenfield area must be planned to achieve a minimum density of 40 residents and jobs combined per hectare, measured across the entire designated greenfield area. As shown in the table, the approved intensification target and the approved designated greenfield density target are similar to those recommended in the City of Kawartha Lakes Growth Management Strategy. The only difference is that the Minister has required a greenfield density target of 40 people and jobs per hectare for both residential and employment greenfield lands. Whereas the Growth Management Strategy had recommended a density target of 30 people and jobs per hectare for greenfield employment lands. The intensification targets and greenfield density targets approved by the Minister are consistent with the findings and recommendations of the Growth Management Strategy Final Report. Therefore, the Growth Management Strategy Final Report has not been changed or amended to reflect the Minister's decision.

The completion of the Northwest Trunk Servicing Study has provided additional information regarding the potential for development on lands within the residential greenfield inventory and the residential intensification inventory in Lindsay. This updated information has been incorporated into the Growth Management Strategy Final Report. This updated information has resulted in some minor changes to the tables and text in the report (primarily within Chapter 5). The updated information does not significantly impact the findings of the Growth Management Strategy and the conclusions and recommendations of the Final Report remain unchanged. The changes to the residential greenfield inventory and the intensification inventory are shown in the table below.

	Area (ha)	Single Detached	Semi- Detached	Town Homes	Apartments	Seniors Retirement	Total
Original Greenfield Inventory	741.4	7433	80	1,598	1,565	0	10,676
Updated Greenfield Inventory	730.0	7,360	80	1,898	1,295	0	10,633
Difference	-11.4	- 73	0	+300	-270	0	-43

Original Intensification Inventory	148.9	848	22	1,898	1,342	568	4,678
Updated Intensification Inventory	151.3	848	86	1,898	1,642	748	5,222
Difference	+2.4	0	+64	0	+300	+180	+544

Original Total	890.3	8,281	102	3,496	2,907	568	15,354
Updated Total	881.3	8,208	166	3,796	2,937	748	15,855
Difference	- 9.0	- 73	+64	+300	+30	+180	+501

In conclusion, this Addendum has been prepared to include updated information as a result of the Minister's approval of alternative density and intensification targets and new information that resulted from the completion of the Northwest Trunk Servicing Study. The new information has been included in the Growth Management Strategy Final Report. However, the updated information does not alter the fundamental findings of the Growth Management Strategy and the recommendations of the Strategy remain unchanged.

Yours Truly,

MHBC

A handwritten signature in black ink, reading "Bernie Hermesen". The signature is written in a cursive style with a horizontal line underneath the name.

Bernie Hermesen, MUDS, MCIP RPP

CITY OF KAWARTHA LAKES

GROWTH MANAGEMENT STRATEGY

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EXECUTIVE SUMMARY

The City of Kawartha Lakes Growth Management Strategy is one of the components of the City's Municipal Master Plan Project. The purpose of the City of Kawartha Lakes Growth Management Strategy is to develop a strategy to plan for and manage growth in a sustainable manner that addresses economic, social and environmental considerations. The goal of the City of Kawartha Lakes Growth Management Strategy is to prepare an overall comprehensive growth management plan that:

- is in keeping with the intent of the policies of the Province's Places to Grow - Greater Golden Horseshoe Growth Plan (2006), the Provincial Policy Statement, and the City of Kawartha Lakes Community Vision;
- examines the City's capacity to accommodate growth, and answer the question of whether or not the City has sufficient land to accommodate the forecast future growth over the long term planning horizon to 2031;
- ensures that growth is managed in coordination with infrastructure capacities and needs and appropriate financial planning; and
- recommends a preferred growth scenario based on an assessment of a variety of factors including land capacity, servicing capacity and allocations, and ability to achieve growth plan density targets.

The Province's Growth Plan requires that the City of Kawartha Lakes undertake analysis and policy amendments to implement and conform to the Growth Plan. In June 2009, the City took a first step in conforming to the Growth Plan by approving four Official Plan Amendments that ensure basic conformity to the Provincial Growth Plan. Completion of the Growth Management Strategy is the second step. Its purpose is to develop a comprehensive plan that will examine land use supply and demand and existing and planned infrastructure to better understand how and where the City of Kawartha Lakes should grow over the long term planning horizon to 2031.

Provincial Policy Direction and Implications on the Growth Management Strategy

The Provincial Policy Statement (PPS) and Places to Grow Plan assign responsibilities and specific tasks to the City. The PPS, Places to Grow Act and Places to Grow Plan have significant implications on growth considerations for the City. The City's Official Plan must conform with the policies of the Province's Places to Grow Plan.

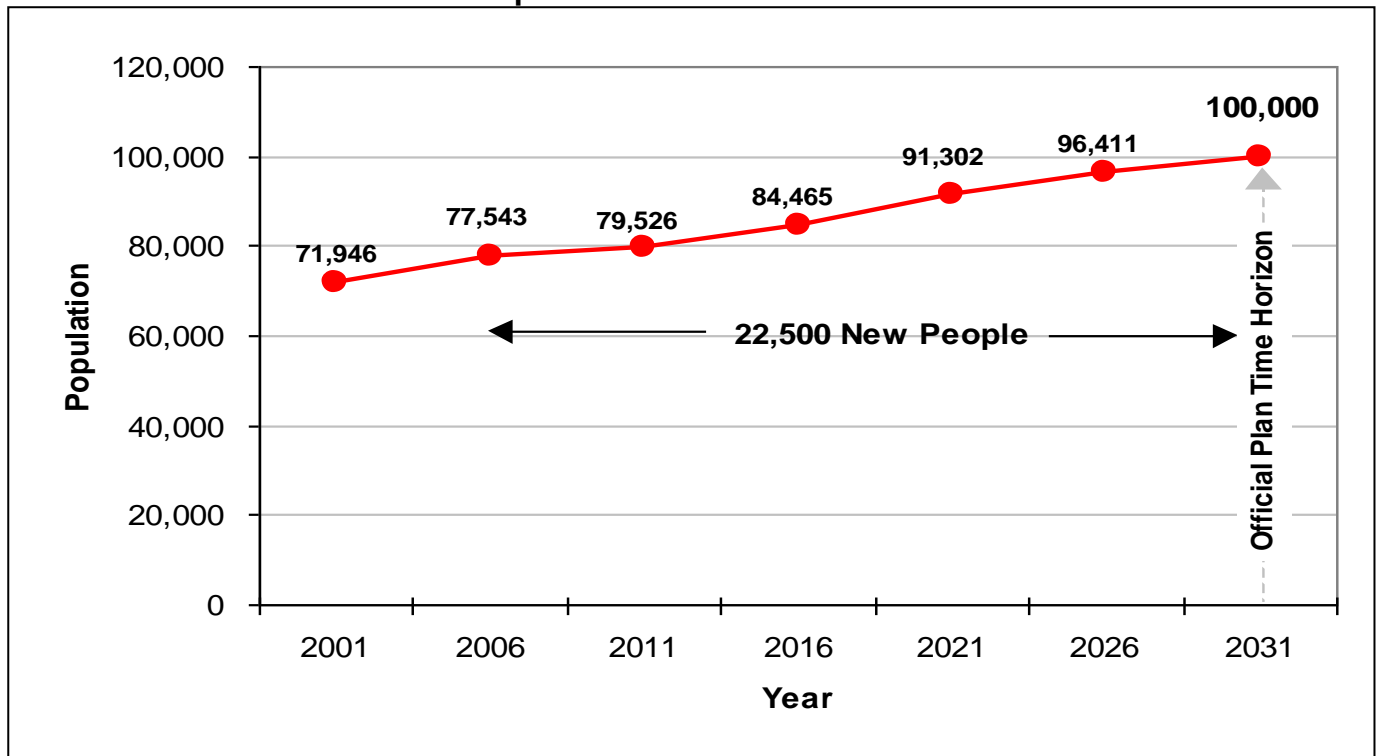
Key policy directions considered in the Growth Management Strategy include:

- The Places to Grow population, housing and employment forecasts allocate a total population of 100,000 people and 27,000 jobs to the City of Kawartha Lakes by 2031.
- Provincial Policy directs the City to implement policies related to intensification, density targets, redevelopment, and opportunities for growth within existing built up areas as a starting point for determining the City's long term land supply. The intensification and density targets established in the Places to Grow Growth Plan can be modified by Minister's approval.
- Municipal water and wastewater systems are the preferred form of servicing to accommodate forecasted growth.
- Provincial Policy Framework encourages land use planning based on a balanced and managed approach with consideration for the economy, environment and community.
- Developing "complete communities" that are well designed, offer transportation choices, accommodate people at all stages of life and have the right mix of housing, a good range of jobs, and easy access to stores and services to meet daily needs.

Summary and Conclusions

Population, household and employment forecasts are the basis for determining the requirements for industrial, residential, institutional and commercial land.

Population Forecast to 2031



Source: Watson & Associates Economists Ltd, Dec. 2009.

The population, household and employment forecasts prepared for the Growth Management Strategy conform to the population and employment forecasts established in the Places to Grow Growth Plan for the City of Kawartha Lakes.

Population, Household and Employment Forecasts to 2031

	2001	2006	2011	2016	2021	2026	2031
Population	71,956	77,543	79,526	84,465	91,302	96,411	100,000
Employment	20,000	23,877	24,036	24,765	25,528	26,272	27,000
Households	26,690	29,505	31,090	33,841	37,439	40,364	42,516

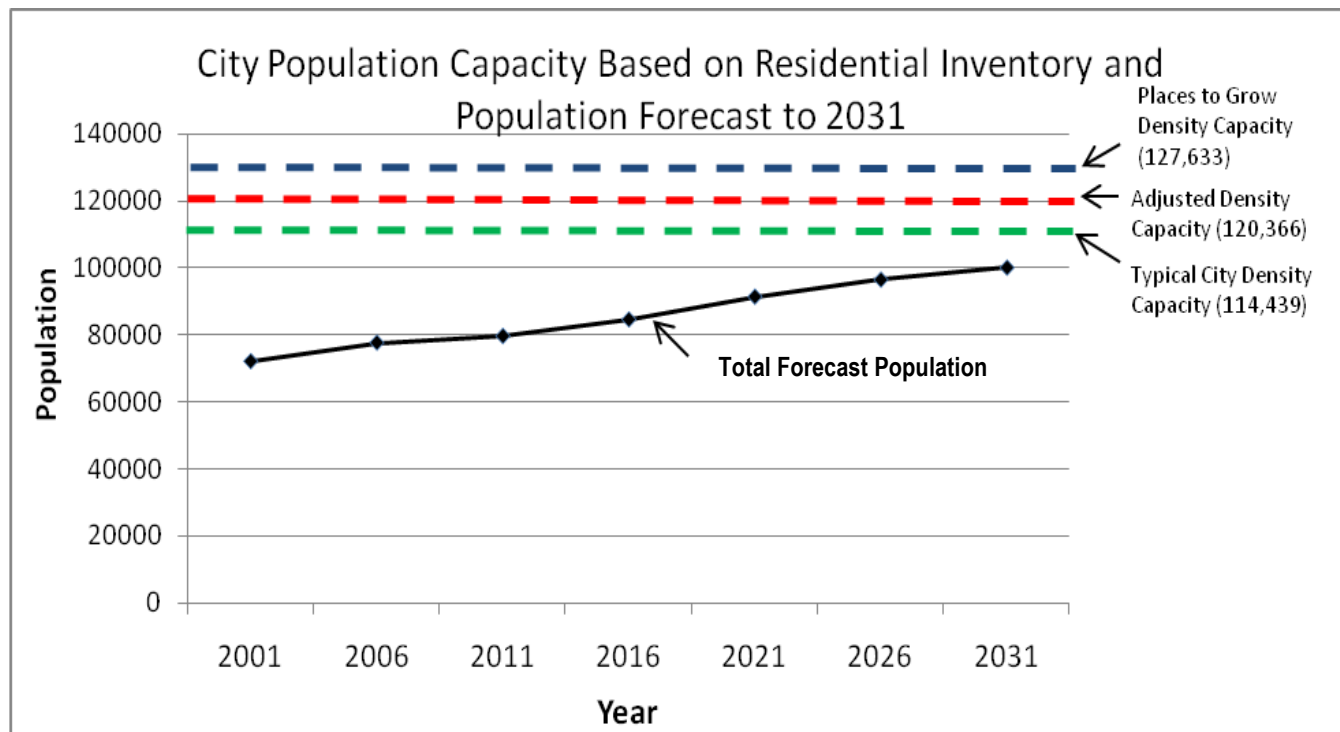
Source: Watson & Associates Economists Ltd, Dec. 2009.

Three (3) land capacity scenarios apply to the development of lands already designated or approved for development:

Continued Growth with Typical Densities	Growth Achieving Places to Grow Density Targets	Growth Achieving an Adjusted Density Target*
<p>This scenario assumes:</p> <p>Intensification would occur at low rates</p>	<p>This scenario assumes:</p> <p>Intensification would meet the Places to Grow target of at least 40% of all new residential units within the built-up area after 2015</p>	<p>This scenario assumes:</p> <p>Intensification would meet an adjusted target of at least 30%* of all new residential units locating within the built-up area after 2015</p>
<p>Greenfield development density would be typical of recent development in the City at approximately 27 people and jobs per hectare</p>	<p>Greenfield development would meet the Places to Grow density target of 50 people and jobs per hectare</p>	<p>Greenfield development on residential lands would meet an adjusted density target of 40 people and jobs per hectare and Greenfield development on employment lands would meet an adjusted density target of 30 people and jobs per hectare *</p>

Notes: * Reduced targets require approval of the Minister

For each of the three scenarios tested there is sufficient capacity of designated land in the City of Kawartha Lakes (within existing urban settlement areas and hamlet settlement area boundaries) to meet the growth forecasts on Schedule 3 of the Provincial Growth Plan and the forecast prepared by Watson & Associates to the year 2031. The land capacity analysis also shows that there is sufficient capacity to accommodate the forecasted demand for each housing unit type.



There is sufficient land capacity to accommodate forecast employment to 2031. The land analysis concludes that there are sufficient employment lands to accommodate those employment types (work at home and some institutional employment) that tend to locate in residential areas. There are also sufficient vacant, designated, serviced industrial lands to accommodate forecast industrial jobs. Future commercial employment represents approximately 50% of the forecast employment growth to 2031. Some of these jobs will be office and service commercial jobs that typically locate in employment areas. Others will be retail commercial jobs that locate on existing vacant commercial lands or occur through redevelopment and/or intensification of existing commercial areas – such as the downtowns of the urban areas.

Recommendations

The recommended growth scenario for the City of Kawartha Lakes is Option 3 – Adjusted Density Target Option. It is possible to achieve the Growth Plan’s Greenfield residential density target of 50 people and jobs per hectare but it would require significant change from existing development patterns. Similarly, achieving the Growth Plan density target on greenfield industrial employment lands will be extremely difficult given the traditional industrial densities in the outer ring and given the lack of off-setting ‘office’ type densities in such locations. The land supply and density analysis concludes that a Greenfield density target of 40 people and jobs per hectare for residential development and 30 people and jobs per hectare for employment development is more appropriate to an outer ring community such as the City of Kawartha Lakes and yet still achieves the goals and intent of the Places to Grow Growth Plan.

The land capacity analysis shows that the intensification target of 40% would be difficult to achieve. Analysis of potential intensification opportunities has identified a potential intensification supply of 37.9% of total residential units. However, this includes 1,254 potential units in the hamlet settlement areas. Unlike larger cities in the Growth Plan Area, the City of Kawartha Lakes does not have a designated “Urban Growth Centre” and no planned transit or major transit station areas that would facilitate redevelopment and intensification. Furthermore, in the City of Kawartha Lakes, growth and intensification are planned to occur in several small to medium sized urban areas rather than in one central city. Therefore, an adjusted intensification target of 30% would be more appropriate than the Growth Plan target of 40%. It is noted that the intensification target is a minimum, and the achievement of a higher percentage would be encouraged.

Total population is forecast to increase by 22,500 people from 2006 to 2031. Approximately 13,011 new dwelling units will be required. Total employment is forecast to increase by approximately 3,120 jobs. To accommodate this forecast growth the following is recommended:

- The majority of forecast population and employment growth will be accommodated in existing designated settlement areas.

- The majority of new residential growth and all of the forecast employment growth will be directed to the four urban settlement areas of Lindsay, Bobcaygeon, Fenelon Falls, and Omemee.
- There is sufficient land supply to accommodate the forecast amount of growth. Even in a situation where all of the forecast growth would need to occur in Lindsay, Fenelon Falls and Bobcaygeon, there is sufficient land supply. The distribution of the population growth among the four urban settlement areas, the hamlet settlement areas, and cottage conversions should be guided by the findings of the servicing study component of the Municipal Master Plan Project.
- Within the urban settlement areas approximately 70% of new residential units will be accommodated in the designated Greenfield areas and approximately 30% of new residential units will be developed through redevelopment and/or intensification on sites within the Built Boundary.
- New Greenfield developments will be planned to develop at an average minimum density of 40 people and jobs per hectare in residential areas and 30 people and jobs per hectare in employment areas.
- Conversions of seasonal residences to permanent residences will continue to occur. Approximately 2,330 conversions are expected by 2031. These are not new units, but rather the conversion of existing seasonal dwellings to permanent residences.
- The City should direct new seasonal residential development to vacant lots in existing waterfront developments where possible. New seasonal residential multi-lot developments should be located in designated waterfront areas or in designated hamlet or urban settlement areas. Based on the population and housing forecasts developed by Watson and Associates, the City should plan for approximately 4,068 new seasonal dwelling units between 2006 and 2031.
- The City should consider Official Plan, Secondary Plan and/or Community Improvement Plan policies that would facilitate development of potential intensification sites within the

urban settlement areas. For example, the City could redesignate and rezone prime intensification sites through the Secondary plan process. This would provide an incentive to property owners by removing the need to obtain an Official Plan and/or Zoning By-law amendment as part of a development application. The City could also designate intensification areas as Community Improvement Plan Areas. Through a Community Improvement Plan the City could develop incentive programs to encourage redevelopment on brownfield sites, develop façade improvement or building rehabilitation programs, or offer financial incentives such as the waiving of development charges or other fees.

- The City should consider developing Urban Design Guidelines for the downtown area and other potential intensification areas to ensure that new redevelopment occurs at a scale, density and design that complements the existing small/medium town urban form.
- The City should consider zoning regulations for employment lands that have appropriate maximum coverage and minimum setback regulations to permit the expansion of businesses over time in order that Greenfield employment lands are developed efficiently. For example, the Restricted Industrial (M1) zone and the General Industrial (M2) have maximum lot coverage regulations of 30% and 50% respectively. The City may want to consider increasing the maximum coverage requirements. This would allow for larger, denser buildings and greater ability for businesses to remain on site as they grow and expand over time. At the same time the yard setback regulations and minimum landscape open space regulations would ensure that industrial and business park developments have sufficient landscaped open space and building setbacks.
- The City should establish a monitoring protocol to measure achievement of the Growth Management Strategy.

SECTION 1 INTRODUCTION

The City of Kawartha Lakes Growth Management Strategy is one of the components of the City's Municipal Master Plan Project. The goal of the City of Kawartha Lakes Growth Management Strategy is to prepare an overall comprehensive growth management plan that:

- is in keeping with the intent of the policies of the Province's Places to Grow - Greater Golden Horseshoe Growth Plan (2006); and
- ensures that growth is managed in coordination with infrastructure needs and appropriate financial planning.

The Province's Growth Plan requires that the City of Kawartha Lakes undertake analysis and policy amendments to implement and conform to the Growth Plan. In June 2009, the City took a first step in conforming to the Growth Plan by approving four Official Plan Amendments that ensure basic conformity to the provincial Growth Plan. Completion of the Growth Management Strategy is the second step. Its purpose is to develop a comprehensive plan that will examine land use supply and demand and existing and planned infrastructure to better understand how and where the City of Kawartha Lakes should grow over the long term planning horizon to 2031. The findings and the recommendations of the Growth Management Strategy will be incorporated into the City's Official Plan.

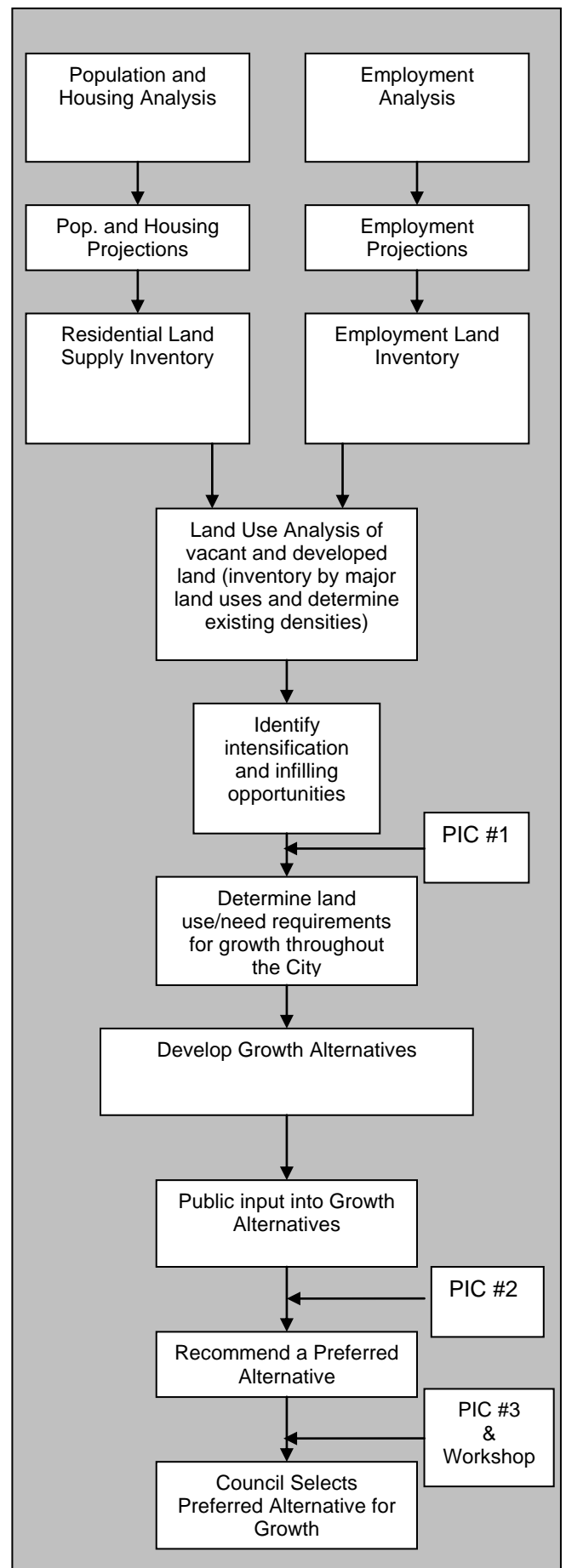
The City of Kawartha Lakes Growth Management Strategy consisted of two phases. Phase 1 examined the City's existing capacity to accommodate growth. An analysis of the demand for residential and employment lands was determined based on population and employment projections. An assessment of total land supply was undertaken to determine the total residential land capacity and employment land capacity. Intensification and infilling opportunities were also identified. The information developed in Phase 1 of the Growth Management Strategy was presented at the two Public Information Centres (PIC #1) in May 2009 (one in Lindsay and one in Coboconk).

Phase 2 of the Growth Management Strategy was the identification and assessment of three growth alternatives and recommendation of a preferred growth alternative for the City. The three growth alternatives were:

1. Typical Density Scenario – land demand was based on existing housing and employment densities;
2. Places to Grow Density Scenario – land demand was based on housing and employment densities consistent with the Places to Grow Growth Plan.
3. Alternate Density Scenario – land demand was based on housing and employment densities that were higher than the typical density scenario but less than those required by the Places to Grow Growth Plan.

The three growth alternatives were presented at the second Public Information Centres (PIC #2) held in Lindsay and Coboconk in December 2009.

A third Public Information Centre (PIC #3) was held in Lindsay and Coboconk in January 2010. A workshop was also held with members of the development community. The purpose of the Public Information Centres and the workshop was to obtain feedback on the recommended growth options.



SECTION 2

PROVINCIAL POLICY CONTEXT

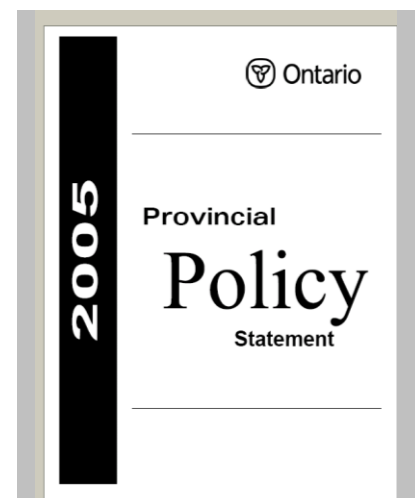
Understanding the current planning policy framework and authority is important to framing a growth management study for the City. A key component of the study is to examine the direction of current Provincial policies to assess the implications and ensure planning requirements are addressed. There are four (4) significant policy/planning documents at the Provincial level which must be considered:

- Provincial Policy Statement, 2005
- Places to Grow Act, 2005
- Growth Plan for the Greater Golden Horseshoe - Places to Grow Plan, June 2006
- Oak Ridges Moraine Conservation Plan

2.1 Provincial Policy Statement 2005

The current Provincial Policy Statement (PPS) was issued under Section 3 of the Planning Act and came into effect on March 1, 2005. The Provincial Policy Statement replaces the Provincial Policy Statement issued May 22, 1996, as amended on February 1, 1997. The PPS provides the broad policy direction for Provincial interest in land use planning. The PPS derives its authority from the Ontario Planning Act. Section 3(5) of the Planning Act states that decisions of municipalities shall be 'consistent with' the policy statements.

The Provincial Policy Statement provides a “vision” for how communities in Ontario should grow over time by providing the policy foundation for regulating the development of land in Ontario. The PPS supports a comprehensive, integrated and long term approach to planning, and recognizes linkages between policy areas.



The following principles established in the PPS will guide the development of the City of Kawartha Lakes Growth Management Study:

- Land uses are to be carefully managed to meet the full range of current and future needs of residents;
- Growth is focused to existing settlement areas and away from significant or sensitive resources;
- Sufficient land is to be made available through intensification and redevelopment and, as required, designated growth areas, to accommodate an appropriate range and mix of employment opportunities, housing and other land uses to meet the projected needs for a time horizon of up to 20 years;
- Cost effective development standards to minimize land consumption and servicing costs are promoted;
- Ensuring necessary infrastructure and public service facilities are or will be available to meet current and projected needs;
- Establishing and implementing minimum targets for intensification and redevelopment, protection of prime agricultural areas and development in rural areas which is appropriate to the infrastructure which is planned or available;
- Protection of employment areas;
- Optimizing existing infrastructure and public service facilities before consideration is given to developing new infrastructure and public service facilities; and
- Municipal sewage services and water services are the preferred form of servicing and policies limit the use of communal, individual and partial services.

The Provincial Policy Statement requires that single and upper-tier municipalities are to identify, co-ordinate and allocate population, housing and employment and to identify areas where growth will be directed including intensification and redevelopment.

The Provincial Policy Statement does provide the municipality with an opportunity to identify settlement areas or allow the expansion of settlement area boundaries at the time of a comprehensive review and only where it has been demonstrated to meet the following:

- a) sufficient opportunities for growth are not available through intensification, redevelopment and designated growth areas to accommodate the projected needs over the identified planning horizon;

- b) the infrastructure and public service facilities which are planned or available are suitable for the development over the long term and protect public health and safety;
- c) specialty crop areas are not compromised and there are no reasonable alternatives which avoid agricultural areas; and
- d) impacts on agricultural operations are mitigated to the extent feasible.

When consideration is given to expansion of settlement area boundaries the Provincial Policy Statement identifies that Section 2 and Section 3 of the PPS shall be applied to determine the most appropriate direction or alternative for boundary expansion.

2.2 Places to Grow Act (2005)

On June 13, Bill 136, the Places to Grow Act, 2005 received Royal Assent. The Places to Grow Act (Bill 136) established a legal framework for provincial growth planning in Ontario. The Growth Plan for the Greater Golden Horseshoe is the strategic policy document which was derived from the authority of the Places to Grow Act. The Growth Plan for the Greater Golden Horseshoe was approved in June 2006, under the legislation of the Places to Grow Act.

2.3 Growth Plan for the Greater Golden Horseshoe (June 2006)

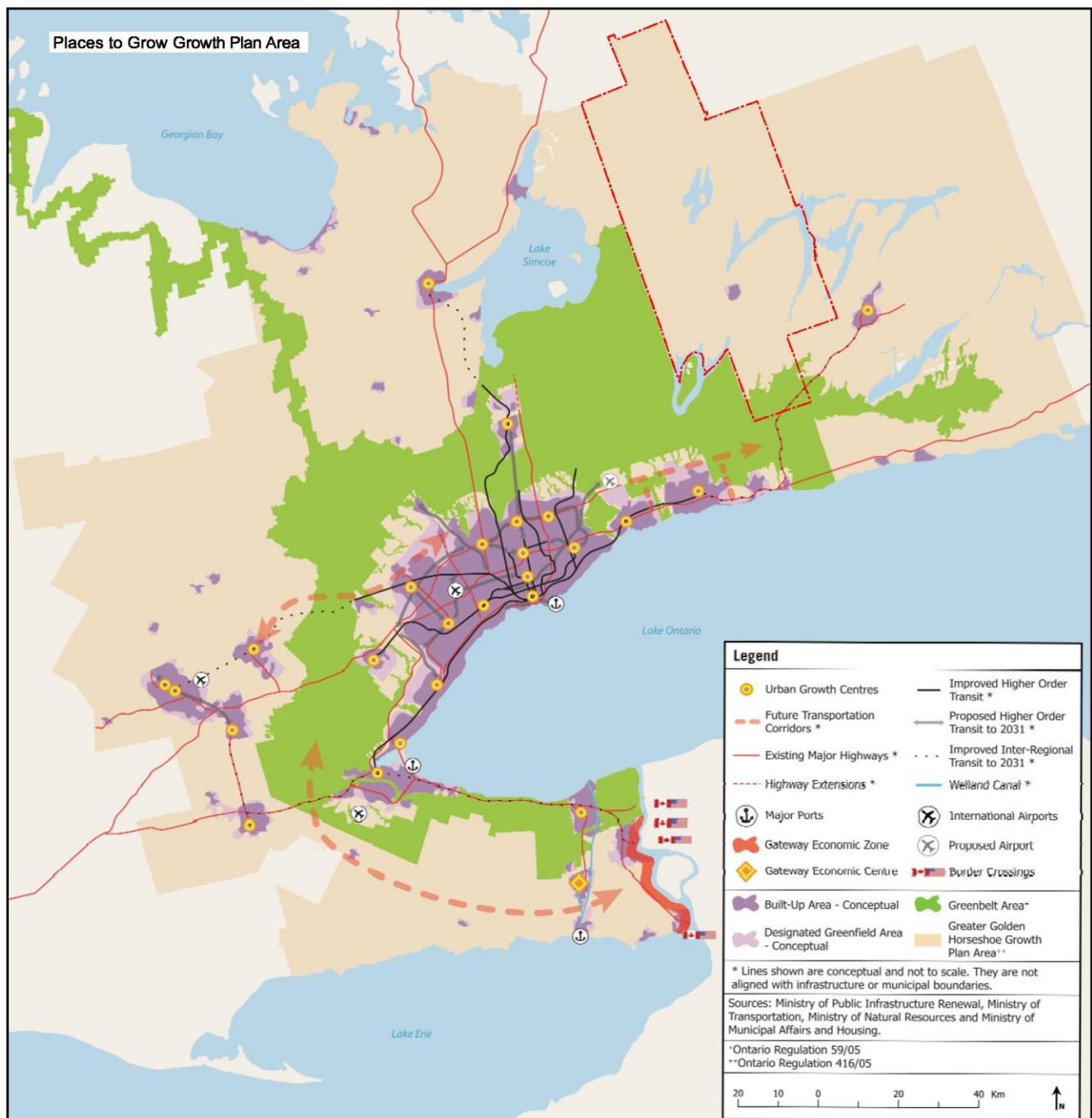
The City of Kawartha Lakes is located within the Greater Golden Horseshoe (GGH) area as identified through the Provincial Places to Grow Growth Plan. The City of Kawartha Lakes is one of a number of municipalities located within the “outer ring” of the Growth Plan area.

The Growth Plan principles relate to creating complete communities, directing growth to existing urban areas, managing growth to support a strong competitive economy, protecting and enhancing natural resources,



and optimizing use of existing and new infrastructure to support growth in a compact, efficient form.

The Places to Grow Growth Plan includes a growth concept (Schedule 2) and identifies Lindsay with a built boundary and Designated Greenfield area. The following figure illustrates the location of the City of Kawartha Lakes (the dashed red line represents the municipal boundaries) in the context of the Places to Grow Growth Plan.



The Ministry of Public Infrastructure and Renewal also established a built boundary for settlement areas within the City of Kawartha Lakes. The built boundary was delineated for four (4) urban settlement areas that have full municipal services, which will be targeted for intensification, and will accommodate significant future growth in the City. The urban settlement areas identified with a built boundary in the City of Kawartha Lakes include Lindsay, Fenelon Falls, Bobcaygeon, and Omemee (see following map). A number of communities and hamlets in the City were also identified as “undelineated” built up areas,

Detail of Schedule 1: Places to Grow Growth Plan Area



Source: Growth Plan for the Greater Golden Horseshoe

which are typically smaller, unserviced or partially serviced smaller settlements with limited capacity to accommodate significant future growth. Woodville is identified as an “undelineated built-up area” by the Growth Plan even though it is designated as an urban settlement area in the City’s new Official Plan.

The Growth Plan establishes population and employment projections for the City of Kawartha Lakes (as presented in Schedule 3 of the Places to Grow Growth Plan). In 2031, the population projection for the City of Kawartha Lakes is 100,000 people. This represents a growth of 28,000 from 2001. The employment projection for the City is an additional 7,000 jobs to a total of 27,000 jobs in 2031.

The following policies of the Places to Grow Plan are key to development of the City of Kawartha Growth Management Strategy:

- An intensification target of a minimum of 40% of all residential development occurring within the City is to occur within the defined built up area(s) by 2015. The Growth Plan establishes an opportunity to request the Minister approve an alternative intensification target.
- A process whereby municipalities are to develop and implement through their official plans and other supporting documents, a strategy and policy to phase in and achieve intensification and the intensification target. This is one of the purposes of the City of Kawartha Lakes Growth Management Strategy.
- The Growth Plan does not identify an urban growth centre or major transit station areas within the City of Kawartha Lakes.
- Designated greenfield areas are to be planned to achieve a minimum density target of not less than 50 residents and jobs combined per hectare. The Minister may review and permit an alternative density target for single tier municipalities located in the “outer ring” where it does not have an urban growth centre to ensure the density target is appropriate given the characteristics of the community.
- The majority of growth is to be located in settlement areas that offer municipal water and wastewater systems and growth is to be limited in settlement areas that are serviced by other forms of water and wastewater services. Municipal water and

wastewater systems are the preferred form of servicing to accommodate forecasted growth.

- Expansions of small cities and towns within the outer ring are to provide a minimum of one full time job per 3 residents within or in the immediate vicinity of the small city or town.
- New multiple lots and units for residential development are directed to settlement areas and may only be allowed in rural areas in site specific locations where approved zoning or designation permitted the development as of the date of the Places to Grow Plan (June 2006).
- Settlement area boundary expansions shall only occur as part of a comprehensive review and provided that sufficient opportunities are not available within the existing settlement area boundary through intensification, redevelopment and designated greenfield areas.

2.4 Oak Ridges Moraine Conservation Plan Area

The southern portion of the City of Kawartha Lakes is located within the Oak Ridges Moraine Conservation Plan (ORMCP) area. The Oak Ridges Moraine is one of Ontario's most significant landforms. This irregular ridge stretches 160 kilometres from the Trent River in the east to the Niagara Escarpment in the west. The Escarpment and Moraine together form the foundation of south-central Ontario's natural heritage and green space systems. Strategically located north of and parallel to Lake Ontario, the Moraine divides the watersheds draining south into western Lake Ontario from those draining north into Georgian Bay, Lake Simcoe and the Trent River system.

Through the legislation and the ORMCP, the Ontario Government has set a clear policy framework for protecting the Oak Ridges Moraine. All municipalities within the ORMCP area were required to conform to the ORMCP. In 2005, the policies established within the ORMCP were incorporated by amendment to official plan documents and form part of the draft City of Kawartha Lakes Official Plan.

There is little impact of the ORMCP on the Growth Management Strategy. The ORMCP places restrictions on the development of land within the ORMCP area; however, the majority of future growth for the City will be directed to the urban settlement areas and some limited growth in the hamlet settlement areas. Little, if any growth, is intended to occur in the ORMCP area.

