

# **Burlington Economic Vision 2025**

Burlington Economic Development Corporation

DRAFT FINAL REPORT

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# 1 Why Burlington needs an Economic Vision

The City of Burlington has long history of entrepreneurship, and industry has always played a significant role in the development of the community, where an innovative spirit has driven the city to succeed over time.

During the last three Census periods, Burlington has grown in population by 16.5% to a total population of 175, 779 residents in 2011. Its diversified business base across numerous sectors, and healthy spread of employers and self-employed, with strong numbers of small and medium sized enterprises has helped the City weather the storm of the recent economic recession, and fare better than many Southern Ontario communities during the same period.

Over time, the city has produced an enviable quality of life. A beautiful waterfront, arts and culture experiences, and well recognized community based events draw thousands of visitors to Burlington every year. The community exhibits a strong sense of civic pride, and benefits from a low crime rate, safe neighbourhoods, and a family oriented place to live. All of these attributes have had a positive effect and have supported a relatively affluent and highly educated population.

That said, Burlington is at a cross roads, where it is faced with the need to compete in an environment that becomes increasingly competitive as neighbouring municipalities strive harder and faster to capture increased investment, business expansion, and attract new and innovative talent, skilled workers, and enterprises to their communities.

An aging population and distinct gaps of younger aged populations 24 years and below in the community alert of near future issues related to maintaining adequate labour supply. Lower proportions of the prime working age populations of 25 to 44 years of age, and outmigration of youth warn of talent drain and the need to attract and retain skilled workers. Rising housing costs and issues related to affordability will frustrate efforts to increase immigration, and encouraging new families and young professionals to locate in the city.

Issues related to commercial and employment land availability, and its market readiness, along with a relative lack of coordination and alignment among all economic development stakeholders put Burlington in a compromising position when pursuing new growth potential and fostering increased levels of entrepreneurship and innovation.

In order to address these challenges head on, and establish a clear plan of action for propelling the City forward, a single Economic Vision is required. Although the City has developed community based strategic plans in the past, the economy has often been one of many areas of strategic focus.

To effectively leverage existing assets, address key obstacles, and align all vested stakeholders (including residents) behind driving Burlington's economy forward, this Economic Vision strategic planning exercise is critical to establishing collective ownership and a cooperative approach to effecting positive change.



As the economy underpins the growth and success of the City, its residents and industry, this plan provides a structured and coordinated means to achieving these goals, that is grounded in evidence, based on significant community and stakeholder input, and created from the ground up to provide solutions to the unique challenges that Burlington faces.

## 1.1 Methodology

The diagram in Figure 1 highlights the methodological process employed in developing an Economic Vision for the City of Burlington.

A four phase approach was adopted that grounded the strategic planning process in extensive primary and secondary research and consultation.

During the consultations process, background research and key findings from the community engagement efforts were provided to help inform key stakeholders and the Advisory Committee during the collaborative visioning and key opportunity identification exercises.

The following sections of this report provide a detailed reflection of the strategic planning process that has ultimately culminated in the development of an Economic Vision to propel the City of Burlington forward to the year 2025.

As identified above, collaboration, collective ownership, and shared responsibility from all community stakeholders is critical in successfully achieving the goals and objectives outlined in the Action Plans established in this strategic plan.

FIGURE 1: METHODOLOGICAL PROGRESSION DIAGRAM





## 2 Research and Consultations

### 2.1 Competitiveness Assessment

To better contextualize Burlington's positioning in the Greater Golden Horseshoe and Southern Ontario, a comprehensive competitiveness assessment was undertaken. This included a comparative examination of the City's relative competitiveness in a number of demographic, occupational, and business areas against a select group of comparator jurisdictions. The analysis is meant to be used as a benchmark to better understand what competitive advantages or disadvantages the City of Burlington may have relative to competitor communities around it.<sup>1</sup>

The comparator jurisdictions used in the analysis are:

- The Town of Oakville
- The City of Mississauga
- The City of Hamilton
- The City of Markham
- The Region of Waterloo

The following section provides a brief overview of the various highlights that emerged from the research process. The full analysis is available through the Burlington Economic Development Corporation in a separated appendicized document.

#### 2.1.1 Highlights from the Competitive Analysis

Burlington has a number of competitive advantages and disadvantages when measured against the comparator jurisdictions identified above. These competitive advantages offer opportunities for Burlington to further position itself to attract and retain industry and labour force talent to the city, whereas the competitive disadvantages highlight areas that Burlington may want to explore further in order to compete more effectively with the comparator jurisdictions.

Based on key findings from the Competitive Analysis, it is clear that knowledge intensive and value-added employment constitutes an important part of Burlington's economy and competitive advantages relative to the comparator jurisdictions (based on demographic, industry, and business trends). Continued focus on these sectors will further support Burlington's

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<sup>1</sup> Each of the comparator jurisdictions were selected for inclusion in the Competitive Analysis by the Burlington Economic Development Corporation



competitive advantages and the employment and business growth that Burlington is well positioned to experience based on these advantages.

### **Competitive Advantages in Burlington**

- Burlington has a relatively well-educated population which presents competitive advantages in the attraction of industry looking for a more educated workforce
- Burlington is a relatively affordable place to buy a home, offering opportunities when attracting or retaining young professionals to the area that would be looking to buy a home
  - The dwelling values in Burlington, however, are significantly higher than those in Hamilton and the Region of Waterloo, indicating a competitive disadvantage when competing against these jurisdictions
- The level of household wealth in Burlington ranks among the top relative to comparator jurisdictions, with one of the fastest levels of income growth between comparator jurisdictions
- There is a relatively high rate of home ownership in Burlington relative to comparator jurisdictions, which is helpful in attracting families to the area
- Burlington had the lowest unemployment rate in 2011 among comparator jurisdictions, and among the lowest relative increase in unemployment rate during the same period.
  - These statistics highlight the relative stability of the workforce in Burlington
- According to EMSI Analyst projections, there is a high rate of job growth anticipated from 2011-2020 in Burlington relative to comparator jurisdictions, which offers an important competitive advantage in attracting more population and talent to the area
- Employment in industries in Burlington are growing more quickly than comparator jurisdictions in:
  - 72 - Accommodation and food services (11% increase, 7,692 people employed in 2014)
  - 54 - Professional, scientific and technical services (8% increase, 5,848 people employed in 2014)
  - 61 - Educational services (8% increase, 5,332 people employed in 2014)
  - 23 - Construction (7% increase, 5,071 people employed in 2014)
- Employment in occupations in Burlington are growing more quickly than comparator jurisdictions in:
  - E - Occupations in social science, education, government service and religion (15% increase, 6,987 people in 2014)
  - F - Occupations in art, culture, recreation and sport (12% increase, 1,908 people in 2014)



- I - Occupations unique to primary industry (10% increase, 880 people in 2014)
- H - Trades, transport and equipment operators and related occupations (7% increase, 13,280 people in 2014)
- Burlington saw the largest increases among comparator jurisdictions in number of business establishments between 2009 and 2013 in:
  - 11 - Agriculture, forestry, fishing and hunting (98% increase, 81 business establishments in 2013)
  - 51 - Information and cultural industries (42% increase, 254 business establishments in 2013)
  - 71 - Arts, entertainment and recreation (32% increase, 241 business establishments in 2013)
  - 56 - Administrative and support, waste management and remediation services (29% increase, 736 business establishments in 2013)
  - 23 - Construction (21% increase, 1,385 business establishments in 2013)
  - 31-33 - Manufacturing (4% increase, 597 business establishments in 2013)
- Burlington has a number of competitive advantages in development charges relative to comparator jurisdictions, including:
  - site plan fees
  - development charges for office and industrial development, and
  - industrial building permit fees that make the city an attractive place for office and industrial development
  - Overall, these findings highlight Burlington's competitive advantage in attracting industrial and office developments when competing with communities to its east (i.e. Oakville, Mississauga, and Markham)
- Burlington has a competitive advantage in municipal tax rates when competing with Hamilton and the communities that make up the Region of Waterloo across all tax categories
- Based on a variety of quality of life rankings used by *MoneySense* magazine in 2014, Burlington ranks as the fifth best place to live in Canada (above all other comparator jurisdictions examined)
  - In particular, Burlington ranks very well along a variety of criteria related to health, crime, and real estate and wealth relative to comparator jurisdictions
- Burlington's price of land per acre for industrial properties offers a significant competitive advantage relative to Markham and Mississauga (and to a smaller degree Oakville)
  - In addition, the average net rent per square foot for Class A office space in Burlington ranks on the less costly end compared to Oakville, Mississauga, and Hamilton



## Competitive Disadvantages in Burlington

- Burlington is facing some significant competitive disadvantages related to age distribution in the local population relative to comparator jurisdictions, particularly with smaller youth cohorts (i.e. aged 24 years old and below) needed to transition into the prime working age population category over the next ten years
  - This gap in the youth population may result in future labour shortages in Burlington that may dissuade industry from locating in Burlington<sup>2</sup>
  - In addition, Burlington is already in a position where they have a relatively lower proportion of the population in the working age (i.e. 25-64 years old); indicating that labour shortages may already be a factor in the community
- Average and median rents for apartments in Burlington increased by the largest amounts relative to all comparator jurisdictions between 2013 and 2014
  - This presents a competitive disadvantage in Burlington as people may find the increased cost of living less appealing or more difficult to manage than other jurisdictions
  - This in turn could contribute to outmigration of target demographics
- Average earnings by industry and average hourly earnings by occupation are both low relative to comparator jurisdictions presenting a competitive disadvantage for Burlington in attracting more skilled talent to the city
  - It should be noted that the employment mix does suggest that higher levels of lower wage earnings in specific industries (such as retail) drive total earnings down artificially
- Burlington has some competitive disadvantages in development charges relative to comparator jurisdictions, including:
  - site development charges for retail development, and
  - building permit fees for office developments
  - Overall, these findings highlight Burlington's competitive disadvantages in attracting industrial and office developments when competing with communities to its west (i.e. Hamilton, Waterloo, Kitchener, and Cambridge)

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<sup>2</sup> It is important to note that projections from Hemson Consulting for the Government of Ontario on growth forecasts for the Greater Golden Horseshoe (included in the Economic Base Analysis) show that the youth population for Halton Region will actually be increasing to 2041. This increasing youth population may help solve Burlington's issue with a small youth cohort, though it remains to be seen how that increase in youth will be distributed throughout Halton Region.



- Burlington has a competitive disadvantage in municipal tax rates when competing with:
  - Markham across all tax categories
  - Oakville across all tax categories (although these differences are minor), and
  - Mississauga when competing across most tax categories
- Burlington's price of land per acre for industrial properties offers a significant competitive disadvantage relative to:
  - Hamilton
  - Waterloo
  - Kitchener
  - Cambridge
- In addition, the average net rent per square foot for Class A office space in Burlington is more expensive compared to Markham, Waterloo, Kitchener, and Cambridge



## 2.1.2 Hamilton and Oakville

During the consultation process, Hamilton and Oakville both emerged as the top competitors to Burlington (as will be seen below in the proceeding sections). Both communities' present different challenges, however, they are also targeting the same types of talent, companies, industry, and investment.

In order for Burlington to compete effectively, it is important that the City is able to differentiate itself from its neighbouring municipalities, as well as establish its own, unique identity that can be leveraged to attract attention and investment.

Figure 2 highlights a number of specific areas that the Community and Business Survey respondents felt the City was lagging behind in, in comparison to its adjacent competitors.

FIGURE 2: SURVEY PERSPECTIVES ON HAMILTON AND OAKVILLE

### Oakville and Hamilton as Competitors

The category of *proximity* was viewed by respondents as a significant competitiveness issue for Burlington compared to Oakville and Hamilton. The category tops the list of identified competitive advantages in Oakville and is the second highest on Hamilton's list, following costs of rent or property.

Proximity is an issue for Burlington because it is situated between Oakville and Hamilton, sharing boundaries with both. Oakville's proximity to Toronto gives it an advantage over Burlington for reasons such as talent attraction, investment attraction from Toronto, commuter mobility and distance to Pearson airport.

Though Hamilton is farther from Toronto, it is directly adjacent to Burlington's southern boundary and has the added value of lower rent and property costs. Additionally, Hamilton is closer to the United States border, which may make it more appealing for some industries.

Survey results also indicated that both comparator municipalities have a higher quality of life and/or city image. Though value judgements concerning quality of life reflect the personal, subjective tastes of individuals, the findings imply a perception that Burlington lags behind the two other municipalities in areas such as:

- Downtown vibrancy or rejuvenation
- Affluence (Oakville)
- Affordability (Hamilton)
- Livability
- Arts, culture and entertainment
- Natural amenities



## 2.2 Infrastructure and Planning Assessment

Given the more tangible, development-oriented tactics and outcomes envisioned as part of BEDC's future work, this section provides a high-level assessment of Burlington's infrastructure (e.g. water and wastewater servicing, electricity, communications connectivity and capacity, transportation links), employment lands, and planning and economic development policies, with a particular interest in identifying factors that influence development opportunities or approaches. The assessment is not meant to be comprehensive or exhaustive, but focuses on highlighting infrastructure, development, and policy issues that influence the establishment of Burlington's economic vision.

### 2.2.1 General Infrastructure Assessment

Generally speaking, much of the infrastructure needs concerning Burlington's vacant employment land supply were assessed at a high-level in the Employment Lands – Phase Two Report, completed by Dillon Consulting and Watson and Associates in 2014<sup>3</sup> and the High Level Servicing Review, completed by Dillon Consulting in 2014.<sup>4</sup> Those studies looked at the current vacant and underutilized<sup>5</sup> employment land supply with regards to the availability of water and wastewater, power, telecommunications, and gas, offering insight into the current conditions of infrastructure, and any investments that may increase the marketability of currently vacant lands for development.

Both studies confirmed that providers of hydro, natural gas, and telecommunications do not anticipate any problems with providing services to the vacant or underutilized employment land supply, nor was there any specific network-level investments needed to accommodate development on any given site.<sup>6</sup> Only area-specific issues were outlined, including<sup>7</sup>:

- Radial, rather than looped hydro lines to areas west of Waterdown Road, potentially impacting reliability in the area
- Limited connectivity to existing 27.6 kV high voltage lines for nine parcels with intensification potential around the city

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<sup>3</sup> Dillon Consulting, Watson & Associates Economists. (2014). Employment Lands Study – Phase Two.

<sup>4</sup> Dillon Consulting. (2014). High Level Servicing Review of Employment Lands.

<sup>5</sup> Underutilized lands are defined in the ELOP as those with the potential for intensification to minimum market standards, ranging from 50% site coverage (office) to 35% coverage (industrial/commercial), or those sites with the potential for the creation of a new development lot through severance.

<sup>6</sup> Dillon Consulting. (2014). High Level Servicing Review of Employment Lands.

<sup>7</sup> Ibid.



- Limited existing availability of natural gas to the west of Highway 407 (Aldershot), and between Mainway, Upper Middle Road, Burloak Drive, and Appleby Line (solutions are currently being investigated and contemplated for Aldershot)

However, depending on the characteristics of development on each parcel (e.g. power demand, need for higher gas delivery pressure) these assumptions may need to be revisited as development proceeds. The Employment Lands Operational Plan (ELOP)<sup>8</sup> contemplates mostly office-oriented and light industrial uses on the vacant or underutilized employment lands in the city, so it is reasonable to suggest that limited investment would need to be made beyond specific infrastructure intended to deliver the respective hydro, gas, or telecommunications service to the site. For example, the type of knowledge-based and higher density development envisioned in the ELOP seems less likely to require high capacity power or gas infrastructure characteristic of medium/general to heavy industrial uses.

As a result, this section focuses on other key elements of regional and local infrastructure like water/wastewater, stormwater, road, and transit servicing, where specific need for investment and improvement has been outlined on either a network or local/site-specific level.

