



# Population and Employment Growth Analysis Proposed Terms of Inquiry

## Purpose

The purpose of this document is to highlight key areas of concern as they relate to the preparation of a proposed Terms of Reference for a Population and Employment Growth Analysis Study. The outline will inform the preparation of a detailed terms of reference that will be flexible and responsive to the ongoing changes to planning policy in Ontario and that will be supported by a formal procurement process.

## Background

In 2019, the city undertook the [City of Burlington Growth Analysis Study](#) which was presented to [Committee of the Whole](#) on September 12, 2019. City Staff engaged Dillon Consulting in preparing the report. The purpose of the 2019 Growth Analysis Study was to undertake growth analysis work at the local level that would be used to inform the Regions' Integrated Growth Management Study (IGMS) as a part of the Region's Official Plan Review (ROPR) process. This work was a provincial conformity exercise that among other things, sought to distribute population and employment to the local municipalities to 2031 and 2041 in conformity with the Growth Plan, 2017. To date, the ROPR, including the IGMS work has resulted in 2 Regional Official Plan Amendments (ROPA 48 & 49).

At the time of the 2019 Growth Analysis work, the intent was to provide local context to inform the IGMS work and the subsequent updated Best Planning Estimates (BPEs) that were expected to come forward as a result of the IGMS work. It was expected that the Region would revise the Best Planning Estimates of Population, Occupied Dwelling Units and Employment for 2031 and 2041. The BPEs show when and where development is likely to take place in Halton Region and would have assisted the Region in preparing the Regional Phasing to 2041. The BPEs tie new development and infrastructure expansions to the timing of growth assigned through the Regional Growth Management Strategy.

Since 2019, there have been a whole range of changes made to the planning framework in Ontario including the Royal Assent of Bill 23, *More Homes Built Faster Act, 2022* and Bill 97, *Helping Homebuyers, Protecting Tenants Act, 2023*. Additionally, there are proposed changes to the PPS and Growth Plan currently undergoing public consultation. These shifts necessitate a new Growth Analysis Study that considers the new and changing policy landscape in Ontario, Halton Region and Burlington.

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The list below, highlights a few of the recent policy shifts that the 2019 Growth Analysis did not have the opportunity to consider:

### **Burlington’s Housing Pledge**

Complimentary to Bill 23, the Province introduced the concept of housing targets in a bulletin listed in the ERO as “2031 Municipal Housing Targets”. The bulletin established housing targets for 29 selected municipalities in Southern Ontario. The City of Burlington has been assigned a 2031 Housing Target of 29,000 units and the Province requested that Burlington prepare a Municipal Housing Pledge and take the necessary steps to facilitate the construction of 29,000 units by 2031. At the February 28, 2023, meeting of [CPRM Committee, Staff Report PL- 24-23: Burlington Housing Pledge](#) was presented to Committee with an attached draft Housing Pledge.

Council has since approved the City of Burlington’s signed Housing Pledge to demonstrate its commitment to accelerating housing supply and taking the necessary actions to facilitate the construction of 29,000 units by 2031. The 29,000-unit housing target amounts to 17,658 more units than are currently anticipated for Burlington (2021 – 2031) as part of the recently completed Land Needs Assessment in accordance with the Provincial Land Needs Assessment Methodology, as set out in the Growth Plan, 2020.

The housing target is recognized as an aspirational target and as such, the City will continue to utilize the applicable population and employment distributions to 2051 as identified in the Regional Official Plan and in conformity with the Growth Plan, 2020. It will be important to consider both the City’s population and employment distribution to 2051 as well as Burlington’s housing target in the Growth Analysis Study work.

### **Regional Official Plan Amendment No. 49 - 2051 Planning Horizon & New Community Area**

The 2019 Growth Analysis Study took place in advance of the 2020 amendments to the Growth Plan, which among other things, shifted the planning horizon out from 2041 (considered by the 2019 Growth Analysis Study) to 2051. While the work undertaken by the Region’s LNA as part of the IGMS work considered a 2051 planning horizon in earlier drafts, ROPA 49 as adopted by Regional Council distributed population and employment to 2041.

ROPA 49 was then approved by the Minister of Municipal Affairs and Housing with modifications in November 2022. These modifications, among other things, extended the planning horizon to 2051 and modified Table 1 (Population and Employment Distribution) of the Regional Official Plan. Further, the

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Province provided direction to Halton Region to update Table 2 (Intensification and Density Targets) and 2a (Regional Phasing) accordingly.

ROPA 49 approved as modified also introduced 347 ha of new Community Area in Burlington that had not been previously considered by the 2019 Growth Analysis Study, nor by the City's Official Plan, 2020 or the Region's Official Plan.

New Population and Employment Growth Analysis work will provide the city with an opportunity to assess the impacts of these changes on Burlington's population and employment growth to 2051 and beyond.

### **New Planning Authority & Joint Best Planning Estimates**

Halton Region is currently undertaking their Joint Best Planning Estimates (JBPE) work. The work commenced in early 2023. As a result of Bill 23, upon Royal Proclamation, the lower-tier municipalities in Halton will inherit the Region's Official Plan and its planning authority. However, infrastructure master planning and allocation will continue to be implemented by Halton Region. While growth management will soon be undertaken by the individual local municipalities, Halton Region will continue to be tasked with the master planning and delivery of infrastructure to facilitate growth and development across the Region.