SECTION 3

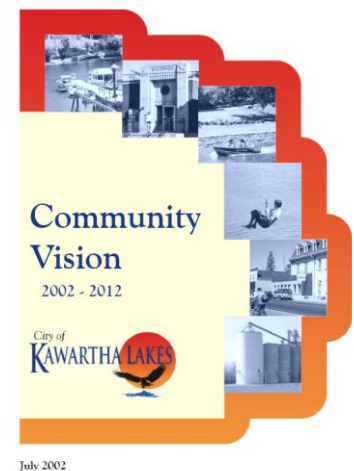
CITY OF KAWARTHA LAKES POLICY CONTEXT

Consideration of the existing City of Kawartha Lakes policy context has also been an important part of the development of the Growth Management Strategy. Four key documents were reviewed:

- Community Vision;
- Current Official Plans;
- New Draft Official Plan; and
- Community Economic Development Mission.

3.1 City of Kawartha Lakes Community Vision

The City of Kawartha Lakes came into being in 2001 as the result of municipal amalgamation. The City completed an extensive community-based vision process to create a positive sense of community and to provide unified community-based directions for the future. The Community Vision became the foundation to build on and guide planning effort, including the development of a new Official Plan, an Infrastructure Plan, and an Economic Strategy. The overall vision for 2012 was “the City of Kawartha Lakes is a Community of Vibrant Communities.”



The community visioning process included numerous public consultation sessions, focus groups and community events. Some of the trends and the community opinions that are related to the Growth Management Strategy include:

- **Growth** offers opportunities for economic growth but it must be well managed to ensure minimal impact on the natural environment, rural communities and agricultural lands.
- **Community identities** must be preserved and the success of the City requires its many communities survive and thrive.
- **Natural environment** is an important component of the City's identity and economy and must be protected.

The Community Vision identified ten (10) initiatives as priorities for action during the life of the Community Vision. One (1) of the initiatives is the development of a new Official Plan for the City which is based on the Community Values and Vision and:

- incorporates an Environment First policy;
- designates and protects prime agricultural lands, open space and other significant green areas;
- concentrates urban growth in designated settlement areas with supporting infrastructure plans;
- protects heritage and cultural assets;
- supports and promotes economic development including:
 - resorts and other tourism facilities
 - main streets
 - employment zones; and
- any proposed amendments to the Official Plan should be justified with supporting documentation taking into consideration such matters as: environmental impact, economic cost benefit analysis, servicing requirements and feasibility of same.

In order to ensure that the new Official Plan reflects the vision and values of the community and satisfied the Community Vision initiatives, it was recommended that the new Official Plan incorporate a number of principles into the Official Plan. With respect to growth management, the following was recommended:

“GROWTH MANAGEMENT

- 1. Encourage responsible growth in a comprehensive manner that respects the uniqueness of each community and protects the natural environment.*
- 2. Ensure that growth is consistent with environment first principles and that development respects and integrates with the natural features.*
- 3. Direct the majority of growth to existing communities consistent with historic trends and the ability of the communities to sustain further growth.*
- 4. Ensure that growth is well managed, fiscally responsible and financially sustainable.*
- 5. Ensure that appropriate economic development is a fundamental component of future growth in the City.”*

The Community Vision also provided direction relating to infrastructure and servicing, as follows:

- “2. *Encourage urban development to locate where servicing costs are minimized and use is maximized. Avoid premature service and utility extensions and locate development where municipal services exist or where they can be logically and economically extended.*”

3.2 City of Kawartha Lakes Official Plan

The City of Kawartha Lakes is developing a new Official Plan. A draft Official Plan has been developed and it is expected it will be considered by Council by mid 2010. The purpose of the new Official Plan is to replace all of the existing Official Plans within the City with one comprehensive Official Plan and to update the policies to incorporate recent provincial policy such as the Provincial Policy Statement and the Places to Grow Growth Plan. Previously, there were four (4) Official Plans in effect in the City of Kawartha Lakes, including Official Plans of the Town of Lindsay, Village of Fenelon Falls, Township of Ops and County of Victoria. The Official Plans of Lindsay and Fenelon Falls will be maintained as secondary plans to the new Official Plan and new secondary plans will be prepared for Bobcaygeon, Omemee and Woodville.

In June 2009, the City of Kawartha Lakes considered and adopted amendments to the Official Plans of the Town of Lindsay, Village of Fenelon Falls, Township of Ops and County of Victoria to implement the policy directions of the Places to Grow Plan. The amendments were necessary to meet the provincial requirement for Official Plans to be in conformity with the Places to Grow Growth Plan within 3 years of the release of the plan in June 2006. These policies will be carried forward into the new Official Plan and serve to provide the fundamental context for the Growth Management Strategy. The key policy directions that impact the Growth Management Strategy are described below.

1. **Population and Employment Forecasts:** the Official Plan will include the population and employment forecasts for the City of Kawartha Lakes in the Places to Grow Growth Plan. By 2031 the City is forecast to have a total population of 100,000 people and total employment of 27,000 jobs.

2. **Future growth is directed to Built-Up areas:** the Official Plan will include policies that direct a significant proportion of future growth to be accommodated through intensification in appropriate areas within the existing built up area of the City.
3. **Intensification and Density targets:** the Official Plan will include the intensification and density targets set out in the Places to Grow Growth Plan. Specifically the policies state that:

“By the year 2015 and for each year thereafter, a minimum of 40 per cent, or an alternative target approved by the Minister of Energy and Infrastructure, of all residential development occurring annually within the municipality will be within the built-up area.”

“New development areas or greenfield areas will be planned to achieve a minimum density target that is not less than 50 resident and jobs combined per hectare, or an alternative density target approved by the Minister of Energy and Infrastructure, and phased in a manner to assist with achieving the intensification target for new residential units being constructed in the built up area.”

The policies also state that the Growth Management Strategy is underway and it may conclude that different intensification targets and/or Greenfield density targets are warranted and this could lead to a request to the Minister of Energy and Infrastructure to approve an alternative target.

4. **Settlement area boundary and boundary expansions:**
The Official Plan will include policies that prohibit the expansion of settlement area boundaries unless a comprehensive review has been undertaken to justify that there is need for the boundary expansion. The policies list a number of criteria for justification.
5. **Protection of employment areas:** the Official Plan will includes policies that prohibit the conversion of employment lands to non-employment uses (residential uses and major commercial uses are defined as non-employment uses) unless a comprehensive review has been undertaken to justify that there is a need for the conversion. The policies list a number of criteria to be used to determine justification.

Other policies in the draft Official Plan important to the Growth Management Strategy include:

1. **Hamlet Settlement designation policies:** The purpose of the Hamlet designation is to accommodate small-scale residential and non-residential development within existing settlement areas. Unless full communal services are provided, growth in hamlet settlement areas will be limited and they will not serve as significant growth areas within the City.
2. **Waterfront designation policies:** The purpose of the Waterfront designation is to permit seasonal and permanent residential development adjacent to the lakes and rivers within the City. The Waterfront designation is not anticipated to accommodate any significant portion of the projected population growth within the City. The majority of new growth will be encouraged to locate in settlement areas. New waterfront development will primarily be developed on individual services at a low density. Single unit residential lots are the preferred form of development. However, limited new multi lots and units for residential development may be permitted in the Waterfront designation

3.3 City of Kawartha Lakes Economic Development Mission

The City of Kawartha Lakes Economic Development Mission was developed in 2007. The Mission statement is “to enhance the City’s prosperity by providing accessible, well-paying employment opportunities, through a diversified and enduring economy, that builds on the past while embracing the potential of the future.”

The Mission identifies several strategic thrusts. The availability and cost of land are key elements of several of the strategic thrusts. Ensuring that the City has sufficient lands for new businesses to locate to the City and sufficient land for existing businesses to expand is a key element in achieving the City’s Economic Development Mission.

SECTION 4

POPULATION, HOUSING AND EMPLOYMENT BASE

Population, household and employment forecasts are the basis for determining the requirements for industrial, residential, institutional and commercial land. The Places to Grow Growth Plan (Schedule 3), provides population and employment forecast to 2031 for all of the upper tier municipalities within the Growth Plan area including the City of Kawartha Lakes. For the purposes of the City of Kawartha Lakes Growth Management Strategy, Watson & Associates Economists Ltd. have been retained to provide more detailed population, household, and employment forecasts for each five year period to 2031. The Watson & Associates forecast is consistent with the Growth Plan forecast to 2031. A summary of the Watson & Associates forecast for population, housing and employment is included in Appendix 1.

Population, Household and Employment Forecasts to 2031

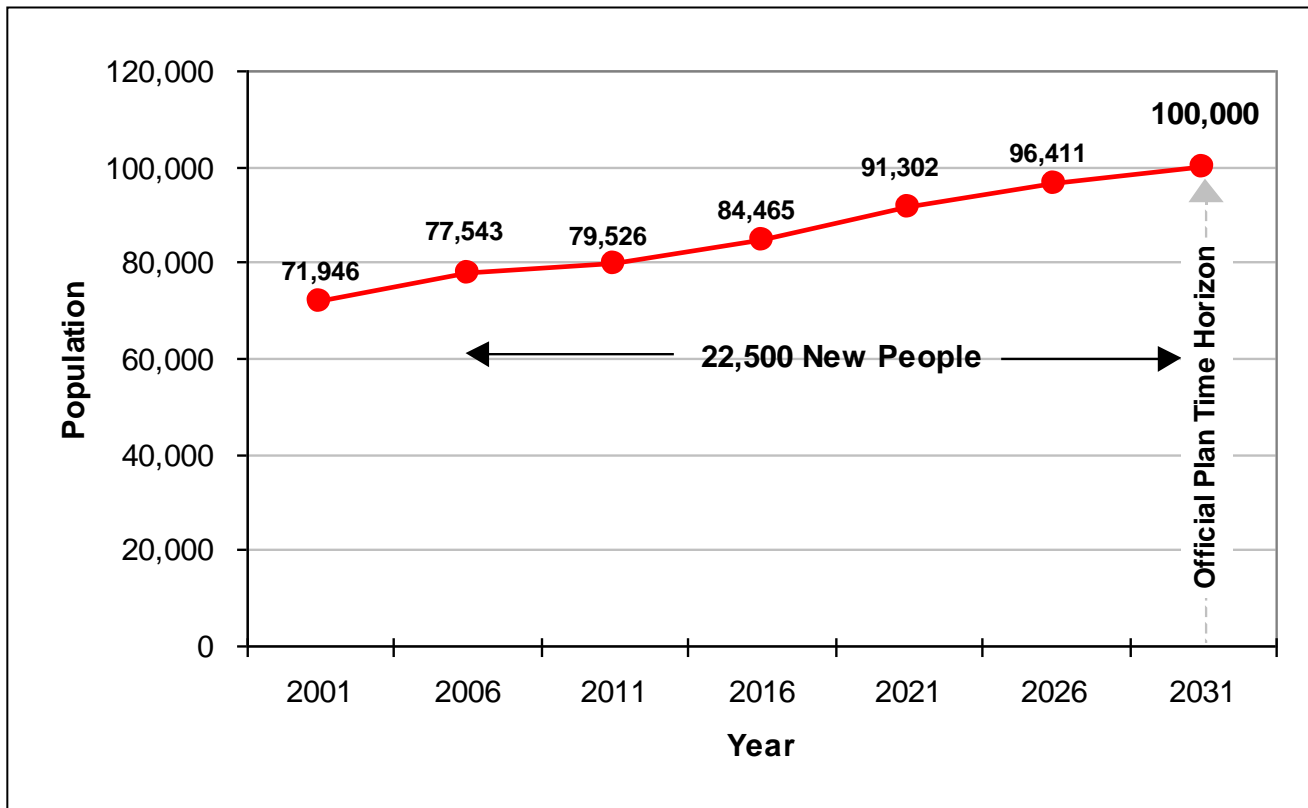
	2001	2006	2011	2016	2021	2026	2031
Population	71,956	77,543	79,526	84,465	91,302	96,411	100,000
Employment	20,000	23,877	24,036	24,765	25,528	26,272	27,000
Households	26,690	29,505	31,090	33,841	37,439	40,364	42,516

Source: Watson & Associates Economists Ltd, Dec. 2009.

4.1 Forecast Population Growth

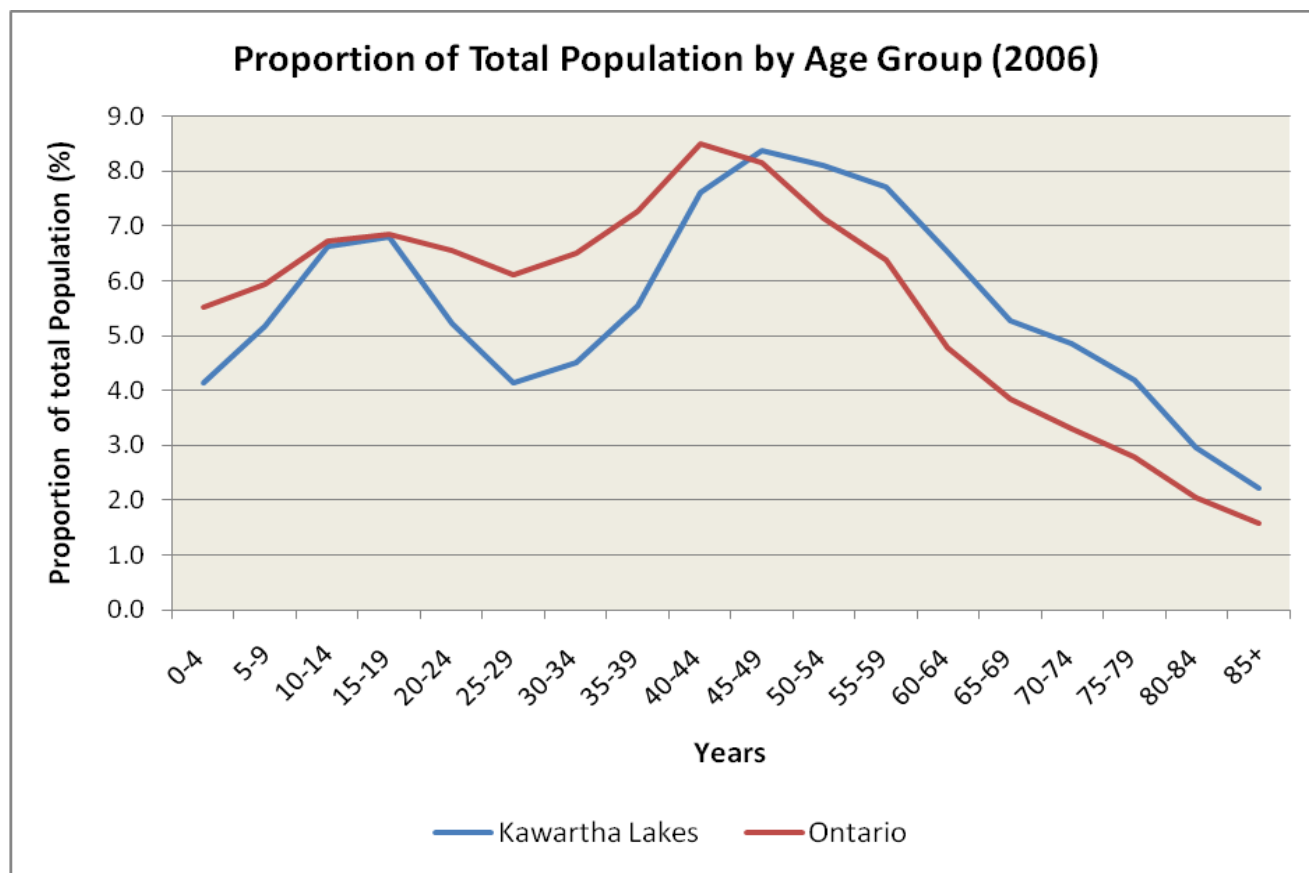
In 2006, the City of Kawartha Lakes population was approximately 77,500. The Places to Grow Growth Plan forecasts the total population to be approximately 100,000 by 2031. As shown below, the rate of population growth is a relatively moderate increase from 2001 and 2031 (approximately 1.2% average annual growth). Sharp increases or decreases in population growth are not expected.

Population Forecasts to 2031



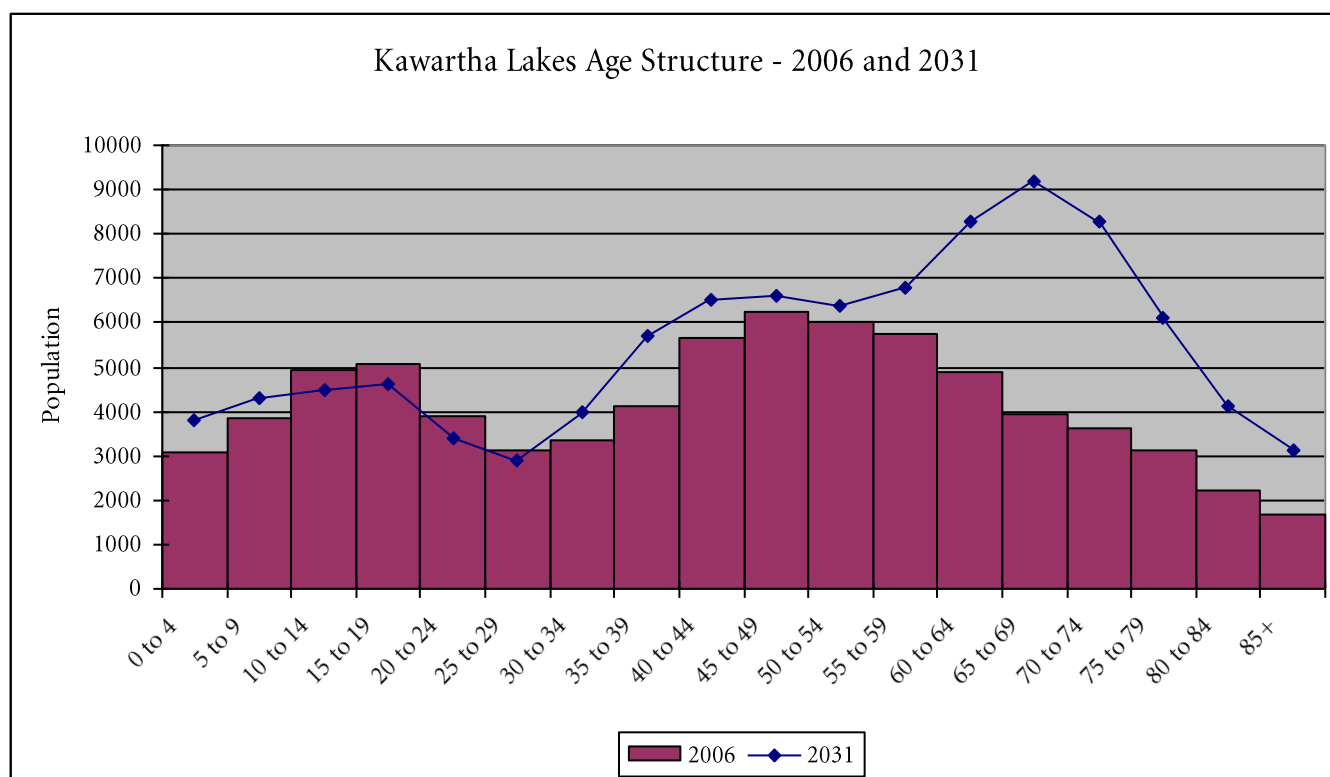
Source: Watson & Associates Economists Limited, 2009

The **population age profile** of the City of Kawartha Lakes residents is older on average than other cities. In 2006, the median age of the population was 45.1 years old, which is significantly higher than the Ontario median age of 39.0 years old. The figure below shows the proportion of total population in each five year age category for the City of Kawartha Lakes and for Ontario. The City of Kawartha Lakes has a higher proportion of people in the older age categories (50 years of age and older) than the average for Ontario.



Source: Statistics Canada

It is forecast that from 2006-2031 there will be a continued increase in the number of people in older age categories. The graph below shows the 2006 population profile of the City of Kawartha Lakes compared to the 2031 population profile for the City of Kawartha Lakes. The dominant trend is the increase in population of older age groups. The total numbers of people in younger age groups (less than 55 years of age) are expected to remain relatively constant from 2006 to 2031. However, all of the age groups 55 years and over are forecast to see significant increase in population. This is due in part to the natural aging of the population – particularly the ‘Baby Boom’ generation. In 2006 ‘Baby Boomers’ (those aged 40 to 60 years) were the age categories with the greatest numbers of people. By 2031, the Baby Boomers would be in the 65 to 85+ age categories. The forecast increase in older age groups in the City of Kawartha Lakes is also due to expectations that as people in older age groups retire they will choose to move to the City of Kawartha Lakes. Some of this will occur as people convert their seasonal home to a permanent residence. Others will choose residential neighbourhoods in the urban areas.



Source: Growth Outlook for the Greater Golden Horseshoe, Hemson Consulting

4.2 Housing Base

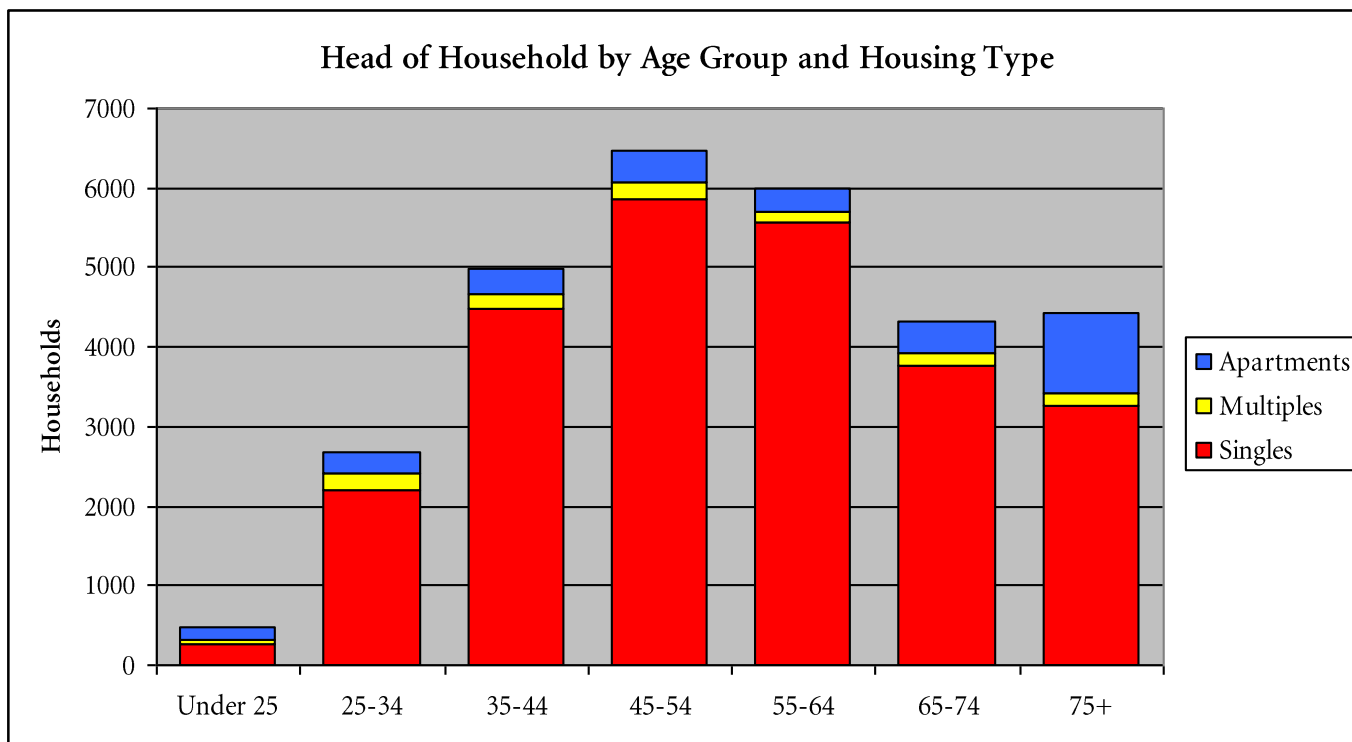
In 2006, there were approximately 29,505 housing units in the City of Kawartha Lakes. As shown in the table below, the majority of those housing units are single and semi detached houses. Apartment units make up about 10% of the housing stock and townhouses make up about 4%. The proportion of housing types has changed little over time. There was nearly the same proportion of housing types in 1996.

Existing total dwelling units by housing type

House Type	1996		2006	
	Total Units	Proportion of Total Units	Total Units	Proportion of Total Units
Single/semi detached	21,860	85.1	25,265	85.6
Townhouses	955	3.7	1,100	3.7
Apartments	2,580	10.0	2,870	9.7
Other	285	1.1	270	0.9
Total	25,680	100.0	29,505	100.0

Source: Watson & Associates Economists Ltd., December 2009

An analysis of housing types by age of the household head shows that single detached houses are the preferred choice of housing for every age group. For middle aged households (age 35-64 years) the single detached house is the overwhelming choice. There is demand for townhouses and apartments within each age group and the oldest age group (75+) has the highest demand for apartment units



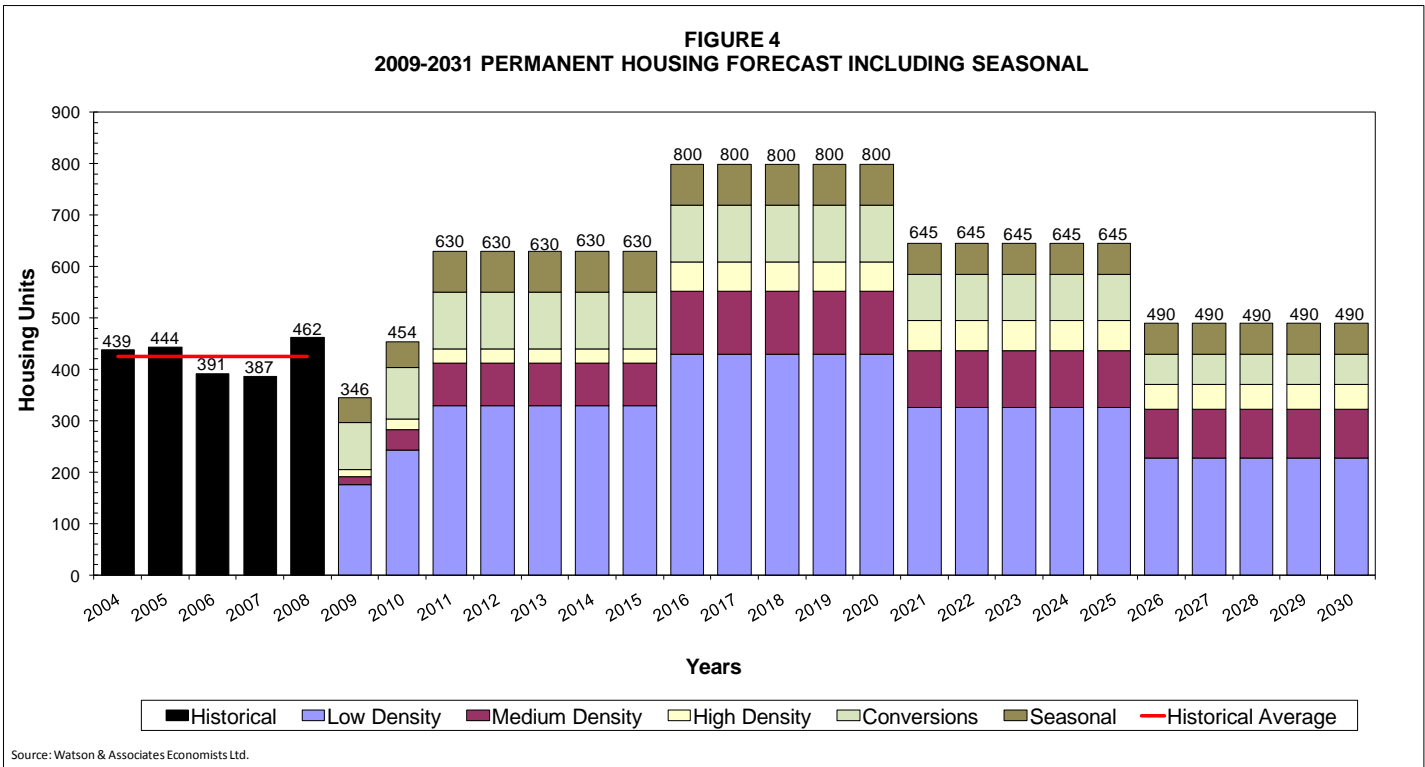
Source: Statistics Canada, 2006

The average **household size** in the City of Kawartha Lakes is approximately 2.5 persons per household, which is similar to the provincial average of 2.6 persons per unit. One-person households and couples without children have increased since 1996 while households containing a couple with children have decreased. The same phenomenon is true for Ontario as a whole. The average household size in the City of Kawartha Lakes is forecast to decrease to 2.27 people per dwelling unit by 2031. This is reflective of the aging population profile and greater numbers of older couples without children at home and greater numbers of single occupant households.

4.3 Housing Demand

In the last ten years, approximately 3,815 dwelling units have been constructed in Kawartha Lakes for an average of about 380 new housing units per year. New subdivision or greenfield development has been the primary form of new housing development in the City. Single-detached dwellings are the dominant form of housing unit type and have accounted for almost 90% of new housing units over the past 10 years.

Watson & Associates have developed a housing forecast for the City of Kawartha Lakes to 2031. Residential construction is anticipated to increase in 2010 as the local economy comes out of the recession. After 2010, average annual housing growth is forecast to be above historical trends.



The forecast number of new housing units from 2006 to 2031 by housing type is shown on the table below. It is anticipated that approximately 2,330 seasonal dwellings will be converted to permanent residences over the forecast time period. These are not new units but rather, the conversion of existing cottages or seasonal dwellings to permanent housing units that have

residents year around. Therefore, a total of 10,681 new dwelling units will be needed to accommodate the forecast population growth from 2006 to 2031. This translates into an annual average growth rate of approximately 427 new units per year from 2006 to 2031.

Forecast Housing Units 2006-2031 by Housing Type

Housing Type	Total Forecast Housing Units Including Conversions	Total Forecast Housing Units Excluding Conversions
Single/semi detached	7,527	7,527
Townhouses	2,160	2,160
Apartments	995	995
Conversions	2,330	
Total	13,011	10,681

Source: Watson & Associates Economists Ltd., December 2009.

The housing forecast also indicates that there is expected to be a shift in demand to fewer single and semi detached units to more demand for townhouse units. The table below shows that excluding conversions, approximately 20% of new units will be townhouse units, which is a considerable increase from 2006, where townhouse units account for less than 4% of the housing stock. Future demand for apartment units is expected to remain unchanged at about 9% of total housing units. The shift in demand toward more townhouse units is likely a reflection of an aging population. As households age there is likely to be a greater number willing to move from their single detached house to a townhouse. For some it will be because of the ease of maintenance, for some it may be to reduce housing costs, and for some it will be because they wish to move to a townhouse in an urban area to be close to services.

Forecast Housing Units 2006-2031 by Housing Type

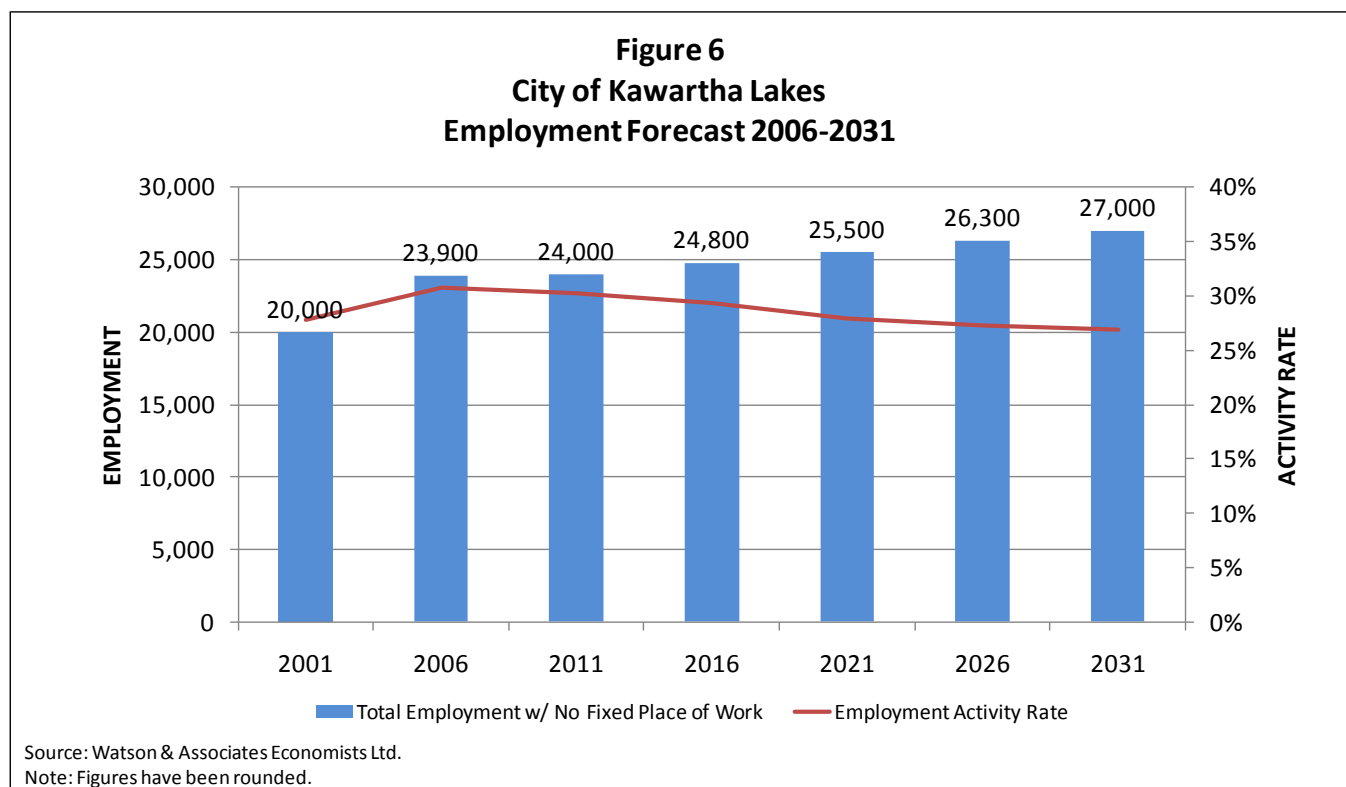
Housing Type	Total Units Including Conversions	Proportion of total Units	Total Units Excluding Conversions	Proportion of total Units
Single/semi detached	7,527	0.58	7,527	0.70
Townhouses	2,160	0.17	2,160	0.20
Apartments	995	0.08	995	0.09
Conversions*	2,330	0.18		
Total	13,011	1.00	10,681	1.00

Source: Watson & Associates Economists Ltd., December 2009.

* Virtually all conversions are single detached houses

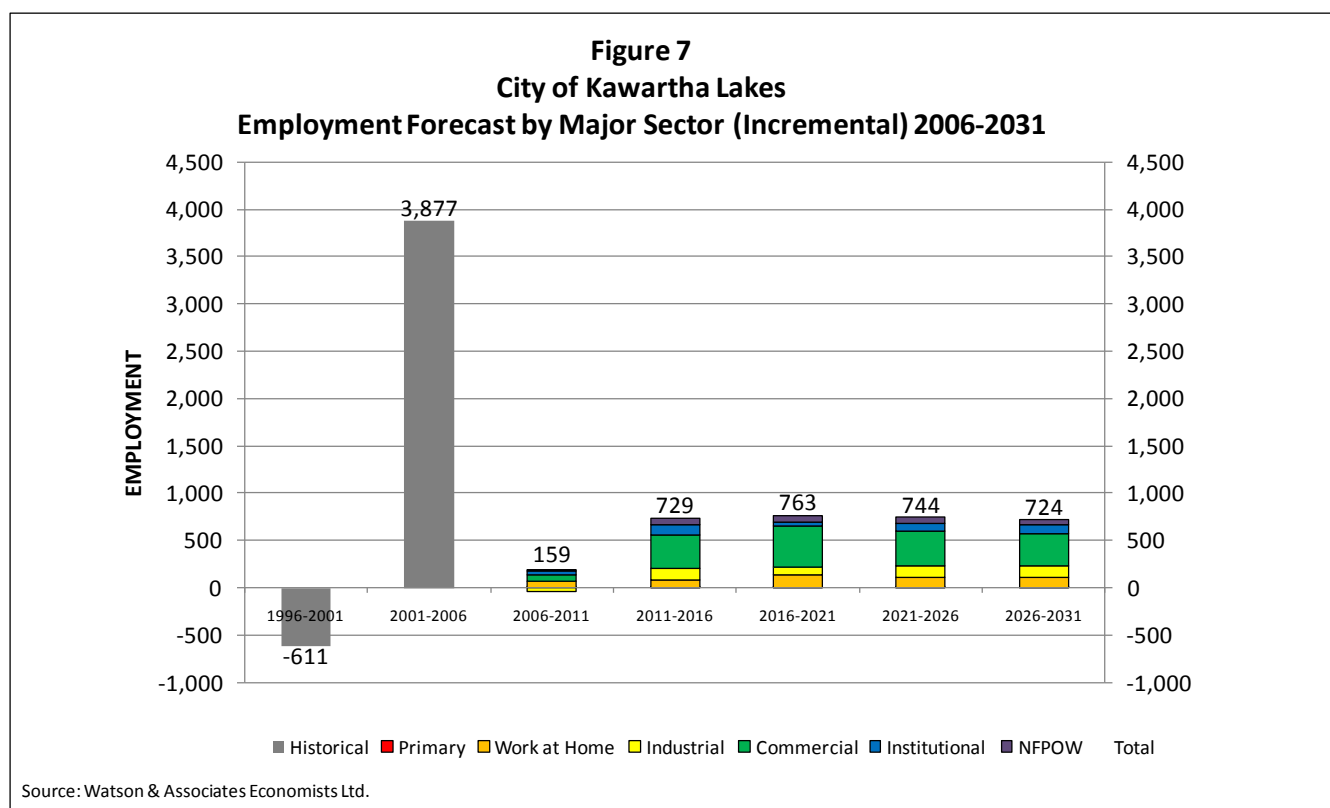
4.4 Employment Base

Within the City of Kawartha Lakes in 2006 there were approximately 23,900 jobs. With a population of 77,500 people, this results in an employment activity rate of about 31%. Watson & Associates completed an employment forecast to 2031. Total employment is forecast to increase to 27,000 jobs by 2031, an increase of 3,100 jobs over the forecast period (which consistent with the Provincial Growth Plan forecast). Employment projections are largely based on the activity rate method, which is defined as the number of jobs in the City divided by the number of permanent residents. As shown on the figure below, employment activity rates (i.e. employment to population ratio) will decline during the forecast period due to the aging population.