### **2.2.1.1 Water and Wastewater Servicing**

Halton Region is responsible for water purification and distribution, and wastewater treatment and collection in Burlington, and the other lower-tier communities in the region. Halton's water system represents over \$3.1 billion in infrastructure assets, contained in three lake Ontario-based water plants supplying 25 reservoirs and booster stations, nine groundwater treatment systems supplying six reservoirs and pumping stations and seven bulk water stations, and approximately 2,200 kilometres of watermains and feeder mains and over 33,235 fire hydrants and valves. The region is home to \$3.3 billion in wastewater assets separated among 1,850 kilometres of wastewater mains, 28,200 maintenance holes, eighty wastewater pumping stations, and seven wastewater treatment plants.

Maintenance and replacement of the existing infrastructure remains a key consideration in capital plans. The overall water system in Halton is rated as good by the region, reflecting the relatively young age of infrastructure in some parts of the region (e.g. Milton), and ongoing investments in replacement and maintenance programs. Approximately 36% of water infrastructure is rated as fair or poor, meaning these assets are reaching the end of their life, and require ongoing monitoring to identify and prioritize their replacement/repair. Similarly, the region's wastewater system is rated as good

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<sup>8</sup> BEDC. (2012). Employment Lands Operational Plan.



overall. However, like water infrastructure, approximately 40% of infrastructure is rated as fair or poor, necessitating a focus on monitoring, investment, and renewal.

Overall, the region's 10-year state-of-good-repair capital budget for water and wastewater projects sat at \$673.1 million in 2015 (\$741.1 million, including considerations for infrastructure to be built over the next 10 years).<sup>9</sup> Major water and wastewater capital plans in the state-of-good-repair program over the next 10 years include<sup>10</sup>:

- \$344.4 million for rehabilitation and replacement of the regional distribution system
- \$306.6 million for plant/infrastructure upgrades and replacements, including the Burlington Skyway Wastewater Treatment Plan, the Burlington Water Purification Plant, and a pumping station in the Burlington East area

In comparison though, the 10-year capital plan for development-related water and wastewater infrastructure sat at \$889.6 million in 2015, suggesting the accommodation of new growth remains a priority across the region as well.<sup>11</sup> The \$889.6 million in capital investments to support new development includes<sup>12</sup>:

- \$452.1 million to service region-wide capacity-related infrastructure
- \$309.6 million to service infrastructure in greenfield areas
- \$82.4 million to service infrastructure within the built boundary
- \$45.5 million to service employment lands (e.g. Milton Business Park Phase Two, Oakville Winston Park West, and Halton Hills 401 Corridor)

Generally speaking, the region faces the need to finance the construction of new infrastructure to serve employment and residential growth in greenfield areas, as well as the need to finance the maintenance and rehabilitation of infrastructure in the existing built-up areas to support redevelopment and intensification. Except for the inherent challenges of financing new growth while maintaining present infrastructure conditions, there appears to be few barriers to accommodating new employment growth in greenfield or built-up areas in the region based on existing capital plans. As with all other municipalities in Ontario though, this requires the municipality to maintain a strong fiscal position, of which revenues from tax assessment play a key role.

The High Level Servicing Review of Employment Lands provides an overview of the municipal servicing of the city's vacant and underutilized employment land supply, including an assessment of which employment lands are serviced or

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<sup>9</sup> Halton Region. (2015). Budget and Business Plan 2015, Water and Wastewater Overview.

<sup>10</sup> Ibid.

<sup>11</sup> Halton Region. (2015). Budget and Business Plan 2015, Water and Wastewater Overview.

<sup>12</sup> Ibid.



serviceable, which properties may require upgrades to the regional systems to accommodate employment growth, and the general cost implications of addressing opportunities and challenges. Overall, the majority (71%) of vacant and underutilized parcels in the study (114 of the 160 parcels, or 385 hectares of the total 570 hectares under consideration) are considered to be serviced, having access to water, wastewater, and stormwater services.<sup>13</sup> An additional 14 parcels (20 hectares) are considered to be serviceable with the potential need for off-site infrastructure to connect to municipal systems adjacent to the parcel, and 32 parcels (165 hectares) considered as serviceable if required off-site extensions are built to connect to municipal systems.<sup>14</sup> Generally speaking, the assessment determines that all vacant and underutilized lands are theoretically serviceable (should off-site infrastructure be constructed in some cases), with a strong portion of lands already serviced. This mirrors the conclusions for vacant lands in the Employment Land Strategy – Phase Two report.<sup>15</sup>

Generally speaking, both the employment lands strategy and high level servicing review concluded that development on the city's vacant and underutilized employment lands can be accommodated on an aggregate level (i.e. capacity exists within existing capital plans and facilities to accommodate development, pending confirmation through submission of development applications for specific sites), based on employment forecasts at the regional level used in the employment lands strategy<sup>16</sup> and Best Planning Estimates (BPEs) at the regional level used to create the Regional Water and Wastewater Master Plan (WWMP).<sup>17</sup>

However, the preferred strategy for Burlington still requires a range of infrastructure investments in the regional water system within those capital forecasts, including specific upgrades to watermains, pumping stations, and reservoirs, as well as investments in water purification plants (WPP):<sup>18</sup>

- An upgrade to the Oakville WPP from 109 to 130 million litres per day (MLD) by 2016, and design (2012-2016) and construction (2017-2021) of intake pipe extension
- An upgrade of the Burloak WPP from 55 to 165 MLD by 2016, as well as a class EA (2017-2021) and design and construction (2022-2026) of an expansion from 165 MLD to 220 MLD
- Maximization of Burlington WPP through distribution transfer to the Oakville WPP

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<sup>13</sup> Dillon Consulting. (2014). High Level Servicing Review of Employment Lands.

<sup>14</sup> Ibid.

<sup>15</sup> Dillon Consulting, Watson & Associates Economists. (2014). Employment Lands Study – Phase Two.

<sup>16</sup> Ibid.

<sup>17</sup> Dillon Consulting. (2014). High Level Servicing Review of Employment Lands.

<sup>18</sup> Ibid.



Wastewater servicing capacity for vacant and underutilized employment lands development in the city can generally be accommodated through the improvements to the Skyway Waste Water Treatment Plant (WWTP), which are intended to be complete by the end of 2015.<sup>19</sup> As with the regional water system, the development of vacant and underutilized employment lands will require investments in wastewater mains and pumping stations to meet demand as well.

As noted previously, regional level capital plans seem to highlight few, if any, issues preventing the servicing of unserved lands, given scheduled construction, maintenance, and repair. The recommended upgrades to both WPPs and the Skyway WWTP are either underway or scheduled for completion over the next 10 years (with construction for additional capacity under consideration as well), and all of the identified and recommended investments to water and sewer infrastructure that would improve (to serviced parcels) or service (to serviceable properties) currently vacant and underutilized parcels are scheduled to be completed in the next 10 years within the region's existing capital plans.

When considering the sufficiency of infrastructure to accommodate employment growth on vacant and underutilized lands, it is worth noting the differences in the proposed level of employment growth for the city. The ELOP proposes aggressive employment growth targets for the city, of 1,526 total jobs per year to 2031, or a total increase of 28,995 from 2012 to 2031<sup>20</sup>. This translates to total employment of 123,395 in the city by 2031. In contrast, the employment forecast for Burlington based on Regional BPEs expects employment growth of 679 per year to 2031, or total employment growth of 12,900.<sup>21</sup> Under that scenario, employment in the city is expected to reach 107,300 by 2031, a figure that is considered build-out by regional planners.<sup>22</sup>

The Regional estimates were used as a basis for capital planning for south Halton. Pending the densities and characteristics of employment that ultimately locates on these vacant and underutilized lands then, it may be possible that additional infrastructure investment may be needed. The high level servicing strategy contemplated the need for additional capital investment beyond what is envisioned in the current WWMP. For water, the high level servicing strategy concluded that there was good potential for the existing and planned system to support employment beyond what is contemplated in the WWMP, based on uncommitted capacity in the Burlington WPP and interconnections with adjacent lake water based WPPs in south Halton (e.g. Burloak, Oakville).<sup>23</sup> However, the study also concluded that the Skyway WWTP may represent a barrier to higher employment growth than envisioned in the Regional BPEs, given that there is

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<sup>19</sup> Dillon Consulting. (2014). High Level Servicing Review of Employment Lands

<sup>20</sup> BEDC. (2012). Employment Lands Operational Plan.

<sup>21</sup> Ibid.

<sup>22</sup> Ibid.

<sup>23</sup> Dillon Consulting. (2014). High Level Servicing Review of Employment Lands



limited additional room for expansion on the site.<sup>24</sup> Additional concerns were raised about the type of industry that may be attracted to vacant or underutilized lands, and the potential impacts that heavy wastewater treatment demand might have on the network.<sup>25</sup>

In short, employment growth levels envisioned in Regional BPEs on vacant and underutilized employment lands can be accommodated by the existing and planned water and wastewater infrastructure in the city, with potential need for additional local infrastructure investment to connect parcels to the municipal system or increase local capacity, as noted in the high level servicing strategy. While the more aggressive employment targets of the ELOP can be accommodated within the existing and planned water system, limitations in the wastewater system may represent a barrier to longer term growth above what has been allocated to Burlington in the BPEs. However, given that much of the development envisioned in Burlington's key employment areas in the ELOP is light industrial or office-oriented in nature, little may need to be done beyond projected investments to accommodate things like heavy process water demand, typical of more general industrial uses, perhaps reducing the barriers posed by the limitations in the wastewater system.

### 2.2.1.2 Stormwater Servicing

Stormwater management and storm drainage are the responsibility of the City of Burlington, with Conservation Halton having regulatory authority over watercourses. Overall, the City of Burlington holds \$131 million in net tangible capital assets across both urban and rural stormwater management facilities, primarily associated with linear assets like stormwater sewers.<sup>26</sup>

The Employment Land Strategy – Phase Two undertook a network-wide and site-by-site analysis of stormwater servicing needs across Burlington's vacant employment lands inventory, with a general conclusion that stormwater servicing does not pose a major risk to the development of employment lands. From a network-wide perspective, several capital projects were highlighted as required to facilitate employment land development in the Highway 403 West Corridor Employment Area:

- Falcon Creek erosion control, including North Shore Boulevard to Hamilton Harbour (2016-2017) and Highway 403 to CN Rail line (2018-2020)
- Falcon Creek Stormwater Management Master Plan

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<sup>24</sup> Ibid.

<sup>25</sup> Ibid.

<sup>26</sup> Ministry of Municipal Affairs and Housing. (2013). Municipal Financial Information Return (FIR), City of Burlington.



On a site-by-site basis, the analysis concluded that the majority of vacant employment lands (90% of sites) were considered to be serviced, having existing stormwater services immediately adjacent to the site.<sup>27</sup> The remaining seven sites were deemed to require additional off-site extensions to the municipal stormwater servicing system, with required stormwater lines ranging from 35 metres (Burlington Innovation District) to 205 metres (501 North Service Road) to allow for servicing.<sup>28</sup>

As with water and wastewater servicing, the existing capital plans (in this case at the City level) appear positioned to accommodate development of employment lands, with the extension of off-site infrastructure required likely to be financed through growth-related revenues, and constructed with the construction/rehabilitation/improvement of transportation facilities in the area. When considering underutilized lands as well, the High Level Servicing Review did not highlight any anticipated challenges with existing and planned stormwater infrastructure.<sup>29</sup> Overall, there do not appear to be any major barriers to the development of the existing employment land inventory related to existing or required stormwater servicing facilities.

### **2.2.1.3 Transportation**

Burlington has access to a range of multi-modal passenger and goods movement infrastructure, which greatly improves its investment prospects. The following section discusses the existing characteristics of the transportation network in Burlington, as well as any anticipated issues or challenges preventing employment land development in Burlington. Given the absence of major cargo rail (e.g. intermodal yards) and air infrastructure and assets within the city, the assessment focused on the issues and opportunities associated with the transportation infrastructure most likely to influence economic development in the city – roads and highways, and transit.

### **Roads and Highways**

One of Burlington's strongest location factors is its positioning along provincial highway corridors. Burlington provides access to both the QEW/403 corridor, as well as the Highway 407 express toll route. Beyond the provincial transportation

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<sup>27</sup> Dillon Consulting, Watson & Associates Economists. (2014). Employment Lands Study – Phase Two.

<sup>28</sup> Ibid.

<sup>29</sup> Dillon Consulting. (2014). High Level Servicing Review of Employment Lands



routes, the city has access to major regional routes with inter-regional connections, including Regional Road 1 (Guelph Line), Regional Road 5 (Dundas Street), and Regional Road 7 (Derry Road).

Few major capital projects are planned along the QEW/403 corridor in the short-term, with the exception of bridge rehabilitations at Appleby Line, Burloak Drive, and Plains Road/Highway 403 off-ramp, which generally will not affect longer term employment land prospects. Perhaps the most notable recent expansion was the widening of the QEW through Burlington to accommodate High Occupancy Vehicle (HOV) lanes, which was completed in 2010. The Halton Region Transportation Master Plan (TMP) noted several provincial transportation infrastructure investments expected to be in place by 2031, with impacts on Halton Region. Only one project is expected to have direct impacts on Burlington:

- Implementation of new east-north and north-east ramps at the Highway 403 and QEW interchange, currently under study by MTO

As noted in the High Level Servicing Review though, MTO has jurisdiction on regional roads within 800 metres of highway interchanges, which has the potential to limit access to these roadways from vacant and underutilized parcels.<sup>30</sup> So while there are few infrastructure improvements planned for provincial highway corridors in the city, MTO may still have a bearing on the design and completion of transportation improvements in the Highway 403 West, Highway 407, and Prosperity corridors.

The Regional Capital Plan (2015) lists several projects in Burlington with a potential impact on transportation capacity in the city:

- Widening of Dundas Street to six lanes from Appleby Line to Tremaine Road, 2015-2017
- Widening of Dundas Street to six lanes from Guelph Line to North Hampton, 2016-2019
- Widening of Dundas Street to six lanes from Guelph Line to Halton/Hamilton boundary, 2016-2017
- Intersection improvements at Brant Street and Plains Road, 2016
- Intersection improvements at Guelph Line and Harvester Road, 2015-2016
- Grade Separation (CNR Crossing) at Dundas Street between Appleby Line and Tremaine Road, 2016
- Widening of Guelph Line to six lanes from Mainway to Upper Middle Road, 2017-2021
- Widening of Guelph Line to six lanes from Upper Middle Road to Dundas Street, 2022+
- Widening of Brant Street to six lanes from North Service Road to Dundas Street, 2017-2022
- Widening of Appleby Line to six lanes from Fairview Street to Taywood Drive, 2018-2024
- Widening of Upper Middle Road to six lanes from Appleby Line to Burloak Dive, 2021-2024

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<sup>30</sup> Dillon Consulting. (2014). High Level Servicing Review of Employment Lands



Though not exclusively focused on improving transportation flow or assets in the city's key employment districts, these regional level improvements may facilitate greater traffic flow across the city, which will likely assist with tackling key emerging issues like increasing traffic congestion across the city.<sup>31</sup> The City of Burlington's 2015-2024 Capital Forecast outlines a number of planned transportation investments across the city's key employment areas, as outlined below:

- Highway 407 Corridor, Harrison Court northerly extension, linking the commercial and industrial areas in the northeast quadrant of Appleby Line and Dundas Street, 2015-2017
- Prosperity Corridor, intersection improvements and widening at Appleby Line and Harvester Road, 2016-2024
- Prosperity Corridor, intersection improvements and widening at Harvester Road and Guelph Line, 2016-2018
- Prosperity Corridor, widening of Harvester Road from Guelph Line to Walkers Line, 2016-2024
- Highway 403 West Corridor, extension of South Service Road from Aldershot Station to King Road, 2016-2024
- Prosperity Corridor, intersection improvements and widening at Harvester Road and Walker's Line, 2017
- Prosperity Corridor, grade separation (CNR) at Burloak Drive, 2019-2024
- Prosperity Corridor, reconstruction and widening of Harvester Road, 2019-2024

The majority of these improvements are focused on improving capacity and traffic flow, particularly along local roads that have seen increasing demand over the last several years, particularly in AM and PM peak periods (e.g. Harvester Road) and in site-specific areas experiencing continuing challenges (e.g. CNR crossing at Burloak). Most of these planned improvements to 2024 likely have some positive impact on development prospects in the city, particularly in the city's prosperity corridor.