In response to these changing responsibilities, Halton Region has developed a process to work closely with the local municipalities in Halton to develop Joint Best Planning Estimates. The purpose of the JBPEs is to inform Regional infrastructure master planning that supports local municipal visions for growth. This work is informed primarily by the findings of the [Land Needs Assessment](#) completed as part of the [Integrated Growth Management Strategy](#). The work will also be informed by ROPA 49 as modified (which among other things, introduced new community area to Halton Region), the findings of the 2021 Census and the Housing Pledge. It is the intent of the JBPEs that they be flexible and responsive to change as Halton moves through this time of change and as understanding of the impacts of Bill 23, Bill 97 and the Housing Pledge and future policy changes evolve. Staff have provided detailed comments to the Region and continue to discuss the importance that there be clarity on the purpose and use of the JBPEs and that they be flexible and responsive to change.

The JBPEs are being prepared for the express purpose of infrastructure master planning, this work is also being undertaken in advance of Burlington's Growth Analysis to fully understand the amount of growth the city should anticipate to 2051. The findings of the Growth Analysis will inform future iterations of the JBPEs.

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In addition to the Region’s JBPE work, the City is in the process of undertaking a number of projects that employ growth assumptions, including updates to the Development Charges By-law, the Community Benefit Charge By-law and the Park Land Dedication By-law. For this work, a shared approach was used related to growth assumptions that consider recent changes to the planning framework, staff will continue to work together as the growth analysis work moves forward to inform these projects and evolve our strategy to ensure the most accurate and up to date information is used.

### **Purpose of the Population and Employment Growth Analysis**

The purpose of the Population and Employment Growth Analysis work is to provide a single, reliable, up-to-date source of population and employment growth analysis data to 2051 and beyond, that is approved by Council. The Population and Employment Growth Analysis will be based on detailed technical work that gives regard to current market conditions as well as recent and future policy shifts. As the city moves a variety of growth-related work forward, including the Official Plan Re-Alignment project, it will be important that Burlington have a single, reliable, source of population and employment growth data.

The Population and Growth Analysis work will be informed by the preparation of Policy Directions for growth. The Policy Directions will be guided by a set of principles. The proposed principles can be found in Staff Report PL-45-23 New Burlington Official Plan – Work Plan. Additionally, the Population and Growth Analysis work will be informed by a set of project givens, the current and future policy context and the most up-to-date population and employment related data. The population and employment growth analysis work will assist staff in preparing population and employment estimates to 2051. This work will be informed by the Population and Employment Growth Analysis, best practices, as well as any emerging guidance from the Province.

Once completed, the Population and Employment Growth Analysis will be used to support the city in a variety of growth related work including:

- The Official Plan Realignment project,
- The Joint Best Planning Estimates,
- Other Growth Related Projects, and
- Future background studies and updates.

### **Key Inquiries**

The Population and Employment Growth Analysis will address the following inquiries:

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1. What are some of the broader macro-economic and regional growth trends which will influence growth in Burlington?
2. What do the City's recent economic, demographic and real estate market trends tell us about future growth potential?
3. What is the potential range of population and employment growth that the City can expect between now and 2051 based on available supply and market trends?
4. Given the range of potential growth and multiple opportunities for developments, what are the phasing considerations for residential and employment growth?
5. How does the 2031 Housing Pledge fit into the potential range of population and employment growth's phasing considerations?

### **Initial Project Deliverables (to be refined through the proposed Terms of Reference):**

The key deliverable is a single, council approved, source of population and employment growth analysis for the city of Burlington that will inform the work of the City, Region and Province. The Population and Employment Growth Analysis work will at a minimum:

- Determine the likely amount of growth the city should anticipate within the 2021-2051 timeframe.
- Determine where capacity exists to accommodate population and employment growth in the city (considering the land use designations of the BOP, 2020 and ROPA 48 & 49).
- Provide an understanding of the impact on the City's ability to accommodate the 2041 and 2051 Employment Distribution set out in the Regional Official Plan.
- Assess how demographic and market trends relate to the growth framework in the city's Official Plan, 2020 while also considering recent changes to provincial policy and the Regional Official Plan.
- Support the city to effectively participate and influence the distribution of growth to 2031, 2041 and to 2051 as part of the Joint Best Planning Estimates process.
- Provide an understanding of the potential to accommodate new people and jobs in the MTSA's and new community areas to full build out. The outcomes of the MTSA, ASP work will be considered alongside the findings of this work.

### **Guidance for Developing the Proposed Terms of Reference**

The proposed Terms of Reference will refine the purpose of the Growth Analysis Study and will refine the key areas of concern outlined in this document. The proposed Terms of Reference will emphasize flexibility and adaptability of the required work to future policy changes such as the proposed changes to the PPS and Growth Plan. The Terms of Reference will require that proposals be designed to deliver

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on this work based on best practices and have embedded flexibility and adaptability as a project given. The proposed Terms of Reference will include at a minimum, the following:

- Project Purpose
- Detailed Project Background
- Project Context
- Project Risks
- Project Givens
- Project Scope, Deliverables and Timing
- Project Team & Resources