The majority of the growth in employment is forecasted to occur in the form of commercial and institutional jobs. During 2001-2006, the City experienced strong employment growth, particularly in the industrial and institutional sectors and was a strong reversal of the negative employment growth witnessed during 1996-2001. The majority of the employment growth in

the 2001 to 2006 period was a result of the development of the Central East Correctional Centre. Employment growth from 2006 to 2011 is expected to be modest, with marginal employment reductions in the primary, industrial, and commercial sectors, due to the impact of the current economic challenges. During 2012-2031, more moderate employment growth is forecast to return, though employment activity rates (i.e. employment to population ratio) will continue to decline as the population ages.



The top 10 employers in the City of Kawartha Lakes in 2010 are shown below. The top three (3) employers are associated with the health care, educational services and government and public administration sectors. The chart also illustrates that Lindsay is a regional centre for the City of Kawartha Lakes with regard to health care, educational and government services sectors.

Major Employers in the City of Kawartha Lakes

Employer	Location	Sector Classification	Total Estimated Jobs
City of Kawartha Lakes	Lindsay	Other services	1,058
Trillium Lakelands District School Board	Lindsay	Educational services	1,020
Ross Memorial Hospital	Lindsay	Health care and social services	820
Central East Correctional Centre	Lindsay	Other Services	514
Armada Toolworks Ltd.	Lindsay	Manufacturing	400
ICT Group	Lindsay	Business services	350
Great Lakes RV	Lindsay	Manufacturing	250
Sir Sandford Fleming College	Lindsay	Educational services	195
Laidlaw Transit Company	Lindsay	Other services	160
Zellers	Lindsay	Retail trade	120
Kawartha Dairy Ltd.	Bobcaygeon	Manufacturing	106

Source: City of Kawartha Lakes, 2010

SECTION 5

RESIDENTIAL LAND SUPPLY

An inventory of potential residential land supply was undertaken in order to compare the supply against forecast residential land demand. The results of this inventory are tabulated on the following tables by the four urban settlement areas and the designated hamlet areas. Appendix 2 includes the four maps of the urban settlement areas (Lindsay, Fenelon Falls, Bobcaygeon and Omemee), and the maps of Woodville and the hamlet settlement areas identified within the context of the Places to Grow Plan and the Built Boundary report of the Province (dated 2008).

The inventory identifies potential future household supply within the categories and boundaries as identified in the Places to Grow Plan. For example:

- The Province's Built Boundary report identifies Lindsay, Fenelon Falls, Bobcaygeon and Omemee as "Delineated Built up Areas". This boundary (which has been superimposed on the four urban settlement maps) identifies the area within which intensification is to be monitored. Policy 2.2.3.1 of the Places to Grow Plan states:
"By the year 2015 and for each year thereafter, a minimum of 40% of all residential development occurring annually within each upper and single tier municipality will be within the built up area."
- The inventory also identifies the potential number of households within "Designated Greenfield Areas". This as an area within a settlement that is not built up. In other words, what has traditionally been viewed as suburban within a designated settlement is now termed "greenfield areas".
- The Province's built boundary report also identified 30 "undelineated built up areas". These correspond to designated suburban settlements, hamlets and rural residential settlement areas within the City. Woodville is also included as an "undelineated built up area" in the Provincial Growth Plan. Woodville has been designated as an Urban Settlement Area in the City of Kawartha Lakes Official Plan, however, for the purposes of the land supply analysis Woodville is categorized with the hamlet settlement areas.

- Inventory of potential future development has been calculated based on these approximate settlement area boundaries of the designated hamlets (in discussion with City staff). This is one of the perhaps more challenging areas of the inventory exercise given the historical nature of settlement boundaries and the predominantly unserved (water supply and sewage treatment) nature of the majority of these hamlet settlements. It raises the issue of whether the land inventory estimate for hamlet settlement areas is capable of being met given restrictive provincial policies which apply to development on private services.

- The inventory of potential future development is an estimate. The development potential shown for any parcel or area is not meant to limit (either upward or downward) the actual development of the lands. In some cases, actual development may be higher or lower than what is estimated in this report. In some cases, properties that have been identified as intensification sites may not redevelop (due to market factors, landowner willingness or other factors) within the timeframe of this study (i.e. before 2031), while other properties that had not been identified as prime redevelopment opportunities may redevelop. However, when taken together, the land inventory analysis provides a reasonable assessment of the City's existing land supply. It is expected that development proposals will evolve and clarify the development yields on individual properties over time.

5.1 Findings of the Residential Land Inventory Analysis

In summary, the residential land inventory analysis indicates that there is a total estimated development potential for 19,439 residential units within the City.

Total Estimated Residential Development Potential

	Number of Units
Intensification	5,222
Committed Greenfield lands	1,640
Uncommitted Greenfield Lands	8,993
Hamlets	1,254
Subtotal	17,109
Conversions	2,330
Total	19,439

There is capacity for approximately 17,109 residential units within the designated urban settlement areas and designated hamlet settlement areas. Within the urban settlement areas of Lindsay, Fenelon Falls, Bobcaygeon and Omemee a portion of the designated Greenfield lands have draft approved or registered plans of subdivision and are therefore 'committed'. These committed Greenfield lands are planned to yield approximately 1,640 new units. The remaining uncommitted Greenfield lands have an estimated capacity for approximately 8,993 units if developed at an average density of 40 people and jobs per hectare. There is potential for approximately 5,222 new units via redevelopment and intensification of existing sites within three of the four urban areas (not including Omemee). Detailed analysis for each of the urban settlement areas is shown in the table on page 38 and in the maps attached as Appendix 2.

Within the designated hamlet settlement areas and the Woodville settlement area there is potential for an estimated 1,254 new units on existing residential lands. The land capacity analysis for each hamlet and Woodville is shown in the table on page 39 and in the maps attached as Appendix 2.

The housing demand analysis provided by Watson and Associates (see Appendix 1) indicates that approximately 2,330 seasonal dwellings will be converted to permanent residences over the forecast time period. These are not new units but rather, the conversion of existing cottages or seasonal dwellings to permanent housing units that have residents year around. It is expected that these units will be located primarily in the designated Waterfront areas. Since the population in these housing units are considered permanent residents of the City of Kawartha Lakes, they are included in the population forecast developed by the Province and stated in the Places to Grow Growth Plan. Therefore, the 2,330 housing units and corresponding population are included in the residential land analysis for this report.

There is also the potential that a small number of units will be developed on existing, vacant lots outside of the urban, hamlet or waterfront settlement areas. These are vacant lots that were created some time ago through severance or plan of subdivision, but have not been developed. The number of potential new units on vacant lots outside of settlement areas has not been calculated due to the lack of comprehensive data. However, it is expected that the number of new units developed on lots outside of settlement areas will be relatively small and would not accommodate a significant amount of the forecast population growth. Furthermore,

development of these lots will not have significant impact on the servicing analysis since they would likely require individual services.

Seasonal Population Growth

The seasonal population is forecast to increase by approximately 6,361 people from 2006 to 2031 (see Appendix 1). Approximately 4,068 new seasonal dwelling units are forecast. It is assumed that the majority of these seasonal units will be developed in the designated waterfront areas with possibly some seasonal development in the urban and hamlet settlement areas. Since these housing units accommodate a seasonal population, they have not been included in the Province's population forecast for the City. Therefore, they have not been included in the residential land analysis for this report.

Notwithstanding that the seasonal population growth is not included in the Places to Grow population forecasts, the City of Kawartha Lakes may plan for the additional seasonal residential development. The City can allow for some multi-lot development in Waterfront areas and still meet the intent and policies of the Places to Grow Growth Plan. It is recommended that the City direct new seasonal residential development to vacant lots in existing waterfront developments where possible. New seasonal residential multi-lot developments should be located in designated waterfront areas or in designated hamlet or urban settlement areas. Based on the population and housing forecasts developed by Watson and Associates, the City should plan for approximately 4,068 new seasonal dwelling units between 2006 and 2031.

Estimated Residential Development Potential within Four Urban Settlement Areas

	Area (ha)	Single Detached	Semi-Detached	Town Homes	Apts	Seniors Retirement	Total
Lindsay							
Greenfield	463.9	4,552	72	1,478	838	0	6,940
Intensification	103.7	458	66	1,639	1,527	693	4,383
Sub Total	567.6	5,010	138	3,117	2,365	693	11,323

Fenelon Falls							
Greenfield	50.4	532	8	98	0	0	638
Intensification	13.1	22	0	175	55	55	307
Sub Total	63.5	554	8	273	55	55	945

Bobcaygeon							
Greenfield	166.4	1,691	0	219	457	0	2,367
Intensification	34.5	368	20	84	60	0	532
Sub Total	200.9	2,059	20	303	517	0	2,899

Omeme							
Greenfield	49.3	585	0	103	0	0	688
Intensification	-	-	-	-	-	-	
Sub Total	49.3	585	0	103	0	0	688

TOTALS

Greenfield	730.0	7,360	80	1,898	1,295	0	10,633
Intensification	151.3	848	86	1,898	1,642	748	5,222
TOTAL	881.3	8,208	166	3,796	2,937	748	15,855

Estimated Residential Development Potential within Woodville and the Hamlet Settlement Areas (shown as “undelineated built boundary” under Places to Grow)

Settlement Area	Estimated No. of Units	Water Supply		Sewage Treatment	
		Private	Public	Private	Public
Argyle	5	✓		✓	
Baddow	–	✓		✓	
Bethany	163		✓	✓	
Bexley	11	✓		✓	
Bolsover	10	✓		✓	
Burnt River	75	✓		✓	
Cambray	11	✓		✓	
Cameron	20	✓		✓	
Coboconk	7	✓			✓
Corsons	5	✓		✓	
Cresswell	4	✓		✓	
Downeyville	70	✓		✓	
Dunsford	50	✓		✓	
Glenarm	–	✓		✓	
Head Lake	5	✓		✓	
Janetville	81		✓	✓	
Kinmount	143		✓	✓	
Kirkfield	21	✓		✓	
Little Britain	82	✓		✓	
Lorneville	11	✓		✓	
Manilla	65		✓	✓	
Norland	5		✓	✓	
Oakwood	93		✓	✓	
Pontypool	159		✓	✓	
Sebright	–	✓		✓	
Sonya	--		✓	✓	
Sturgeon Point	–	✓		✓	
Valentia	10	✓		✓	
Victoria Road	10	✓		✓	
Woodville	138		✓	✓	
Total Estimated Units	1,254				

5.2 Land Capacity and Demand Analysis

In total, there are a potential 17,109 additional housing units in greenfield and intensification areas within the urban and settlement areas of the City. The breakdown of the housing unit potential by housing unit type is shown on the table below. Comparison to the demand analysis developed by Watson and Associates shows that there is sufficient capacity to accommodate the forecast demand for all housing types to 2031.

Potential Housing Supply versus Forecast Housing Demand

Unit Type	Potential Housing Unit Supply**				2031 Forecasted Additional Unit Demand*	
	Urban Settlement Areas		Hamlet Settlement Areas	Total Units	Total Units	Difference
	Intensification	Greenfield				
Single Detached	848	7,360	1,254	9,462	7,527	2,101
Semi Detached	86	80		166		
Townhomes	1898	1,898		3,796	2,160	1,636
Apartments	1642	1,295		2,937	995	2,690
Seniors Retirement	748	0		748		
TOTAL	5222	10,633	1,254	17,109	10,682	6,427

* Source: Watson & Associates Economists Ltd, Dec 2009

** Cottage Conversions not included.

There are a total of 1,640 units in Draft Approved and Registered Plans in the Designated Greenfield Areas of Lindsay (1148), Bobcaygeon (427), Fenelon Falls (65 units) and Omemee (0), at the time of this report. The housing demand analysis indicates a need for 10,681 new units from 2006 to 2031 for an average of 428 units per year. City staff indicate that there has been an average of approximately 338 new units built per year over the last 10 years (1999-2008).

The following table illustrates the total years of supply of housing units in the urban settlement areas, the hamlet settlement areas and the forecast cottage conversions using the forecast average annual demand. There is sufficient land supply to meet the PPS requirements for a 3

year supply in registered plans, draft approved plans and intensification lands and a 10 year supply in intensification lands and lands designated for residential development.

Estimate of Residential Land Supply in Years

	Number of units	Year(s) Supply (based on 428 units per year)
Committed Greenfield Lands (registered and draft approved)	1,640	3.8 years
Intensification	5,222	12.2 years
Uncommitted Greenfield Lands	8,993	21.0 years
Hamlet Settlement Areas	1,254	2.9 years
Subtotal	17,109	40.0 years
Cottage Conversions	2,330	5.4 years
Total	19,439	45.4 years

5.3 Population Capacity

The additional housing unit potential of the residential lands within the four urban settlement areas, the hamlet settlement areas and the forecast number of conversions is estimated to provide capacity for an additional population of approximately 43,419 people. This exceeds the projected population growth to 2031 of approximately 22,500 people. The population capacity was estimated by multiplying the number of units determined in the residential land analysis by the average persons per unit factor developed by Watson & Associates Economists Ltd.

Estimated Total Population Capacity

	Single Detached	Semi Detached	Townhouses	Apartments	Seniors	TOTAL
Lindsay	13,126	362	5,548	3,571	832	23,438
Fenelon Falls	1,451	21	486	83	66	2,107
Bobcaygeon	5,395	52	539	781		6,767
Omeme	1,533		183			1,716
<i>Sub-total</i>	<i>21,505</i>	<i>435</i>	<i>6,757</i>	<i>4,435</i>	<i>898</i>	34,029
Hamlets	3,285					3,285
Conversions	6,105	0	0	0	0	6,105
TOTAL	30,895	435	6,757	4,435	898	43,419
Average persons per unit (in 2031)	2.62	2.62	1.78	1.51	1.2	

The hamlet settlement areas are characterized by great diversity in terms of the extent of the settlement boundary and potential land capacity. A number of them achieve relatively high potential future residential yields based on their settlement boundaries. Examples include Bethany, Burnt River, Downeyville, Dunsford, Kinmount, Janetville, Little Britain, Oakwood, and Pontypool. Some of these are based on existing draft plan of subdivision approvals, others are based on the extent of the settlement area boundary. The majority of the 30 hamlet settlement areas are on private services. Nine have some public water supply, and one has public sewage treatment. This raises a basic issue as to whether the 1,254 additional units estimated for the hamlet settlement areas is too great given the limited serviceability of these areas.

5.4 Density Analysis

The Growth Plan establishes a minimum target of 50 persons and jobs per hectare for new development in Greenfield areas and an overall intensification target of 40% of all new residential units in the built-up area. The Growth Plan states that the Minister of Public Infrastructure and Renewal may permit alternative targets for upper or single tier municipalities located in the 'outer ring', such as the City of Kawartha Lakes. As noted earlier in the report, the Official Plan policy recognizes the opportunity for determination of alternative intensification and density targets.

Density Target

Policy 2.2.7 of the Growth Plan is to be interpreted to mean that the residential and employment greenfield areas are to be combined to calculate the density figure. The intensification and density targets are intended to be measured across the entire City, which means that some areas may have higher densities and other areas may have lower densities. Currently, new residential Greenfield areas are developing at an average density of approximately 27 people and jobs per hectare, which is below the Growth Plan target density of 50 people and jobs per hectare.

The density analysis for this study considered several density targets. The land supply discussion in the previous section shows the scenario based on an average Greenfield density of 40 people and jobs per hectare. Other scenarios including one at 50 people and jobs per hectare were also analyzed. As shown in the previous section there is more than sufficient land supply to accommodate the forecast population growth to 2031 with an average Greenfield density target of 40 people and jobs per hectare.

Implementation of the Density Target

The City of Kawartha Lakes has a total Designated Greenfield land area of 730 hectares. In order to achieve an average density of 50 people and jobs per hectare those lands need to accommodate, 36,500 people and jobs. To achieve an average density of 40 people and jobs per hectare the designated Greenfield lands would need to accommodate 29,200 people and jobs.

Greenfield capacity

Total Greenfield land area	730 hectares	730 hectares
Density target	50 people and jobs/ha	40 people and jobs/ha
Total people and jobs capacity	36,500 people	29,200 people

Some of the lands within the Designated Greenfield area are ‘committed’, meaning that these lands have registered plans of subdivision or draft approved plans of subdivision. There is a total of 146 hectares of land within the Designated Greenfield that is committed. These lands are planned to have a total of 1,640 units. Details on each of the registered and draft approved lands that make up the committed Designated Greenfield lands are contained in Appendix 2.

Based on the average person per unit factor for each housing type developed by Watson & Associates Economists Ltd, the number of people accommodated on the committed lands is calculated to be 3,966 people. Total jobs in the committed lands are estimated to be 278 jobs. These are jobs typically found in residential areas such as schools, churches, and work at home. Therefore, the total density in the committed Designated Greenfield area is 29 people and jobs per hectare.

Committed Greenfield Lands

Committed land area (ha)	146
Total units	1,640
Total people	3,966
Total jobs*	278
Density (p-j/ha)	29.0

*assumes 7 jobs per 100 population

There are approximately 584 hectares of Designated Greenfield lands that do not have registered or draft approved plans and thus are 'uncommitted'. To achieve a Greenfield density target of 40 people and jobs per hectare on the entire Greenfield, the uncommitted lands must develop at slightly higher densities to accommodate for the lower density of committed Greenfield lands. To achieve 50 people and jobs per hectare, the uncommitted lands would need to develop to an average density of 55.3 people and jobs per hectare (equal to approximately 21.4 units per hectare). To achieve 40 people and jobs per hectare, the uncommitted lands would need to achieve an average density of 42.8 people and jobs per hectare (equal to approximately 16.6 units per hectare).

Uncommitted Greenfield Lands

	50 people and jobs per hectare	40 people and jobs per hectare
Uncommitted land area	584	584
Required total pop and jobs	32,257	24,957
Required total pop	29,980	23,190
Required total jobs*	2,277	1,766
Required units	12,491	9,663
Required density (p-j/ha)	55.3	42.8
Required density (units/ha)	21.4	16.6

*assumes 7 jobs per 100 population

To achieve an overall density of approximately 16.6 units per hectare in the greenfields a greater proportion of townhouse and apartment units will be required than is found in current Greenfield developments. The table below shows the recommended proportion of housing types to achieve a Greenfield density of 40 people and jobs per hectare and 50 people and jobs per hectare compared to the existing proportion of housing types in recent Greenfield developments.

Comparison of the Proportion of Housing Types in Designated Greenfield Areas

Housing Types	Proportion of housing types in recent Greenfield Developments	Proportion of housing types required at 40 people and jobs per hectare	Proportion of housing types required at 50 people and jobs per hectare
Single/semi detached	94.9%	75%	63%
Townhouses	1.4%	21%	28%
Apartments	3.8%	4%	9%

It is recommended that the minimum residential greenfield density target be established at 40 persons and jobs per hectare for the City of Kawartha Lakes. A Greenfield density target of 40 people and jobs per hectare is still a considerable increase in density over current Greenfield developments and would be consistent with the goals of the provincial Growth Plan to reduce land consumption for urban development. This density approach will provide for consideration of appropriate densities in the urban areas of Omemee, Fenelon Falls and Bobcaygeon. Higher density can be directed to Lindsay where the supporting services are available. The proposed density alternative also provides opportunity to direct medium and higher density forms of development to the built-up area and support the overall intensification objectives. Other reasons that a lower density target is appropriate in the City of Kawartha Lakes include:

- 1) There is no **Urban Growth Centre** into which large scale residential and employment growth can be directed and accommodated. Urban Growth Centres are defined in the Places to Grow Growth Plan as places that will be planned:

- a. as focal areas for investment in institutional, commercial, recreational, cultural and entertainment uses,
 - b. to accommodate and support major transit infrastructure;
 - c. to serve as high density major employment centres that will attract provincially, nationally or internationally significant employment uses; and
 - d. to accommodate a significant share of the population and employment growth.
- 2) There are no **major transit station areas** in which to focus higher density developments. The Growth Plan defines major transit station areas as the area around any existing or planned higher order transit station (which is defined as transit on its own right of way such as light rail).
- 3) Other than in Lindsay, there is limited potential for **major office** development which would assist with increasing the employment densities. The Growth Plan defines major office as freestanding office buildings of 10,000 m² or greater or with 500 jobs or more.
- 4) The City is comprised of four urban settlement areas and many small hamlet settlement areas. The hamlet settlement areas have traditionally developed at relatively low densities and the majority are developed on private or partial services. Trying to achieve the provincial targets on designated lands within the smaller urban areas and settlement areas would result in a significant change in the character of the settlements.
- 5) The main focus for increased densities should be in areas with full services (such as Lindsay, Fenelon Falls and Bobcaygeon).

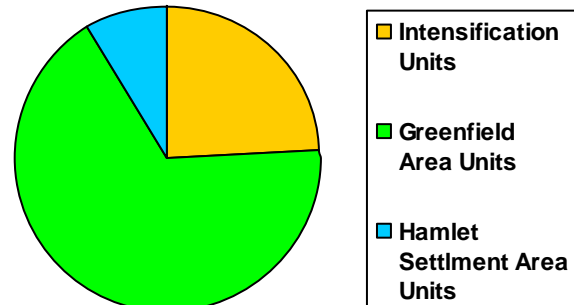
Intensification Target

The Province has targeted that by 2015 the City achieve intensification of 40% of all new residential units within the built-up area. The urban settlement areas of Lindsay, Bobcaygeon, Fenelon Falls and Omemee represent the larger built-up areas within the City.

The potential for intensification and nature of intensification was reviewed as part of the land supply analysis. The land capacity analysis determined there is a potential supply of 17,109 units in the four urban settlement areas and hamlet settlement areas. There are approximately

5,222 units or 30.5% which could be considered intensification. The majority of the City's intensification is focused in the urban area of Lindsay. It is important to note that some potential intensification sites would require Official Plan amendments to allow for a residential development.

It is recognized that the development of unbuilt subdivisions and vacant lands in the hamlet settlement areas (1,254 units) may qualify as intensification units under the Places to Grow framework but these areas are not likely to be a major source of intensification. This is the case particularly given many of the settlement areas are on private services and would not be characterized as typical urban infill projects. However, should the settlement area units be included as intensification, the potential for intensification is increased to approximately 37.9% of new units within the built-up area.



Context is important in determining how much intensification should be accommodated in the City and the forms of housing that would be required to achieve that level of intensification. Historically, in the City of Kawartha Lakes, the majority of new residential development has occurred in greenfield areas.

Reaching an intensification target of 40% by 2015 will be a significant challenge for most of the cities in the Greater Golden Horseshoe. There are many cities that have an abundance of redevelopment sites within the Built Boundary but still intensification remains well below 40%. This occurs for a number of reasons including:

- a) Redevelopment of intensification sites is often more costly than Greenfield development;
- b) Intensification is sometimes opposed by existing surrounding residents and thus adds time and cost to a redevelopment application; and
- c) there is limited demand for intensification units since the majority of intensification units are apartment units and townhouses.

Smaller centres have additional challenges such as limited or no public transit, relatively affordable housing in greenfield locations and a relative lack of traffic congestion that increases travel times to work from suburban locations. Therefore, even if there is a surplus of potential intensification sites, there would need to be considerable change in consumer demand in the City of Kawartha Lakes to move from an intensification rate of around less than 10% to the Provincial Growth Plan intensification target of 40%. Also, unlike larger cities in the Growth Plan Area, the City of Kawartha Lakes does not have a designated Urban Growth Centre that would be a focal point for intensification. Nor is there a major transit station which would facilitate intensification.

In a small sized city, that has an existing low intensification rate, the jump to 40% intensification is a significant challenge. Therefore, an intensification target of 40% of all residential units after the year 2015 would be very difficult to achieve given the context of the City of Kawartha Lakes. A target of 30% would be more appropriate and is recommended.

SECTION 6

RESIDENTIAL LAND ALLOCATION ANALYSIS

The land supply analysis indicates that the City has sufficient capacity in designated settlement areas to accommodate the forecasted population to the year 2031. The focus of the Province and the draft City Official Plan is to direct growth to serviced settlement areas. Therefore, the majority of growth is expected to occur in the four urban settlement areas of Lindsay, Bobcaygeon, Fenelon Falls and Omemee.

At the same time, it is recognized that hamlet settlement areas that are on private or partial services have existing land use designations in place which allow for development and therefore, some growth in hamlets is expected. The land inventory analysis identified a potential supply of 1,254 units in the existing settlement area boundaries of the 29 hamlet settlement areas and Woodville. In keeping with the direction of provincial policy, expansion to the boundaries of the existing hamlet settlement areas has not been considered.

It is expected that growth will not be uniform across all of the designated settlement areas over the 25 year planning period. Because of their location, size, amenities, housing choice, employment opportunities and a variety of other factors, some areas will attract more growth than others. Infrastructure upgrades will also be required in some settlement areas over the next 25 years in order to accommodate more growth. The amount of growth that occurs in each area is also dependent on decisions about whether or not infrastructure upgrades are undertaken or services extended to areas not yet serviced. The servicing analysis that was undertaken as part of the Municipal Master Plan Project is described more fully in other volumes.

The purpose of this section of the growth management strategy report is to analyze a range of scenarios for the allocation of population growth across the designated settlement areas within the City to determine if there are any scenarios which would result in a need to expand the settlement area boundaries for one or more of the urban settlement areas.

6.1 Settlement Area Expansion Requests

Through the public consultation component of the growth management strategy, a number of people have requested urban area boundary expansions to bring new lands into the urban settlement area. The table below describes the settlement boundary expansion requests. The capacity of these lands is approximately 1,629 additional housing units, which would provide additional capacity for approximately 3,846 people.

Settlement Area Expansion Requests

Location	Name	Single/Semi detached	Town-homes	Apartment	Total Units
Lindsay	Mackey Estate	339	107		446
Fenelon Falls	Black Bear Estates / Windsong Properties	51	65		116
Fenelon Falls	Fenelon Trails Inc	624	310		934
Fenelon Falls	Landmark	113	20		133
Total		1,127	502	0	1,629

6.2 Existing Population Distribution

In 2006, the total population for the City of Kawartha Lakes was 77,543. The four urban settlement areas of Lindsay, Fenelon Falls, Bobcaygeon, and Omemee account for about a third of the total population or approximately 26,126 people. The remaining 51,417 people are located in the 29 hamlet settlement areas and Woodville, the waterfront settlement areas, and the rural settlement areas. The table below shows the distribution of the urban population among the four urban settlement areas.

Existing Population Distribution

	Total 2006 Urban Population	Proportion of Total Urban Population
Lindsay	19,361	0.74
Fenelon falls	2,164	0.08
Bobcaygeon	3,313	0.13
Omemee	1,323	0.05
Total Urban Population	26,161	1.00

6.3 Estimated Population Growth Capacity

Based on the land inventory analysis, at an average designated greenfield density of 40 people and jobs per hectare, the urban settlement areas, the hamlet settlement areas (including Woodville) and the forecast number of cottage conversions have an estimated population capacity for an additional 42,647 people. As noted in Chapter 5 of this report, this capacity is more than sufficient to accommodate the forecast population growth of 22,500 people.

Estimated Population Growth Capacity

	Forecast Population					Total Population Growth Capacity
	Population in Single Detached Units	Population in Semi Detached Units	Population in Townhouses	Population in Apartments	Population in Seniors Units	
Lindsay	13,126	362	5,548	3,571	832	23,438
Fenelon Falls	1,451	21	486	83	66	2,107
Bobcaygeon	5,395	52	539	781		6,767
Omeme	1,533		183			1,716
<i>Sub-total</i>	<i>21,505</i>	<i>435</i>	<i>6,757</i>	<i>4,435</i>	<i>898</i>	34,029
Hamlets	3,285					3,285
Conversions	6,105	0	0	0	0	6,105
TOTAL	30,895	435	6,757	4,435	898	43,419
Average persons per unit (in 2031)	2.62	2.62	1.78	1.51	1.2	

6.4 Analysis of Population Growth Allocation Alternatives

There are several possible scenarios for the distribution of the forecast population growth among the various settlement areas within the City. The analysis considered a number of factors including:

- 1) The land inventory analysis indicates that the hamlet settlement areas provide about 7.3% of the total residential inventory. Since most hamlets are on private services, it is reasonable to expect that not all of the lands in the hamlet settlement areas will

develop. Therefore, for this analysis it is assumed that hamlet settlement areas will accommodate a maximum of 7% of the total forecast population growth.

- 2) Infrastructure upgrades will be required for Omemee to take any significant share of forecast growth. Therefore, some of the scenarios assume no growth in Omemee.
- 3) The majority of future growth is likely to occur in the three urban areas of Lindsay, Fenelon Falls, and Bobcaygeon. In general, it is expected that the population distribution among the three urban areas will remain similar to the existing distribution.

Scenario 1:

The allocation of population growth in Scenario 1 considers that the forecast number of cottage conversions will occur and approximately 7% of population growth will be accommodated in the hamlet settlement areas. The remaining forecast population growth is distributed among the four urban areas. The distribution is based in part on the population forecast in the 2009 City of Kawartha Lakes Development Charge Background Study and based in part on the historical distribution of population among four urban centres. Column 4 shows the total forecast population growth from 2006-2031. In each location, the total population capacity (shown in Column 5) is greater than the forecast growth. Therefore, in this scenario, no additional lands are required in any of the settlement areas.

Population Growth Allocation Scenario 1

	2006-2011 Population Growth	2006-2021 Population Growth	2006-2031 Population Growth	Total Population Growth Capacity
Lindsay	515	6,830	11,641	23,438
Fenelon Falls	65	866	1,476	2,107
Bobcaygeon	58	770	1,312	6,767
Omemee	36	481	820	1,716
Subtotal Urban Areas	675	8,946	15,248	34,028
Hamlet Settlements	51	673	1,148	3,285
Subtotal	725	9,619	16,395	37,313
Conversions	1,258	4,140	6,105	6,105
Total Population	1,983	13,759	22,500	43,419

Scenario 2

The allocation of population growth in Scenario 2 considers that the forecast number of cottage conversions will occur and a modest amount of growth will occur (approximately 3%) in the hamlet settlement areas. This scenario considers that no growth will occur in Omemee. The remaining forecast population growth is distributed among the other three urban settlement areas (Lindsay, Fenelon Falls, and Bobcaygeon) at a distribution very similar to the distribution in the 2009 Development Charges Study. In this scenario, no additional lands are required in any of the settlement areas.

Population Growth Allocation Scenario 2

	2006-2011 Population Growth	2006-2021 Population Growth	2006-2031 Population Growth	Total Population Growth Capacity
Lindsay	566	7,503	12,788	23,438
Fenelon Falls	73	962	1,640	2,107
Bobcaygeon	65	866	1,476	6,767
Omemee	0	0	0	1,716
Subtotal Urban Areas	704	9,331	15,904	34,028
Hamlet Settlements	22	289	492	3,285
Subtotal	725	9,619	16,395	37,313
Conversions	1,258	4,140	6,105	6,105
Total Population	1,983	13,759	22,500	43,419

Scenario 3

This scenario considers an extreme situation whereby all of the forecast population growth is directed to the three urban settlement areas of Lindsay, Fenelon Falls and Bobcaygeon at proportions that are similar to their respective 2006 population. This scenario assumes that there would be no population growth in Omemee or the hamlet settlement areas. Also no population growth would occur through cottage conversions. While this scenario may be less likely to occur than other scenarios, it demonstrates that there is sufficient capacity in the Lindsay, Fenelon Falls, and Bobcaygeon settlement areas to accommodate all of the forecast population growth. Therefore, if there were short or long term constraints to development in the hamlet settlement areas, the waterfront settlement areas and Omemee, there would still be sufficient land capacity to accommodate forecast residential growth.

Population Growth Allocation Scenario 3

	2006-2011 Population Growth	2006-2021 Population Growth	2006-2031 Population Growth	Total Population Growth Capacity
Lindsay	1,527	10,594	17,325	23,438
Fenelon Falls	178	1,238	2,025	2,107
Bobcaygeon	278	1,926	3,150	6,767
Omeme	0	0	0	1,716
Subtotal Urban Areas	1,983	13,759	22,500	34,028
Hamlet Settlements	0	0	0	3,285
Subtotal	1,983	13,759	22,500	37,313
Conversions	0	0	0	6,105
Total Population	1,983	13,759	22,500	43,419

6.5 Summary

The population allocation analysis indicates that the expansion of settlement area boundaries is not required to accommodate forecast growth. Even in a situation where all of the forecast growth would need to occur in Lindsay, Fenelon Falls and Bobcaygeon, there is sufficient land supply to accommodate the forecast amount of growth.

A detailed analysis of infrastructure and servicing is contained in the other component reports of the Municipal Master Plan Project. These reports provide an assessment of the potential servicing options. However, regardless of the future decisions the City may make on infrastructure investment and the provision of services, there are sufficient lands in all of the designated settlement areas to accommodate the forecast population growth.

SECTION 7

EMPLOYMENT LAND SUPPLY AND DEMAND ANALYSIS

Employment land is important to the City's future economic prosperity and competitiveness. The provision of employment land contributes to overall growth within the City. Maintaining an available supply of serviced employment land provides opportunity for growth and diversity. The Growth Plan requires that sufficient lands be made available to ensure continued economic prosperity and establishes employment levels that the City is expected to plan for to the year 2031. The primary objectives of the employment lands review component of the Growth Management Study are to:

- 1) Review employment forecasts for the City;
- 2) Determine the City's existing supply of employment lands; and
- 3) Identify requirements to ensure the adequate future supply of employment lands to 2031.

7.1 Employment Growth

The Places to Grow Growth Plan forecasts an increase of approximately 7,000 new jobs for the period 2001 to 2031. Approximately 3,877 jobs were created from 2001 to 2006 and it is forecast that approximately 3,123 new jobs will occur over the period 2006 to 2031. Watson & Associates have forecast the number of jobs for each employment type for the total forecast employment growth from 2006 to 2031.

Employment Growth by Employment Type 2006-2031

	Primary	Work at home	Industrial	Commercial	Institutional	No fixed place	Total
Employment Growth 2006-2031 (jobs)	17	489	404	1,559	390	260	3,119

Source: Watson & Associates Economists Ltd, December 2009.

7.2 Employment Land Supply

The majority of the available serviced employment land is located in Lindsay. Within Lindsay there are approximately 354 hectares of land zoned for employment uses, and directly adjacent to Lindsay in the Township of Ops there are approximately 113.7 hectares of land zoned for employment uses. The employment lands in the Township consist of approximately 77.1 hectares at the airport and 36.6 hectares south of Lindsay adjacent to Highway 7. Appendix 3 shows the location of the employment lands in Lindsay.

Excluding the airport lands, approximately 180.6 hectares of the zoned employment land is currently vacant. The majority of the vacant employment lands are outside of the Built Boundary, and therefore, any future development would be required to meet the provincial Growth Plan greenfield density target of 50 jobs per hectare.

7.3 Employment Land Requirements

The analysis of the employment land demand and supply concludes that no additional employment lands are required to accommodate future employment growth to 2031. There are sufficient vacant zoned employment lands within the Town of Lindsay to accommodate all of the forecast industrial job growth from 2006 to 2031. There are 404 new industrial jobs forecast. New Greenfield development would have to meet the provincial density target of 50 people and jobs per hectare (or an adjusted density target). However, as shown in the table below, even if the forecast employment were to develop at very low densities, there is more than sufficient lands to accommodate the forecast employment growth.