The ELOP, completed in 2012, outlined several key employment area-specific transportation improvements to be undertaken by the City, Region, and development community, to increase the development capacity in the area:

- Improved access to North Service Road from the QEW at Walker's Line, particularly to support further development of vacant lands to the north of the QEW
- Expansion of North Service Road to three lanes, noted as a current project in the City's Capital Plan
- Construction of new road network extending Sutton Drive from Upper Middle Road to Mainway, and a road connecting Sutton Drive and Burloak Road, to support the development of a business park in Bronte Meadows
- Widening of Burloak Road, to ensure greater capacity in support of the development of Bronte Meadows
- Widening of the Waterdown Road bridge over Highway 403
- Creation of a new South Service Road from Waterdown Road to King Road

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<sup>31</sup> City of Burlington. (2014). Transportation Master Plan: Current State of Transportation in Burlington, Discussion Paper 1



- Reconstruction of King Road

Some of these requirements are either complete, or in the regional or city level capital forecasts for completion over the next 10 years. For example, the widening of the Waterdown Road bridge is in its final stages, while projects like improved access to North Service Road from Walkers Line and the construction of a South Service Road from Waterdown Road to King Road are currently being addressed (at least in part) in Regional and City-level capital forecasts respectively.

However, several recommended improvements remain outside of currently projected capital needs. This is likely a result of the need for their development falling outside of the capital forecast term, or the fact that the improvements are currently under study. For example, the recommended internal road network in the Bronte Meadows area remains outside of current capital plans at the City level, given the anticipated longer term timeline for development in the area. Similarly, the widening of Burloak Road remains outside of regional plans, given limited current need for increased local capacity. As a result, continued advocacy for these projects that are needed to make these lands shovel ready and more marketable is needed, particularly if development timelines accelerate.

The High Level Servicing Review also made comments about challenges facing the development of vacant and underutilized employment land, even with these projected capital improvements. Despite intersection improvements and widening at Guelph Line and Harvester Road, and Appleby Line and Harvester Road, there is little potential for additional capacity in the future.<sup>32</sup> For employment land development in the vicinity of those intersections – or relying on them for access – there will likely be continued constraints related to congestion, particularly at peak periods. In short, though there are capital plans and forecasts addressing transportation challenges, the continued growth of Burlington – particularly in line with ELOP targets - may be constrained by transportation issues.

## Transit

Burlington is served by both regional and local transit services. Regional transit is provided by Metrolinx through GO Transit. GO Transit provides all day, two-way train service to the city's three train stations on the Lakeshore West line, as well as bus connections to regional centres west, north, and east of the city. This provides the city and its residents with a viable alternative connection to downtown Toronto, as well as a rail-based connection to Pearson International Airport as UP Express Service launches from Union Station.

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<sup>32</sup> Dillon Consulting. (2014). High Level Servicing Review of Employment Lands



GO Transit and Metrolinx are making continued investments in service in Halton Region through *The Big Move*, including expansions to stations and parking facilities in Burlington, as well as the longer term electrification of the Lakeshore West corridor to increase frequency. Burlington's GO Stations are generally in close proximity to employment lands, with the Aldershot Station (also connected to VIA rail) within the 403 West Corridor, the Burlington and Appleby Stations within the Prosperity corridor, and the Highway 407 carpool lot within the 407 Corridor. Local transit in the city is provided by Burlington Transit, which provides a varying range of service to the city based on day of the week and time of day (i.e. peak and off-peak hours). The transit system is well integrated with regional transit hubs, particularly for peak hour service along the lakeshore west line to and from Toronto, as well as offering limited connections to adjacent transit systems in Hamilton and Oakville.

Though stations and transfer points are well situated (in some cases within employment areas), and routes are dispersed across the city (and integrated with adjacent systems), many of the key employment areas remain underserved from a transit perspective, suggesting potential difficulties with getting employees to work, particularly for businesses that operate outside of traditional weekday hours, those that require access to employees that may or may not have other transportation, and those that draw on a more regional labour pool. In short, the connections with regional transit through Burlington Transit do not necessarily serve businesses in Burlington's employment areas, as much of the peak and off-peak movement is oriented to commuters that work outside of Burlington, rather than in the city. For example, existing connections would do little to provide employees in the planned Burlington Innovation District from outside of the city with an alternative to automobile transportation.

The Employment Land Strategy – Phase Two report noted that the Highway 403 West Corridor, the Highway 407 Corridor, and Bronte Meadows areas were not well-served by existing transit services.<sup>33</sup> Though the Prosperity Corridor was noted as well-served – due to access to Burlington and Appleby GO Stations, as well as a range of major Burlington Transit routes – it should be noted that the area remains largely unfriendly to transit and other forms of alternative transportation, with a lack of pedestrian and cycling infrastructure through much of the employment area (e.g. sidewalks, multi-use trails, cycling lanes).

Overall, almost half (44%) of vacant parcels in the city are not within 400 metres of a local transit route, and 91% of vacant parcels are more than 800 metres away from a GO Station or Mobility Hub.<sup>34</sup> Though varying in importance for different businesses, the availability of transit in employment areas can have a key influence on location decisions, mandating a continued effort on the part of the city to ensure employment land planning is well integrated with regional and local transit planning.

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<sup>33</sup> Dillon Consulting, Watson & Associates Economists. (2014). Employment Lands Study – Phase Two.

<sup>34</sup> Dillon Consulting, Watson & Associates Economists. (2014). Employment Lands Study – Phase Two.



## 2.2.2 Employment Lands and Policy Directions

The availability of land is an essential component of investment readiness with regards to the attraction of businesses to an area, as well as the level of support that can be provided to existing businesses to facilitate growth. This section of the assessment outlines the characteristics of Burlington's vacant employment land supply, and the policy directions that may impact development opportunities or approaches.

### 2.2.2.1 Employment Land Assessment

The Burlington Employment Lands Study – Phase Two inventoried a total of 308.1 net hectares (761.3 net acres) of vacant employment land in the city.<sup>35</sup> Accounting for internal infrastructure in some of the larger parcels (e.g. Bronte Meadows) and a long-term vacancy factor, the inventory was noted as slightly smaller, at 248.3 net hectares (613.6 net acres).<sup>36</sup>

This excludes opportunities for redevelopment or intensification of existing lands, which the ELOP noted as opportunities for the downtown core and older industrial areas. The ELOP estimates that there is a total supply of 445 gross hectares of vacant land in the municipality, with an additional 364 gross hectares of underutilized land available for redevelopment or intensification through higher density redevelopment or severance of lands for redevelopment.<sup>37</sup> The vacant and underutilized land inventory in the city displays the following characteristics, summarized by theme below.

- **Parcel Size:** The majority of vacant and underutilized parcels in the ELOP inventory are smaller in size, with parcels smaller than two gross hectares making up 44% of the total inventory. By size, these smaller parcels make up just 8% of the inventory though, with parcels over 10 hectares making up the majority of the inventory (53%). Of the 445 gross hectares of vacant land, approximately 64% are in parcels of 10 gross hectares in size of greater, suggesting notable remaining opportunities for both large and smaller scale (through subdivision) development in the remaining inventory. Of the vacant land inventory included in the Employment Lands Study – Phase Two, all parcels were considered to have potential as development sites based on their size and configuration.<sup>38</sup>

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<sup>35</sup> Ibid.

<sup>36</sup> Ibid.

<sup>37</sup> BEDC. (2015). Employment Land Operational Plan.

<sup>38</sup> Dillon Consulting, Watson & Associates Economists. (2014). Employment Lands Study – Phase Two.



- **Land Use Permissions:** The majority of vacant and underutilized parcels in the ELOP (48%) are zoned for General Employment (GE)<sup>39</sup> uses, with an additional 15% zoned for Business Corridor (BC)<sup>40</sup> uses, intended to be more prestige in nature. The remaining parcels are spread among the Employment Commercial (CE), Regional Commercial (CR), Development (D), North Aldershot Mineral Resource (MRNA), Mixed Use Corridor Employment Oriented (MXE), and Open Space (O2) zones. Though some employment land-type uses may be permitted on these lands not presently zoned for employment uses, these lands may also require an amendment to their existing regulations to facilitate development as envisioned in the ELOP.
- **Environmental Constraints:** The Employment Lands Strategy – Phase Two study noted that the majority of environmental risk sites in the city are associated with active businesses, with only one vacant property considered to have potential for environmental contamination (low potential).<sup>41</sup> However, a community improvement plan study suggested that there were 13 key sites along the QEW, Highway 403, Highway 407, and CN Rail corridors that fit the Ministry of Municipal Affairs and Housing (MMAH) definition of a brownfield (i.e. vacant or underutilized sites with potential for redevelopment, and potential contamination).<sup>42</sup> Though there are a limited number of vacant and underutilized employment lands with the potential for environmental contamination, it is worth noting that as the city ages, some of the remaining 281 properties identified in the 2010 study as not currently vacant or underutilized (as well as others identified since) may become vacant or available for redevelopment, potentially greatly increasing the environmental barriers to development on higher priority sites.
- **Municipal Servicing:** As noted previously, all vacant and underutilized sites in the city are considered serviced or serviceable (at least, in theory) with off-site extensions. In total, the ELOP identified 111 total serviced sites (69% of total number of parcels), representing 522 gross hectares (or 65% of the total vacant and underutilized land area in the city). Though site-specific improvements and investments may be needed to service the remaining vacant and underutilized properties, the development of the ELOP vacant and underutilized land inventory to full municipal standards (e.g. municipal water, wastewater, stormwater services) appears technically possible, depending on demands from individuals users and network constraints (e.g. wastewater treatment).

The Employment Land Study - Phase Two assessed the current vacant employment land inventory to accommodate anticipated levels of growth. Forecast demand for the Burlington to 2031 was estimated at 149 hectares, suggesting that there is a sufficient supply of land to accommodate growth in the city, with the city's existing supply to be exhausted

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<sup>39</sup> Includes all lands zoned for General Employment uses, including site-specific regulations and lands with a hold.

<sup>40</sup> Includes all lands zoned for Business Corridor uses, including site-specific regulations and lands with a hold.

<sup>41</sup> Based on the Classification of Properties and Risk of Migrating Contaminants Study conducted for the City of Burlington in January 2007 by MMM.

<sup>42</sup> MMM Group, Metropolitan Knowledge International. (2010). City of Burlington Recommended Brownfield Remediation Assistance Program Community Improvement Plan.



sometime between 2031 and 2044.<sup>43</sup> As a result, the study recommends maintaining all employment lands for employment purposes, while continuing to ensure that infrastructure and planning decisions facilitate development in strategic locations with limited amounts of serviced or investment-ready land (e.g. Bronte Meadows, 403 West Corridor).

However, this assessment is based on the more conservative employment forecasts noted previously, which are notably slower than employment growth objectives outlined by BEDC and the city through the ELOP. That said, the ELOP also advocates for higher density employment forms than previously present in Burlington, with density moving from 41 jobs per hectare to 59 jobs per hectare.<sup>44</sup> This would be accommodated primarily through intensification and redevelopment opportunities along the Prosperity Corridor.

As this has the potential to reduce the absorption of land (and thus improve the sustainability of the employment land supply), this places more emphasis on effective planning of new greenfield employment lands – particularly the city’s large supply or large employment land parcels – but also an increased emphasis on ensuring that new developments are more densely concentrated (e.g. through transit supportive development or mixed-use development), and older employment areas are redeveloped to accommodate new growth.

### **2.2.2.2 Policy Directions for Economic Development**

As part of a two-tiered municipal structure, economic development and planning decisions are subject to planning policies at both the local and regional level. Further, the major provincial infrastructure in the city (e.g. Highway 403/QEW) and natural heritage features (e.g. Niagara Escarpment, Ontario Greenbelt, Lake Ontario) makes land use policy subject to provincial policies, as well as regulatory policies from Conservation Halton.

The interests of the province are largely reflected in both local and regional planning policies through direction from provincial policies (e.g. Provincial Policy Statement, Places to Grow), with Conservation Halton playing a regulatory role with regards to natural hazards (e.g. watercourses, wetlands, shorelines of inland lakes, and the Great Lakes-St. Lawrence river system). As such, Conservation Halton reviews all planning policy and amendment applications at the city level where natural hazards might be affected, potentially impacting the prospects for development in vacant employment lands – including the net developable area available to accommodate employment uses when accounting for regulatory setbacks from hazard areas. Lands within the Highway 403 West Corridor are likely most impacted by Conservation

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<sup>43</sup> Dillon Consulting, Watson & Associates Economists. (2014). Employment Lands Study – Phase Two.

<sup>44</sup> Ibid.



Halton policies, though development on a number of other vacant or underutilized employment lands would also be subject to Conservation Halton review based on the presence of small watercourses and other natural heritage features.

Regional land use policies are outlined in the Halton Region Official Plan (ROP). Part II of the ROP includes the objectives and policies of the Urban Area in the region, of which the majority of Burlington falls within. Section 77.4 establishes regional policies with regards to Employment Areas in Halton, with the overall intent of maintaining employment areas for employment uses, strategically investing in infrastructure to support development of employment areas, and promoting intensification and increased density of development in new and existing employment areas.

Part IV of the ROP contains regional policies for economic development, with an overall goal of achieving “sustainable economic prosperity for Halton on the basis of its competitive location, innovative businesses, skilled labour force, high quality infrastructure, sustainable natural resources, positive business environment, and diversified economic base.” This includes objectives to support innovative capacity and knowledge of businesses and labour force; support entrepreneurship, business start-up, and business retention and growth; diversify the economic base; protect an adequate land base to maintain competitiveness; and provide the necessary infrastructure to ensure timely development of employment areas.

The ROP includes the following policies which can assist with outlining strategic economic directions for the City of Burlington:

- 170(1) Support the continuous education and training of Halton's labour force.
- 170(4) Encourage local municipalities to phase the development of employment lands concurrent with nearby residential lands.
  - 170(4.1) Consider strategic investment in infrastructure to enhance the timely development of employment lands.
  - 170(4.2) Protect employment lands for economic development during the current planning period to 2031, in accordance with sections 77.1, and 77.2, of this Plan.
- 170(5) Prepare and update regularly, in conjunction with the local municipalities and in consultation with the business and education sectors and the general public, an Economic Development Strategic Plan that will include:
  - a) An assessment of the current economic health of the Region based on information from the State of Sustainability Report and the monitoring reports under Section 170(2.1),
  - b) An assessment, based on available sources and information, of global, national and regional economic trends and structural changes in the economy,



- c) Identification of the growth sectors, new economic opportunities for Halton, and necessary adjustments in human resources, infrastructure, land supply and government policies to take advantage of such opportunities,
- d) Identification of possible impact of the changing economy on existing businesses and industries in Halton and necessary remedial action,
- e) Direction for the Joint Infrastructure Staging Plan, and
- f) An agenda for action by the various stakeholders, including the business, government and education sectors.

- 170(6) Encourage the establishment of regular liaison and discussion among the heads of regional and municipal councils in Halton and representatives of the business community.
- 170(7) Participate with municipalities in the Greater Toronto Area in the development of strategies, plans, and programs to promote the Greater Toronto Area as a large, diverse, competitive, and dynamic economy and to attract foreign direct investments.
- 170(10) Encourage and direct office, commercial, cultural, and institutional uses and compatible industrial uses to locate within intensification areas.
- 170(12) Encourage local municipalities to:
  - a) Ensure, through studies, land designation and revisions to their Zoning By-laws, that retail needs of residents are satisfied within the municipality or *Halton*;
  - b) Make provisions for the redevelopment and rehabilitation of older industrial areas; and
  - c) Implement plans and programs for the preservation, improvement, redevelopment and/or revitalization, as the case may be, of downtown core area(s).
- 170(14) Monitor the opportunities and constraints on future expansion of existing businesses within Halton, and within the policies of this plan, promote the growth of those businesses in Halton.
- 170(15) Recognize the importance of entrepreneurship and the contribution by small businesses to the local economy and support plan and programs to maintain and strengthen their role.

The ROP also includes sector-specific policies directing the development and promotion of Halton as a tourism destination, based on its natural and cultural heritage resources; the maintenance of a region-wide 10-year supply of vacant employment lands; and the production, collection, and dissemination of data to be used for economic development planning purposes (e.g. employment forecasts).



In part, this policy direction is implemented across the region through the Halton Region Economic Development Vision and Strategic Directions, 2012-2021. The strategy includes over-arching direction for the region in five key areas:

- Employment lands, including servicing of lands and assistance with advocacy for servicing of lands, support for site selection inquiries, and delivery of an annual employment survey
- Existing and emerging sectors, including supporting the sector-based efforts of local municipalities for higher-density employment uses, and supporting Halton's agricultural community
- Investment attraction and retention, including development of an investment attraction strategy and programming, representation of the region in broader regional activities (e.g. GTMA), collection and dissemination of economic research and investment information, and maintenance and improvement of the region's competitiveness in terms of business costs (e.g. development charges, tax rates)
- Entrepreneurship and innovation, including marketing the services of small business and innovation services in the region, extending service areas of current small business assistance structures, supporting entrepreneurship among youth and new Canadians, and establishing business incubation infrastructure
- Quality of place, including promotion of Halton's quality of life through web and social media channels, supporting physician recruitment, and collaborating with partners on regional tourism development

The City of Burlington's Official Plan further outlines policies that further influence the economic vision for the city. Several of the Guiding Principles of the plan, outlined in Part I, Section 3.0, speak directly to the city's vision from an economic context:

- a) Provide a community plan and growth strategy aimed at creating an attractive, livable community that offers a wide range of housing, employment, transportation, and leisure opportunities for all its citizens
- e) Create a community development pattern that supports the existing business community and promotes new business development opportunities, by protecting critical areas of economic enterprise and promoting a variety of locations for economic activity
- f) Support a vigorous local economy
- h) Promote the efficient use of land through intensification within appropriate areas of the City, in accordance with Provincial growth management objectives, while recognizing the need for balancing this objective with other planning considerations

Section 4.3 builds on these guiding principles and the present state of the city, to establish a vision for the future built form and natural environment in Burlington. Among other directions envisioning characteristics like greater neighbourhood stability, intensification, compact community form, preservation of natural heritage, and promotion of transit-oriented



development, the Plan responds to the changes in the nature of employment that are expected across the city over the term of the plan. Namely, the City anticipates the need to create policies and land use designations that allow for the integration of information based technology, research, and services activity with traditional manufacturing and warehouse uses. Fiscal sustainability of the City and a stronger live-work relationship are key elements of the vision as well.

Part III of the Official Plan outlines the land use policies for the city’s urban area, with Section 3.0 establishing the policies regarding employment lands in the city. Employment land planning in the city is based on the principles of strengthening the local economic base; increasing jobs and assessment base; balancing physical, social, economic, and environmental demands; ensuring land use compatibility; allowing a full range of industrial and office uses; servicing by public transit; and ensuring a sufficient supply of employment lands. These principles guide the general objectives of balancing industrial/manufacturing development with professional office employment growth; limiting the development of non-employment uses; providing a balance market choice in available lands; and promoting convenient access to infrastructure (e.g. high voltage power lines, rail sidings, truck routes).

The General Employment and Business Corridor designations play a key role in accommodating economic development growth in the city, particularly industrial and commercial office uses, with limited potential for competition from non-employment land uses (e.g. large-format retail, residential). Generally speaking, the policies in these land use designations strike a balance between encouraging a full range of employment land uses, while ensuring development proceeds according to the City’s objectives through policies guiding floor area ratios, building heights, ancillary uses, and site plan considerations. The permitted uses in each land use designation are detailed below.

FIGURE 3: PERMITTED USES AND INTENT OF EMPLOYMENT LAND DESIGNATIONS, CITY OF BURLINGTON OFFICIAL PLAN

Designation	Permitted Uses	Notes
General Employment	Industrial uses that involve assembling, fabricating, manufacturing, processing, warehousing and distribution uses, repair activities, communications, utilities, transportation storage, service trades and construction uses; office uses; research and information processing; recreational uses; large scale motor vehicle dealerships; adult entertainment uses  Limited range of retail uses such as convenience stores, and a limited range of service commercial uses such as restaurants and banks subject to policies restricting size/scale	Uses that have only a limited impact on surrounding areas will be permitted in locations adjacent to residential uses
Business Corridor	A broad range of office uses; industrial uses that involve assembling, fabricating, manufacturing, processing, warehousing and distribution uses, research and information processing, communications, utilities and transportation uses, and service trades, provided these uses are located within an enclosed building and are unlikely to	Provides for more prestige-type offices and industrial uses that require good access and



Designation	Permitted Uses	Notes
	<p>cause significant pollution or excessive noise; hotel, conference and convention uses</p> <p>Limited range of retail uses such as convenience stores, and a limited range of service commercial and recreation uses such as restaurants, banks, and fitness centres subject to policies restricting size/scale</p>	<p>high visibility</p> <p>Establishes high design and development standards</p>

As noted previously, the existing designations in the City’s official plan are well positioned to accommodate a full range of general industrial to prestige (i.e. enclosed) employment uses, with limited potential for competition from non-employment land uses (e.g. commercial retail) or conversion for other non-employment uses.

Overall, the existing land use and economic development policies across the region and city provide a broad framework from which Burlington can establish an economic vision. Existing policies are supportive of growth in the municipality, particularly with regards to the promotion of intensification of new and existing employment areas in the urban area. Further, policies allow for the accommodation of a range of investment while ensuring the integrity of the city’s limited supply of employment lands.

However, some challenges may remain with regard to accommodating demand in line with the more aggressive forecasts, as well as ensuring development moves in a timely fashion. For example, the present land use policies that limit floor area ratio of office uses in General Employment and Business Corridor areas may not necessarily align with the higher density and mixed use vision for employment lands in specific corridors – namely the Prosperity Corridor – outlined in the ELOP. Similarly, zoning regulations around site coverages in the employment areas may also limit potential for the types of development envisioned in the ELOP. Further, the two-tiered structure of land use planning in Halton introduces the possibility of a misalignment between the vision and intent of each jurisdiction for specific properties in the urban area, which has the potential to affect approval timelines for both specific applications, as well as policy documents (e.g. Official Plan, secondary plans). On a more local level, the timelines associated with development of policies for major areas of infrastructure (e.g. mobility hubs) and the broader land use policies for the city (i.e. Official Plan), is perceived as placing the city in a competitive disadvantage.

In general, the current policy directions at the regional and local level do not appear to pose significant challenges to employment growth in the municipality, and appear supportive of the development of an economic vision for the city. However, to accommodate employment growth more in line with the aggressive targets of the ELOP, there may need to be alternative approaches to land use planning that allow for more flexibility in development and built for in vacant and underutilized sites. More important than the policy environment though, development of employment lands appears to require a closer relationship between economic development and land use interests at both the regional and local levels,



in order to investigate the potential for innovative approaches to land use planning that accomplish the objectives of both jurisdictions.

## 2.3 Business and Community Survey

A targeted survey was designed in consultation with the Burlington Economic Development Corporation, with the purpose of soliciting key feedback from stakeholders and the community regarding the establishment of an Economic Vision for the City of Burlington.

It was distributed by the Burlington Economic Development Corporation (BEDC) through an established contact list via email. In addition, the survey was also made available on the BEDC's website. In total, 255 individuals participated in the survey, through links to Survey Monkey.

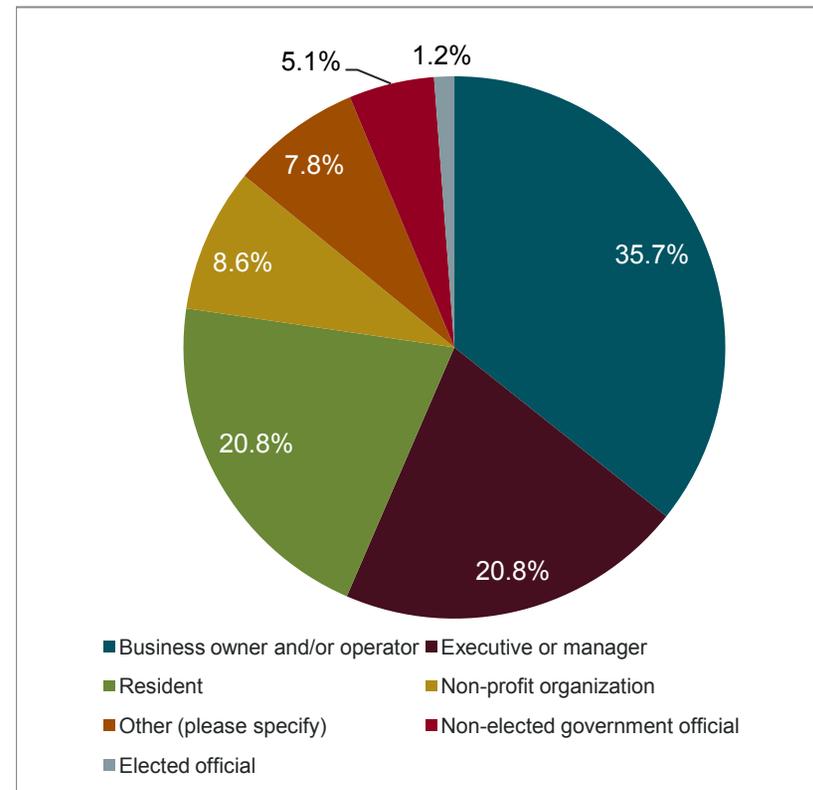
Figure 4 demonstrates that, of 255 respondents, 35.7% self-identified as business owners or operators. Those who self-identified as Residents and Executives or Managers each represented 20.8% of respondents equally.

Further, 8.6% identified as non-profits, 7.8% identified as 'other,' 5.1% as non-elected government officials, and 1.2% (or three people) identified as elected officials. Therefore, 56.5% of respondents to this survey represent perspectives from the business community.

Taking the elected officials, non-elected government officials, and 'other' respondents together, only 37% (or 13 people) were residents of the community. For those that owned or operated businesses, were executives or managers, or worked in non-profits, 48% were local residents, while the remaining 52% (or 86 people) were non-residents.

Furthermore, of those in the latter list of business owners, executives or managers, or non-profits, 77% (or 127 people) operated their business or organization in Burlington.

FIGURE 4: SELF IDENTIFICATION OF RESPONDENTS



Source: Millier Dickinson Blais Inc. 2015.



### 2.3.1 Summary of Online Survey Analysis

A total of 59 interviews were conducted by the BEDC, which included 28 business stakeholders, 2 Regional contacts, 12 partner associations, and 17 key staff and leadership positions at the City and BEDC itself. The majority of respondents (88% of 202 responses) either strongly agree or agree that Burlington is a good place to own, operate, or conduct business. This indicates a high level of confidence in the overall potential of the local economy.

In a survey question designed to identify key words that represent the ability of Burlington to attract investment, the following key words were most commonly referenced by respondents:

- Safe
- Accessible
- Location
- Vibrant
- Growth
- Innovation
- Beauty
- Clean
- Business-friendly
- Livability
- Progressive
- Proximity
- Diverse
- Dynamic
- Educated

The implication of the key words identified by respondents denotes strong value toward quality of life and quality of place attributes. A second implication is that respondents view the community as energetic, as manifested through words such as innovation, progressive and dynamic. The words also reveal traits of the business environment, such as business-friendly, accessible and educated.

Based on a score individuals allocated to various local attributes, the top rated local assets identified by respondents are:

- Access to a skilled and employable workforce (score 4.52 / 5)
- Quality of life (i.e. amenities for families, safety, and arts and culture community etc.) (4.48 / 5)
- Availability of and high speed telecommunications (4.45 / 5)



Investors searching for ideal business locations are most interested in identifying a skilled labour force and a high quality of life for employees<sup>45</sup>. Therefore, the level of confidence offered by respondents in awarding these two characteristic top scores illustrates Burlington may be competitively positioned to meet these investment demands.

The availability of quality telecommunications infrastructure also positions the city strategically for innovative, high-technology, or other infrastructure-intensive investment attraction.

## Articulating a Vision for Burlington

Survey respondents were asked to articulate a vision for economic development in Burlington. The following represent the top five themes under which respondent's visions fit:

- **Having real estate development opportunities and complimentary planning to allow for development (49 responses)**
  - Availability of developable land
  - Higher density developments
  - Infill or repurposing
  - Development friendly zoning that supports mixed-use and high density development
- **Having a vibrant or growing economy (41 respondents)**
- **Having or maintaining a great quality of life (27 responses)**
  - Increased affluence
  - Being a great place to live
  - Having a healthy work-life balance
- **Having greater investment attraction of industry (22 responses)**
  - Seeking anchor industries to cluster around
  - Attracting more corporate head-quarters or head offices
- **Having excellent transit and/or transportation infrastructure (15 responses)**
  - Improved and more accessible transit

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<sup>45</sup> Richard Florida, "What Cities Really Need to Attract Entrepreneurs, According to Entrepreneurs," Citylab, Feb 11, 2014. <http://www.citylab.com/work/2014/02/what-cities-really-need-attract-entrepreneurs-according-entrepreneurs/8349/>



- Increased GO Train services and connections
- Reduced traffic congestion and improved transportation infrastructure

Three of the bullets above represent a broader notion associated with growth; however, they are complimented by a clear desire to maintain a positive quality of life.

## Opportunities

Overall, the areas that were identified by survey respondents as containing the greatest potential opportunities were related to technology and related industry growth, enhancing a highly educated and skilled workforce and talent pool. Additional areas of opportunity and potential are highlighted below.

Opportunities identified by respondents for enhancing the economy or improving employment include:

- Sector specific growth in the following identified areas:
  - High tech, IT and related clusters and spin-off industries (23 responses)
  - Health/life sciences (15 responses)
  - Tourism (12 responses)
  - Higher education (10 responses)
  - Professional services (9 responses)
  - Traditional manufacturing (6 responses)
  - Commercial and financial businesses (6 responses)
  - Transport and logistics sector (6 responses)
  - Retail (3 responses)
  - Advanced manufacturing (3 responses)
- Supporting and/or enhancing the educated workforce, skilled labour development or skill training (23 responses)
- Advancing redevelopment and intensification opportunities, strategic planning and rezoning (13 responses)
- Leveraging Burlington's location between Hamilton and Toronto (12 responses)
- Ensuring stronger municipal support structures for business development:
  - Stronger municipal government, competitive taxes / development charges and less red-tape (6 responses)



- Making taxes and development charges more competitive (6 responses)
- Enhancing business retention and expansion activities help small and medium sized businesses and encouraging start-ups (3 responses)
- Addressing infrastructure problems:
  - Transit and transportation infrastructure enhancements to alleviate congestion (10 responses)
  - City infrastructure improvements to meet growth demands (including broadband) (4 responses)

## Challenges

Overwhelmingly, gridlock, traffic congestion, and poor transit offerings were seen as the key challenge to Burlington's future growth. In fact, this was the predominant concerns among respondents related to infrastructure concerns.

Quality of life also ranked prominently among challenges facing Burlington, with specific emphasis on housing affordability and increased cost of living concerns.

Issues associated with land space and availability were identified through responses as the third most prominent challenge faced by the community. A lack of development and employment lands was the most frequently identified issues related to this challenge. Additional challenges are identified in the findings below.

Identified challenges fit within three broad themes:

- Infrastructure:
  - **Poor transit, gridlock and congestion (62 responses)**
  - Poor progress on municipal infrastructure (slow, behind schedule and lacking funding) (7 responses)
  - Parking issues (3 responses)
  - Need for Intensification planning (2 responses)
  - Road and highway quality (2 responses)
- Quality of life:
  - **Increased cost of living concerns (including housing or rent, utilities and necessities) (40 responses)**
  - Desire for better wages (6 responses)
  - Loss of the "small town" feel (2 responses)
  - Lack of vibrancy (2 responses)



- Land and space availability:
  - **Lack of development / employment lands (26 responses)**
  - Insufficient office space (6 respondents)
  - Concentration of land-owners that drive up costs (5 responses)
  - Lack of land (type not specified) (2 responses)

Synergies exist between components of the above listed opportunities and challenges, indicating respondents are both aware of challenges or barriers as well as mindful of possible opportunities to address them. Furthermore, the linkage implies that strategic actions taken to secure opportunities will resonate well because of clear connections to local concerns.