Land Requirements at Various Average Employment Densities

Forecast Jobs	Average Density	Land Area Required
404 jobs	10 jobs per hectare	40.4 hectares
404 jobs	30 jobs per hectare	13.5 hectares
404 jobs	40 jobs per hectare	10.1 hectares
404 jobs	50 jobs per hectare	8.1 hectares

It is anticipated that some of the forecast Commercial employment would locate on vacant employment lands. Even if it is assumed that the majority of commercial employment were to locate on vacant employment lands, there are sufficient employment lands within the existing settlement boundary to accommodate the forecast employment growth.

The following table shows the employment forecast by type and an assessment of the land needed to accommodate that level of employment.

Employment Land Capacity

Employment Type	Total Jobs Forecast 2006 - 2031*	Land Capacity
Primary	17	Will be accommodated on lands outside the urban areas
Work at Home	489	To be accommodated in residential areas, primarily Designated Greenfield
Industrial	404	Existing 180.6 ha of designated Industrial lands have capacity for 5,400 jobs at 30 jobs/ha or 7,224 jobs at 40 jobs/ha or 9,030 jobs at 50 jobs/ha
Commercial	1,559	To be accommodated by development and intensification on existing designated Commercial lands and serviced Industrial lands.
Institutional	390	Primarily accommodated on residential lands with some accommodated through intensification and expansion of existing institutional lands
No Fixed Place of Work	260	No additional lands required
Total	3,119	No additional lands required

* Watson & Associates Economists Ltd, December, 2009

Primary jobs (e.g. farming, forestry, mining) occur outside the urban area and have no impact on urban land needs. No Fixed Place of Work includes truck drivers, landscape contractors and others who do not work at the same place every day. No additional lands are required for these jobs.

Work at Home employment and the majority of Institutional employment occurs within residential areas. The analysis of residential land needs described earlier in this report has included the forecast employment for these employment types. A small amount of Institutional employment will occur through intensification and expansion of existing Institutional lands (such as government offices, Sir Sanford Fleming College). No additional lands are required for the forecast Work at Home or Institutional employment.

Approximately 404 new industrial jobs are forecast for the period 2006-2031. The City of Kawartha Lakes has approximately 180 hectares of vacant, serviced Industrial land. At a density of 30 jobs per hectare there is more than sufficient Industrial land within the City to accommodate the forecast 404 new jobs.

Approximately 1,559 new Commercial jobs are forecast for the 2006 to 2031 period. Some of these jobs will be office and service commercial jobs that typically locate in employment areas. Others will be retail commercial jobs that locate on existing vacant commercial lands or occur through redevelopment and/or intensification of existing commercial areas – such as the downtowns of the urban areas.

7.4 Employment Lands Density Targets

The Provincial Growth Plan requires that all designated Greenfield employment lands be planned to achieve a minimum density target of 50 jobs per hectare. This would be a significant increase in density over the current form of development in Greenfield employment lands in the City. A density target of 50 jobs per hectare would be difficult to achieve in the City of Kawartha Lakes. Unlike larger cities within the Growth Plan area there is no planned public transit, no planned intensification corridors, and no major office hubs which would facilitate higher employment densities. It is recommended that a density target of 30 jobs per hectare be assigned to the City of Kawartha Lakes. An adjusted density target would not require an urban boundary expansion or require an increase in designated employment lands over the period to 2031. As shown in the previous section, there is more than sufficient land supply to accommodate the forecast employment at a density of 30 jobs per hectare.

7.5 Conversion of Employment Lands

The policies of the Places to Grow Growth Plan prohibit the conversion of employment lands to non-employment uses such as major commercial or residential use without justification through a comprehensive review. Policy 2.2.6.5 of the Growth Plan sets out the criteria that must be met in order for the conversion of lands to occur:

- a) there must be a need for the conversion;
- b) the municipality will meet the employment forecasts allocated to the municipality;
- c) the conversion will not adversely affect the overall viability of the employment area and achievement of the intensification target, density targets, and other policies of the Growth Plan;
- d) there is existing or planned infrastructure to accommodate the proposed conversion;
- e) the lands are not required over the long term for the employment purposes for which they are designated; and
- f) cross-jurisdictional issues have been considered.

The land inventory analysis conducted for this study identified that some of the older industrial lands along Mary Street in Lindsay could be considered for redevelopment and intensification (the lands are identified as parcels H1, H2 and H3 on the Lindsay residential inventory map in Appendix 2). Conversion of these lands to residential uses would meet the employment lands criteria of the Growth Plan:

- a) There is a need for redevelopment sites within the existing urban area if the City is going to approach the residential intensification targets set out in the Growth Plan.
- b) The City will meet its employment forecasts. As described earlier in this section, there is more than enough vacant, designated employment land within the City to meet the forecast demand.
- c) There are limited opportunities for redevelopment and intensification within the City. The redevelopment of these lands provides greater opportunity for the City to achieve the intensification target.
- d) There is, or could be, sufficient infrastructure.
- e) These lands are not needed for employment uses in order for the City to accommodate the forecast growth.
- f) Cross jurisdictional issues are not a consideration.

The older industrial lands located near Mary Street in Lindsay are appropriate for redevelopment and conversion to other uses. Employment land absorption in the City is relatively slow and the City should consider better, strategic locations for employment development. The conversion of these lands to non-employment uses would meet the tests set out in the Places to Grow Growth Plan. The City should consider putting the appropriate policy framework in the new Official Plan so that conversion of the lands could occur over time.

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CITY OF KAWARTHA LAKES
GROWTH MANAGEMENT STRATEGY

APPENDIX 1

SUMMARY OF POPULATION, HOUSING AND
EMPLOYMENT GROWTH 2006-2031, WATSON AND
ASSOCIATES ECONOMISTS LTD. (DECEMBER 2009)

CITY OF KAWARTHA LAKES

**SUMMARY OF POPULATION,
HOUSING & EMPLOYMENT
GROWTH 2006-2031**

Final

DECEMBER 3, 2009



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 **Planning for growth**

Summary of 2006-2031 Growth Forecast

The following commentary and corresponding tables and figures summarize the 2006-2031 City of Kawartha Lakes population, housing and employment forecast prepared by Watson & Associates Economists Ltd. (W&A). This forecast has been carried out as part of the Municipality's Provincial Growth Plan conformity exercise, as required under the Places to Grow Act, 2005.

Population Growth

- During the 2006-2031 forecast period, the permanent¹ population is anticipated to increase from 78,000 in 2006 to 100,000 by 2031, consistent with the targets identified in Places to Grow – Growth Plan for Greater Golden Horseshoe (GGH), Schedule 3, 2006, as summarized in Table 1 and illustrated in Figure 1.

**TABLE 1
CITY OF KAWARTHA LAKES
POPULATION GROWTH FORECAST SUMMARY**

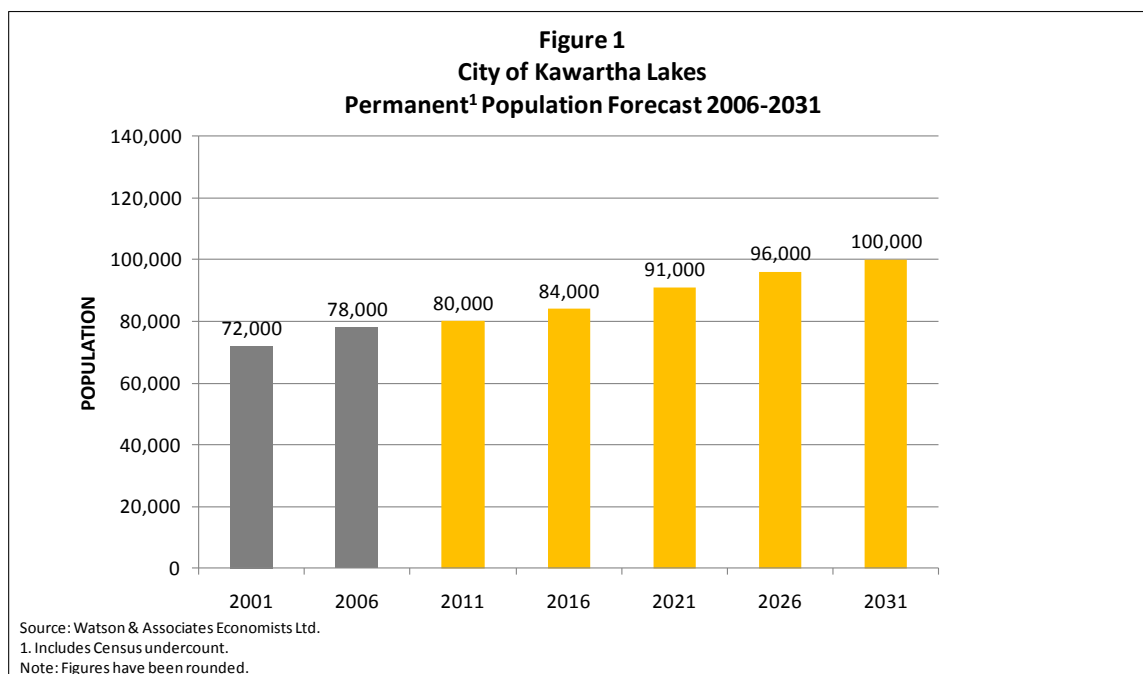
YEAR	FORECAST						PLACES TO GROW ¹
	Population (Excluding Census Undercount)	Population (Including Census Undercount) ²	Seasonal Population	50% Seasonal	Total Population (including Census Undercount)+ 100% Seasonal	Total Population (including Census undercount)+ 50% Seasonal	Population (Includes Census Undercount)
<i>Mid 1996</i>	67,926	70,643					-
<i>Mid 2001</i>	69,179	71,946	28,757	14,379	100,703	86,325	72,000
<i>Mid 2006</i>	74,561	77,543	31,026	15,513	108,569	93,056	-
<i>Mid 2011</i>	76,468	79,526	32,263	16,132	111,789	95,658	80,000
<i>Mid 2016</i>	81,216	84,465	33,727	16,864	118,192	101,329	-
<i>Mid 2021</i>	87,791	91,302	35,191	17,596	126,493	108,898	91,000
<i>Mid 2026</i>	92,703	96,411	36,289	18,145	132,700	114,556	-
<i>Mid 2031</i>	96,608	100,472	37,387	18,694	137,859	119,166	100,000
Mid 1996 - Mid 2001	1,253	1,303					
Mid 2001 - Mid 2006	5,382	5,597	2,269	1,134	7,866	6,731	
Mid 2006 - Mid 2016	6,655	6,921	2,701	1,351	9,622	8,272	
Mid 2006 - Mid 2026	18,142	18,868	5,263	2,632	24,131	21,500	
Mid 2006 - Mid 2031	22,047	22,928	6,361	3,181	29,289	26,109	

Source: Watson & Associates Economists Ltd.

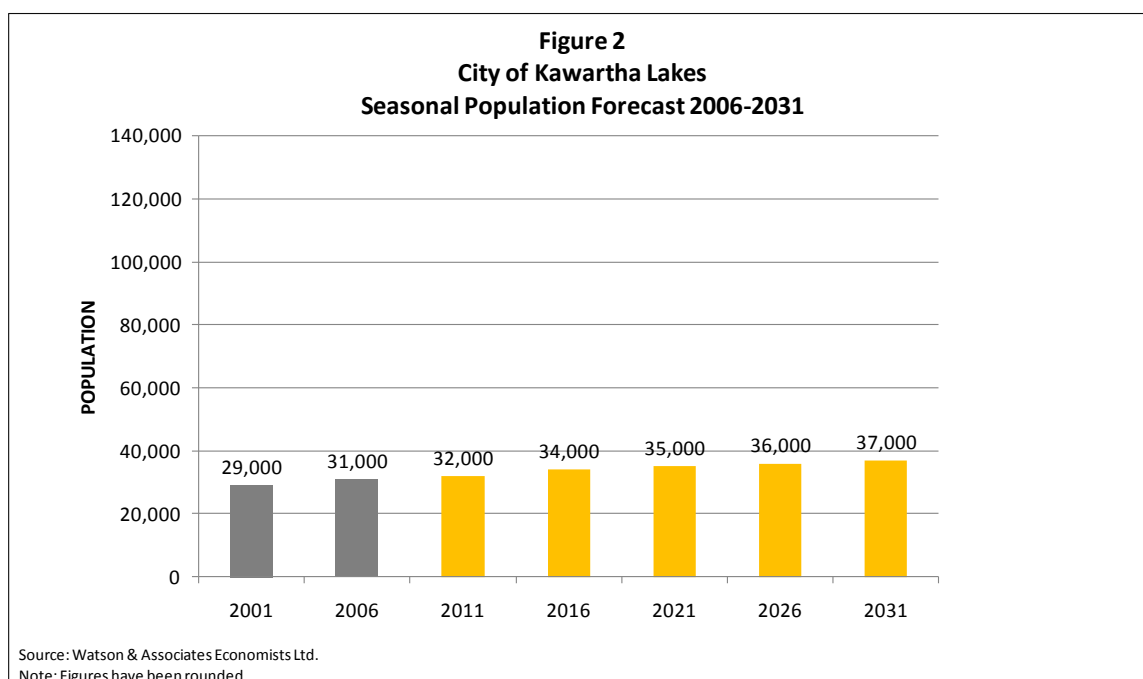
1. Places to Grow - Growth Plan for the Greater Golden Horseshoe, Schedule 3, Government of Ontario, 2006

2. Population includes a Census Undercount of approximately 4%.

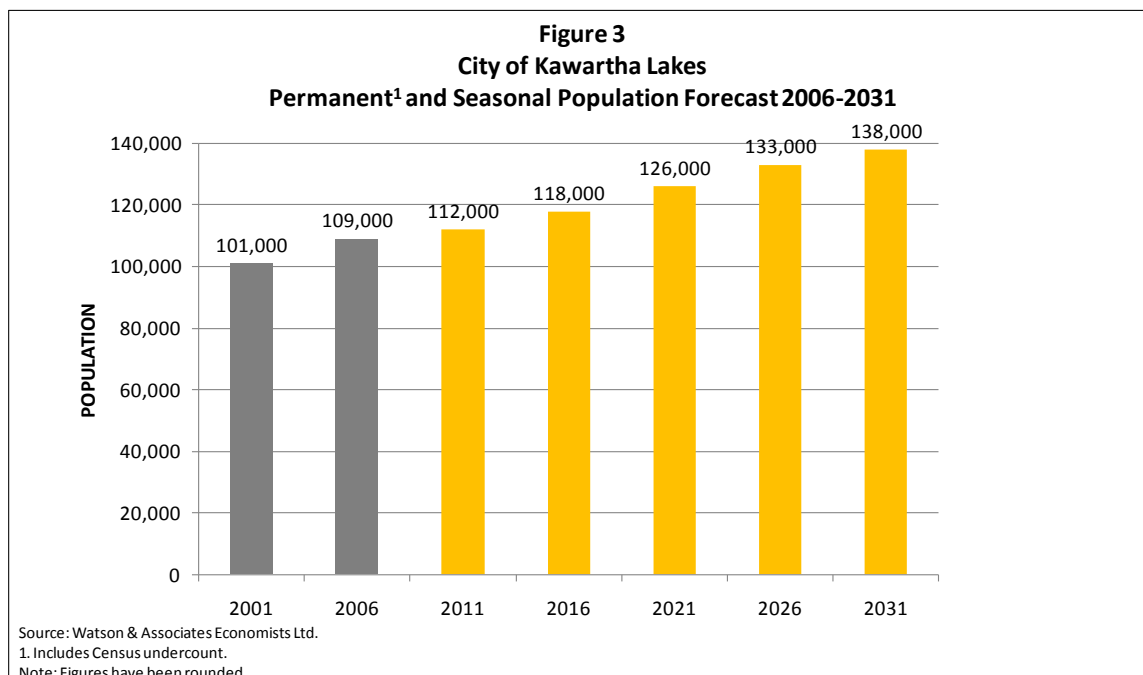
¹ Permanent population includes Census undercount of approximately 4%.



- The City of Kawartha Lakes is forecast to experience moderate permanent population growth (1.2% average annual growth) during the period 2006-2031.
- The City has a significant seasonal population which is expected to increase from 31,000 in 2006 to 37,000 by 2031, as illustrated in Figure 2.



- The total permanent and seasonal population is anticipated to increase from 109,000 in 2006 to 138,000 in 2031, as illustrated in Figure 3.



Housing Growth

- As summarized in Table 2, new housing development (excluding conversions¹) is anticipated to total 10,681 units over the 2006-2031 period with an average of 427 units per year. The housing mix for new development over the forecast period is 70% low density, 20% medium density and 10% high density.

TABLE 2
CITY OF KAWARTHA LAKES
HOUSING GROWTH FORECAST SUMMARY

YEAR	Households										Persons Per Unit (PPU) ³
	Single Family (Low Density)	Conversions ¹	Single Family Less Conversions	Multiples (Medium Density)	Apartments (High Density)	Other	Total without Conversions	Total with Conversions	Net Seasonal ²	Total With Net Seasonal	
Mid 1996	21,860			955	2,580	285		25,680			2.65
Mid 2001	23,360			630	2,430	270		26,690	7,857	34,547	2.59
Mid 2006	25,265		25,265	1,100	2,870	270	29,505	29,505	8,477	37,982	2.53
Mid 2011	26,704	480	26,224	1,206	2,910	270	30,610	31,090	8,815	39,905	2.46
Mid 2016	28,905	1,030	27,875	1,619	3,047	270	32,811	33,841	9,215	43,056	2.40
Mid 2021	31,603	1,580	30,023	2,230	3,335	270	35,859	37,439	9,615	47,054	2.34
Mid 2026	33,680	2,030	31,650	2,786	3,628	270	38,334	40,364	9,915	50,279	2.30
Mid 2031	35,122	2,330	32,792	3,260	3,865	270	40,186	42,516	10,215	52,731	2.27
Mid 1996 - Mid 2001	1,500			-325	-150	-15		1,010			
Mid 2001 - Mid 2006	1,905			470	440	0		2,815	620	3,435	
Mid 2006 - Mid 2016	3,640	1,030	2,610	519	177	0	3,306	4,336	738	5,074	
Mid 2006 - Mid 2026	8,415	2,030	6,385	1,686	758	0	8,829	10,859	1,438	12,297	
Mid 2006 - Mid 2031	9,857	2,330	7,527	2,160	995	0	10,681	13,011	1,738	14,749	

Source: Watson & Associates Economists Ltd.

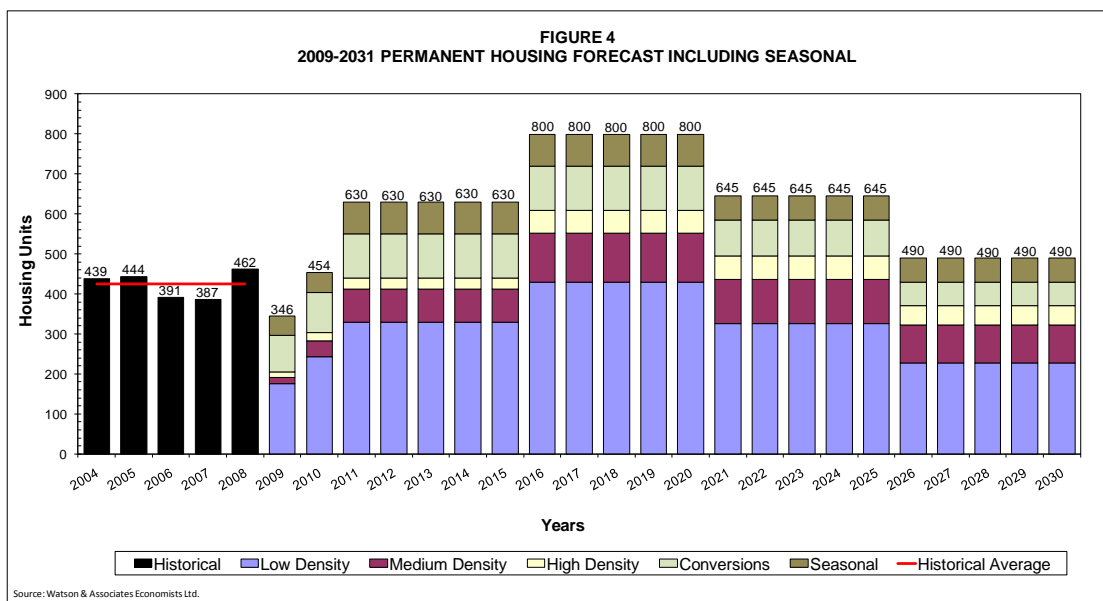
1. Conversions of seasonal dwellings to permanent units.

2. Net seasonal equals total seasonal units less conversions.

3. PPU calculated on permanent population without Census undercount.

¹ Conversions are existing seasonal dwellings (e.g. cottages) which during the course of the forecast period are converted to a permanent dwelling.

- As shown in Figure 4, housing growth has moderated in 2009.¹ Residential construction activity is anticipated to gradually increase in 2010 as the local economy recovers from the current economic recession. During the post 2010 period, average annual housing construction is expected to be well above historical trends (between 2004 and 2008) as the City continues to attract families, retirees and seasonal residents.



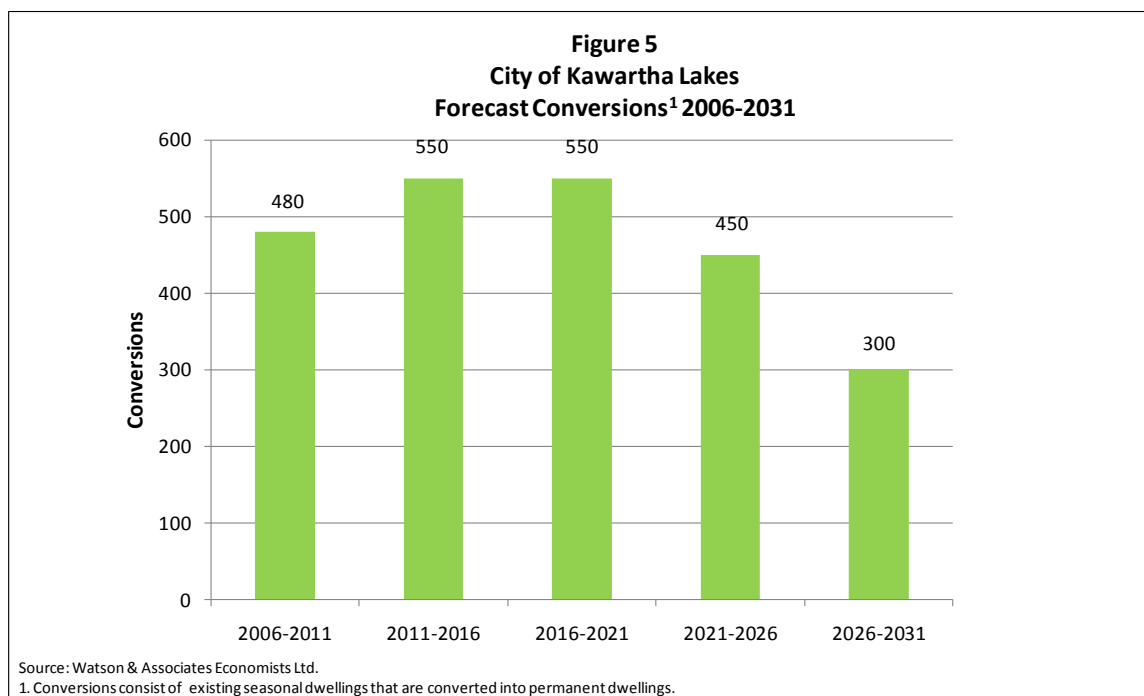
- During the forecast period, the number of net seasonal² dwellings is expected to increase by 1,738 (70 units per year on average).³ Seasonal housing growth is expected to remain strong during the forecast period though demographic trends and potential supply constraints will moderate growth in the longer term (i.e. post 2021).
- Over the forecast period, a total of 2,330 seasonal units are expected to be converted to permanent dwellings (referred to as 'conversions').⁴ The rate of conversions will increase during the first half of the forecast period largely due to the continued growth of the baby boom population (i.e. cohort born between 1946 and 1964) that is expected to retire in the City. Post 2021, the rate of seasonal conversions is anticipated to moderate largely due to the aging population in the local and surrounding market area. Figure 5 illustrates this anticipated trend.

¹ Number of housing units for 2009 is an estimate based on partial year data.

² Net seasonal = total seasonal units less conversions.

³ Seasonal housing growth based on historical building permit trends in the City and reflecting longer term demographic trends and supply constraints.

⁴ Number of forecast conversions based on historical local trends derived from City tax assessment data and reflect long term demographic trends.



Employment Growth

- The City's total employment¹ is anticipated to increase from 23,900 in 2006 to 27,000 in 2031, an increase of 3,100 over forecast period, and consistent with the targets identified in Places to Grow – Growth Plan for Greater Golden Horseshoe (GGH)², Schedule 3, 2006, as shown in Table 3 and Figure 6.
- Employment projections are largely based on the activity rate method, which is defined as the number of jobs in the City divided by the number of permanent residents. Employment activity rates (i.e. employment to population ratio) will decline during the forecast period due to the aging population, as shown in Figure 6.

¹ Total employment with 'no fixed place of work'.

² Place to Grow may be understating the employment growth, particularly for 2011, given the empirical data of 2001-2006.

TABLE 3
City of Kawartha Lakes
Employment Forecast by Major Sector, 2006-2031

Year	Population		Employment								PLACES TO GROW ²	Employment Activity Rate ³
	Census w/o Undercount	w/ Census Undercount	Primary	Work at Home	Industrial	Commercial	Institutional	Total w/o/ No Fixed Place of Work	No Fixed Place of Work ¹	Total w/ No Fixed Place of Work		
2001	69,179	71,946	285	3,475	2,820	7,510	4,075	18,165	1,835	20,000	20,000	27.8%
2006	74,561	77,543	385	3,940	3,685	8,015	5,860	21,885	1,992	23,877	-	30.8%
2011	76,468	79,526	389	4,001	3,649	8,082	5,910	22,031	2,005	24,036	23,000	30.2%
2016	81,216	84,465	391	4,081	3,778	8,423	6,026	22,699	2,066	24,765	-	29.3%
2021	87,791	91,302	392	4,218	3,856	8,866	6,066	23,398	2,130	25,528	25,000	28.0%
2026	92,703	96,411	398	4,324	3,970	9,233	6,155	24,080	2,192	26,272	-	27.2%
2031	96,608	100,472	402	4,429	4,089	9,574	6,250	24,744	2,252	26,996	27,000	26.9%
Total - 2006-2021	13,230	13,759	7	278	171	851	206	1,513	138	1,651		
Total - 2006-2031	22,047	22,928	17	489	404	1,559	390	2,859	260	3,119		
Annual - 2006-2031	882	917	1	20	16	62	16	114	10	125		

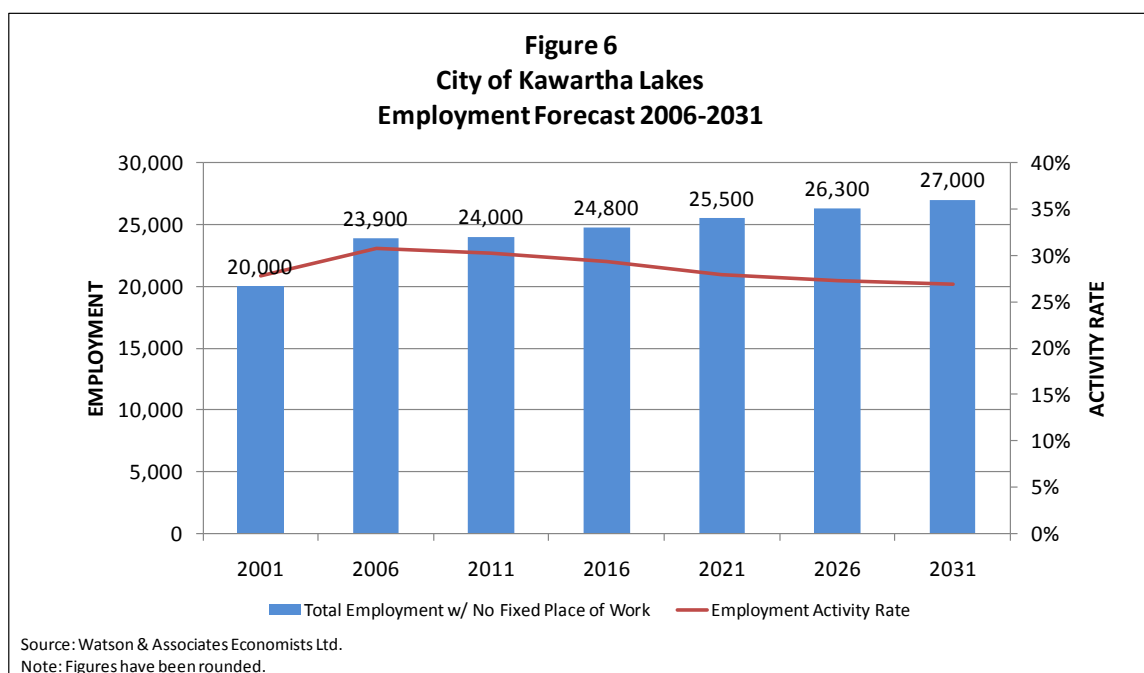
Source: Watson & Associates Economists Ltd. 2009.

1. 2001 No Fixed Place of Work derived from Places to Grow. Total Employment (Places to Grow. Total Employment less Total w/o/No Fixed Place of Work); 2001 Census reported 3,890 w/ no fixed place of work.

"No Fixed Place of Work" (NFPW) are "persons who do not go from home to the same work place location at the beginning of each shift. This include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

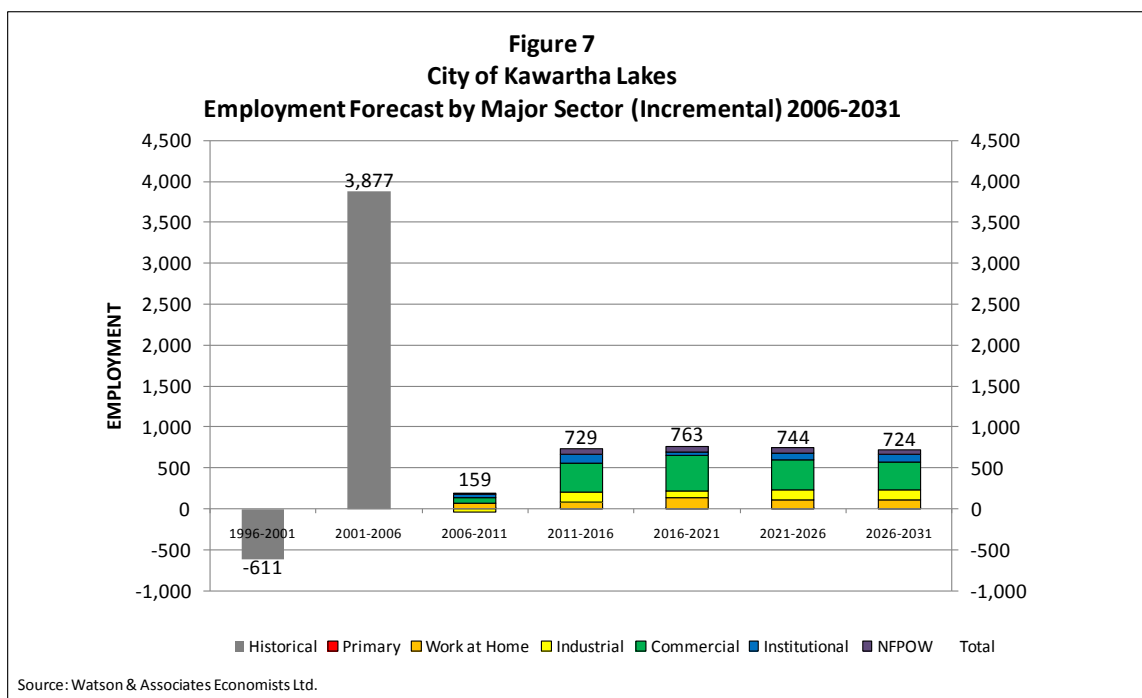
2. Places to Grow - Growth Plan for the Greater Golden Horseshoe, Schedule 3, Government of Ontario, 2006

3. Based on Total Employment with No Fixed Place of Work



- Key employment sectors include primary, industrial, commercial/population related, institutional, and work at home.
- During 2001-06, the City experienced strong employment growth, particularly in the industrial and institutional sectors. This was a reversal of the negative employment growth witnessed during 1996-2001.

- Employment growth during 2006-11 is expected to be relatively modest including a marginal employment reduction in the industrial sector, due to the impact of the current economic recession.
- During the 2011-2031 period, The City is anticipated to experience moderate employment growth in all sectors of the economy, as shown in Figure 7.