## Stacking up Against the Competition

The survey asked respondents to indicate what nearby communities were viewed as competitors and why. The following list ranks the communities from most competitive to least competitive:

1. **Oakville**
2. **Hamilton**
3. Mississauga
4. Toronto
5. Waterloo
6. Markham

Overwhelmingly, Oakville (at 90 responses) and Hamilton (at 86 responses) were identified as the most significant competitors. The following observations on respondent feedback are offered regarding Oakville and Hamilton as competitors to Burlington:

Proximity, accessibility and/or geographic location are viewed as top competitiveness issues, topping the list of identified competitive advantages in Oakville and appearing at second place on Hamilton's list, following costs of rent or property.

The following are other key areas of competitive distinction for these two communities over Burlington:

- Proximity is an issue for Burlington because it is situated between Oakville and Hamilton
- Oakville's proximity to Toronto gives it an advantage over Burlington for reasons such as talent attraction, investment attraction from Toronto, commuter accessibility and distance to Lester B. Pearson airport



- Though Hamilton is farther from Toronto, it is directly adjacent to Burlington's southern boundary and has the added value of lower rent and/or property costs, as articulated by 30 respondents in the survey
- Additionally, Hamilton is closer to the United States border, which may make it more appealing for some industries

Another area of important consideration relates to perceptions of a high quality of life, something that Burlington prides itself on, and was identified by respondent feedback that both comparator municipalities have high qualities of life provided to their residents also.

Though value judgements concerning quality of life reflect the personal, subjective tastes of individuals, the fact that all three communities are seen to have good quality of life attributes re-enforces the strategic importance of Burlington finding a means of differentiating itself from the other three on quality of life attributes.

### **Prioritizing Areas of Importance**

The list below ranks areas of strategic importance for resource prioritization over the next 10 years based on respondent preferences:

1. Prosperity Corridor
2. 403 West Corridor
3. Downtown
4. 407 Corridor
5. Bronte Meadows

The majority of respondents to this question (68%) indicated that industrial and office development growth should be accommodated through redevelopment of existing land and office space, while only 17% indicated greenfield developments as a priority focus.

When asked which areas the City should prioritize resources towards in the next ten years, the Prosperity (QEW) Corridor received the highest number of responses. This is not surprising, given the emphasis placed on redevelopment of existing land and office space, and the lower interest in new builds or greenfield developments.

### **Top 5 Pressing Concerns for Economic Development**

Respondents were presented the question, "what are the most pressing economic development issues for the City of Burlington?" From a list of 12 "issues" respondents selected their order of preference. The top five most pressing economic development issues are:



- Increasing high quality jobs and a skilled and talented workforce
- Attracting and retaining businesses
- Addressing demographic challenges and trends
- Reducing traffic congestion
- Investing in road and transportation infrastructure

## 2.4 Stakeholder Interviews

The Burlington Economic Development Corporation conducted a series of interviews with prominent government, private sector, and not for profit stakeholders on the subject of economic development in Burlington. The purpose of this was to obtain critical insight into the challenges and opportunities that the city is facing, assess the business climate from an attraction and retention perspective, and solicit valuable perspectives on establishing a future Economic Vision that will act as a catalyst for future growth and prosperity for Burlington. The results of a detailed analysis of the interview results are provided in this section.

### Methodology for Analysis

Interviews were conducted with 59 government, private sector and non-profit stakeholders, consisting of up to twelve questions depending on the stakeholder group being interviewed. The distribution of stakeholder groups is as follows:

- Government Participants (19 total)
- Private Sector Participants (28 total)
- Non-profit Participants (12 total)

The interview results, provided in aggregate format according to the question posed, were assessed under a common threads analysis.

A common threads analysis codes interview data from each respondent within a matrix to allow for quantification of thematic results. The analysis is conducted separately for each research question. As new themes materialize in the results of a given question they are added to the matrix for tracking.

The sum of each theme is calculated based on sub-totals according to the three participant groups. Summary figures are employed to demonstrate the results of the common threads analysis. The detailed analysis, including thematic tables and individual findings by question is presented in Section 1.2 following the Summary below.



## 2.4.1 Summary of One-on-One Interview Findings

### Business Climate

Interview participants were asked, “How would you describe the business climate in the City of Burlington?” The most common responses provided by participants were:

- Negative / poor climate (13 responses)
- Positive / healthy climate (10 responses)
- Bureaucracy, red-tape or frustrating regulations (7 responses)
- Lack of vision, plan or brand (5 responses)
- Lack of developable land (including Green Belt constraints) (4 responses)
- Good growth and /or potential in high technology or information technology (4 responses)
- Good location advantage (close to markets, close to Toronto, between Toronto / Hamilton (4 responses)

The following observations about participant impressions of Burlington’s business climate emerge from the results:

- Negative and positive sentiments toward Burlington’s investment climate approximate each other, but lean more strongly toward a negative or poor investment climate
- There are interconnections between positive perspectives and responses associated with:
  - Good growth and/or potential in high technology and information technology
  - Good location
- There are interconnections between negative perspectives and responses associated with:
  - Bureaucracy, red tape or frustrating regulations
  - Lack of vision, plan or brand
  - Lack of developable land

### How Business Climate Affects Success

Private sector respondents were asked,<sup>46</sup> “How does the business climate in the City of Burlington affect the success of your company?” The four sets of responses most commonly provided by respondents are:

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<sup>46</sup> Two members of the government participant group also answered the question “How does the business climate in the City of Burlington affect the success of your company?” Their responses have been dropped from the analysis because they did not provide any generalizable results.



- Affected by local ecosystem / climate health (10 responses)
- Not dependent on local ecosystem / climate health (7 responses)
- Also depends on other markets (4 responses)
- Affected by poor economy growth (non-localized) (3 responses)

The following observations emerge from the results of the above interview question.

When each category is compared discretely, more respondents indicated they are affected by the local ecosystem or climate health than any other individual category of response. Further, the last three bullets of the list (totalling 14 responses) indicate businesses are either dependent on other markets, not dependent on the local climate, or are dependent on the broader economy as a whole, at either a provincial or national level.

Therefore, collectively, more enterprises are affected by a range of factors from outside of the local business climate than enterprises affected by the local climate. The result reflects the fact that many businesses in Burlington operate within a larger economic system than the immediate municipality, thereby being more susceptible to external determinants.

### **Community Characteristics Most Valued by Business**

Interview respondents were asked, “In your experience, what are the characteristics that businesses most value about the City of Burlington?” Five broad themes emerged from the responses:

- Quality of life and/or place
- Business development
- Labour force
- Transit and transportation
- Proximity / accessibility

Results indicate that the characteristics the business community value most frequently are quality of life/place, location and labour force attributes

Adjusting for differences of population size between government and private sector interview participants, the private sector referenced all response categories at a higher frequency than government participants, on average at a ratio of 2.58 to 1.45.

The result indicates private sector participants more frequently express support for the same themes than government participants.



## Establishing a Vision for the Next 10 Years

Interview participants were asked, “What is your vision for Burlington’s economy over the next 10 years?” Responses are summarized under the following themes, which include the top two results within each theme:

- Industries (36 responses)
  - More high-technology / IT (11 responses)
  - More advanced manufacturing (8 responses)
- Businesses (24 responses)
  - Targeted investment attraction, including head quarter or head office attraction (8 responses)
  - Economic diversification (7 responses)
- Quality of life (24 responses)
  - Quality of life and/or place, other (attractiveness, urban-rural, happiness, arts and culture, schooling or unspecified) (14 responses)
  - Amenities and (3 responses) and Cost of living (3 responses)
- Infrastructure and development planning (20 responses)
  - Better urban planning, redevelopment (downtown, waterfront, boroughs) and mixed-use (7 responses)
  - Better transit and transportation infrastructure (4 responses)
- Labour (11 responses)
  - Healthy labour force (educated, youth retention / attraction, youth opportunities) (4 responses)
  - Higher pay for employees (4 responses)
- Municipality (7 responses)
  - Less red-tape, less regulations, less silos, more approachable (4 responses)
  - City have more conviction and action orientation (3 responses)

Overall, the following key observations emerged from the results of findings listed above.

A future Burlington with strong high technology and IT sector growth, along with a strong advanced manufacturing sector ran parallel to notions identified by respondents in earlier portions of the interview in regard to Burlington’s investment climate, indicating an appetite for continued growth or entry into these sectors as part of an overall vision.

Economic diversification is most likely to be embraced if Burlington strategically targets specific sectors. This theme emerged as a larger number of respondents indicated a preference for targeted investment attraction over diversification.



Quality of life and/or place remains a crucial element of respondents' visions, appearing as a direct quote 14 times in responses. The result illustrates a desire among respondents to see quality of life maintained or enhanced as other components of the vision are advanced.

## Identifying Local Strengths and Assets

The interview participants were asked to identify local assets or strengths related to economic and employment growth. Burlington's greatest strengths or assets, as identified by interview participants, are:

- Highly educated population / workforce (17 responses)
- Great location (12 responses)
- Proximity to transportation infrastructure (11 responses)
- Quality of life / place (directly quoted) (9 responses)
- GO Transit or transit connectivity (7 responses)
- Proximity to markets / other locations (6 responses)
- Lifestyle or livability (6 responses)
- Availability of land (6 responses)

The following observations illustrate key findings regarding identified strengths or assets. The frequency of responses regarding the educated population indicates that this asset is valued greater than the others in the list, with the next highest asset being a great location.

These factors often go hand in hand, as educated populations often gravitate toward areas that offer a variety of cultural and social experiences, as well as positive levels of lifestyle amenities.

A highly valued strategic location was illustrated by assets or strengths identified by respondents as follows:

- Great location
- Proximity to transportation infrastructure
- GO Transit or transit connectivity collectively

This further highlights the importance of the intersection between education and transportation and transit systems that enable effective movement of people.

Given the prominence of high technology and advanced manufacturing identified in responses to previous interview questions, this potential strength was noticeably absent from responses to this question. An absence of leading industries



being identified as strengths may imply a lack of awareness of local industry assets, or it may indicate that they are taken for granted as immutable.

## Challenges and Barriers

Interview participants were asked to identify challenges or barriers to economic or employment growth in Burlington. The following list captures the most frequently identified challenges or barriers:

- Shortage of developable land or insufficient parcel sizes (15 responses)
- Competition from other cities with similar characteristics and sectors (13 responses)
- Transit / transportation challenges (11 responses)
- Slow bureaucratic process, red-tape or regulatory environment (11 responses)
- Congestion or traffic (7 responses)
- Aging population / workforce (6 responses)
- Lack of affordable housing (5 responses)
- State of Ontario or Canadian economy (5 responses)

Four sets of challenges highlighted in the above list are discussed in greater detail because of their strategic implications:

- Developable land
- Competition from other municipalities
- Transit, transportation and congestion or traffic
- Bureaucracy, red tape and regulatory environment

### Developable Land

Responses from interview participants containing references to shortages of developable land or insufficient parcel sizes demonstrate a concern that there is inadequate space to encourage increased development.

If insufficient land exists for development purposes, prospective investors will look elsewhere for opportunities, despite advantages identified by interview participants in regard to Burlington's location.

### Competition from other Municipalities

Responses reflect a concern that the city lacks distinction or defining characteristics that would differentiate it from other municipalities.



The challenge of differentiation represents a threat, because Burlington lacks the ability to directly control other cities; however, Burlington does have control over how it presents an image as a distinct municipality to investors and other municipalities.

In other interview questions respondents identified Burlington's location as an asset or strength, or as a characteristic that adds value to Burlington's business community, whereas if the overall perception is one of indistinguishableness vis-à-vis other cities, its competitive advantage associated with location is diminished.

### **Transit, transportation and congestion**

Challenges of transit, transportation and congestion are manifest in two key ways:<sup>47</sup>

- They affect quality of life for local residents based on livability and health
- They affect labour mobility to the detriment of people seeking employment in difficult to access locations and to the detriment of employers seeking specific employees that are otherwise alienated from some employment lands or areas

### **Bureaucracy, Red Tape and Regulatory Environment**

The challenges associated exist at two levels of government, local and provincial. On the one hand, respondents seek greater efficiencies in the local government's regulatory environment processes and less "red tape" while on the other hand respondents also expressed similar frustrations with provincial regulations, particularly as regards the Ministry of Transport (MTO).

The implication is that respondents view bureaucratic challenges, including red tape and regulations, as impediments to development both locally and provincially. Moreover, the result implies desired change at the local level as well as seeing a role for the City in improving the provincially associated problems in ways it is able to.

### **Assessing the Competition**

Interview participants were asked, "Who do you feel are the City of Burlington's biggest competitors and why?" The responses offered by participants were analyzed to determine Burlington's competitors as well as to understand in what ways it held a competitive advantage over other municipalities.

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<sup>47</sup> Both transit and transportation were included within the same coding scheme. Congestion and traffic were included within a separate scheme. The word "transportation" pertains to two responses, one of which did not include an elaboration, the other of which was in regard to transportation and the city's relationship with the Ministry of Transportation (MTO). By contrast, transit was directly referenced by nine respondents.



The highest ranking municipalities considered to be competitors by respondents are as follow:

- **Oakville (25 responses)**
- **Hamilton / Stoney Creek (23 responses)**
- Mississauga (13 responses)
- Milton (13 responses)
- Niagara Peninsula and St-Catherine's (7 responses)
- Kitchener-Waterloo (7 responses)

Overwhelmingly, Oakville and Hamilton were identified as the most significant competitive threats to the City of Burlington. That said, the section below provides a breakdown of the various competitive elements respondents identified for each of the competitor jurisdictions.

#### **Oakville:**

Oakville enjoys greater proximity to Toronto than Burlington and is viewed as similar to Burlington. These are seen as significant challenges that Burlington faces. Further detail was provided to flesh out the disadvantages further:

- The combined results illustrate a competitive advantage over Burlington in potential investment and talent attraction from Toronto
- In addition, Oakville was identified as having more office space available and under development, whereas two respondents indicated in the challenges portion of the interview that Burlington lacked sufficient or suitable commercial and/or office space

#### **Hamilton/Stoney Creek:**

Though Hamilton and Stoney Creek is farther from Toronto than Burlington, respondents have identified it as having the following advantages:

- Lower land costs
- Lower business start-up costs
- Less expensive (unspecified)
- Better business retention and expansion (BR&E) programming
- Having a more established manufacturing / industrial sector



Absent from the above listed competitiveness issues is any neutralizing description associated with similarities between the two cities. This lends evidence to the notion that Hamilton does not suffer from challenges of distinction as profoundly as Burlington does to Oakville and other identified cities.

It should be noted that three interviewees explicitly stated that Burlington holds no advantage over Hamilton.

### **Milton:**

The City of Milton was identified by respondents as a competitor to Burlington due in large part to its recent and sustained growth. Respondents described the growth as both fast and significant.

In an online survey conducted by Burlington Economic Development Corporation, Milton was not one of the cities made available to respondents to evaluate based on competitiveness. The finding illustrated by these interview results implies Milton may be a previously unidentified competitor to Burlington.

### **Burlington's Key Competitive Advantages:**

Counterbalanced to the competition and potential threats or disadvantages highlighted above, the following key advantages were identified for Burlington over the competition:

- Less expensive than Oakville
- Better quality of life than Hamilton
- A better quality of life than other areas (unspecified)
- Abundant green space compared to other areas (unspecified)
- Better natural amenities than other areas (specifically, Lake Ontario and the Niagara Escarpment)

When taking these findings into consideration, there is the notion that some of these indicators, such as abundant green space, are more applicable to communities east of Burlington, than west (for example Kitchener and Waterloo, and Niagara Escarpment in relation to Niagara and Hamilton).

### **Outside Perceptions of Burlington**

Interview participants were asked, "How do you think the City of Burlington is perceived by business leaders from other parts of the GTA [Greater Toronto Area]?" The results were separated into two categories:

- Positive: representing a perception-based strength identified by participants
- Negative: representing a perception-based weakness identified by participants



According to participant' comments, the following aspects are identified as positive perceptions of Burlington:

- Quality of life
- Quality of place (i.e. Niagara Escarpment, Lake Ontario)
- Affluent population
- Clean
- Explicitly stated as a positive impression
- Stable

The positive impressions indicate a strong impression about quality of life and quality of place, with indicators such as affluence and clean, also contributing to the broader themes of quality of life and/or space. Of note is the contribution given by two respondents about Burlington being stable.

The ranking of negative perceptions from highest to lowest number of responses is as follows:

- Lacking image or brand
- Bedroom community reputation
- Dull
- Small town perception
- Under the radar or unknown
- Nothing to get excited about
- Another part of the GTA

The lack of an image or brand holds direct connections to previous expressions by interview participants about Burlington being viewed as similar to other municipalities. The result identifies an opportunity for Burlington to address its image and brand strategically as a means of differentiating itself from competitors.

### **Best Reasons to Locate a Business in Burlington**

Interview participants were asked, "If you were marketing the City of Burlington to a business, are there any arguments that you would make to convince them to locate here?" The highest ranking responses from participants are:

- Quality of life (arts, entertainment, work-life balance) (15 responses)
- Skilled workforce, talent pool (10 responses)
- Quality of place (Lake Ontario, Niagara Escarpment, green spaces, attractiveness) (6 responses)
- Proximity to higher education institutions (5 responses)



- Safe, low crime (5 responses)
- Great location (5 responses)
- Access to major transportation infrastructure (5 responses)

Respondents that noted the proximity to higher education institutions in their responses have articulated an asset not discussed previously in other interview questions.

Though Hamilton and Toronto each have a variety of education options, Burlington's location as being between the two cities affords a flexibility of options for higher education, in addition to already having McMaster University's DeGroote School of Business, Ron Joyce Campus in Burlington.

## Economic Development Opportunities

Interview participants were asked, "What significant opportunities for economic development do you see for the City of Burlington?" The highest ranking opportunities for economic development identified by respondents are:

- Prosperity Corridor development (10 Responses in total)
  - Including responses related to Queen Elizabeth Way Corridor development / redevelopment
- Strategically target specific sectors / subsectors (7 responses)
- Streamline development approval processes, reduce bureaucratic hurdles, red-tape (6 responses)
- Prioritize mixed use development / redevelopment (5 responses)
- Better synergies between higher education and innovation, research and development (5 responses)
- Better business support for small or medium sized enterprises, start-ups and BR&E (4 responses)
- Life/health sciences and pharmaceuticals (3 responses)
- Financial sector (3 responses)
- Advanced manufacturing (3 responses)
- Better mobility hubs for transit, transit improvements (3 responses)
- Address infrastructure issues (roads, bridges and utilities) (3 responses)
- Attract more higher education institutions / expand existing institutions (3 responses)

The Prosperity Corridor (also referred to as the QEW Corridor) was identified an ideal location for development. In the online survey conducted by Burlington Economic Development Corporation, Prosperity Corridor ranked as the most preferred area by far for focussing investment over the next 10 years. The disparity between the results of the interviews and online survey illustrates a gap between the preferences of participants of both consultation exercises.



This could illustrate the need for more streamlined and consistent marketing and communications on the opportunities associated with various employment areas in Burlington, or, it could be illustrative of a difference in perspective between the wider audience reached through the online survey and the targeted leadership groups involved in the stakeholder interviews. Regardless, this is an area that the BEDC should explore in greater detail.

The opportunity of streamlining the development process, reducing bureaucratic hurdles and reducing red tape relates to opportunities to increase efficiencies in the land development context.

The result is most prominently identified by government participants (4 responses), with no expression of interest from private sector participants and two references by non-profit participants.

## Accommodating Growth

Interview participants were asked how the City of Burlington should accommodate industrial and office growth. Based on the aggregate responses of participants, the most prominent ways of accommodating industrial and office growth are through the following:

- More mixed use development (14 responses)
- Intensification of lands, higher densities (13 responses)
- Prosperity Corridor (10 responses)
  - Including QEW Corridor responses
- Build-up downtown core (7 responses)
- Cluster around mobility hubs (4 responses)
- Repurpose existing lands (2 responses)
- No shortage of office or industrial land (2 responses)
- Identifying industries of growth and where they are located (2 responses)
- Brownfield development (2 responses)

With respect to the best ways to accommodate future growth for the city of Burlington, Mixed use developments featured as the most prominent suggestion. This was most often referenced as a means of addressing industrial and office growth in Burlington. A larger number of responses from government participants reflected a preference for mixed-use developments over private sector responses.

Intensification opportunities were also directly related to respondents who identified “building up” the downtown core as the most effective means of addressing growth. Of note is that downtown development was most often cited in regard to



creating vibrancy and cultural place-making, including making the area a centre for attraction based on shops, restaurants and entertainment. These themes were also strongly connected with responses related to clustering around mobility hubs.

The Prosperity (QEW) Corridor ranked as the third most suitable means of accommodating growth. It should also be noted that the Prosperity Corridor was identified by respondents as the number one economic development opportunity.

### **Priorities for the Next 18 Months**

The final question of the interview asked respondents, “Of the opportunities and challenges you mentioned, which need to be a priority for the City of Burlington in the next 18 months?” Based on the aggregate response data, the following list identifies a ranked order of priority preferences for the City of Burlington, as identified by interview participants:

- Put a strategic plan in place, abide by a vision (9 responses)
- Downtown development (5 responses)
- More shovel-ready employment lands (5 responses)
- Development around mobility hubs (5 responses)
- Establish a better brand and marketing image (4 responses)
- Develop an Innovation District (4 responses)
- Improve transit planning and services (3 responses)
- Understand growing sectors to know where to focus (3 responses)
- Streamline development approval processes, reduce bureaucratic hurdles, reduce red-tape (2 responses)
- Infrastructure preparations for shovel ready land (2 responses)
- More mixed-use development (2 responses)
- Prosperity Corridor (2 responses)
- Better higher education relationships (2 responses)



## 3 Building a Vision

### 3.1 SWOT Analysis

The following section of this report presents aggregated findings into common themes from the various forms of community and stakeholder consultations performed, including the detailed baseline data analysis and competitiveness assessment results, as well as a background review of the infrastructure environment and planning policies. These findings have been compiled into a SWOT (strengths, Weaknesses, Opportunities, and Threats) Analysis.

A SWOT analysis is an important element to any strategic planning process, and a valuable tool that supports decision making through the identification of internal and external factors that directly impact on the viability of an organization's projects or plans.

Strengths are generally attributed to local assets and resources the municipality can leverage, or build on to support local growth and prosperity. Weaknesses are current disadvantages internal to the community that hinder, or impeded successful outcomes. These factors may require improvement, strengthening, or mitigation in order to encourage and support the community's ability to capitalize on opportunities.

Opportunities are specific elements that the municipality can exploit, or leverage to its advantage in order to overcome challenges and effect positive change. Threats are generally associated with factors that may jeopardize a community's success and represent barriers, or obstacles that may prevent the City's ability to implement its strategy.

The purpose of this section is to utilize the SWOT Analysis in order to inform the overarching goals and objectives that are developed in order to effectively execute upon the Economic Vision the City of Burlington has for its future. They are drawn from a comprehensive research process, driven by stakeholder and community input, and grounded in an evidence based approach.

#### 3.1.1 Strengths

- Burlington has a well-educated population and highly skilled workforce presenting competitive advantages for attracting and retaining industry looking for more educated workers, and increasing the net worth of residents
- High levels of professional services, entrepreneurship, and micro businesses that support a vibrant entrepreneurial culture and diversity of self-employment



- Very high quality of life with ample cultural and lifestyle amenities, festivals, accessible waterfront, family oriented, green space and northern rural agricultural area, clean and safe environment, and appeal to broad audience of socio-demographic characteristics
- Availability of quality and high speed telecommunications in most urban areas
- Burlington has a relatively less expensive development environment than competitor communities to the East, and the lowest average land prices compared to eastern neighbours
- Burlington has a low unemployment rate, and relatively high earnings in professional, knowledge based, and highly skilled occupations that position it well for attracting self-employed professional talent
- Burlington has a relatively diverse economy and did not experience the negative impact of the recent recession as acutely as other communities
- Burlington has a relatively high level of household income and experienced one of the fastest levels of income growth between comparator jurisdictions
- Within the Greater Toronto Area, Burlington is a relatively affordable place to buy a home
- Go Transit and integration with broader regional and inter-regional transit connectivity

### 3.1.2 Weaknesses

- Gridlock, traffic congestion, and poor transit offerings (especially along key employment districts and corridors) were noted as critical barriers to growth
- A insufficient supply of investment ready lands (not to be confused with a vacant land inventory) presents a key challenge for securing new investment and expansion
- Overly complex bureaucratic environment that discourages investment and frustrates business growth
- Lack of a strong and vibrant Burlington Brand that differentiates the city from its competitors, and energizes and entices people, business, and talent to move to Burlington
- Burlington suffers from a lack of a unique selling proposition
- Burlington needs a strong, long term vision for the city that drives all other elements of planning and corporate activity
- Aging and a lack of modern office space prohibits potential new business growth and employment
- Delayed improvements to municipal infrastructure frustrate the ability to attract and retain new investment
- Need to shift Burlington away from a car dependent design and stimulate more active transportation
- Need for greater alignment between the post-secondary educational community, stakeholders, and the City to increase the required type of talent in demand by local industries



### 3.1.3 Opportunities

- Supporting and/or enhancing the educated workforce, skilled labour development or skill training
- Advancing redevelopment and intensification opportunities, strategic planning and rezoning
- Leveraging Burlington's location between Hamilton and Toronto to better effect population and workforce growth
- Ensuring stronger municipal support structures for business development by streamlining regulatory process, enhanced business expansion and retention activities, small business, start up and innovation enablement
- Establish more effective and appealing incentivization programs that will encourage increased appetite in redevelopment and intensification
- Great potential contained in pursuing sector growth opportunities in High Technology, Information Communications, and Health and Life Sciences and building out the industries to develop stronger support clusters.
- Additional opportunities were identified in pursuing increased Tourism, Higher Education, Professional Services, and advanced manufacturing
- Better leverage Burlington's transportation infrastructure system that see all 400 class highways converge in the city and allow access to major economic centres and populations
- Establish Mobility Hubs around Go Stations to stimulate mixed-use live/work environments
- Significant level of knowledge and wisdom contained in older populations that could be tapped into more effectively to support mentorship, stimulate entrepreneurship, and support growth and prosperity in the local economy
- Greater volunteerism potential and community engagement to support city building and future directions
- Need to effectively harness the potential contained in strategic alliances with local developers and land owners to support mutual aims and benefit
- Focus on leading companies in key sectors that have global markets and ambitions – encourage increased corporate and regional headquarters to locate in Burlington
- Potential contained in agricultural and rural opportunities north of the 407 that could be explored and capitalized on

### 3.1.4 Threats

- Burlington needs a stronger and more integrated transit system that supports the import of workers and talent, as much as it does the export of residents and workers out of the city
- Transit systems are underserved in key employment districts, particularly the Prosperity Corridor



- Increasing cost of living and housing affordability present ongoing challenges to Burlington's ability to attract and retain newcomer and young professionals and families
- Greater affordability of living and housing in Hamilton encourages outmigration of population and workers
- Concentration of privately owned lands affects availability, price, and flexibility in providing development options
- Availability of modern and in demand office space in surrounding competitor areas and high vacancy rates inhibit development opportunities
- Cost and availability of lands in Hamilton, and other competitor jurisdictions to the west of Burlington pose significant risk to attracting new development related investment
- Burlington's lower unemployment rate may deter investment from companies with higher labour overheads, depending on the level of skill and qualification required to meet company needs
- Burlington is facing a serious shortage of younger aged cohorts, with an aging population increase. This is occurring at a more rapid rate than surrounding and comparator areas. In order to meet new employment, knowledge economy, and creative class talent attraction goals. With significant gaps in the ages of 24 and under, Burlington is faced with a potential shortage of people to transition into the prime working age population category over the next ten years
- Burlington suffers from youth and talent leakage as skilled individuals pursue more accessible employment and affordable living opportunities outside of the city
- Community resistance to intensification and downtown redevelopment, including prohibitive regulatory environment
- Employment Lands Operational Plan and Regional Best Planning Estimates not aligned and contribute to confusion, lack of direction, and delays associated with infrastructure and growth planning
- Lack of alignment among all key decision makers at Regional and Provincial levels towards Burlington's growth targets and aspirations

## 3.2 Establishing Key Strategic Directions and Priorities

An important aspect of the strategic planning process was contained in the various workshops and focus groups held with the Burlington Economic Vision 2025 Advisory Committee (herein referred to as "The Committee"), City Council and Senior Executive staff. The Committee was comprised of a wide variety of key community, business, not-for-profit, and government stakeholders who share a common agenda in seeing Burlington achieve the long term prosperity and success it is striving for.

Incrementally throughout the project, key findings related to research and the consultation processes were relayed back to The Committee through two strategic planning workshops. The first workshop (held on April 28, 2015) focused on key



input related to the identification of challenges and opportunities, and establishing the framework for the economic vision moving forward through a critical prioritization exercise.

The second Committee workshop on (June 10, 2015) provided a platform for the Project Team to share the final results of the engagement process, the competitiveness and infrastructure assessments, the SWOT Analysis and key findings to date. In addition, two focus groups were conducted by BEDC staff with the development and realtor community to validate findings and emerging strategies and tactics for the economic vision.

Eight key strategic areas were identified through the community and stakeholder engagement process as top priorities for Burlington's future.

These **Key Strategic Focus Areas** are:

- Transit and Transportation
- Vibrant, Diverse and Growing Community
- Development and Intensification of Employment Lands
- Diverse and Growing Economy / Investment Attraction
- Innovation and Start-up / SME Support
- Intergovernmental Alignment and Cooperation
- Branding & Promoting Burlington
- Improvement of Overall Infrastructure

Each strategic area was presented to BEDC and The Committee. Facilitated small focus group discussions were then organized to garner feedback on certain key questions for each strategic area. These questions were:

- What is your vision for the future of this key strategic area?
- What goals should be identified for this key strategic area? What does success look like in achieving those goals?
- What are some specific strategies and tactics to achieve the goals in this key strategic area?
- How should success be measured in achieving the goals of this key strategic area?

On June 22, 2015, an interactive workshop was held with Burlington City Council and Senior Executive staff to share the results of the project outcomes to date and to garner feedback and support on the Key Strategic Focus Areas. This provided Council and senior staff with an opportunity to offer first hand input into shaping the economic vision, and to assist in prioritizing the Key Focus Areas. It also allowed participants to identify any potential oversight, or gaps that should be given further consideration.



Finally, the workshop took Council through an exercise to establish a number of ‘Big, Hairy, Audacious Goals’ (BHAGs) to further inform the development of an economic vision for the City of Burlington to the year 2025.

A Dotmocracy exercise was performed in which each participant was provided with four dots. All of the Key Strategic Focus Areas and potential gaps were written on flipcharts and the group was provided with 5 minutes to place their dots on the areas they felt were of the highest priority.

The following are the outcomes of the voting and prioritization process:

FIGURE 5: PRIORITIZATION RESULTS OF KEY STRATEGIC FOCUS AREAS

Focus Area	# of Votes
Transit & Transportation	9
Development and Intensification of Employment Lands	9
Intergovernmental Alignment and Cooperation	8
Vibrant, Diverse, and Growing Community	8
Innovation & Start-up Support	2
Diverse and Growing Economy/Investment Attraction	1
Branding and Promoting Burlington	1
Improvement of Overall Infrastructure	1

FIGURE 6: PRIORITIZED AREAS OF IMPORTANCE IDENTIFIED AS GAPS

Identified Gaps	# of Votes
Rural	4
City Revenue	1
Environment	0

Figure 5 and Figure 6 above highlight that the areas of greatest importance and priority were identified as:

- Transit and Transportation
- Development and Intensification of Employment Lands
- Intergovernmental Alignment and Cooperation, and
- Vibrant, Diverse, and Growing Community



This was followed by an identified gap that more consideration should be given to the potential contained in rural Burlington and the opportunities associated with agriculture and tourism.