CITY OF KAWARTHA LAKES
GROWTH MANAGEMENT STRATEGY

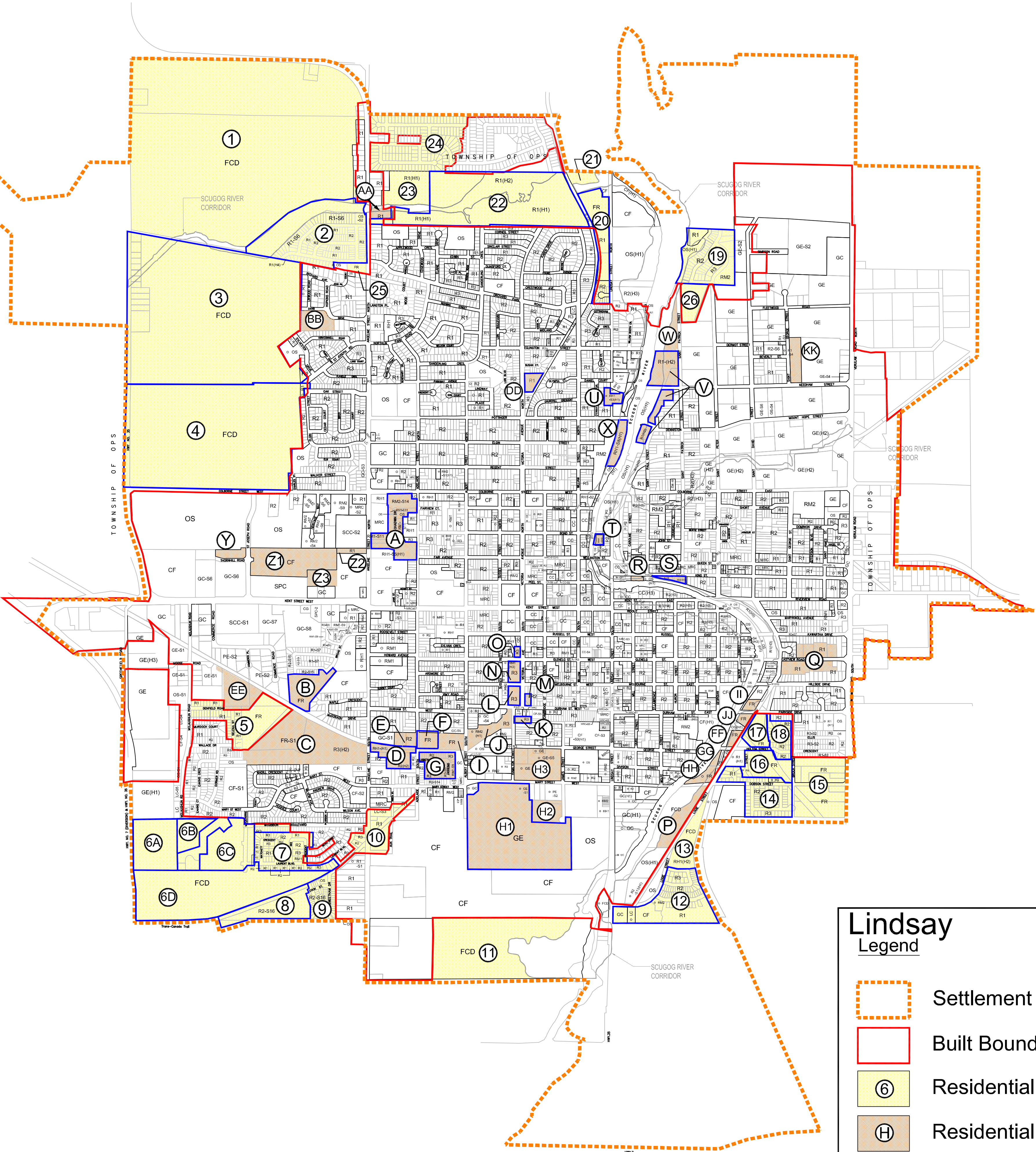
APPENDIX 2

LAND SUPPLY – MAPPING INVENTORY

RESIDENTIAL "GREENFIELD"								
	NAME	STATUS**	AREA (± ha)	UNIT TYPE				
				SINGLE DETACHED	SEMI DETACHED	TOWN- HOMES	APARTMENT	TOTAL
1	Runnymede		126.0	1392		440		1832
2A	Toad Hall	Draft Approved	11.0	124				124
2B	Toad Hall	Draft Approved	1.6	17				17
3	Orsi	Proposal	76.0	645		194		839
4A	Mason Homes	Proposal	35.0	360		120		480
4B	Mason Homes		4.6				285	285
5A	Mason Homes	Proposal	6.1	78		21		99
5B	Manorview	Registered	3.3	34				34
6A	Stollar	Concept	7.4				300	300
6B	Pearson Farms	Proposal	3.3	44				44
6C	Pearson Farms	Proposal	7.4	47		16		63
6D	MTO	Concept	22.9	274		300		574
7	Pearson Farms	Draft Approved	6.5	55	28	16		99
8	Trails of the Kawarthas	Registered	9.7	112				112
9			3.7	63				63
10			2.1*	28		8		36
11			20.0	234		74		308
12	Waterside Acres	Draft Approved	19.1	56	22	25	199	302
13			3.5	41		13		54
14	Morningside	Draft Approved	7.0	92	22			114
15			9.7	113		36		149
16	Roger C./Ray A.	Proposal	4.0	51				51
17	Austin Evans	Proposal	2.1	30				30
18	Churchdown Trails	Reg. Plan	2.7	39				39
19A	Riverview Estates	Registered	6.5	39				39
19B	Riverview Estates	Draft Approved	2.9	20		6	54	80
20	LSN	Proposal	6.1	11		123		134
21			1.0	15				15
22	Woods of Jennings Creek	Proposal	27.7	219		44		263
23			4.8	56		18		74
24	Springdale Gardens	Registered	15.0	188				188
25	Church (south of #2)		1.9	22		7		29
26	Pyle		4.5	53		17		69
	TOTAL		463.9	4552	72	1478	838	6939

*Area does not include 'existing' lotting
**Areas without 'status' assume 15.4 uph (24% townhomes/76% single detached)

REVISED: MAY 2011



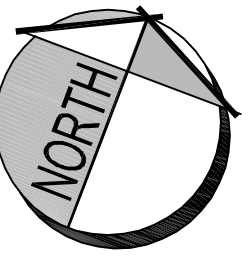
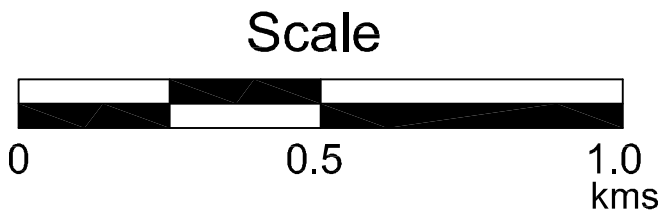
Lindsay Legend

- Settlement Boundary
- Built Boundary
- Residential Greenfield Area
- Residential Intensification Area
- Existing Zoning

RESIDENTIAL "INTENSIFICATION"

				UNIT TYPE					
	NAME	STATUS**	AREA (± ha)	SINGLE DETACHED	SEMI DETACHED	TOWN- HOMES	APARTMENT	SENIORS/ RETIREMENT	TOTAL
A	The Fair	Registered/ Proposal	5.5			113	37	268	418
B	Cloverlea (Mason) Phase 2	Registered	3.6	48					48
C			13.7	160		51			211
D	Arbour Village	Registered	2.5	16		58	135		209
E			0.9				135		135
F	MTCO Developments	Proposal	1.2					125	125
G	Rexton Developments	Registered	2.8	39		12			51
H1	Terrasan	Proposal	23.7	165		24	120		309
H2			2.3			92			92
H3			4.8			192			192
I			1.4			24			24
J			2.1			84			84
K	CMHA	Under Construction	0.4			18			18
L	Community Care	Under Construction	0.7				100		100
M	Rod Brown	Proposal	0.2			8			8
N	Victoria Station	Proposal	0.8				120		120
O	Union Station	Proposal	0.2				53		53
P	Rowart	Proposal	2.8				240		240
Q			3.9	30					30
R		Adaptive Reuse	0.2				15		15
S	River Run	Registered	0.4		2	10			12
T	DIGS	Proposal	0.3				12		12
U	Rivermill Village	Proposal	0.8				70		70
V	Gartner Lee	Proposal	0.8				80	120	200
W			1.2			48			48
X	J Stollar Construction Limited	Proposal	1.45				110		110
Y	J Stollar Construction Limited		1.4			87			87
Z1	J Stollar Construction Limited		8.3		64	120	300	180	664
Z2	J Stollar Construction Limited		0.85			53			53
Z3	J Stollar Construction Limited		1.6			128			128
AA	Talhani	Proposal	0.72			29			29
BB	Mackey		2.1			84			84
DD	Istechenko		0.8			32			32
EE	CKL		4.5			180			180
FF	Kinys		0.48			19			19
GG	Kinys		0.45			18			18
HH	Staples		1			40			40
II	Evans	Concept	0.45			18			18
JJ	2064451 Ont. Ltd.		0.42			17			17
KK	J Stollar Const. Ltd.	Concept	2			80			80
	TOTAL		103.7	458	66	1639	1527	693	4383

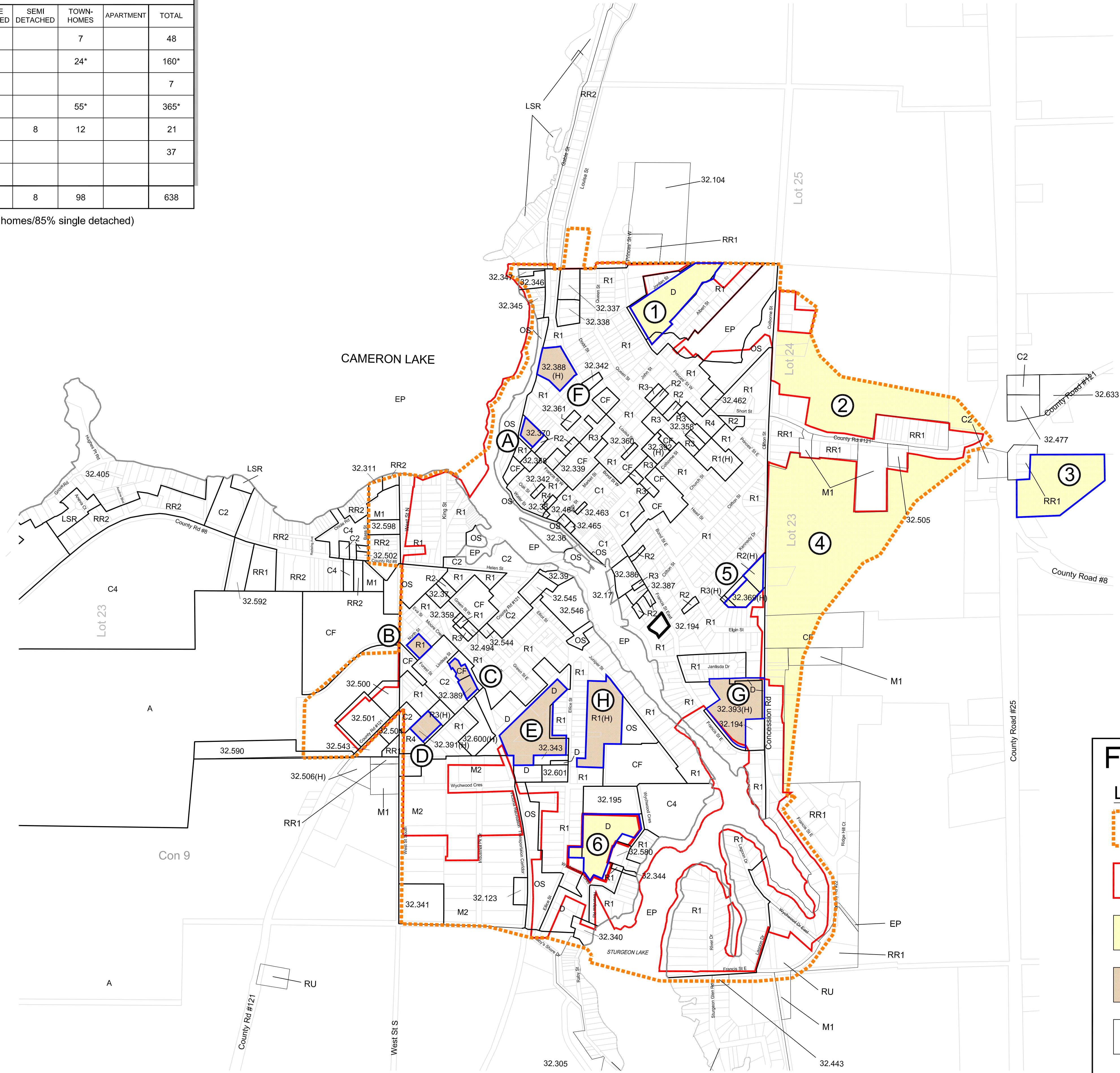
**Areas without 'status' assume 40 uph (townhomes)



RESIDENTIAL "GREENFIELD"				UNIT TYPE				
	NAME	STATUS	AREA (± ha)	SINGLE DETACHED	SEMI DETACHED	TOWN-HOMES	APARTMENT	TOTAL
1	Black Bear Estates/ Windsong Properties	Proposal	3.4	41		7		48
2			11.4	136*		24*		160*
3	Ombra	Draft Approved	5.3	7				7
4			26.1	310*		55*		365*
5	Northern Colours	Under Construction	1.1	1	8	12		21
6	Santron Group	Draft Approved	3.1	37				37
TOTAL			50.4	532	8	98		638

*Number of units assumes 14 uph (15% townhomes/85% single detached)

RESIDENTIAL "INTENSIFICATION"				UNIT TYPE				
	NAME	STATUS	AREA (± ha)	SINGLE DETACHED	SEMI DETACHED	TOWN-HOMES	APARTMENT	SENIORS/ RETIREMENT
A	Ironstone Developments	Not Built	0.4			17		17
B	Sugarbush Villas	Not Built	0.4			12		12
C	Faila		0.6					25
D	Northern Colours	Not Built	0.6					30
E	2165744 Ont. Inc.	Proposal	3.7			106		106
F			1.1				55	55
G	Jackett		3.2			40		40
H			3.1	22				22
TOTAL			13.1	22		175	55	55



Fenelon Falls

Legend

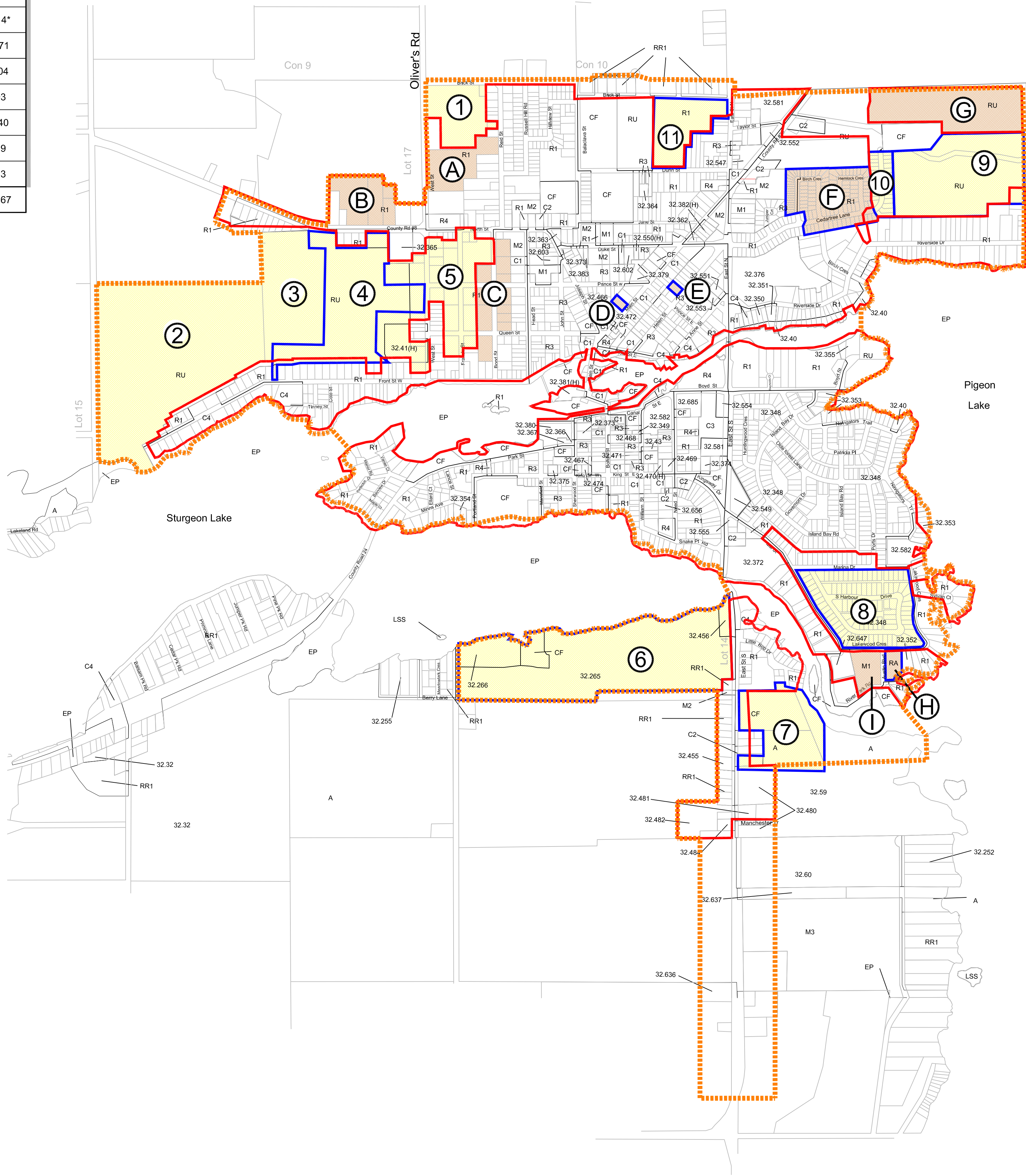
- Settlement Boundary
- Built Boundary
- Residential Greenfield Area
- Residential Intensification Area
- Existing Zoning

Scale

0 100 250 500 metres

RESIDENTIAL "GREENFIELD"				UNIT TYPE				
	NAME	STATUS	AREA (± ha)	SINGLE DETACHED	SEMI DETACHED	TOWN-HOMES	APARTMENT	TOTAL
1			5.7	68*		12*		80*
2			37.6	447*		79*		526*
3			11.7	140*		24*		164*
4	Rokeby	Proposal	16.3	158		72	153	383
5			15.3	182*		32*		214*
6	Bobcaygeon Shores	Draft Approved	32.0	271				271
7	Biglieri Group	Proposal	10.2				304	304
8	Port 32	Registered	12.6	93				93
9	Biglieri Group	Proposal	16.5	240				240
10	Bobcaygeon Heights	Proposal	2.5	29				29
11	Arizona Heights	Draft Approved	6.0	63				63
TOTAL			166.4	1691		219	457	2367

*Number of units assumes 14 uph (15% townhomes/85% single detached)



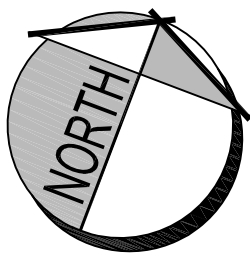
RESIDENTIAL "INTENSIFICATION"				UNIT TYPE				
	NAME	STATUS	AREA (± ha)	SINGLE DETACHED	SEMI DETACHED	TOWN-HOMES	APARTMENT	TOTAL
A			3.8	45*		8*		53*
B			4.5	54*		9*		63*
C			4.5	54*		9*		63*
D			0.2			6		6
E			0.2			4		4
F	Bobcaygeon Heights	Registered	8.5	92	20			112
G			10.4	123*		22*		145*
H			0.8			26		26
I	TRP	Proposed	1.6				60	60
TOTAL			34.5	368	20	84	60	532

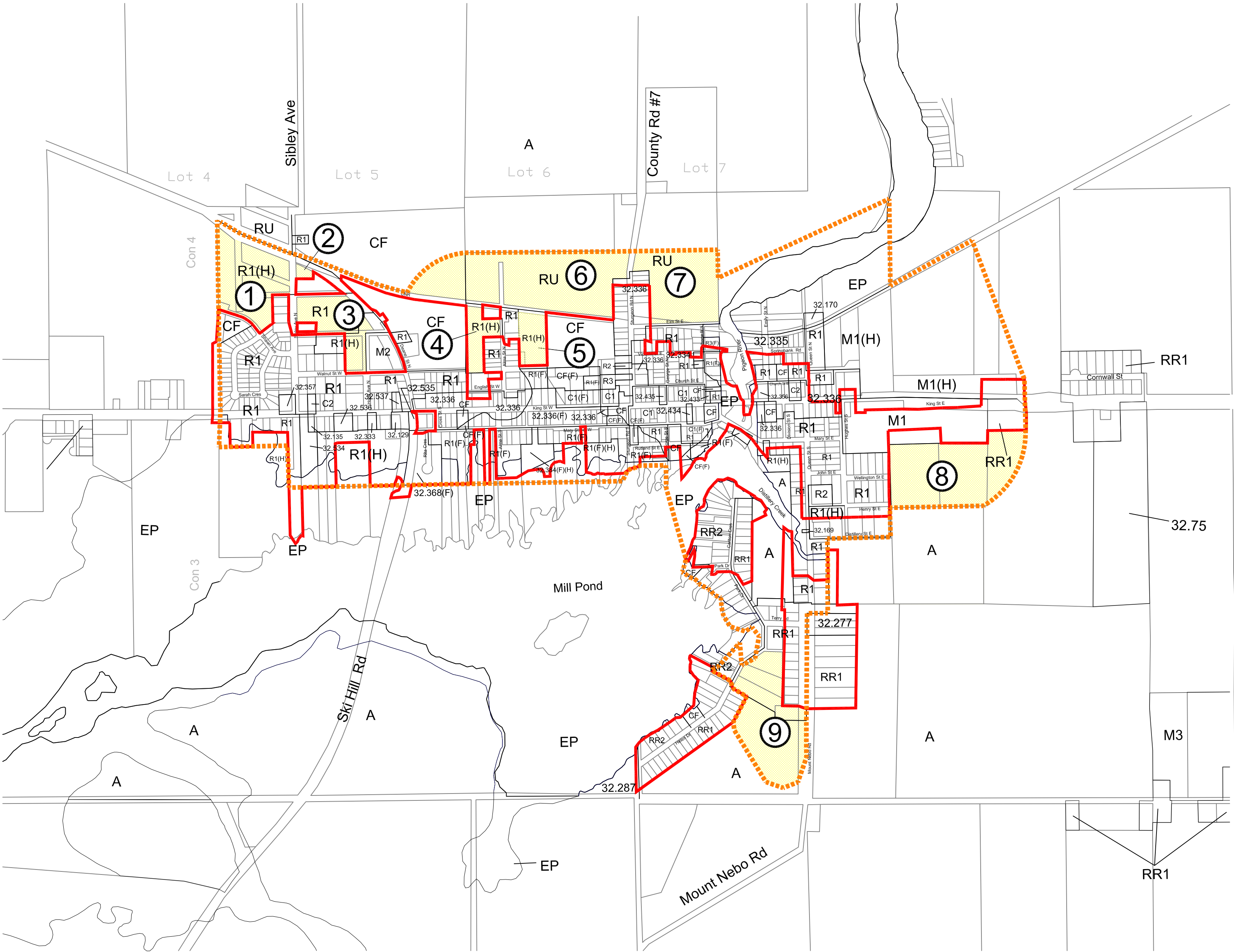
*Number of units assumes 14 uph (15% townhomes/85% single detached)

Bobcaygeon

Legend

- Settlement Boundary
- Built Boundary
- Residential Greenfield Area
- Residential Intensification Area
- Existing Zoning





RESIDENTIAL "GREENFIELD"

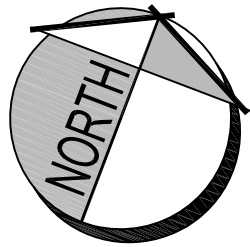
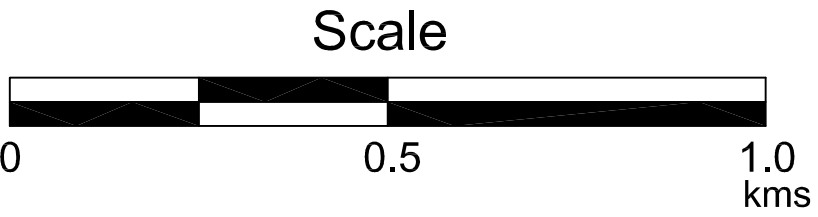
				UNIT TYPE				
	NAME	STATUS	AREA (± ha)	SINGLE DETACHED	SEMI DETACHED	TOWN- HOMES	APARTMENT	TOTAL
1			5.79	69		12		81
2			0.23	3				3
3			3.60	43		7		50
4			1.75	20		4		24
5			1.69	20		4		24
6			12.42	147		26		173
7			6.28	75		13		88
8			9.6	114*		20*		134
9			7.96	94		17		111
TOTAL			49.32	585		103		688

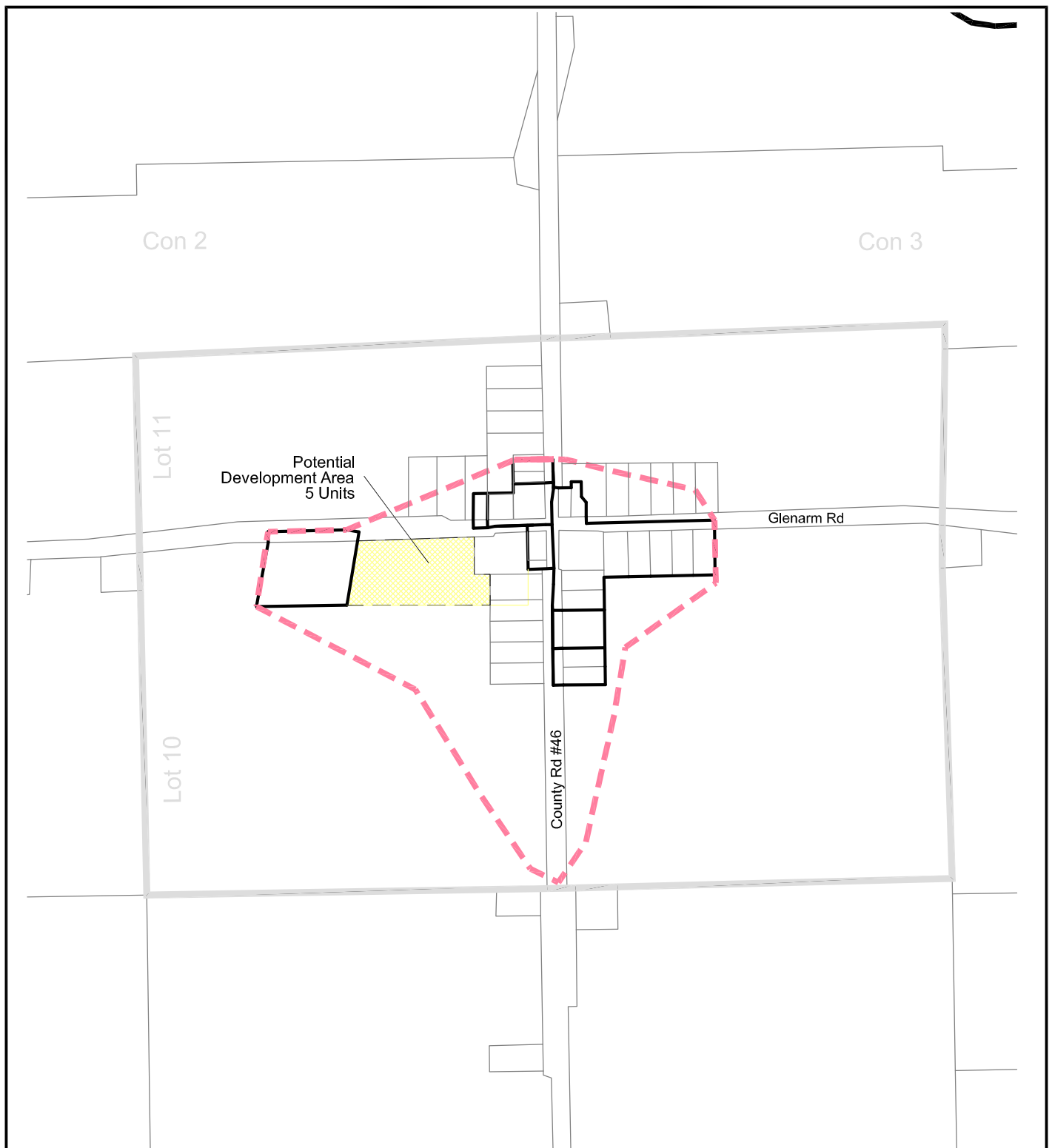
*Number of units assumes 14 uph (15% townhomes/85% single detached)

Omemee

Legend

- Settlement Boundary
- Built Boundary
- Residential Greenfield Area
- Existing Zoning





Argyle Hamlet Area



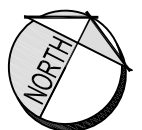
Hamlet Area

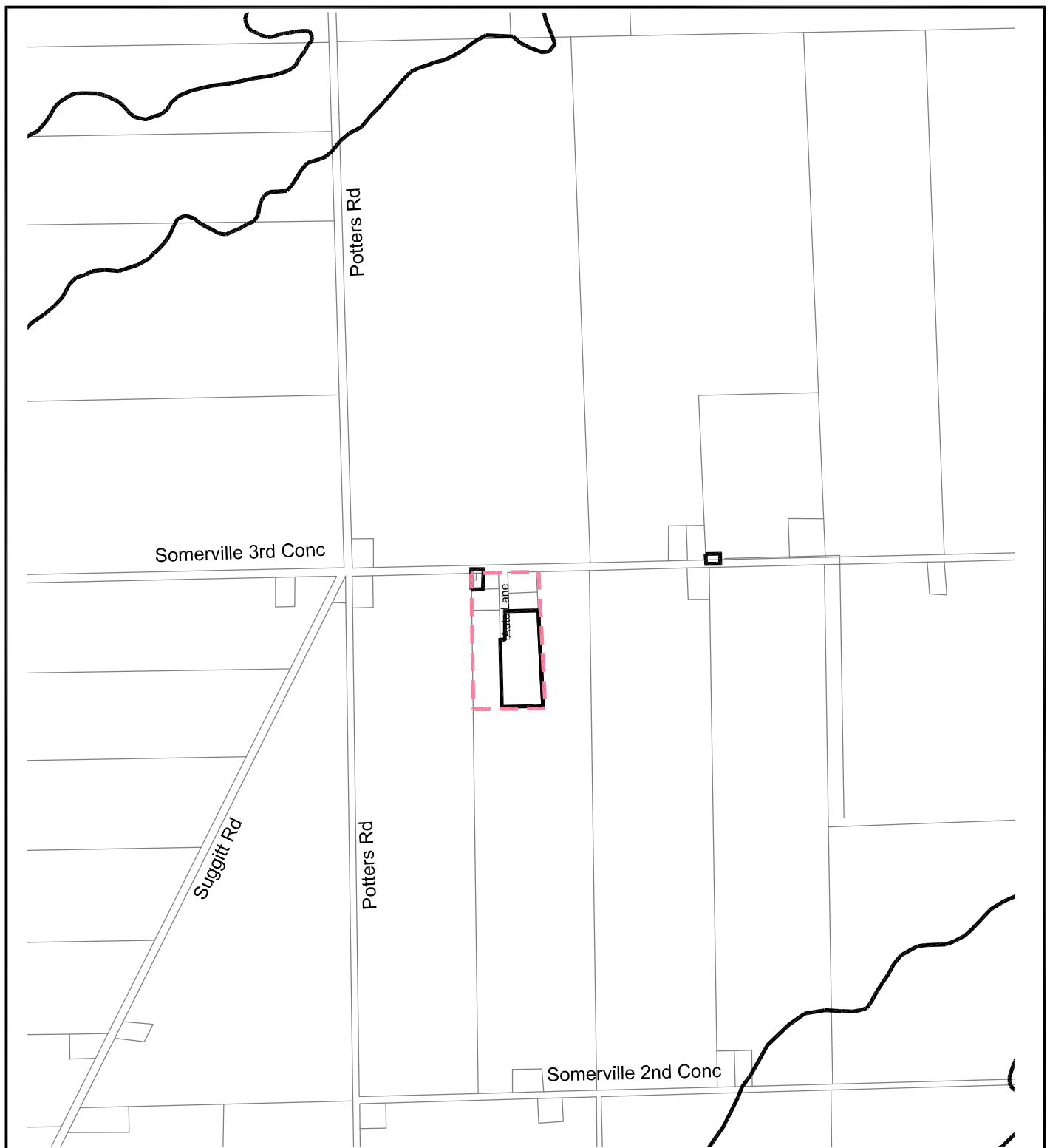


Potential Development Area
5 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:10,000





Baddow Hamlet Area



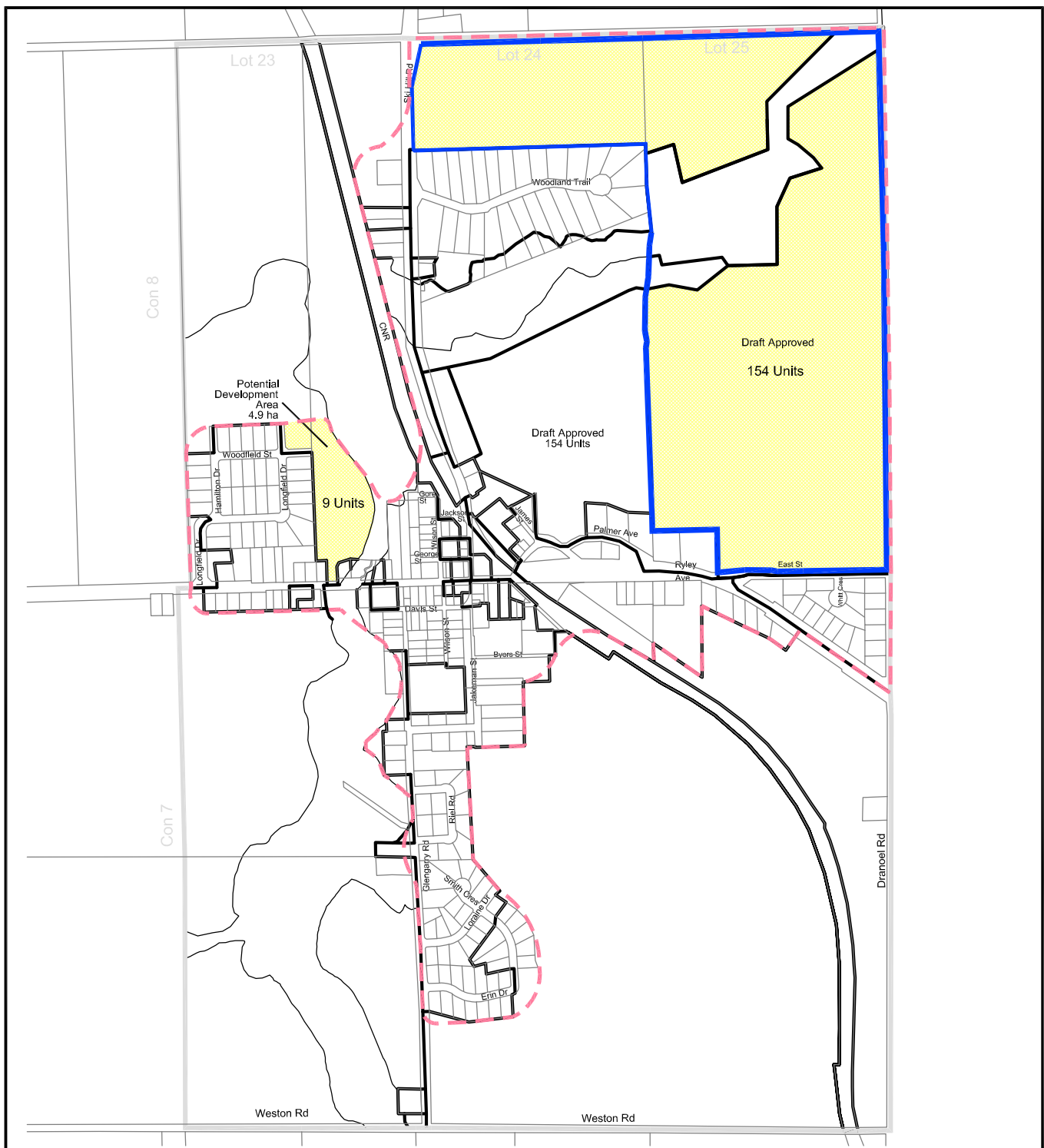
Hamlet Area

No Development Potential

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Bethany Hamlet Area



Hamlet Area



Potential Development Area 4.9 ha. 9 units

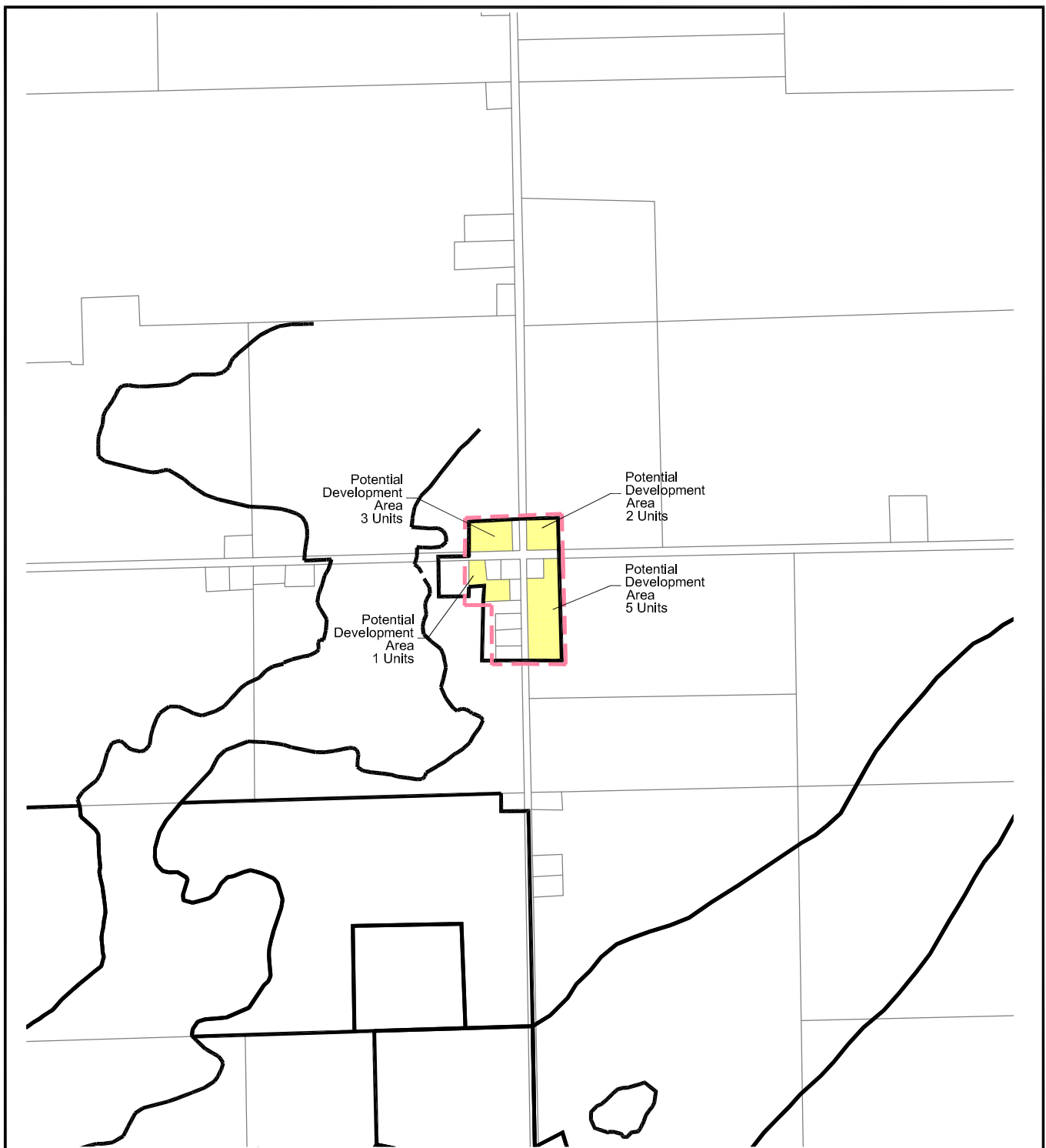


Residential Subdivision 87.0 ha. 154 units
Total 91.9 ha. 163 units

WATER SUPPLY: PUBLIC (for Woodfield Street Area)
 SEWAGE TREATMENT: PRIVATE



SCALE 1:15,000



Bexley Hamlet Area



Hamlet Area

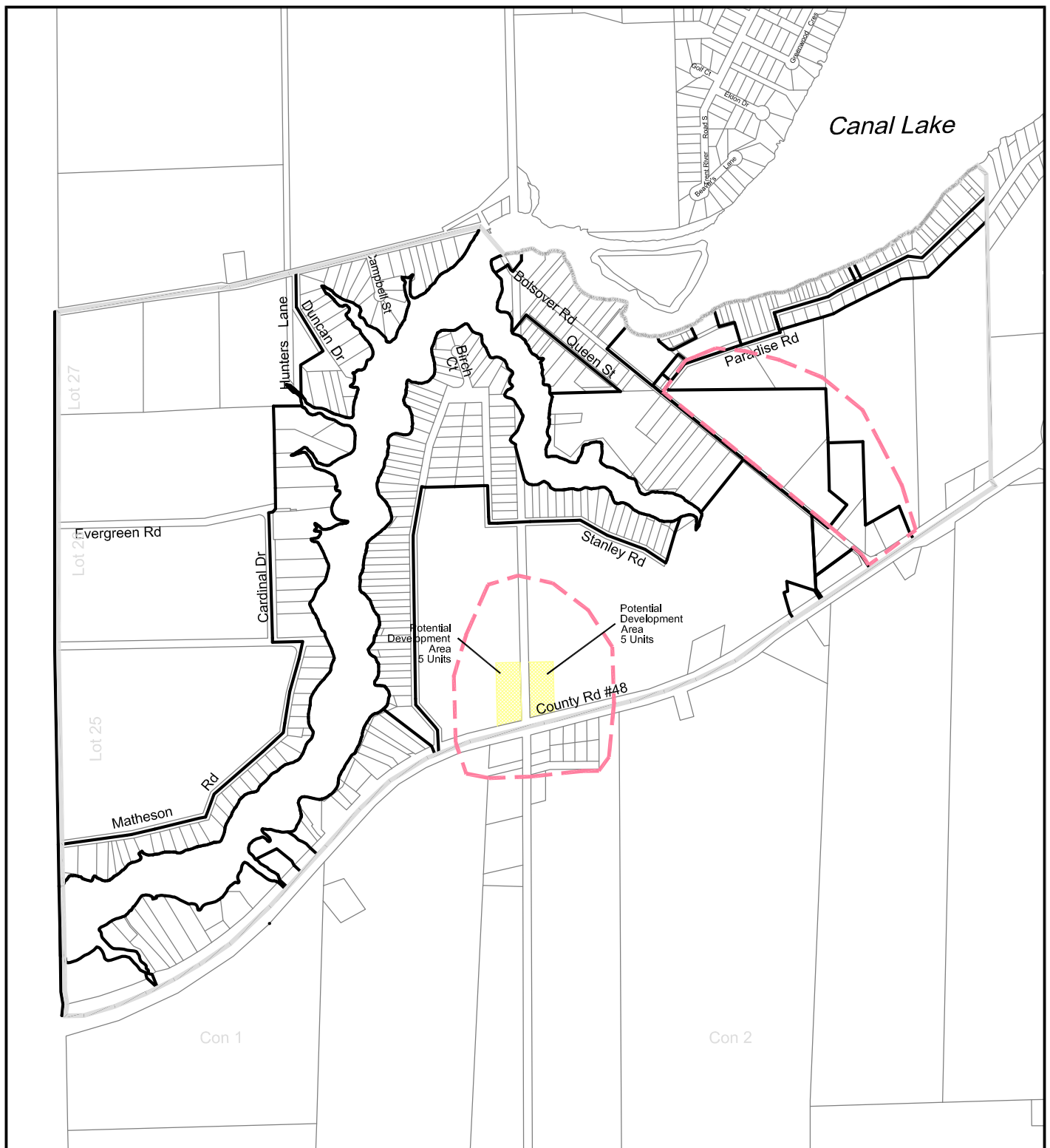


Potential Development Area
11 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Bolsover Hamlet Area



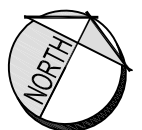
Hamlet Area

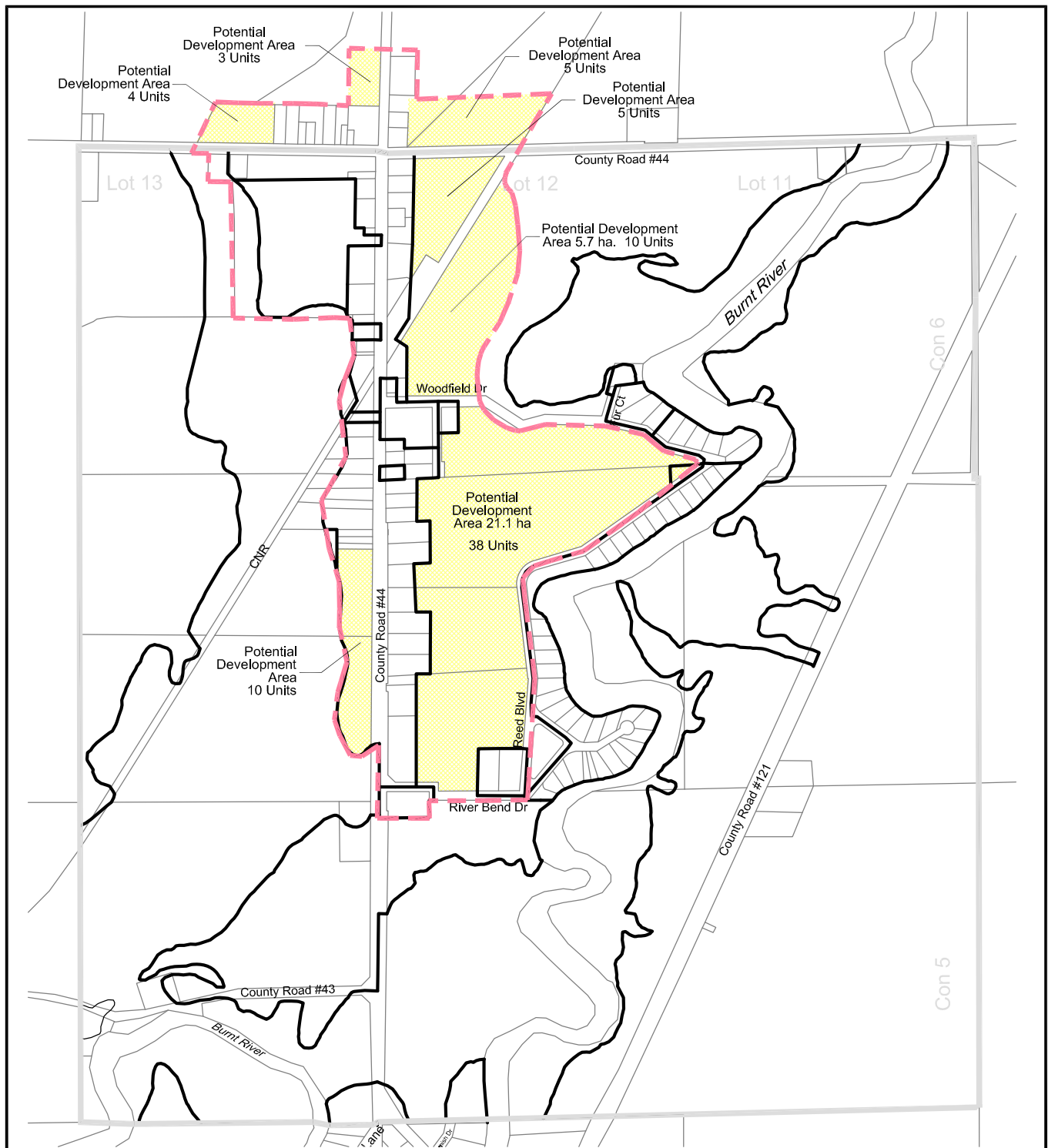


Potential Development Area
10 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000

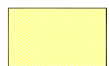




Burnt River Hamlet Area



Hamlet Area

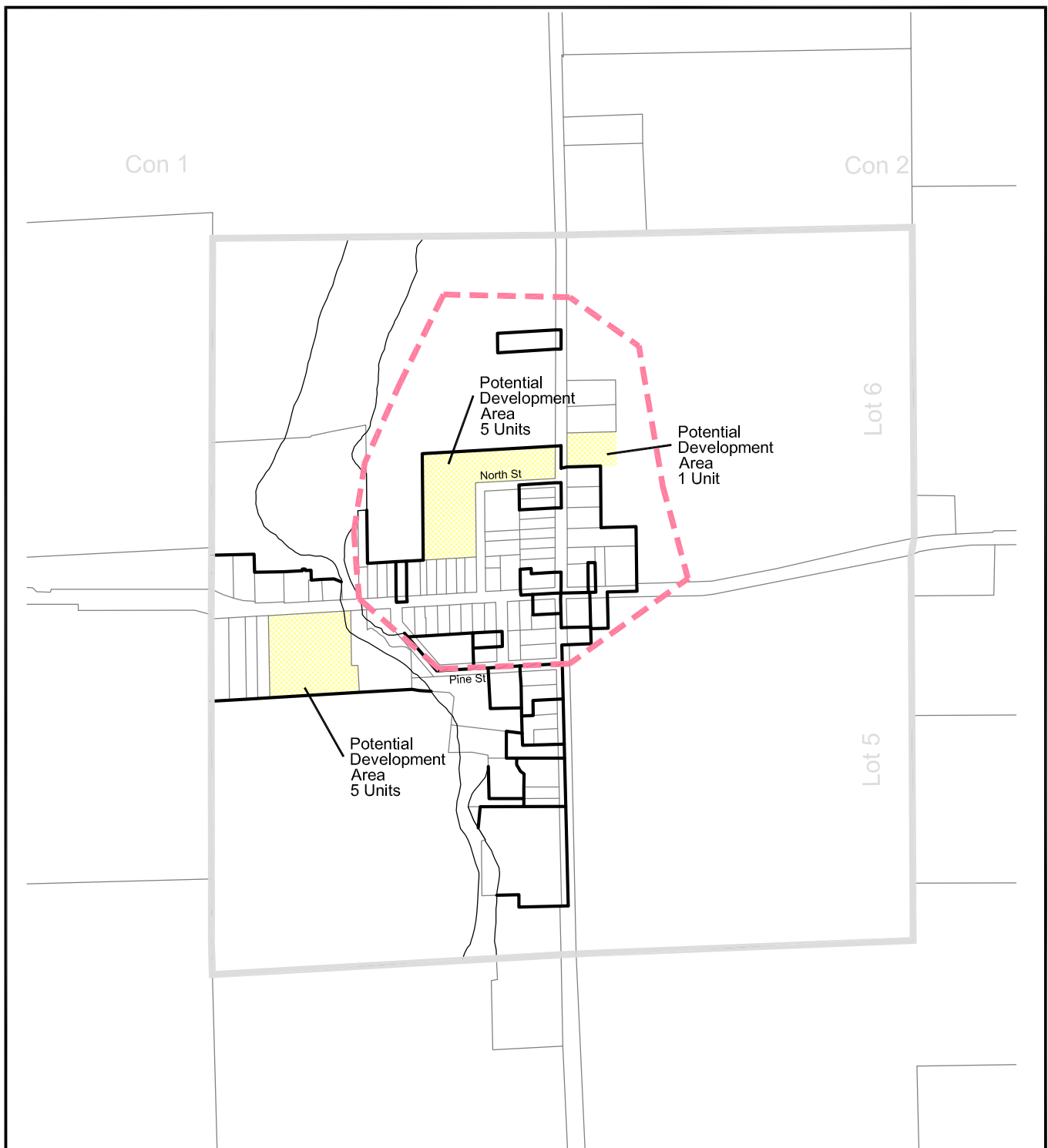


Potential Development Area
75 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:12,500





Cambray Hamlet Area



Hamlet Area

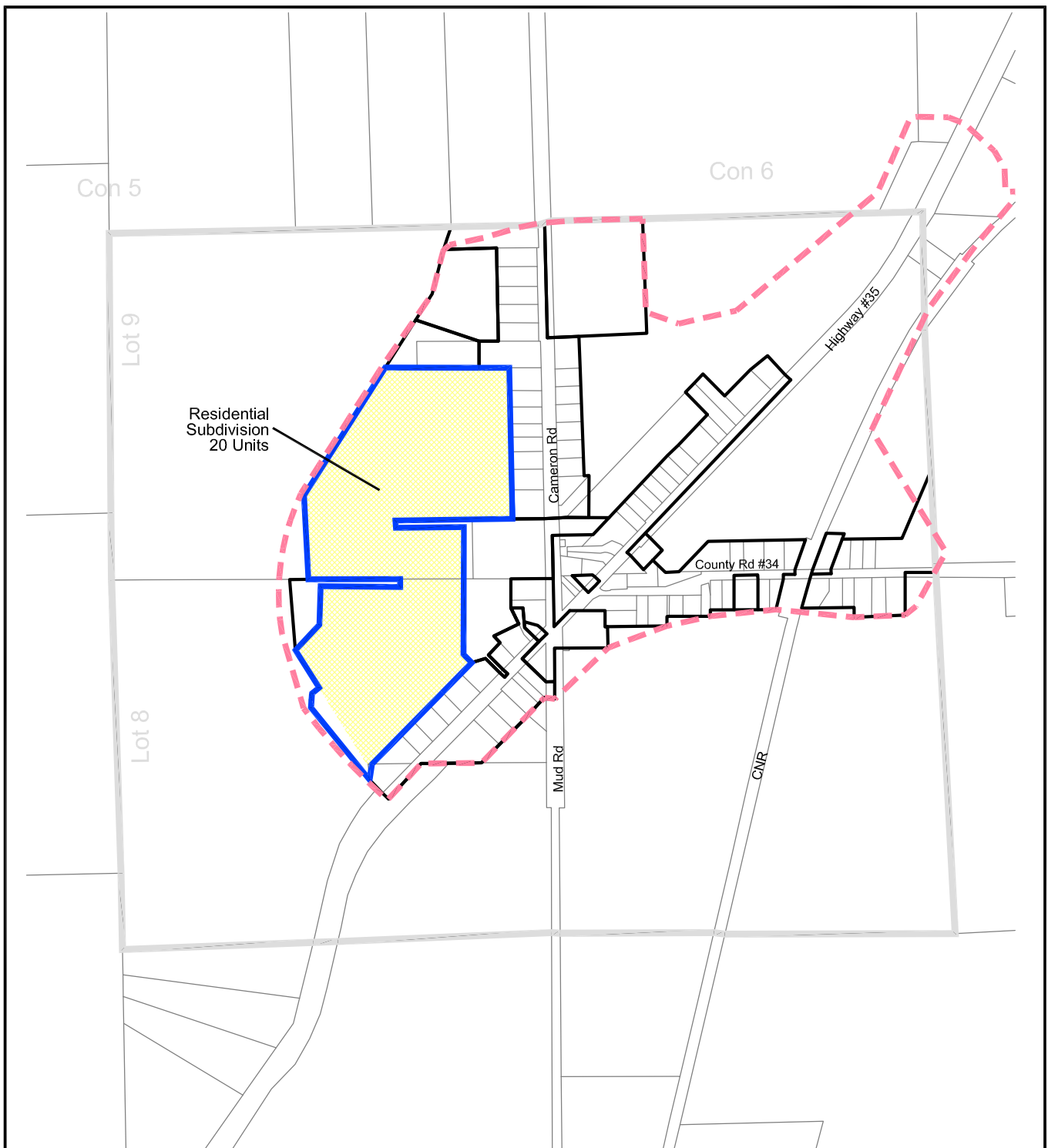


Potential Development Area
11units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:10,000





Cameron Hamlet Area



Hamlet Area

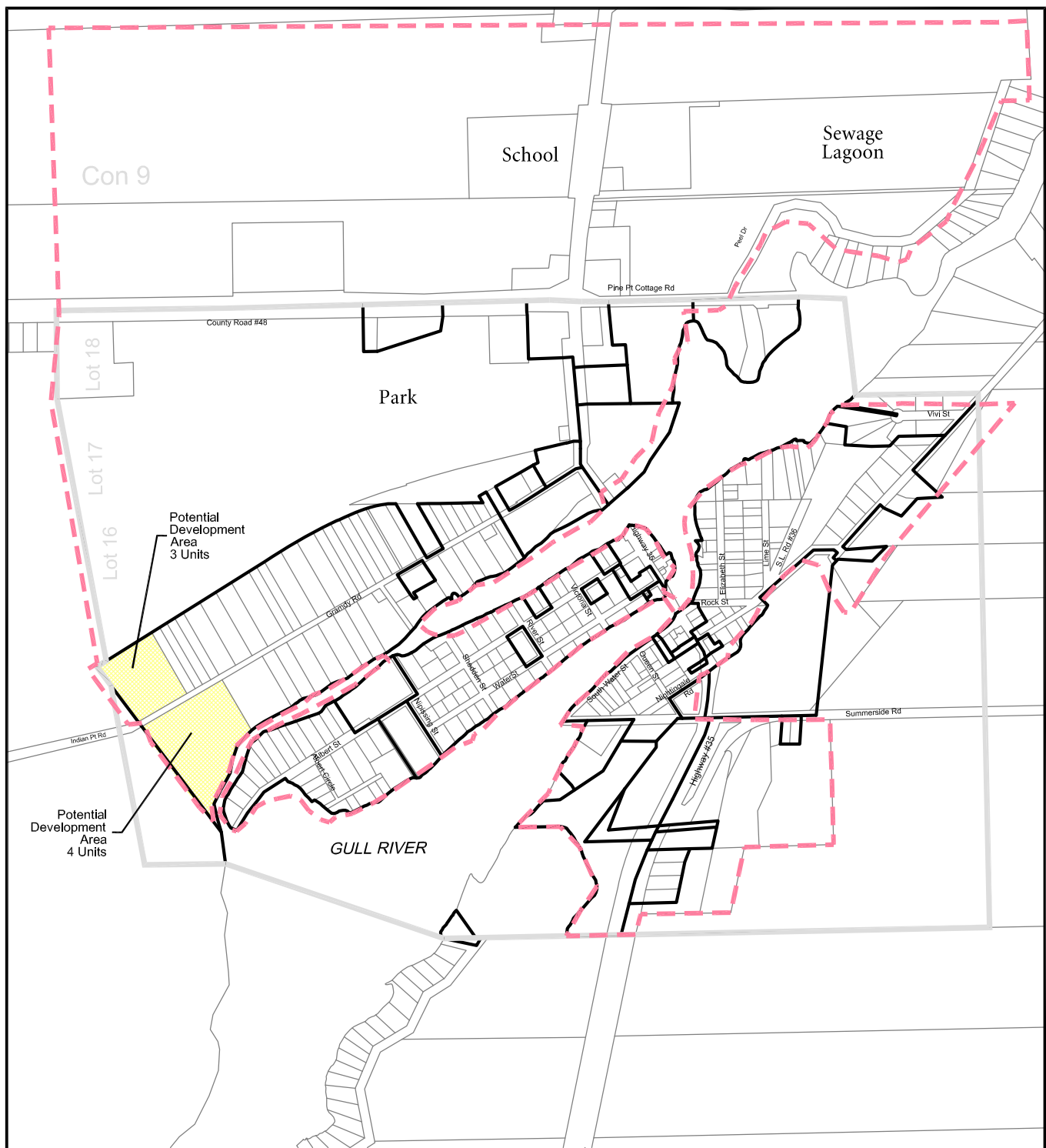


Residential Subdivision
20 Units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:10,000





Coboconk Hamlet Area



Hamlet Area

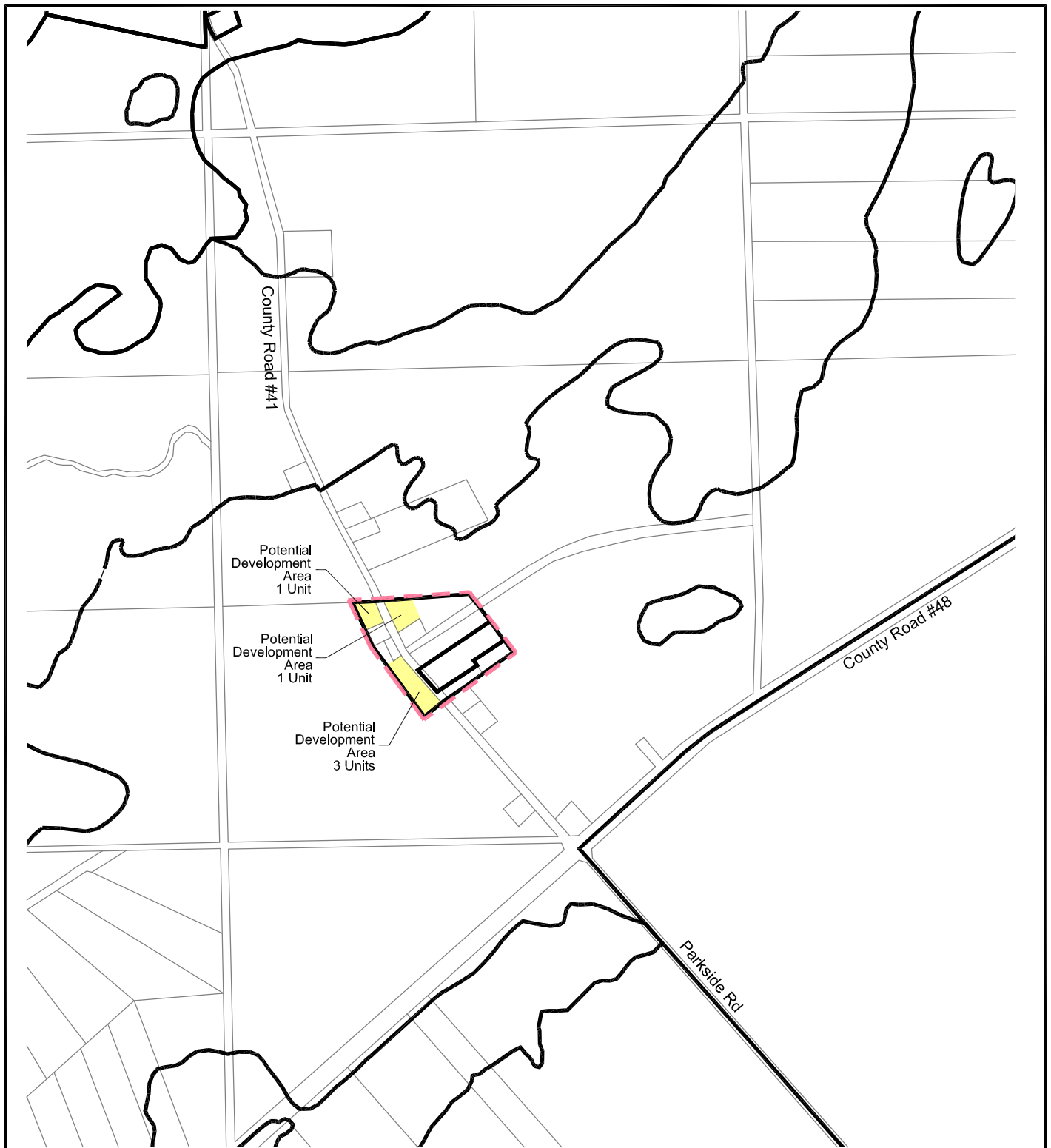


Potential Development Area
7 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PUBLIC

SCALE 1:12,500





Corsons Hamlet Area



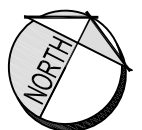
Hamlet Area

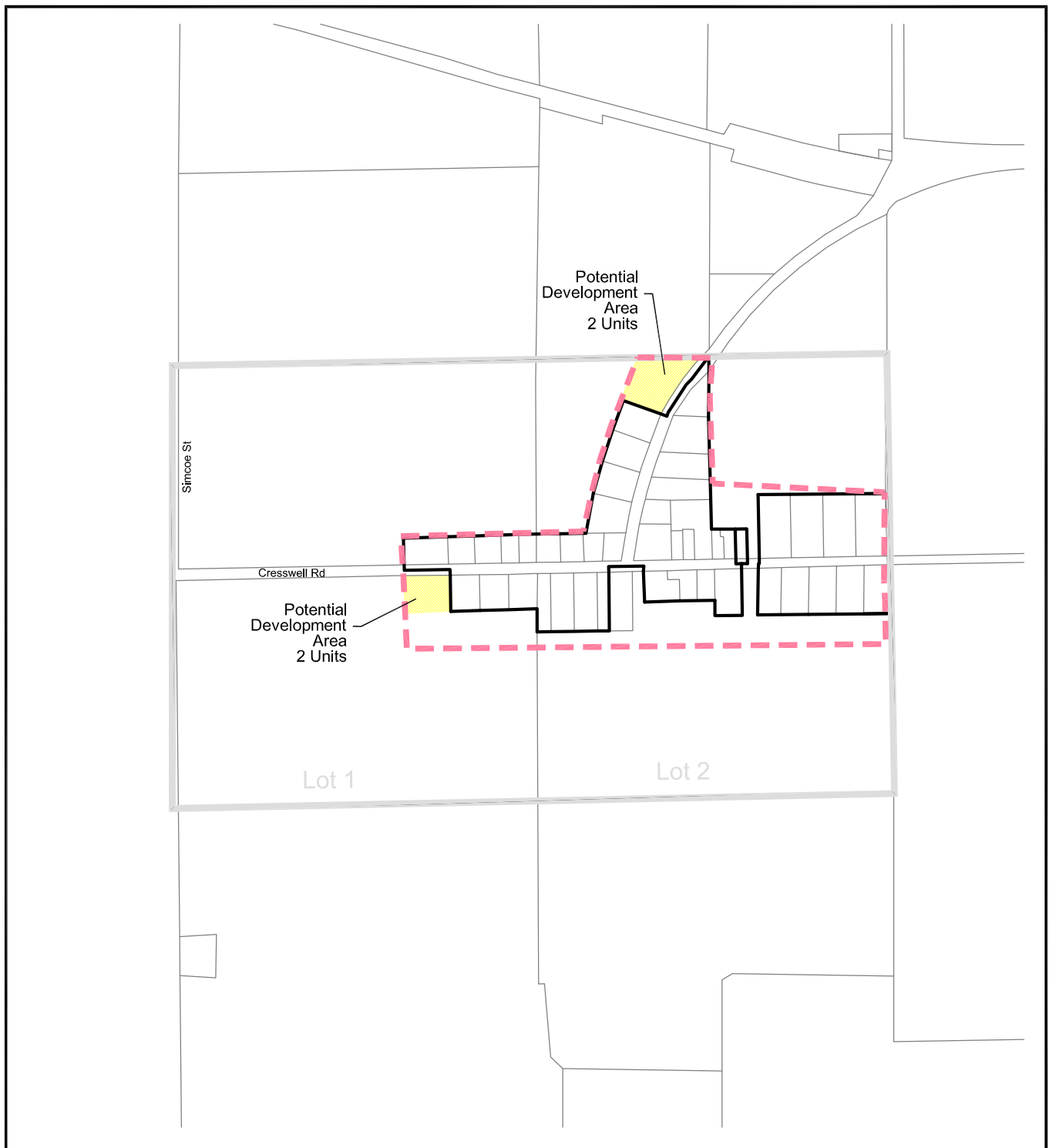


Potential Development Area
5 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Cresswell Hamlet Area



Hamlet Area

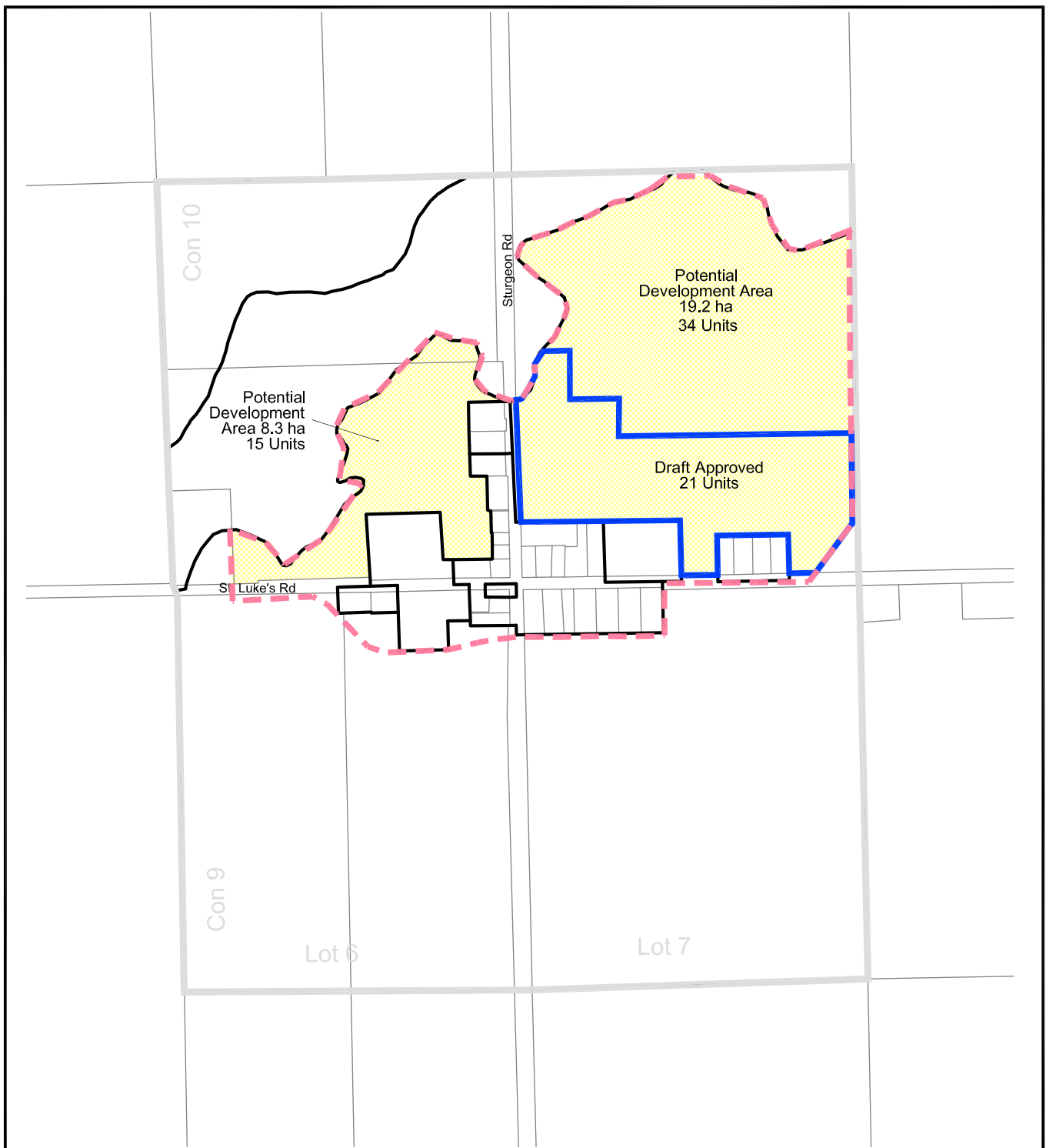


Potential Development Area
4 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:10,000





Downeyville Hamlet Area



Hamlet Area



Potential Development Area 49 units



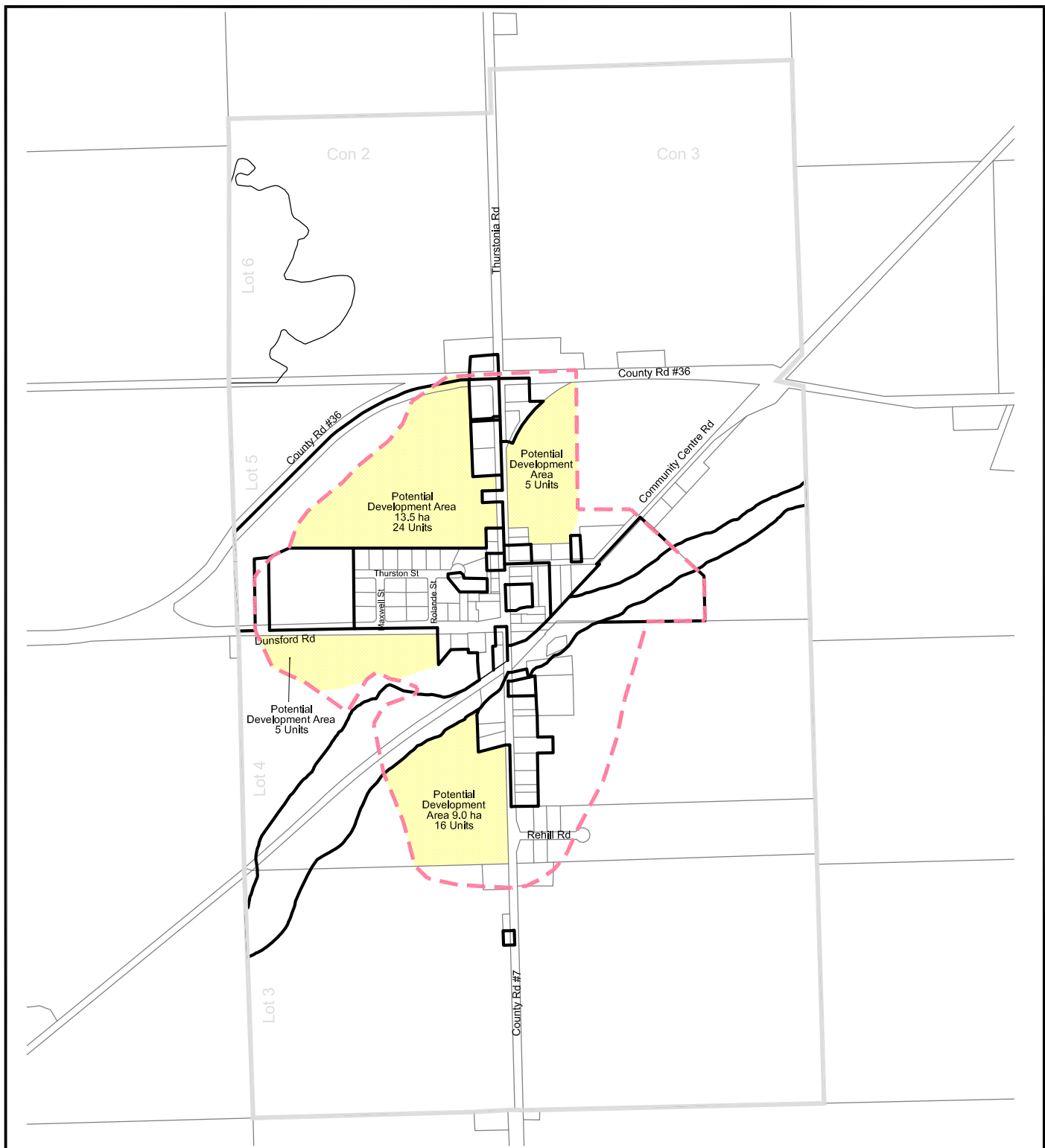
Residential Subdivision

Total $\frac{21 \text{ units}}{70 \text{ units}}$

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:10,000

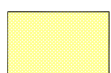




Dunsford Hamlet Area



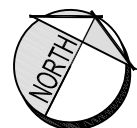
Hamlet Area

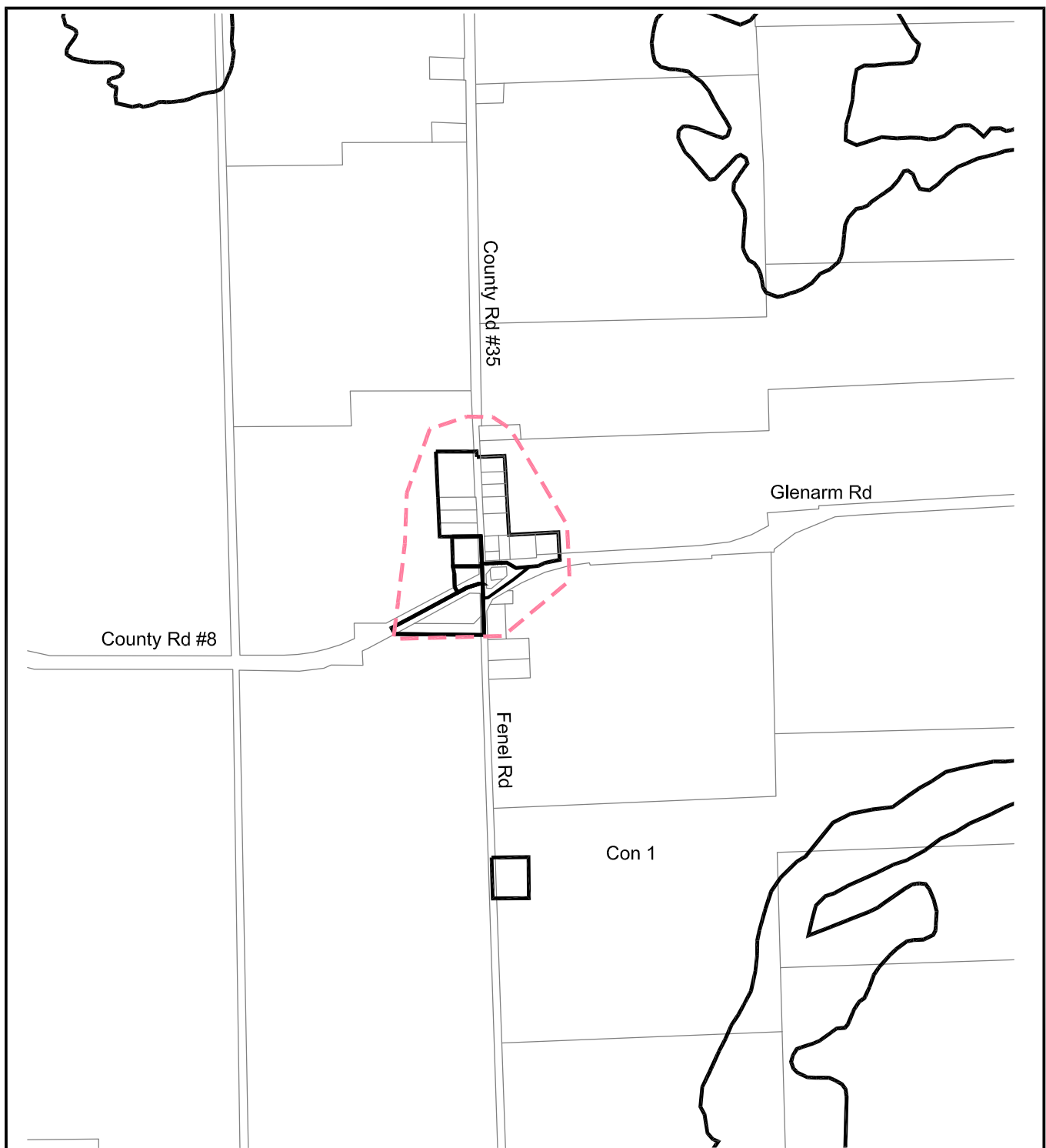


Potential Development Area
50 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Glenarm Hamlet Area