Lastly, Council was urged to vote in order to prioritize the outcomes of the BHAG exercise and discussion. The following results are identified in Figure 7 below where job creation, specifically the creation of 15,000 new, knowledge based jobs (jobs of high value and earnings) are to be generated in Burlington by the year 2025. Further, it is intended that two thirds of these jobs will be filled by Burlington residents.

FIGURE 7: PRIORITIZED BHAGS

BHAGs (Big, Hairy, Audacious Goals)	# of Votes
15,000 new knowledge based jobs (with 2/3 going to Burlington residents)	6
1-1.5% growth in the population	1
1 of the top 5 cities in Canada for Start-up and Innovation	1

Although four strong priority areas emerged through the prioritization exercise, it is important to understand that the remaining Key Strategic Priority Areas still require attention, and are important elements in Burlington’s overall economic success.

They also represent the whole of strategic areas of importance that emerged through the broader consultation process, and are grounded in the research conducted through the initial phases of this project.

As such, certain Key Strategic Priority Areas will be condensed into others, where appropriate, and priority status will be assigned during the action planning phase to the priority areas that emerged as most important through this process. This approach ensures that all areas are captured effectively, and allocated to where they are best suited in the strategic plan.

### 3.3 Building Burlington’s Economic Vision

A vision is meant to capture the goals, aspirations, values and collective desires of a future state by the community. An economic vision for Burlington is meant to capture these attributes as well, but through the lens of economic prosperity. It encompasses the desired future state of what the City can ultimately achieve from an employment and business growth perspective. Wealth generation, entrepreneurship, innovation, and increased investment can all directly translate into increased quality of life, fuller and more meaningful employment, improved services and community wellbeing.



What is critical for the City of Burlington is that its vision for economic success is shared by all vested community stakeholders, and grounded in the realities of the challenges and opportunities that it faces.

It should be understood that the Economic Vision for Burlington is being developed in a manner that compliments and directly feeds into, or supports the overarching Community Vision for Burlington being established through the City's corporate strategic planning process.

In this respect, the Economic Vision for Burlington lays the foundation for how the City, supported by the Burlington Economic Development Corporation, will work in cooperation with the various economic stakeholders and private sector to secure a pathway to prosperity to the year 2025.

The following section draws from the evidence gathered through the comprehensive engagement and strategic planning process above. It begins with charting the vision course by drawing on the vision statements for the Key Strategic Focus Areas developed through the workshops and focus groups. These statements are then cross examined with the Big Hairy, Audacious Goals identified through the exercise above, and ultimately culminate into one, distinct economic vision for Burlington to rally around.

The eight, specific vision statements below were developed during the visioning exercise with the Advisory Committee. Where a succinct vision was not established, one was developed based on the various key vision elements that were provided through the engagement process. These are presented below select visions to provide additional insight and validation into the select individual vision statements.

### 3.3.1 Transit and Transportation

#### Vision Statement

*“As we intensify, we deliberately build a broader range of transportation options (of which transit is one) that makes movement within both the community and the broader region easier and more efficient, and that helps attract people and business to our community.”*

The vision for Burlington incorporates a variety of important elements identified during the focus group discussions:

- Prioritizing the idea of no congestion – but this is achieved in part by recognizing that the car is still integral to our system. We've invested substantially in neighbourhoods that are car-dependent, and we can't retroactively change that
- Creating readily accessible alternative options to vehicular travel



- Creating a broader range of transportation options (i.e. transit, cars, bicycles, pedestrian friendly, taxicabs, Uber, car share, other models).
  - Need to encourage increased transit with a more urban/suburban structure, especially for youth
- Ensuring that transit is not limited to local transit. Focus must be on mobility hubs and the movement of commodities
- Ensuring that land use planning is consistent with accessible and diverse transportation
- Branding around transit alternatives to promote their use and growth
- Capturing the in and out-flows of the community not only the internal movements of the city. Transit is a larger consideration not to be confined by municipal boundaries

### 3.3.2 Vibrant, Diverse and Growing Community

#### Vision Statement

*“Burlington is a diverse and welcoming community that is strategic in its economic growth leading to opportunity for youth. Burlington takes a lead role in being the voice of the next generation.”*

The vision for Burlington incorporates a variety of important elements identified during the focus group discussions:

- Keeping young people in the community (at all education levels and pathways)
- Creating opportunity for foreign students (i.e. financial capacity, competitive environment)
- Being a welcoming place for immigrants
- Ensuring focused growth that is well planned, realistic about intensification, visual, and tells the story of the city
- Having great schools
- Being the voice of the next generation

### 3.3.3 Development and Intensification of Employment Lands

#### Vision Statement

*“Burlington needs a clear and defined understanding of exactly what type of development it wants – A clear articulated vision for Development. Once this is established, alignment is achieved with all*



*regulators (at all levels) in order to unlock barriers, and build the developments around what the target audience (industry, talent, and worker) needs.”*

### **3.3.4 Diverse and Growing Economy / Investment Attraction**

#### **Vision Statement**

*“Burlington is a city based on knowledge jobs that incubates and supports innovation and business growth. Working closely with businesses of all sizes, Burlington is a very attractive place for young professionals to locate.”*

### **3.3.5 Innovation and Start-Up / SME Support**

#### **Vision Statement**

*“Burlington has a supportive business ecosystem that helps start-ups and established businesses grow. This ecosystem needs to be created by the private sector with support from the City of Burlington.”*

### **3.3.6 Intergovernmental Alignment and Cooperation**

#### **Vision Statement**

*“There is a “one stop shop” approach allowing both residents and businesses to efficiently access information and services from all levels of government, matched by high levels of collaboration and partnership between varied levels of government.”*

The vision for Burlington incorporates a variety of important elements identified during the focus group discussions:

- Integrating development processes into one local process (i.e. a “one stop shop” approach)
- Recognizing that borders and municipal boundaries matter less and there are more shared services between jurisdictions. Need to mitigate regional and local competition and parochialism and reward collaboration



- Recognizing that inefficiencies exist that slow processes down (e.g. different strategic plans for different economic development offices and they are not necessarily aligned or co-operating)
- Aligning planning vertically through the province, region and municipality
- Creating a culture of collaboration and 'co-opetition' (even with Burlington's competitors like Oakville and Hamilton)

### 3.3.7 Branding & Promoting Burlington

#### Vision Statement

*“Burlington is the best mid-sized city to do business, with a focus on export-oriented, global, and diverse businesses that excel in a variety of key sectors.”*

The vision for Burlington incorporates a variety of important elements identified during the focus group discussions:

- Enhancing Burlington's existing brand as the best mid-sized city
- Need to create a master brand for Burlington
- Focusing the brand on key sectors (i.e. advanced manufacturing, digital, etc.)
- Highlighting Burlington as an export-oriented, global, diverse place to do business
- Harnessing the power of collective marketing
- Accessing diverse communities, markets, and businesses

### 3.3.8 Improvement of Overall Infrastructure

#### Vision Statement

*“Effectively align the Regional Best Planning Estimates (BPE) and the Employment Land Operational Plan (ELOP) so that there is one growth target that Halton Region and Burlington can be happy with. The key decision makers at the Region and Province of Ontario (MTO, MMAH, MOI, Conservation Halton, Halton Region, Utilities) all support the growth targets and plan accordingly for infrastructure investment.”*



## 3.4 An Economic Vision for the City of Burlington

An economic vision statement represents the *desired future* state of the economy for a community. The vision is meant to capture the goals, values, and collective aspirations of the community and act as a clear pathway to achieving that future state.

The following economic vision for the City of Burlington has emerged through multiple strategic planning sessions:

*“Burlington is recognized as the best mid-sized city in North America to do business, based on a strong and continually growing economy led by a growing population and young professionals, a diversity of businesses, the incubation of start-ups and innovation, a broad range of transportation options that makes movement within the community and the broader region easy and efficient, and high levels of collaboration and partnership between various levels of government.”*

Success in achieving this vision will take many forms, including:

- Attracting 15,000 new knowledge jobs in Burlington, with two thirds of those jobs going to Burlington residents
- Experiencing a 1% to 1.5% growth in the population, with a large share of that population coming from youth (25%-35% greater share than the province)
- Increasing the stewarded rural land for agriculture production by 15%
- Positioning Burlington within the top five cities in Canada for start-up support and innovation
- Investing in infrastructure to make Burlington the most walkable city in the GTA (excluding Toronto)
- Increasing the average household income for Burlington households so that it is within the top ten of all Canadian cities
- Growing wages in Burlington’s top three industries, as well as seeing growth in the creative and digital industries
- Receiving recognition as “the most connected transit city” in the GTA
- Aligning growth targets with Halton Region to create mutual growth targets
- Enhancing cooperation and partnership with the City of Hamilton by working together on projects and aligning targets
- Engaging stakeholders to a degree that they feel engaged and a sense of ownership over the economic success of Burlington



## 3.5 Developing a Value Proposition

One of the important elements to this project is to draw from the strategic planning process and establish a value proposition for the City of Burlington. This value proposition is externally-oriented, and speaks to a clear rationale for why a business, investor, or developer would choose Burlington as an ideal location over other potential locations.

There are two fundamental elements to a value proposition, the refinement, or articulation of value, and secondly the evidence, or support for the value proposition itself – what makes it believable.

A key aspect to a value proposition is determining the unique elements, or differentiating points between one offering versus another. With respect to community based value propositions, this activity becomes more difficult to refine, as many neighbouring competitors, as well as various municipalities across the province have very similar benefits or features that are common to each other. The way forward is contained in focusing on the core elements that your community does better than your competition, and developing the perception of value around these attributes.

Recognizing that the Burlington Economic Development Corporation (BEDC) has already identified a core value proposition in the [Top 10 Reasons to Invest in Burlington](#), this section will focus on establishing a value proposition based on the key findings from the strategic planning research and engagement process.

Burlington's Value Proposition:

*Burlington offers a safe environment for families, talent, and business to operate, with a strong history of entrepreneurship that places an importance on valuing enterprise and adopting a business-minded approach to governance and development.*

*Higher education and lifelong learning opportunities are abundant through prominent post-secondary and training institutions that supply workforce development, employment, and talent solutions to specific industry needs.*

*Ideally situated in the western Greater Toronto Area (GTA), Burlington presents lower land prices, highly competitive business and development costs, and more affordable housing and cost of living than comparator areas in the GTA, along with one of the fastest levels of income growth.*

*One of the best places to raise a family, Burlington has a strong community spirit, beautiful and accessible waterfront bordering a vibrant downtown, with a clean, rural lifestyle only half an hour's drive from the City Core, making it an unparalleled place to live and work for professionals, executives, and skilled workers alike.*



## 4 Taking Action and Measuring Performance

Building off of the key findings and cumulative evidence in the strategic planning process above, the following section presents various goals and objectives that align with the Key Strategic Priority Areas. As mentioned in the previous section, the prioritization exercise comes into play here, where the most important focus areas that were identified through the strategic workshops are reflected appropriately in the action plans below.

Immediately following the Action Plans, a brief exposition into the nature of performance measurement in economic development organizations is provided. This is accompanied by a deeper examination of the Logic Model, and Balanced Score Card approach to performance measurement. This is accompanied by a set of Key Considerations for the development of a performance measurement system.

As at the time of writing, the Burlington Economic Vision 2025 consultation and development process is still underway and anticipated to be completed in September of 2015. As such, performance measures have not been assigned to the respective Action Plans. The intent of Section 0 is to provide the Burlington Economic Development Corporation (BEDC) with a foundation with which to develop a performance management system that can be aligned with their internal systems, and the desired outcomes of this project.

### 4.1 Action Plans

It is said that it takes a community to raise a child, and in many respects this adage rings true with respect to community based strategic planning, in that it takes collective responsibility in order to see a strategic plan through the visioning process and into recognizing tangible results from the implementation phase.

As mentioned previously, it is critical for the long term success of Burlington that the Economic Vision is shared by all vested community and business stakeholders. This sentiment of collective ownership and cooperation is also true with respect to the need for shared responsibilities and accountability surrounding the strategic plan itself.

The following Action Plans have been developed in the form of matrices that establish a 'Lead' organization, assign a Priority Level (with associated timeframe for completion), and identify key Stakeholder Collaborators whose participation in the Recommended Objectives will be critical to their successful accomplishment.

As the strategic planning process will continue throughout the summer months of 2015, and finalize in the fall, the approach taken below is to provide suggested Lead roles and prospective stakeholder collaborators. The



recommendations provided in this report will be fully vetted during the partner process over the period aforementioned, and the final action plan fully developed and finalized by the fall of 2015.

### 4.1.1 Interpreting the Action Plans

Each Recommended Objective in the tables below is accompanied by a Priority Level and set of recommended community Partners. The level of priority was established based on the following criteria:

- Level of priority established through the strategic planning workshops
- Sense of urgency and level of immediacy indicated by the consultations and research
- Level of economic development potential and gain for Burlington
- Feasibility and suitability based on local assets and SWOT analysis
- Logical sequence of actions

Priority levels are identified as the following:

- |                                                |                             |
|------------------------------------------------|-----------------------------|
| ■ Ongoing = Current Action or Once Established | ■ High = Within One Year    |
| ■ Highest = Immediate                          | ■ Moderate = Within 3 Years |
|                                                | ■ Low = Between 3 – 5 Years |

Based on the outcomes of the strategic planning workshop with City Council and the Senior Executive, The Key Strategic Focus Areas have been refined into Strategic Directions that the BEDC and City of Burlington can use to guide their efforts in moving toward accomplishment of Burlington's Economic Vision 2025. Some directions have remained the same as the focus areas based on priority status, whereas others have been combined to form new, overarching directions that still warrant attention and effort in the interest of ongoing and sustainable economic development and prosperity in Burlington. Further, this process also ensures that no identified priority established through the consultative process is ignored, and is incorporated appropriately into the plan.

Each Strategic Direction is accompanied by a Goal, or series of goals that articulate the broad aims behind the strategic direction and identify where the City and BEDC need to focus their attention. Every goal is accompanied by a set of Recommended Objectives that are more specific and measurable milestones with respect to how the goal can be achieved.



The Recommended Objectives have been assigned a suggested Lead organization, allocated to a Priority Level, and have key Stakeholder Collaborators associated with them.

The first set of Action Plans contains key strategic focus areas that play an important role as critical economic enablers to the other strategic directions. The notion here is that a lack of attention toward these initiatives may negatively impact on the ultimate success and outcomes of the other focus areas.