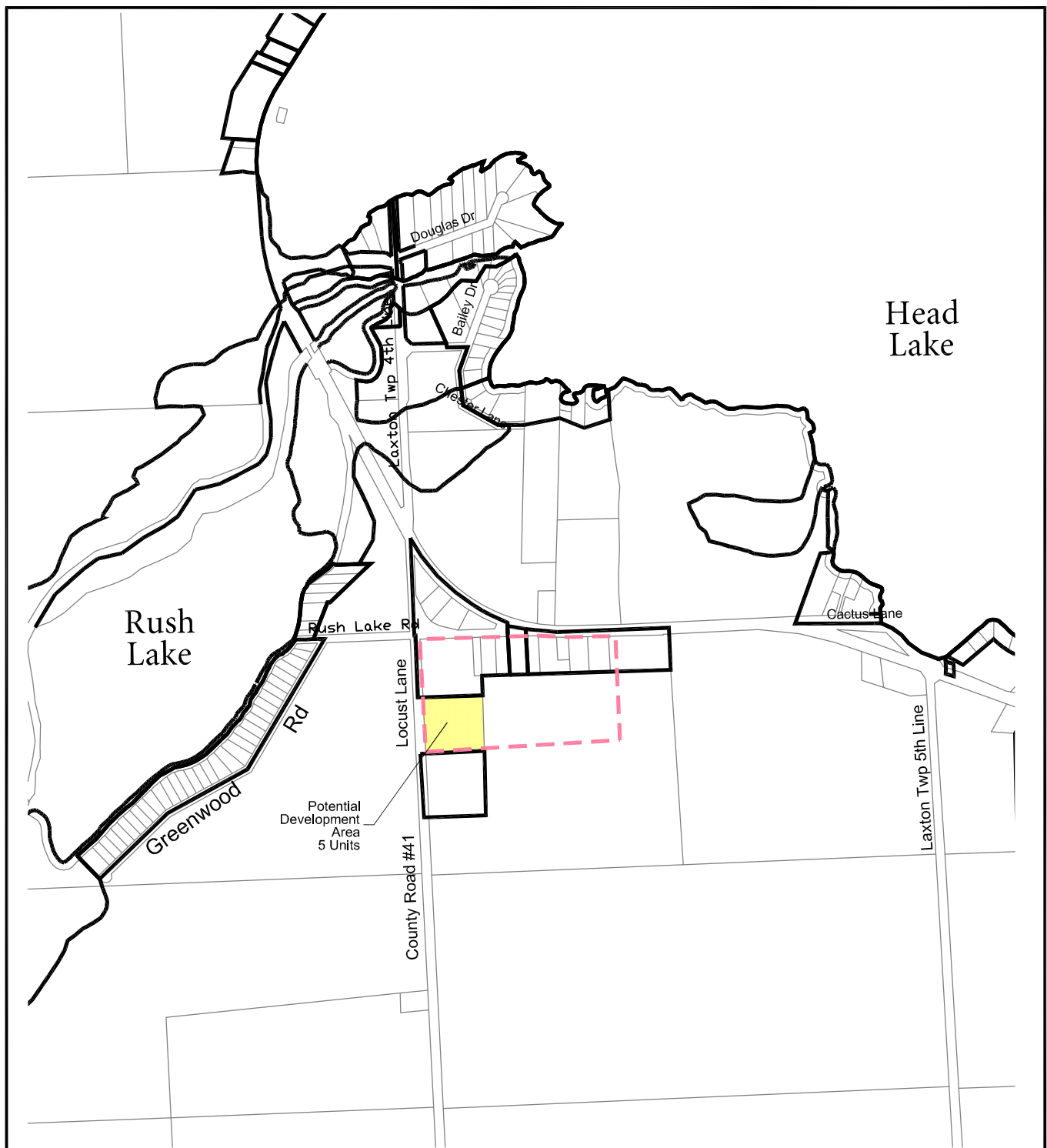


Hamlet Area
No Development Potential

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Head Lake Hamlet Area



Hamlet Area

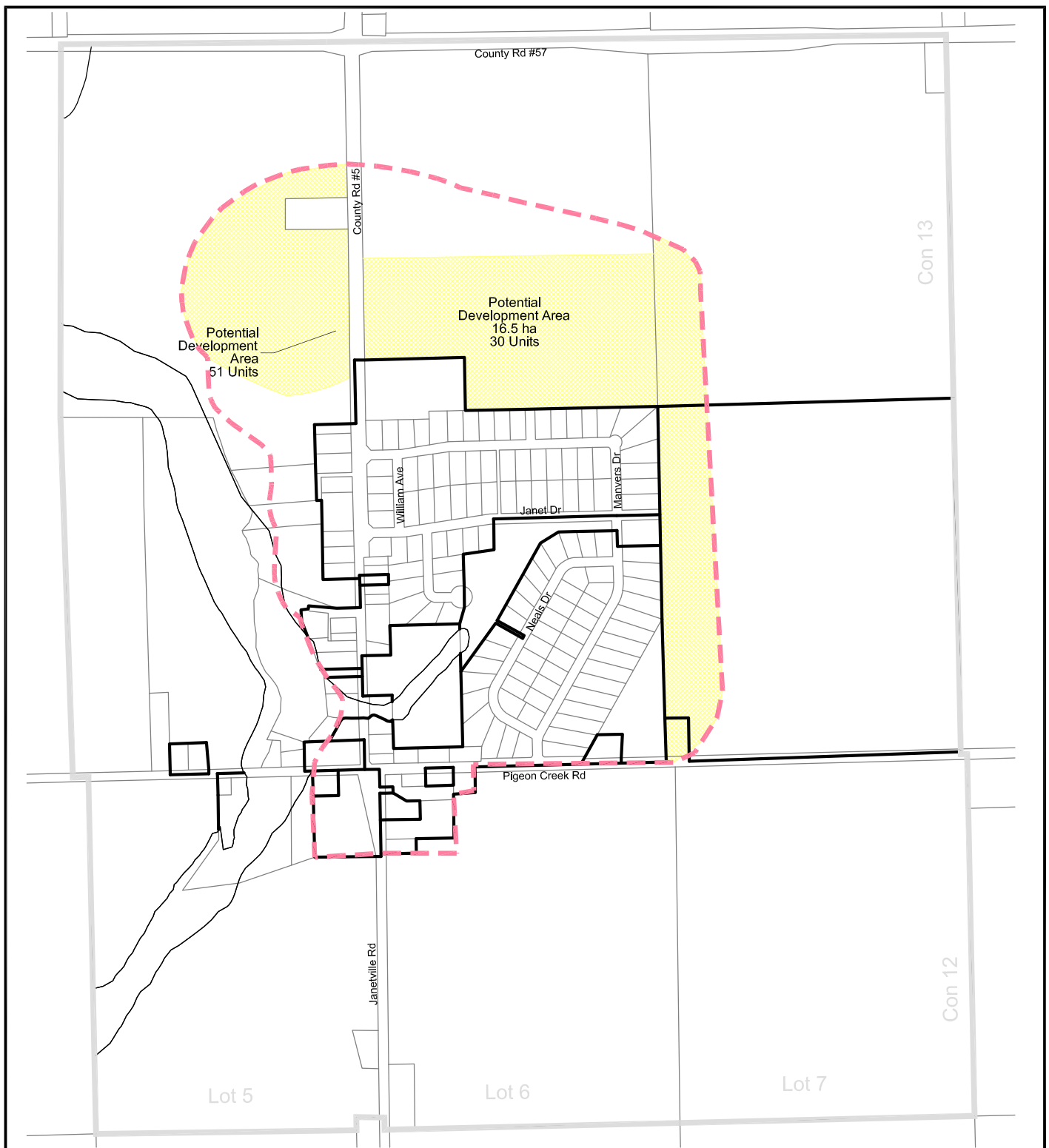


Potential Development Area
5 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Janetville Hamlet Area

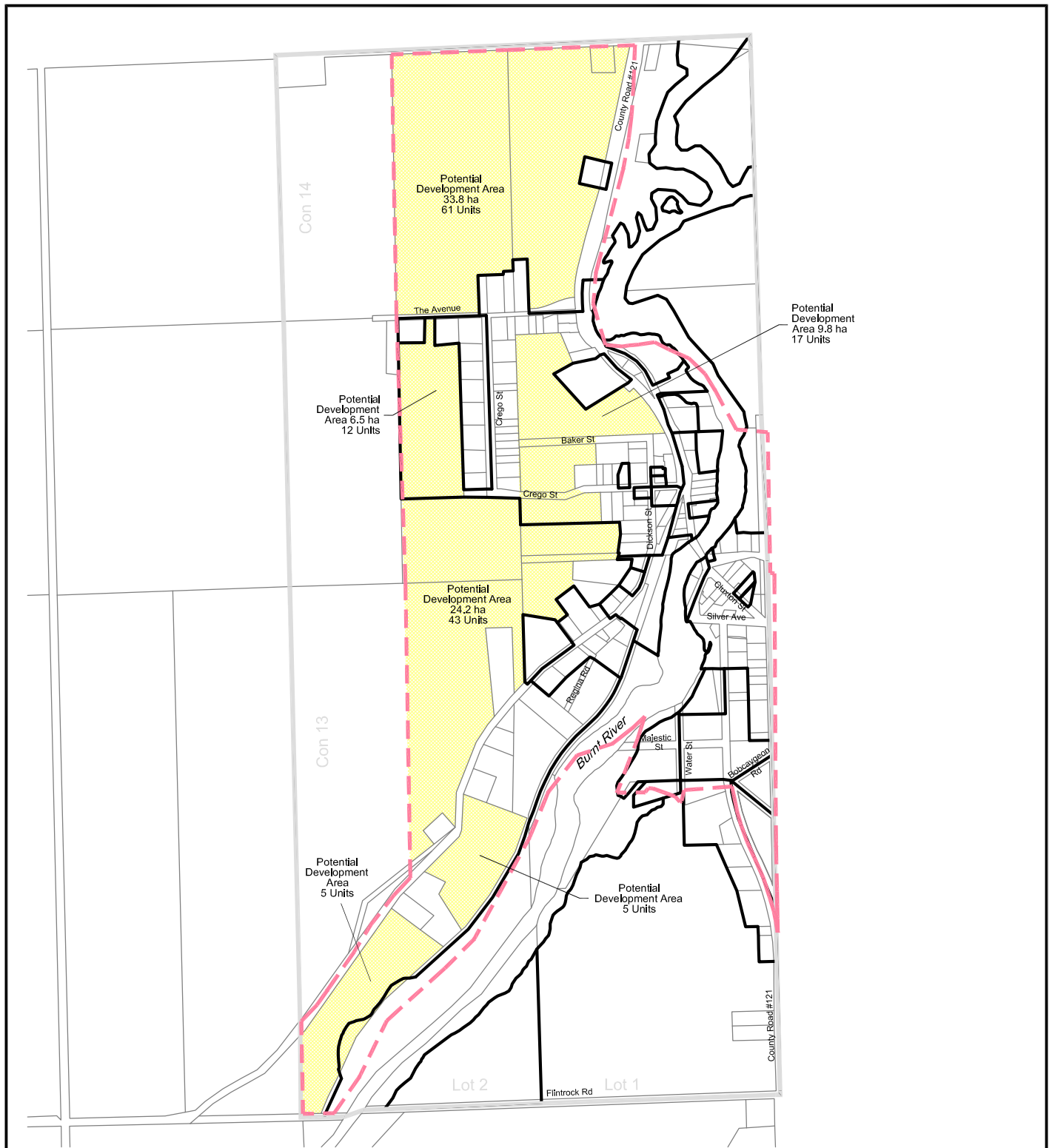
 Hamlet Area

 Potential Development Area
81 units

WATER SUPPLY: PUBLIC
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Kinmount Hamlet Area



Hamlet Area

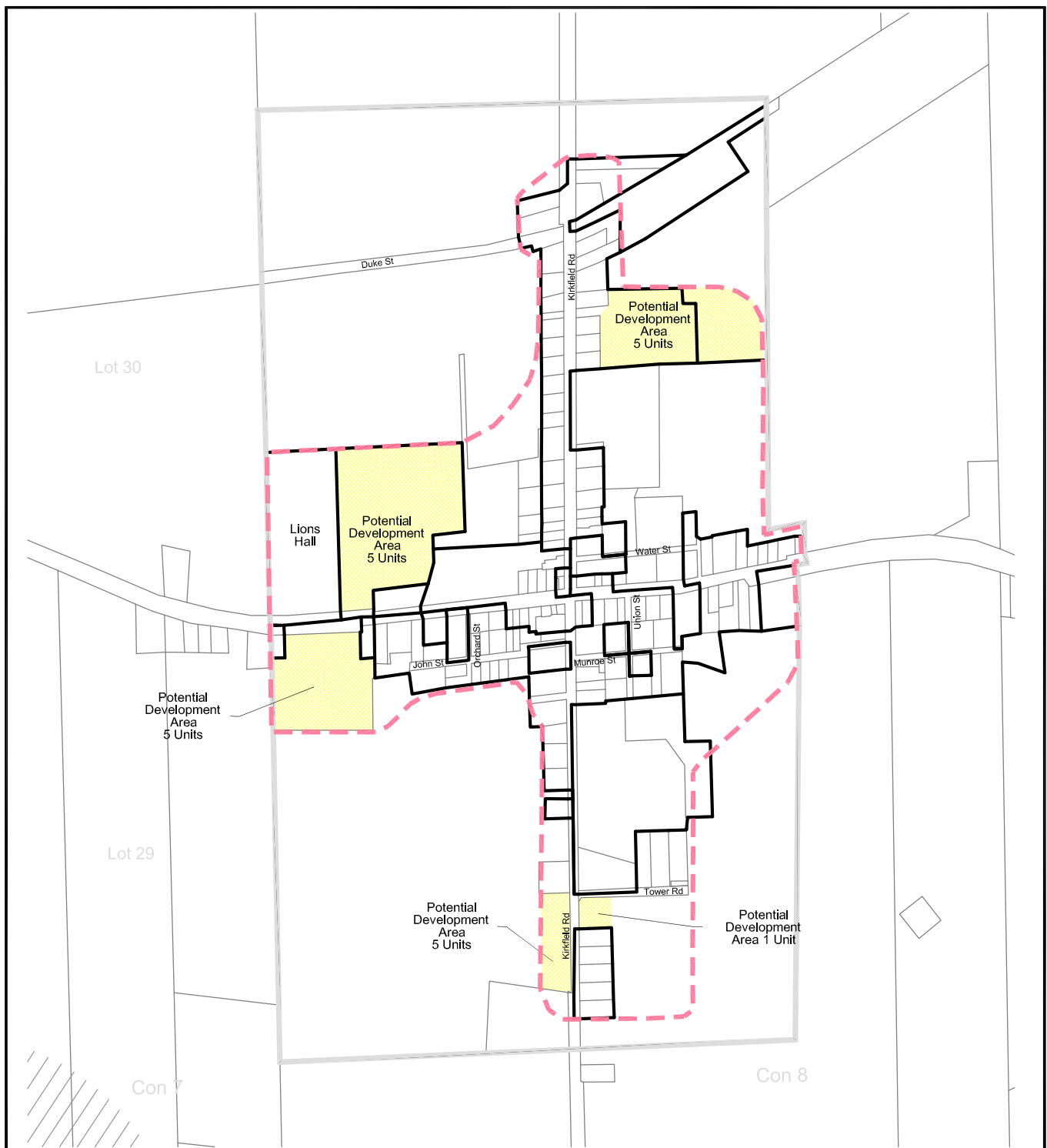


Potential Development Area
143 units

WATER SUPPLY: PUBLIC (For Existing Development Only)
SEWAGE TREATMENT: PRIVATE (High Bedrock)

SCALE 1:15,000





Kirkfield Hamlet Area



Hamlet Area

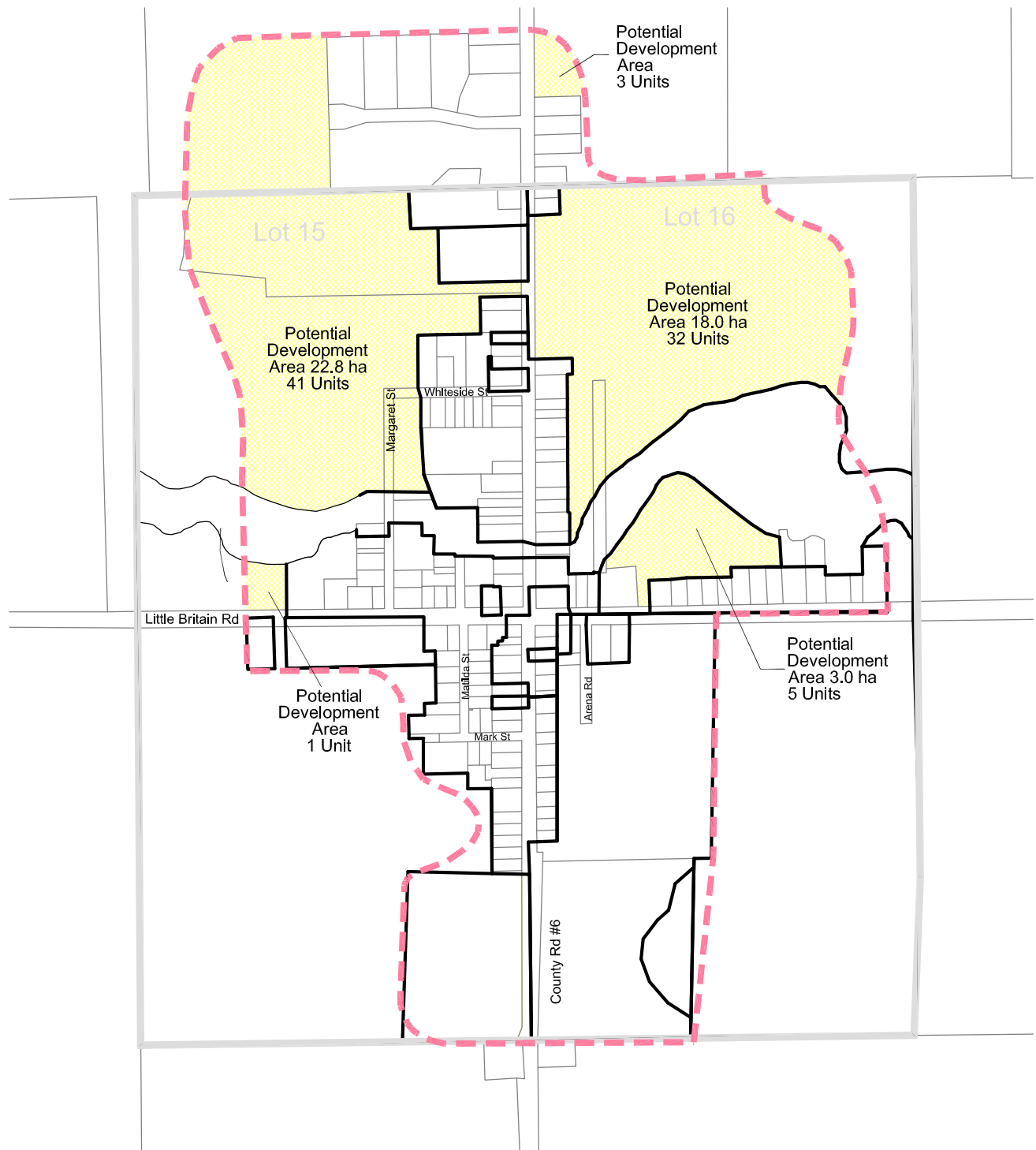


Potential Development Area
21 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:12,500





Little Britain Hamlet Area



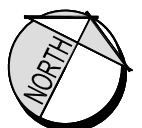
Hamlet Area

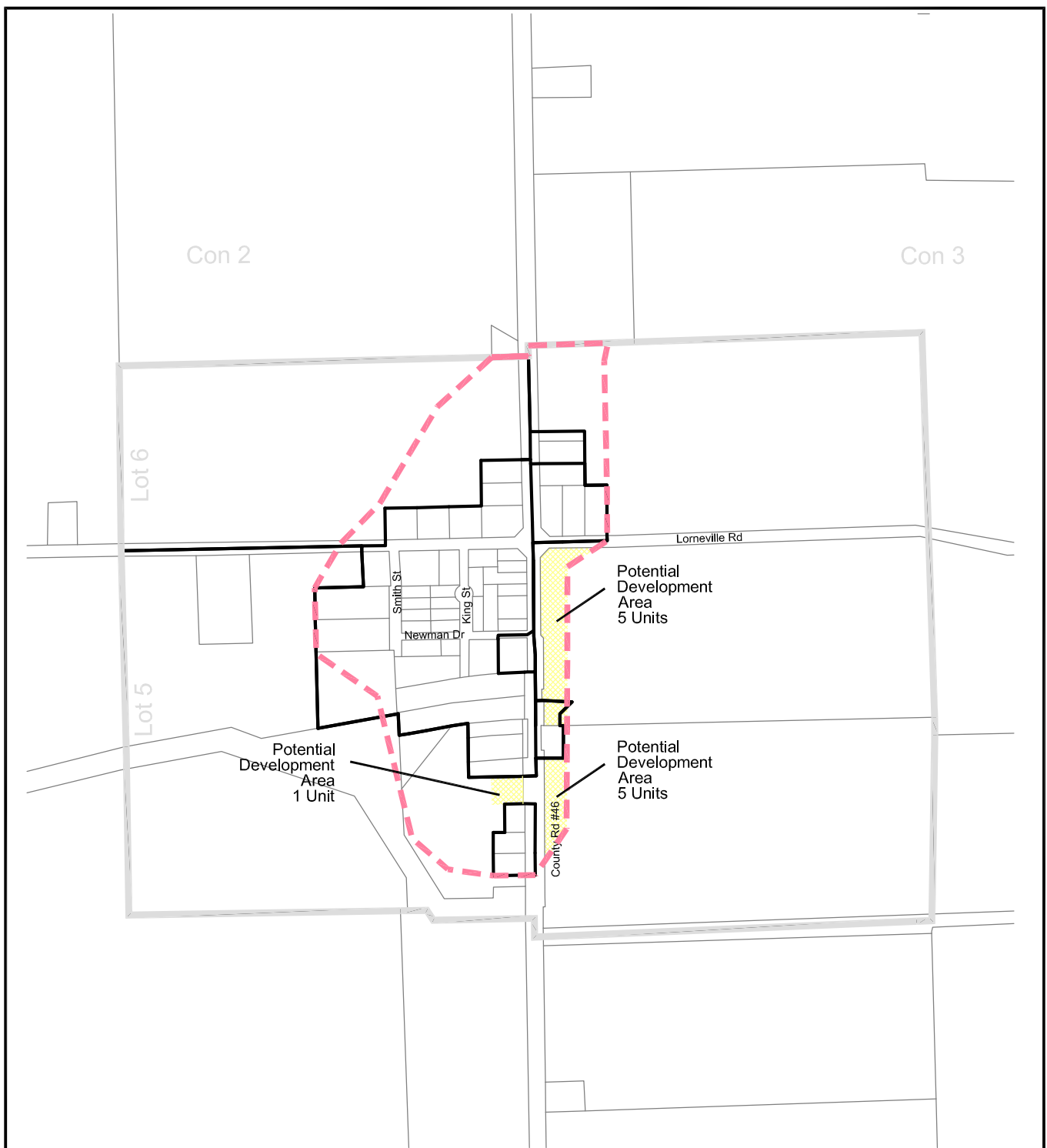


Potential Development Area
82 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:10,000





Lorneville Hamlet Area



Hamlet Area

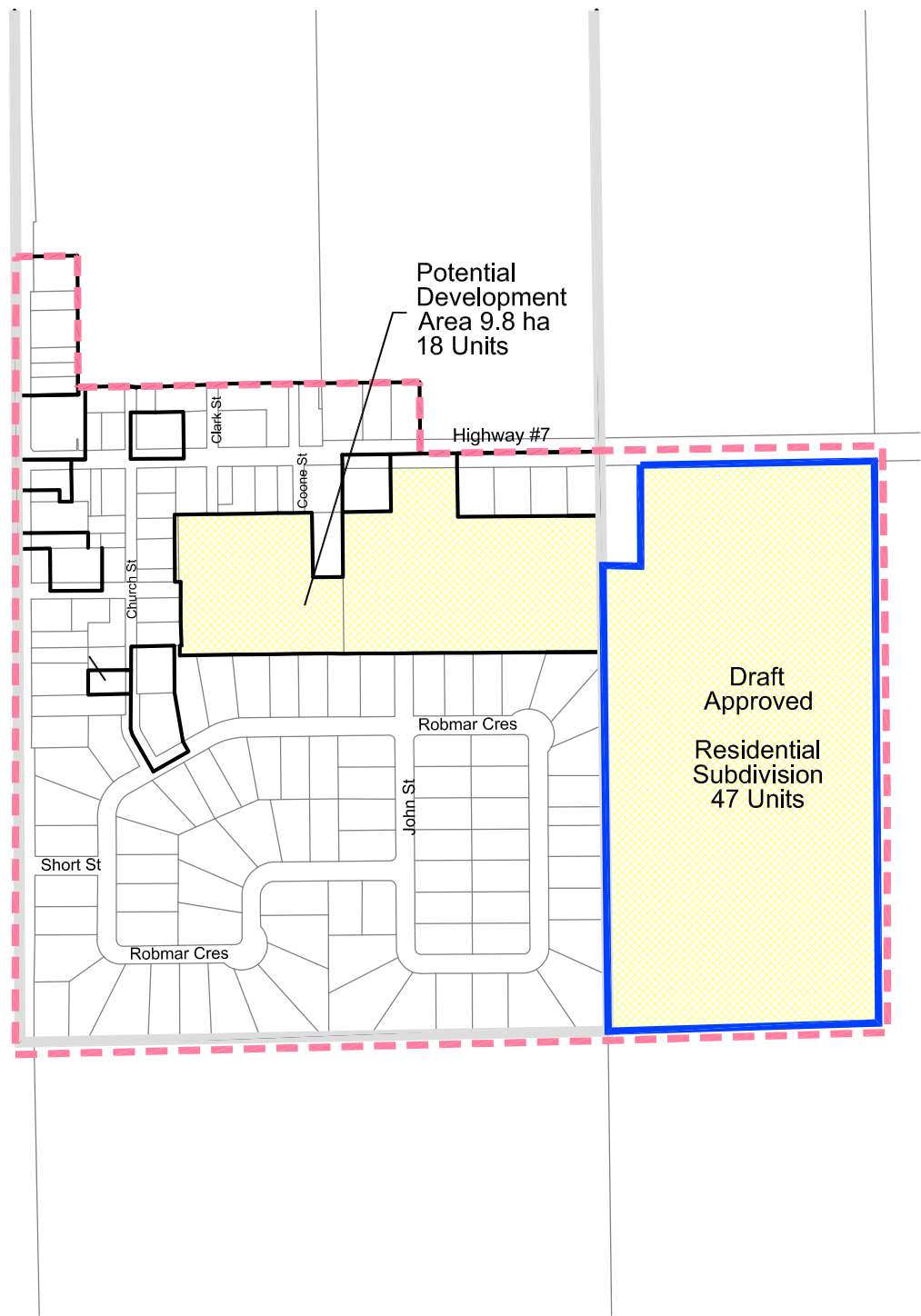


Potential Development Area
11 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:10,000





Manilla Hamlet Area



Hamlet Area



Potential Development Area

18 units



Residential Subdivision

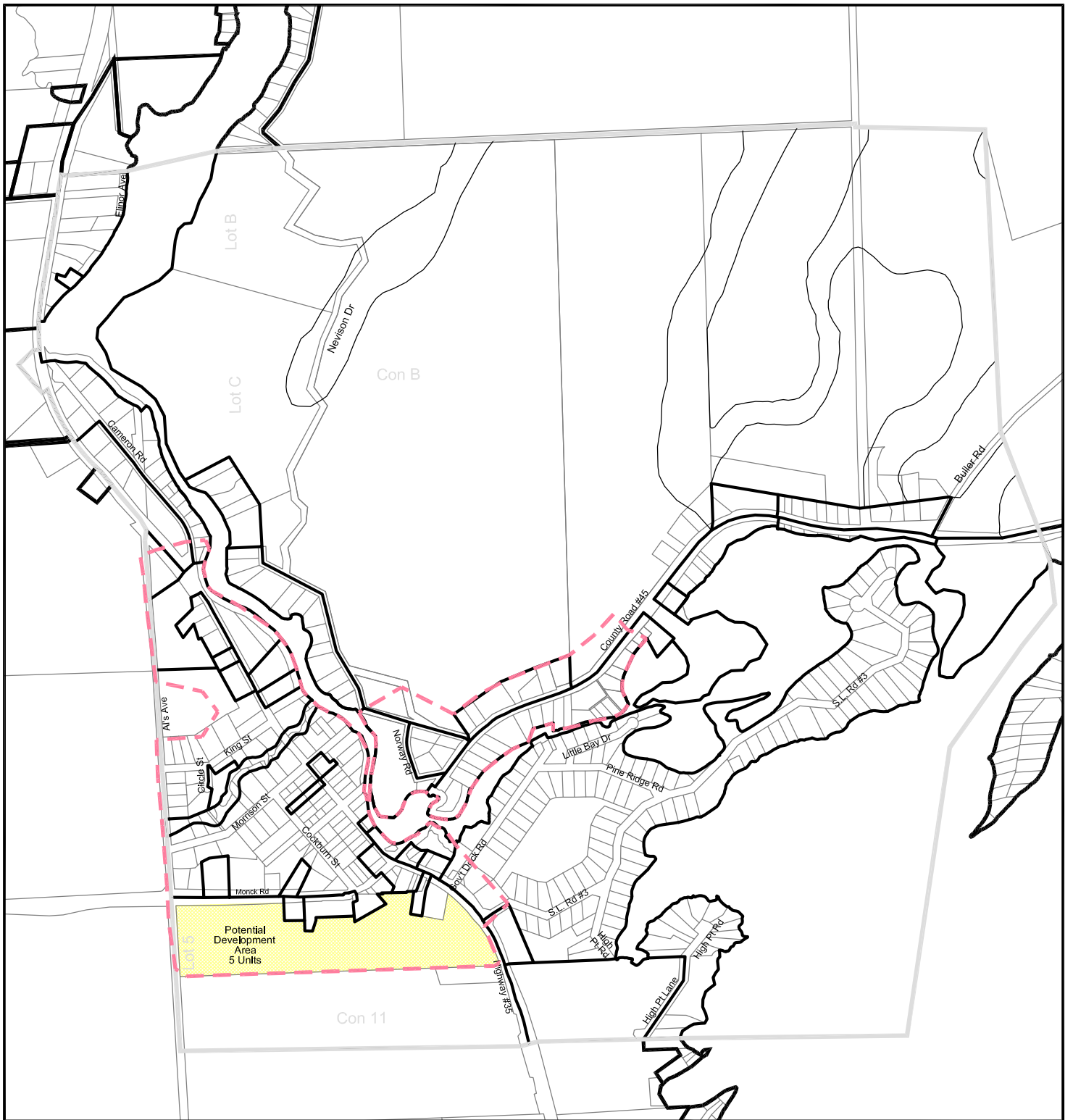
47 units

Total 65 units

WATER SUPPLY: PUBLIC
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Norland Hamlet Area



Hamlet Area



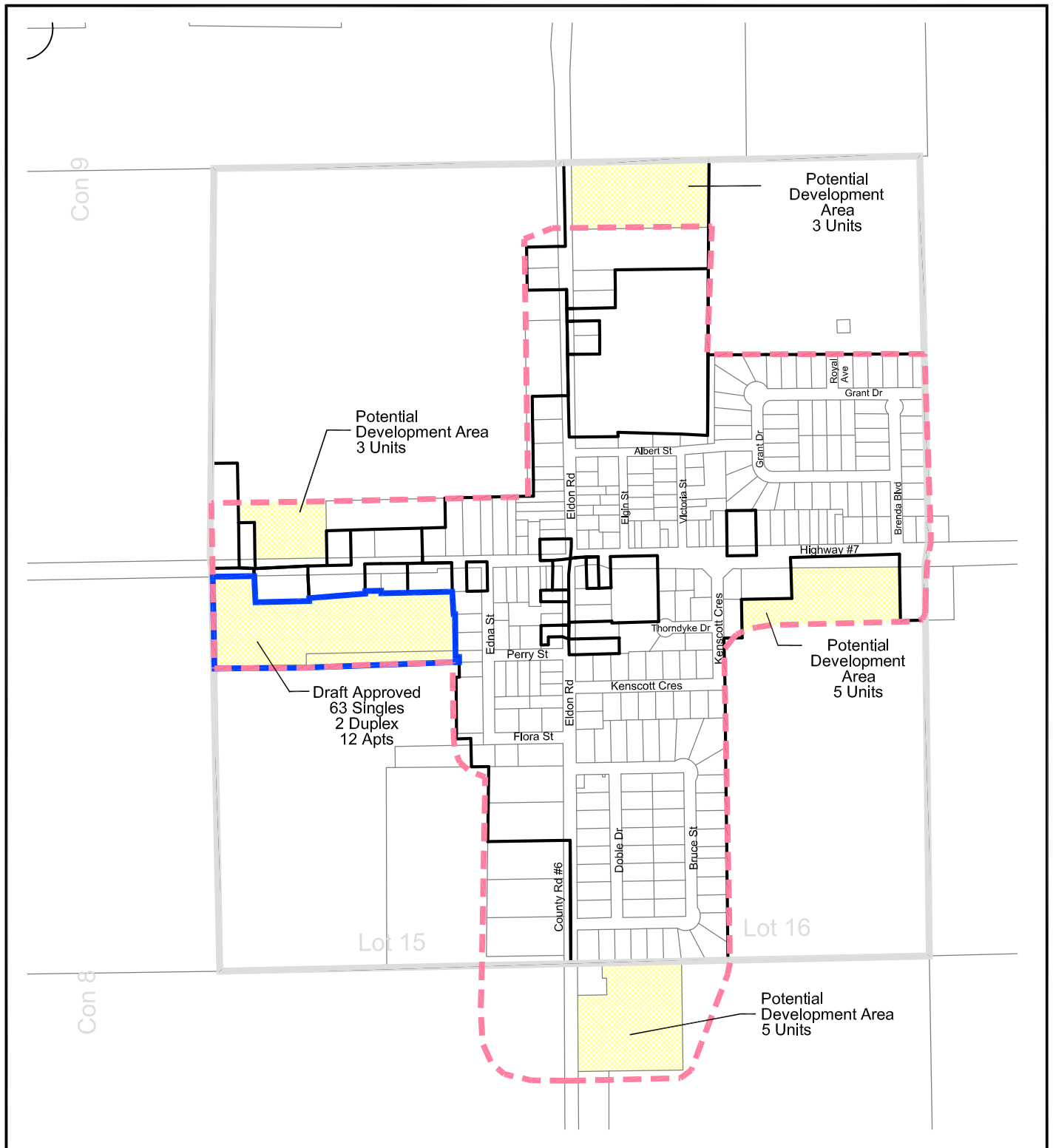
Potential Development Area
5 units



WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE (High Bedrock)

SCALE 1:15,000





Oakwood Hamlet Area



Hamlet Area



Potential Development Area

16 units



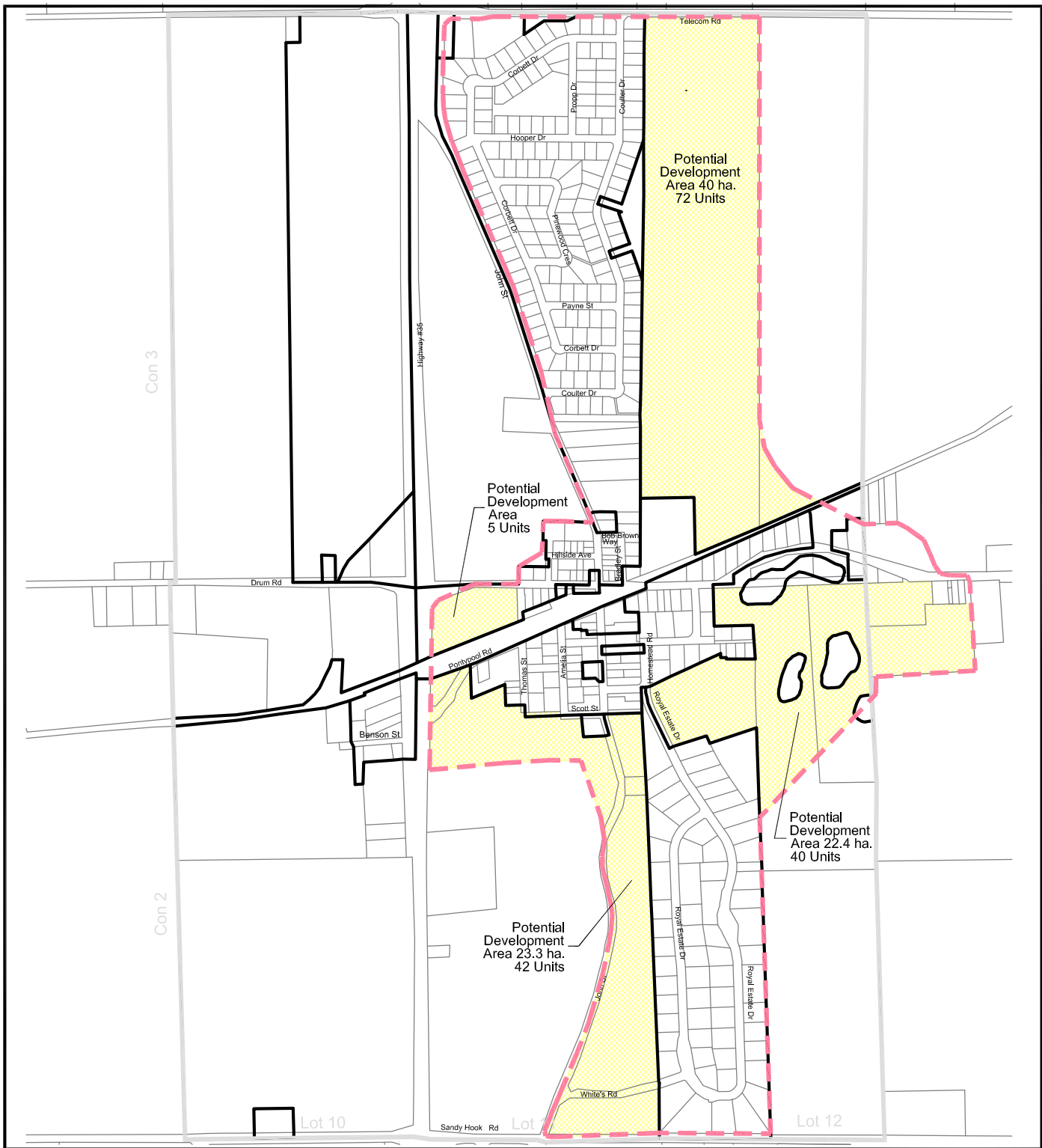
Residential Subdivision

Total 77 units
93 units

WATER SUPPLY: PUBLIC (Piped from Lindsay)
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





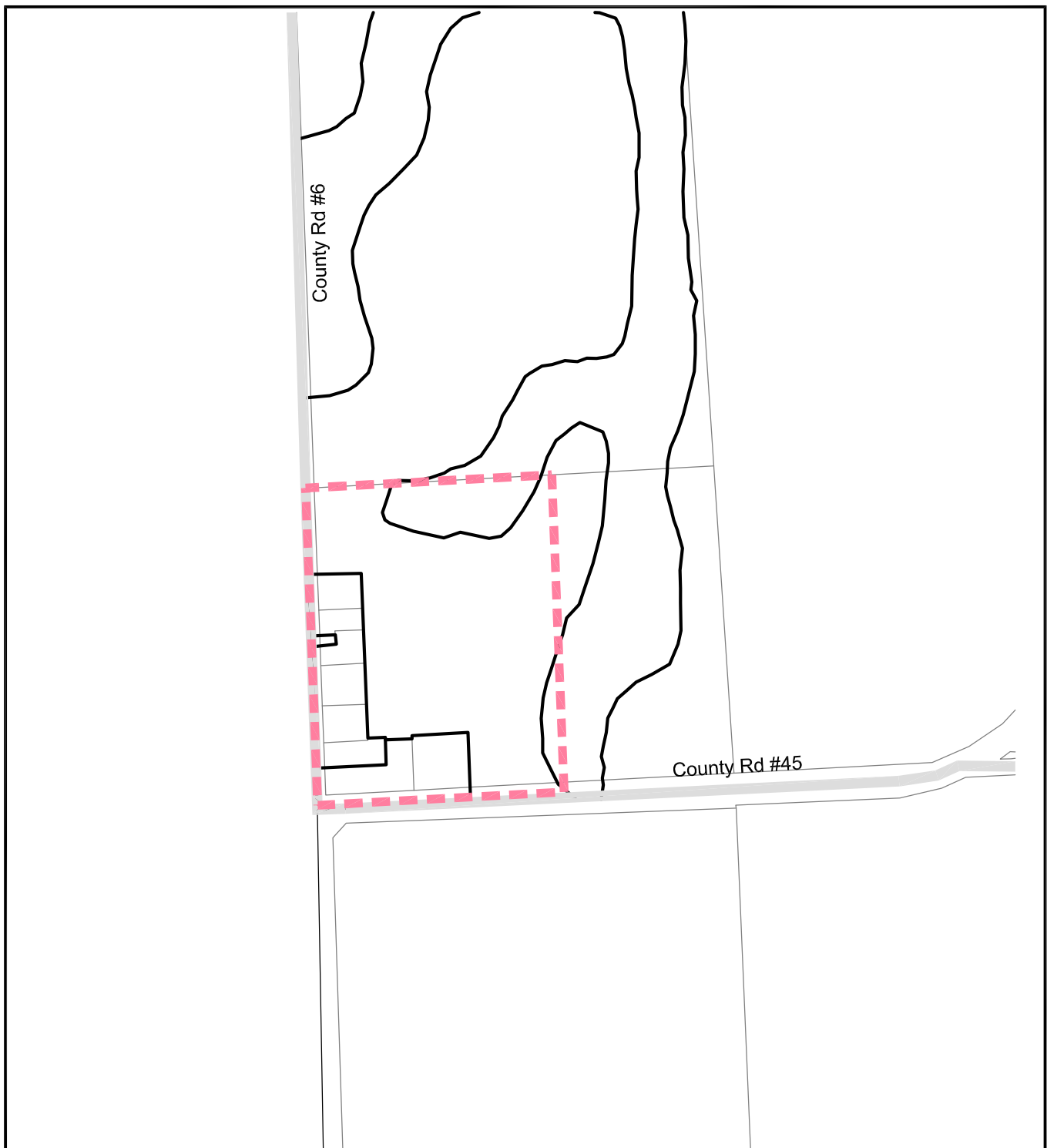
Pontypool Hamlet Area

- Oak Ridges Moraine Settlement Area
- Potential Development Area
159 units

WATER SUPPLY: PARTIAL PUBLIC
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Sebright Hamlet Area



Hamlet Area
No Development Potential

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:7500





Sonya Hamlet Area

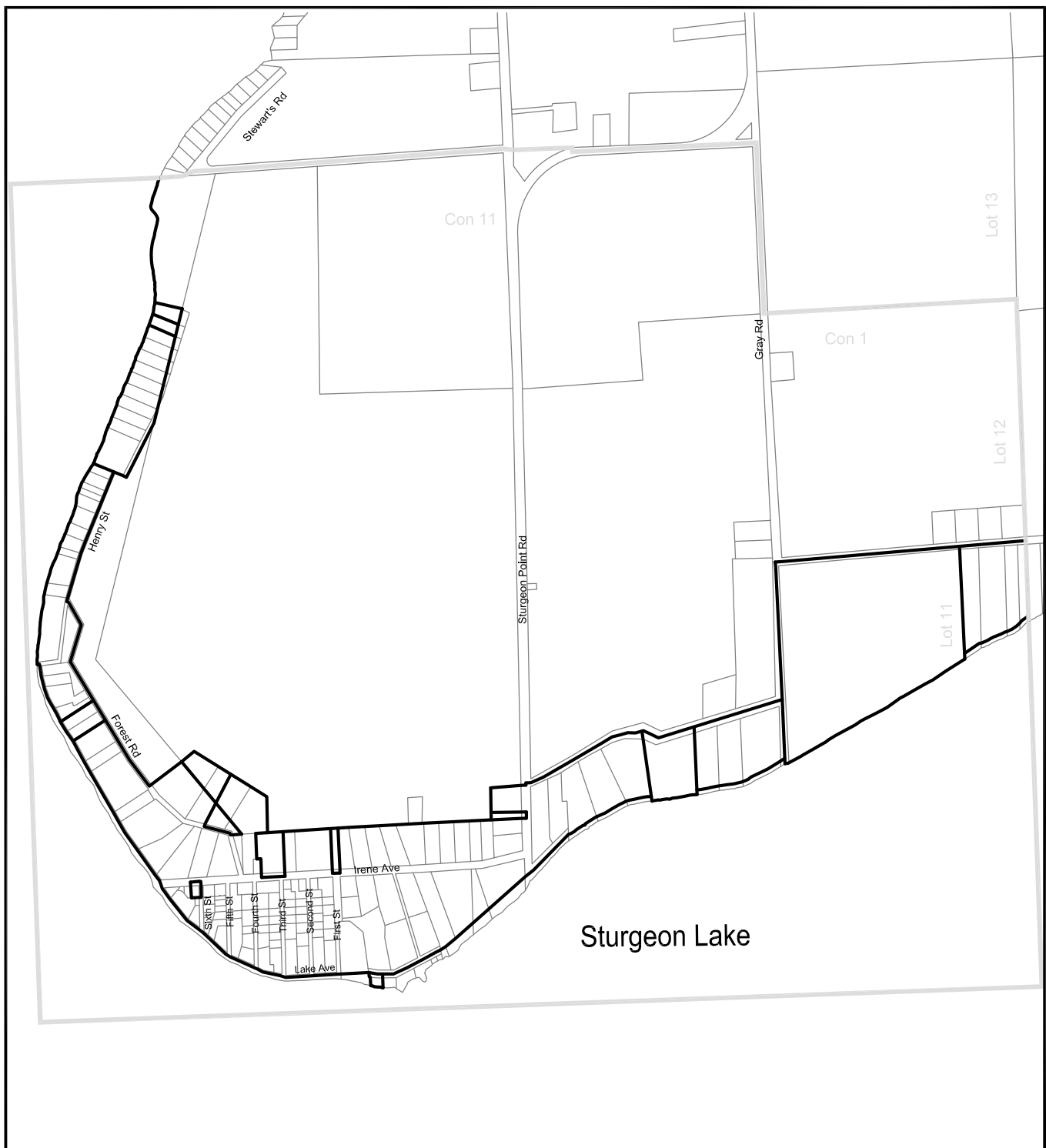


Hamlet Area
No Development Potential

WATER SUPPLY: PUBLIC
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





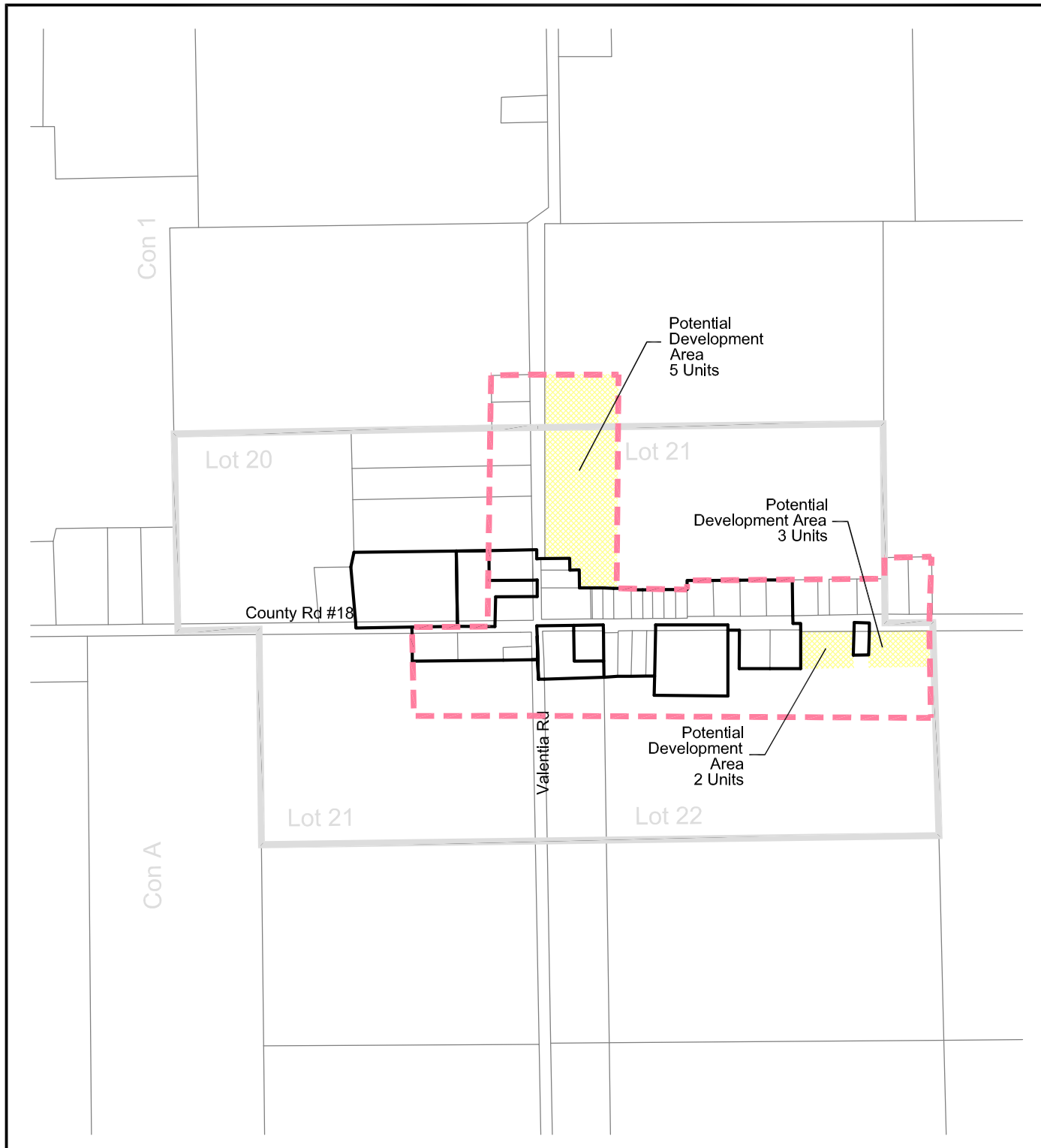
Sturgeon Point

No Development Potential

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Valentia Hamlet Area



Hamlet Area

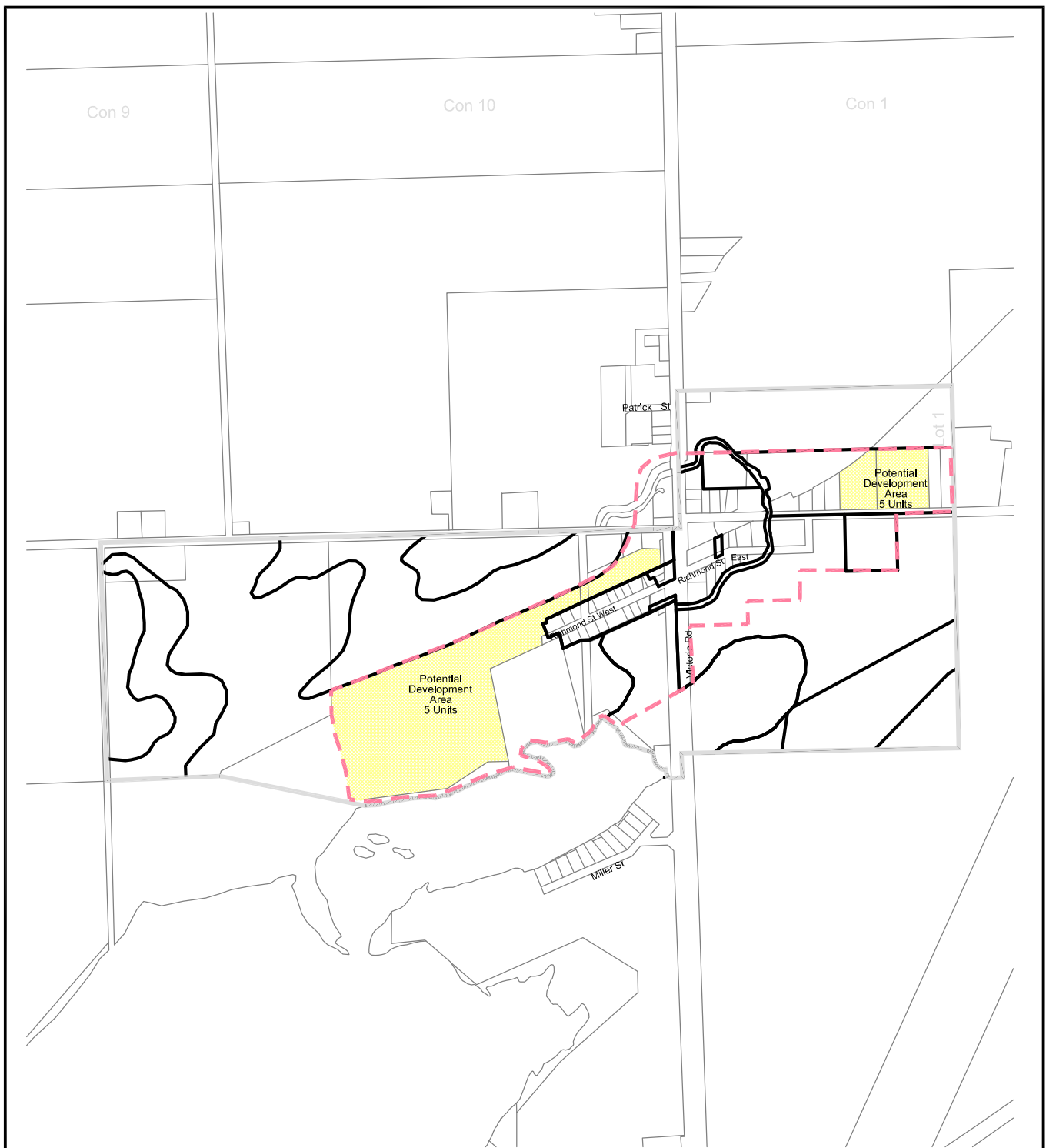


Potential Development Area
10 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:10,000





Victoria Road Hamlet Area



Hamlet Area

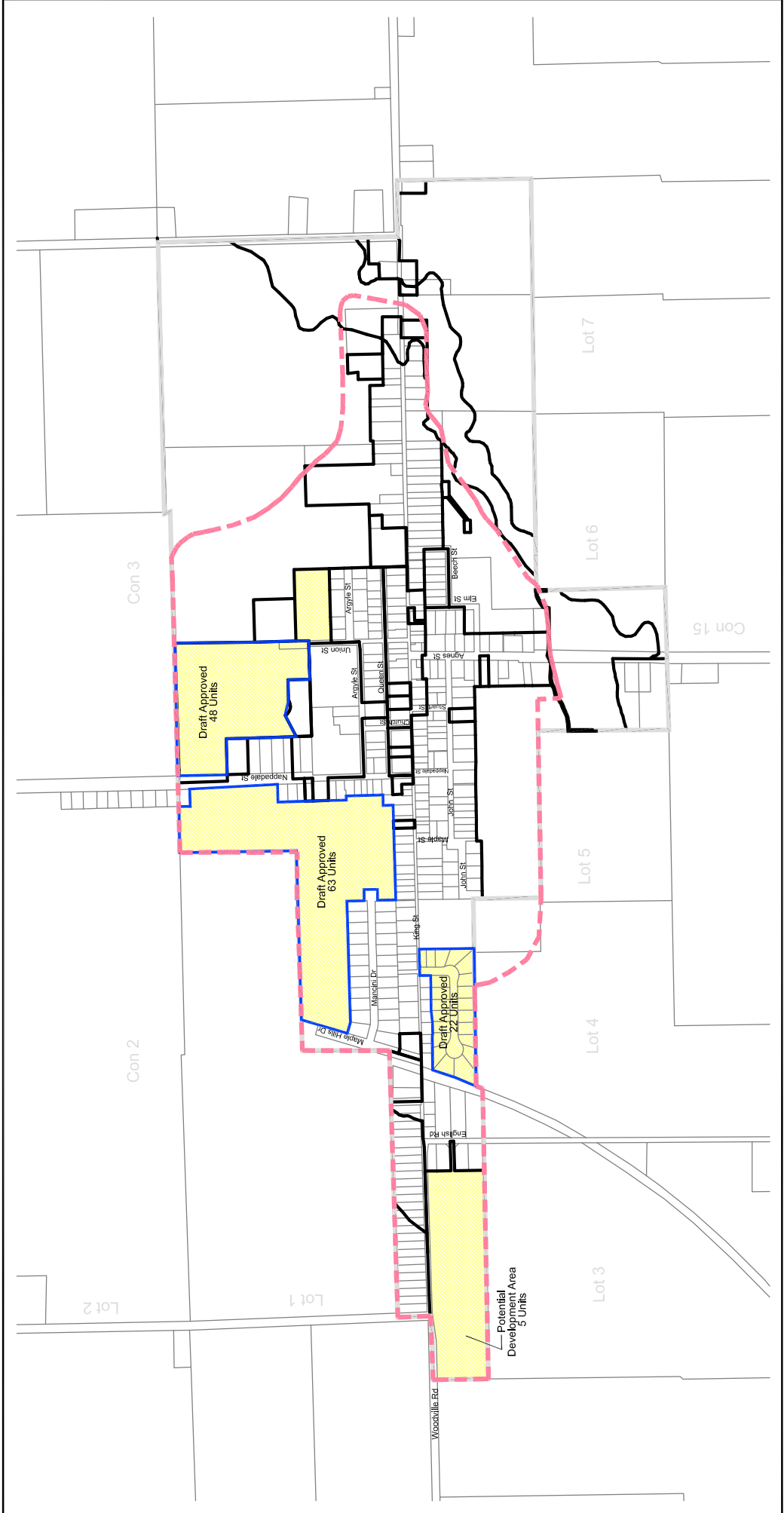


Potential Development Area
10 units

WATER SUPPLY: PRIVATE
SEWAGE TREATMENT: PRIVATE

SCALE 1:15,000





Woodville Urban Settlement Area

	Settlement Boundary		
	Potential Development Area	5 units	
	Residential Subdivision	133 units	
	Total	138 units	
WATER SUPPLY: PUBLIC (at Capacity)			
SEWAGE TREATMENT: PRIVATE			



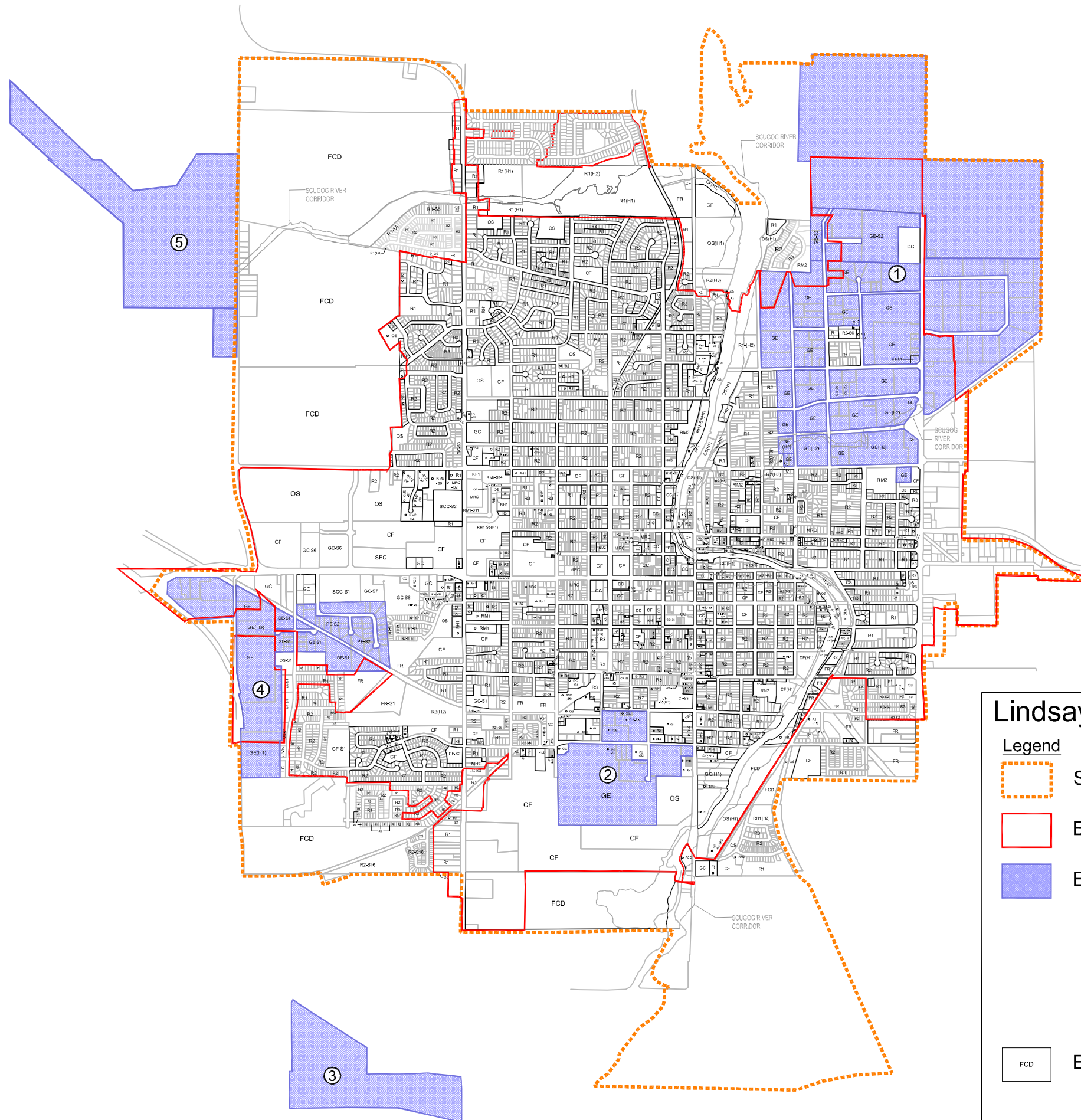
SCALE 1:15,000

K:\0183-KAWARTHA LAKES-GROWTH STRATEGY\WOODVILLE_AREAS.DWG

CITY OF KAWARTHA LAKES
GROWTH MANAGEMENT STRATEGY

APPENDIX 3

EMPLOYMENT LAND – MAPPING INVENTORY



Lindsay Industrial Areas

Legend



Settlement Boundary



Built Boundary

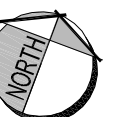
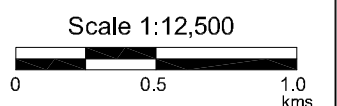


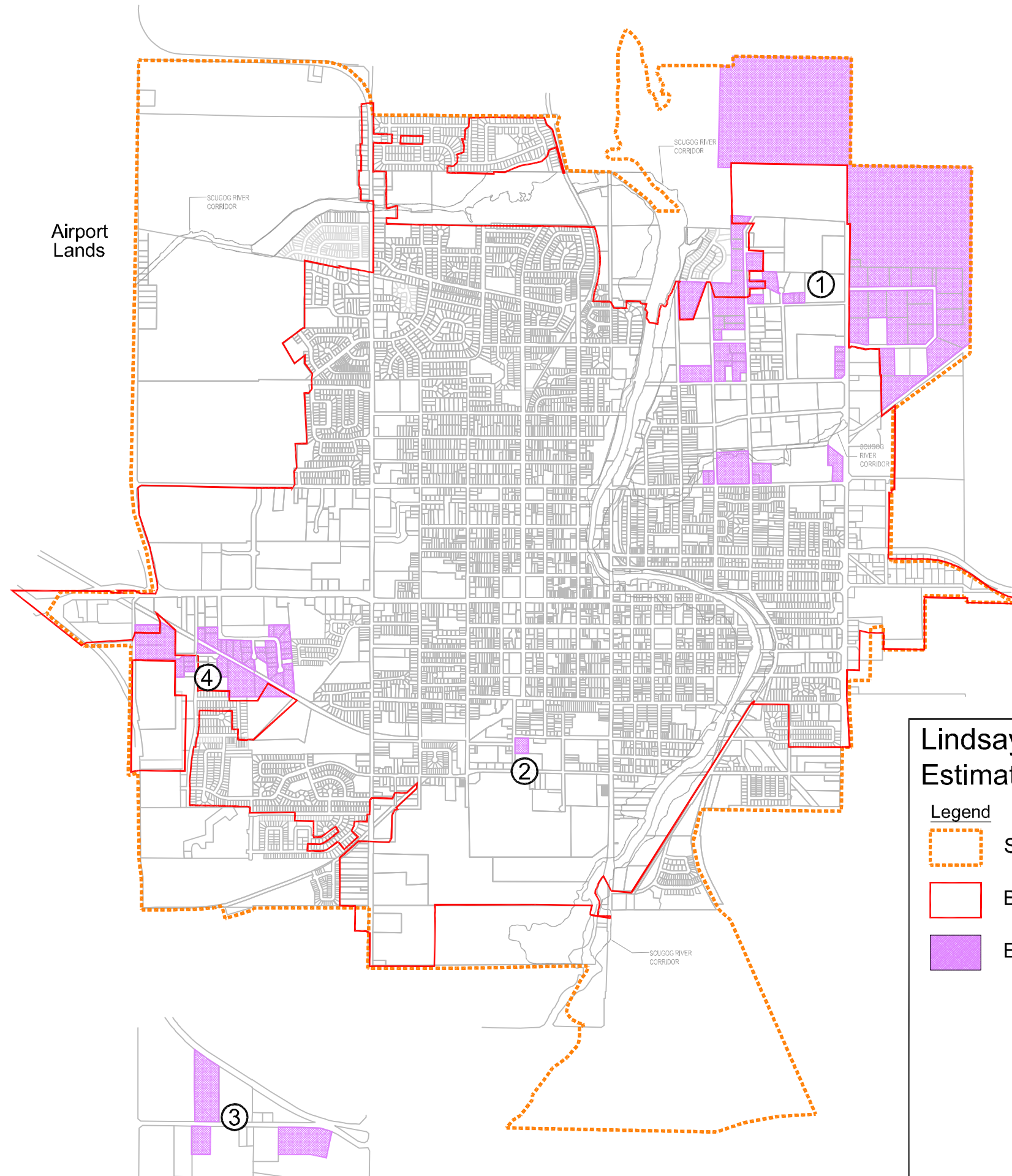
Existing Employment Zoned Area

- ① Northeast - 264.64 ha (653.94 ac)
- ② Central - 35.33 ha (87.30 ac)
- ③ South - 36.55 ha (90.32 ac)
- ④ West - 54.00 ha (133.44 ac)
- ⑤ Airport - 77.10 ha (190.52 ac)
- TOTAL - 467.62 ha (1,155.52 ac)**



Existing Zoning






Lindsay and Surrounding Area Estimated Vacant Employment Land Supply

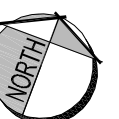
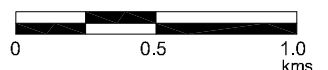
Legend

 Settlement Boundary

 Built Boundary

 Existing Vacant Employment Areas

- ① Northeast - 149.58 ha (369.62 ac)
- ② Central - 0.69 ha (1.71 ac)
- ③ South - 11.67 ha (28.84 ac)
- ④ West - 18.70 ha (46.21 ac)
- TOTAL - 180.64 ha (446.38 ac)



CITY OF KAWARTHA LAKES
GROWTH MANAGEMENT STRATEGY

APPENDIX 4

OFFICIAL PLAN GROWTH MANAGEMENT PRINCIPLES

4. GROWTH MANAGEMENT

4.1. GENERAL PRINCIPLES

It is the policy of this Plan that population and employment growth will contribute to the overall sustainability of the City and will be accompanied by:

- directing a significant portion of new growth to the built-up areas of the community through *intensification*;
- focusing *intensification* in *intensification* areas;
- building compact, transit-supportive communities in *designated greenfield* areas;
- reducing dependence on the automobile through the development of mixed-use, transit-supportive, pedestrian-friendly urban environments;
- providing convenient access to intra- and inter-city transit;
- ensuring the availability of sufficient land for employment to accommodate forecasted growth to support the City's economic competitiveness;
- planning and investing for a balance of jobs and housing in communities across the City of Kawartha Lakes to reduce the need for long distance commuting and to increase the modal share for transit, walking and cycling;
- encouraging development of a complete community with a diverse mix of land uses, a range and mix of employment and housing types, high quality public open space and easy access to local stores and services;
- directing development to *settlement areas*, except where necessary for development related to the management or use of resources, resource-based recreational activities, and rural land ~~used~~ uses that cannot be located in *settlement areas*;
- directing multiple lots and units for residential development which constitutes the creation of more than three units or lots through either a plan of subdivision, consent or plan of condominium to *settlement areas*, and may be allowed outside of settlements areas in rural areas in site-specific locations with approved zoning or designation that permits this type of development as June 16, 2006;
- directing major growth to *settlement areas* that offer municipal water and wastewater systems and limiting growth in *settlement areas* that are serviced by other forms of water and wastewater services;
- prohibiting the establishment of new *settlement areas*.

For lands within the Oak Ridges Moraine Conservation Area, the applicable policies of the Oak Ridges Moraine Conservation Plan applies.

4.1.1. Population and Employment Projections

The population and employment projections for the City at 2031 are 100,000 and 27,000 jobs respectively.

4.1.2. Settlement Area Boundary Expansion

Settlement area boundary expansions may only occur as part of a municipal comprehensive review where it has been demonstrated that:

- a) sufficient opportunities to accommodate forecasted growth through *intensification* and in *designated Greenfield* areas, using the *intensification* target and *density targets*, are not available within the regional market area, as determined by the City.
- b) the expansion makes available sufficient lands for a time horizon not exceeding 20 years, based on the analysis provided for in the policy above;
- c) the timing of the expansion and the phasing of development within the *designated greenfield* area will not adversely affect the achievement of the *intensification* target and *density targets*, and the other policies of this Plan;
- d) where applicable, the proposed expansion will meet the requirements of the Oak Ridges Moraine Conservation Plan;
- e) the existing or planned *infrastructure* required to accommodate the proposed expansion can be provided in a financially and environmentally sustainable manner;
- f) in *prime agricultural areas*:
 - the lands do not comprise specialty crop areas;
 - there are no reasonable alternatives that avoid prime agricultural areas;
 - there are no reasonable alternatives on lower priority agricultural lands in prime agricultural areas;
 - impacts from expanding settlement areas on agricultural operations which are adjacent or close to the settlement areas are mitigated to the extent feasible;
- g) in determining the most appropriate location for expansions to the boundaries of settlement areas, the policies of Section 2 (Wise Use and Management of Resources) and 3 (Protecting Public Health and Safety) of the PPS, 2005 are applied; and
- h) the land will be serviced by both municipal water and wastewater systems.