### 4.1.2 Strategic Direction: Branding

<b>Goal:</b> <b>Develop and implement a unique and dynamic brand for the City of Burlington that differentiates the city from its competitors and entices interest</b>			
Recommended Objectives	Suggested Lead	Priority Level	Stakeholder Collaborators
<b>Undertake a comprehensive branding exercise and Master Brand Strategy</b>	BEDC	Highest	<ul style="list-style-type: none"> <li>■ City of Burlington</li> <li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li> <li>■ Community and Business Stakeholders</li> <li>■ Post-secondary / Innovation Partners</li> <li>■ Local Realtors, Land Owners, and Development Community</li> </ul>
<b>Establish buy-in and ownership of the new brand throughout all social, economic, and cultural spheres in Burlington</b>	BEDC	High	<ul style="list-style-type: none"> <li>■ City of Burlington</li> <li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li> </ul>



**Goal:**

**Develop and implement a unique and dynamic brand for the City of Burlington that differentiates the city from its competitors and entices interest**

Recommended Objectives	Suggested Lead	Priority Level	Stakeholder Collaborators
			<ul style="list-style-type: none"><li>■ Industry and Business Stakeholders</li><li>■ Post-secondary / Innovation Partners</li><li>■ Local Realtors, Land Owners, and Development Community</li><li>■ Community Organizations</li></ul>



### 4.1.3 Strategic Direction: Infrastructure

**Goal:**

**Infrastructure planning by all regulatory bodies is aligned to support Burlington growth targets**

Recommended Objectives	Suggested Lead	Priority Level	Stakeholder Collaborators
<p><b>Establish one employment growth target for Burlington that is accepted by Halton Region</b></p> <ul style="list-style-type: none"> <li>• Best Planning Estimates (BPE) and the Employment Lands Operational Plan (ELOP) targets must be aligned</li> </ul>	City of Burlington	Highest	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ Halton Region</li> <li>■ Ministry of Municipal Affairs and Housing</li> </ul>
<p><b>Establish an Annual Queen’s Park Day to garner support from key Ministries related to infrastructure growth and planning</b></p> <ul style="list-style-type: none"> <li>• Coordinated messaging with Senior Staff, Council, Economic Development, and Mayor’s Office</li> </ul>	City of Burlington	High	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li> <li>■ Community and Business Stakeholders</li> </ul>
<p><b>Undertake comprehensive benchmarking exercise of utilities across all employment districts</b></p>	Burlington Hydro	High	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ City of Burlington</li> <li>■ Utility Regulators and Providers</li> <li>■ Halton Region</li> </ul>
<p><b>Adopt growth targets for utilities that align with Burlington’s established employment targets</b></p> <ul style="list-style-type: none"> <li>• BEDC to host annual infrastructure forum to increase accountability</li> </ul>	Utility Regulators and Providers	Moderate	<ul style="list-style-type: none"> <li>■ Burlington Hydro</li> <li>■ BEDC</li> <li>■ City of Burlington</li> </ul>



#### 4.1.4 Strategic Direction: Transit and Transportation

<b>Goal:</b> <b>Improve the multi-modal transportation system in Burlington by effectively planning for and implementing a broader range of innovative transit, traditional, and non-traditional transportation options</b>			
Recommended Objectives	Suggested Lead	Priority Level	Stakeholder Collaborators
<b>Foster a progressive culture toward transportation planning that emphasizes creative approaches and a long term vision for the City that prioritizes congestion reduction and improved movement of people and goods</b>	City of Burlington	Highest	<ul style="list-style-type: none"> <li>■ Halton Region</li> <li>■ Partner Municipalities</li> <li>■ BEDC</li> <li>■ Ministry of Transportation</li> <li>■ GO Transit</li> </ul>
<b>Plan and pursue Mobility Hubs throughout key employment districts in Burlington</b> <ul style="list-style-type: none"> <li>● Continue to pursue the Burlington Innovation District as a high priority</li> <li>● Ensure that land use planning is consistent with accessible and diverse transportation</li> <li>● Improve marketing aimed at extolling the benefits of mobility hubs</li> </ul>	BEDC / City of Burlington	High – Moderate	<ul style="list-style-type: none"> <li>■ Halton Region</li> <li>■ Post-secondary / Innovation Partners</li> <li>■ Local Realtors, Land Owners, and Development Community</li> <li>■ Ministry of Transportation</li> <li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li> <li>■ Industry and Business Stakeholders</li> </ul>
<b>Ensure effective alignment with infrastructure and site planning that supports increased intensification and alternative approaches to encouraging transit offerings</b> <ul style="list-style-type: none"> <li>● E.g., developers provide PRESTO passes to residents, reduced parking</li> </ul>	City of Burlington	High	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ Halton Region</li> <li>■ Industry and Business Stakeholders</li> </ul>



**Goal:**

**Improve the multi-modal transportation system in Burlington by effectively planning for and implementing a broader range of innovative transit, traditional, and non-traditional transportation options**

Recommended Objectives	Suggested Lead	Priority Level	Stakeholder Collaborators
allowances, businesses encouraged to provide transit options to employees			
<b>Transit coverage is expanded to all employment districts more effectively, particularly along Service Roads and in high volume areas</b>	City of Burlington	Moderate	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ Halton Region</li> <li>■ Industry and Business Stakeholders</li> <li>■ Post-secondary / Innovation Partners</li> <li>■ Local Realtors, Land Owners, and Development Community</li> </ul>
<b>Adopt policy changes and improved marketing to encourage increased uptake of transit offerings and alternative modes of transportation (e.g., cycling)</b>	City of Burlington / BEDC	High	<ul style="list-style-type: none"> <li>■ Halton Region</li> <li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li> <li>■ Local Realtors, Land Owners, and Development Community</li> </ul>
<b>Planning for new technology associated with vehicles, such as electric charging stations, and modern ride sharing/carpooling opportunities</b>	City of Burlington	Moderate	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ Halton Region</li> <li>■ Industry and Business Stakeholders</li> <li>■ Local Realtors, Land Owners,</li> </ul>



**Goal:**

**Improve the multi-modal transportation system in Burlington by effectively planning for and implementing a broader range of innovative transit, traditional, and non-traditional transportation options**

Recommended Objectives	Suggested Lead	Priority Level	Stakeholder Collaborators
			and Development Community



#### 4.1.5 Strategic Direction: Development and Intensification of Employment Lands

<b>Goal:</b> <b>Achieve maximum development potential of key employment districts in a manner that supports the needs of modern industry and workers that is in line with shared developer and community interests</b>			
Recommended Objectives	Suggested Lead	Priority	Stakeholder Collaborators
<b>Establish one, clear understanding of the type of development Burlington will pursue across all employment districts that all vested stakeholders buy into</b>	City of Burlington / BEDC	Highest	<ul style="list-style-type: none"> <li>■ Industry and Business Stakeholders</li> <li>■ Post-secondary / Innovation Partners</li> <li>■ Local Realtors, Land Owners, and Development Community</li> </ul>
<b>Align regulators at the Regional and Provincial (and Federal) levels to support the development Vision of Burlington</b>	City of Burlington / BEDC	High	<ul style="list-style-type: none"> <li>■ Halton Region</li> <li>■ Conservation Halton</li> <li>■ Burlington Hydro</li> <li>■ Industry and Business Stakeholders</li> <li>■ Post-secondary / Innovation Partners</li> <li>■ Local Realtors, Land Owners, and Development Community</li> </ul>
<b>Establish one employment growth target for Burlington that is accepted by Halton Region</b> <ul style="list-style-type: none"> <li>● Best Planning Estimates (BPE) and the Employment Lands Operational Plan (ELOP) targets must be aligned</li> <li>● Establish clear credibility behind</li> </ul>	City of Burlington	Highest	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ Halton Region</li> <li>■ Ministry of Municipal Affairs and Housing</li> <li>■ Local Realtors, Land Owners, and Development Community</li> </ul>



<b>Goal:</b> <b>Achieve maximum development potential of key employment districts in a manner that supports the needs of modern industry and workers that is in line with shared developer and community interests</b>			
Recommended Objectives	Suggested Lead	Priority	Stakeholder Collaborators
the ELOP targets (e.g., hire land economist to review and revise ELOP)			
<b>Ensure that key lands are “shovel ready”</b> <ul style="list-style-type: none"> <li>Establish a tiered system for profiling employment lands based on development preparedness</li> <li>Leverage Ontario pre-certified sites program</li> </ul>	BEDC / City of Burlington	High	<ul style="list-style-type: none"> <li>Halton Region</li> <li>Industry and Business Stakeholders</li> <li>Post-secondary / Innovation Partners</li> <li>Local Realtors, Land Owners, and Development Community</li> <li>Ministry of Economic Development, Employment and Infrastructure</li> </ul>
<b>Adopt a holistic approach to development planning that is centred on the needs of key industries, and build the real estate offering around it</b>	City of Burlington / BEDC	High	<ul style="list-style-type: none"> <li>Halton Region</li> <li>Post-secondary / Innovation Partners</li> <li>Local Realtors, Land Owners, and Development Community</li> <li>Ministry of Economic Development, Employment and Infrastructure</li> </ul>
<b>Create and implement more flexible approaches to development regulation that accommodate options</b>	City of Burlington	High	<ul style="list-style-type: none"> <li>BEDC</li> </ul>



**Goal:**

**Achieve maximum development potential of key employment districts in a manner that supports the needs of modern industry and workers that is in line with shared developer and community interests**

Recommended Objectives	Suggested Lead	Priority	Stakeholder Collaborators
<ul style="list-style-type: none"><li>• <b>Allowance of negotiated outcomes to encourage mixed – use, live / work, walkable community, etc.</b></li></ul>			<ul style="list-style-type: none"><li>■ Halton Region</li><li>■ Local Realtors, Land Owners, and Development Community</li></ul>



#### 4.1.6 Strategic Direction: Intergovernmental Alignment and Cooperation

<b>Goal:</b> Establish a “one stop shop” approach to service delivery that exemplifies cooperation, collaboration, and partnership among all levels of government to smoothly facilitate investment, development , and growth			
Recommended Objectives	Suggested Lead	Priority	Stakeholder Collaborators
<b>Integrate development processes into a single stream (one local process) in order to facilitate increased growth and development</b>	City of Burlington	High – Moderate	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ Halton Region</li> <li>■ Conservation Halton</li> <li>■ Provincial Ministries and regulators</li> </ul>
<b>Foster and implement joint initiatives that transcend municipal boundaries and strengthen relationships with competitor municipalities</b>	BEDC	High	<ul style="list-style-type: none"> <li>■ City of Burlington</li> <li>■ Halton Region</li> <li>■ Local Municipalities</li> <li>■ City of Hamilton</li> </ul>
<b>Streamline internal processes in order to reduce timelines, complexity, and increase efficiency</b>	City of Burlington	High	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ Halton Region</li> <li>■ Local Realtors, Land Owners, and Development Community</li> </ul>
<b>Champion the alignment of planning vertically through the Province, Region, and local Municipalities</b>	City of Burlington	High – Moderate	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ Halton Region</li> <li>■ Conservation Halton</li> <li>■ Burlington Hydro</li> <li>■ Ministry of Municipal Affairs and Housing</li> </ul>



**Goal:**

**Establish a “one stop shop” approach to service delivery that exemplifies cooperation, collaboration, and partnership among all levels of government to smoothly facilitate investment, development , and growth**

Recommended Objectives	Suggested Lead	Priority	Stakeholder Collaborators
			<ul style="list-style-type: none"> <li>■ Ministry of Economic Development, Employment and Infrastructure</li> </ul>
<p><b>Encourage greater involvement in the Greater Toronto Marketing Alliance (GTMA) and inter-regional collaboration</b></p>	<p>BEDC</p>	<p>High</p>	<ul style="list-style-type: none"> <li>■ GTMA</li> <li>■ Halton Region</li> <li>■ City of Burlington</li> <li>■ Various partner regions across GTA</li> </ul>
<p><b>Increase the level of political cooperation between Mayors and Councils across the GTA</b></p>	<p>City of Burlington / BEDC</p>	<p>High</p>	<ul style="list-style-type: none"> <li>■ GTA Mayors and Councils</li> </ul>



#### 4.1.7 Strategic Direction: Vibrant, Diverse, and Growing Economy

**Goal:**

**Increase the level of youth, young professionals, families, and new comers to Burlington in a welcoming environment that offers increased opportunity, wellness, and cultural diversity**

Recommended Objectives	Suggested Lead	Priority	Stakeholder Collaborators
<p><b>Implement a strategy to attract increased levels of young professionals and small business owners to the city</b></p>	<p>BEDC</p>	<p>High</p>	<ul style="list-style-type: none"> <li>■ Industry and Business Stakeholders</li> <li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li> <li>■ City of Burlington</li> </ul>
<p><b>Explore the feasibility of establishing an educational institution, incubation / innovation services, and/or campus offerings in the Downtown core</b></p>	<p>BEDC / Downtown BIA</p>	<p>Moderate – Low</p>	<ul style="list-style-type: none"> <li>■ Post-secondary / Innovation Partners</li> <li>■ Industry and Business Stakeholders</li> <li>■ Team Burlington (Chamber of Commerce, Tourism Burlington, Burlington Hydro)</li> <li>■ Halton Region</li> <li>■ Ministry of Training, Colleges, and Universities</li> </ul>
<p><b>Increase the level of affordable housing for youth, new comers and young families</b></p>	<p>City of Burlington</p>	<p>High – Moderate</p>	<ul style="list-style-type: none"> <li>■ Community Groups</li> <li>■ Community Development Halton</li> <li>■ Halton Region</li> </ul>



<b>Goal:</b> <b>Increase the level of youth, young professionals, families, and new comers to Burlington in a welcoming environment that offers increased opportunity, wellness, and cultural diversity</b>			
Recommended Objectives	Suggested Lead	Priority	Stakeholder Collaborators
			<ul style="list-style-type: none"> <li>■ BEDC</li> </ul>
<b>Develop a strategy for the creation and implementation of themed, intensified, and more vibrant full service neighbourhoods</b>	City of Burlington / BEDC	Moderate	<ul style="list-style-type: none"> <li>■ Community Groups</li> <li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li> <li>■ Community Development Halton</li> </ul>
<b>Encourage the creation of more mixed-use and live work areas in the city</b>	City of Burlington	High	<ul style="list-style-type: none"> <li>■ BEDC</li> <li>■ Local Realtors, Land Owners, and Development Community</li> </ul>
<b>Undertake a comprehensive assessment of the socio-cultural diversity in Burlington in order to identify barriers and opportunities</b>	BEDC / City of Burlington	High	<ul style="list-style-type: none"> <li>■ Community Development Halton</li> <li>■ Halton Region</li> <li>■ Community Groups</li> <li>■ Industry and Business Stakeholders</li> <li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li> <li>■</li> </ul>



**Goal:**

**Increase the level of youth, young professionals, families, and new comers to Burlington in a welcoming environment that offers increased opportunity, wellness, and cultural diversity**

Recommended Objectives	Suggested Lead	Priority	Stakeholder Collaborators
<b>Develop an Immigration Strategy to support increased population growth and entrepreneurship</b>	BEDC	High	<ul style="list-style-type: none"><li>■ Community Development Halton</li><li>■ Halton Region</li><li>■ City of Burlington</li><li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li></ul>



#### 4.1.8 Strategic Direction: Fostering Business Growth, Investment, Innovation, and Entrepreneurship

<b>Goal:</b> Create a business and innovation ecosystem that encourages new start-ups, provides supports to small business, and drives creativity, investment, and industry expansion in Burlington			
<b>Recommended Objectives</b>	<b>Suggested Lead</b>	<b>Priority</b>	<b>Stakeholder Collaborators</b>
<b>Work with local post-secondary institutes and innovation ecosystem partners to increase the levels of opportunity for new start-ups and enterprises locally</b>	BEDC	High	<ul style="list-style-type: none"> <li>■ Post-secondary / Innovation Partners</li> <li>■ HalTech (RIC) and ONE</li> <li>■ Ministry of Economic Development, Employment and Infrastructure</li> </ul>
<b>Increase the capacity and robustness of the Business Retention and Expansion programming offered through the BEDC</b>	BEDC	Highest	<ul style="list-style-type: none"> <li>■ City of Burlington</li> </ul>
<b>Implement a rapid response team of key decision makers and influencers that link all departments and resources in order to facilitate expansions and new investments</b>	BEDC / City of Burlington	Highest	<ul style="list-style-type: none"> <li>■ City of Burlington</li> <li>■ Halton Region</li> <li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li> <li>■ Industry and Business Stakeholders</li> </ul>
<b>Foster a strong sales, marketing, and customer service culture that emphasizes accessibility and business mindedness</b>	City of Burlington / BEDC	Highest – Ongoing	<ul style="list-style-type: none"> <li>■ Team Burlington (Chamber of Commerce, BIA, Tourism Burlington, Burlington Hydro)</li> </ul>



<b>Goal:</b>			
<b>Create a business and innovation ecosystem that encourages new start-ups, provides supports to small business, and drives creativity, investment, and industry expansion in Burlington</b>			
<b>Recommended Objectives</b>	<b>Suggested Lead</b>	<b>Priority</b>	<b>Stakeholder Collaborators</b>
			<ul style="list-style-type: none"> <li>Halton Region</li> </ul>
<b>Proactively taking measures internally to shorten the approval process and leverage this competitively through key marketing</b>	City of Burlington	Highest	<ul style="list-style-type: none"> <li>BEDC</li> <li>Halton Region</li> </ul>
<b>Effectively leverage the twin city relationships with Apeldoorn, Netherlands and Itabashi, Japan in order to stimulate economic opportunities and research/education sector partnerships</b>	BEDC / City of Burlington	High – Moderate	<ul style="list-style-type: none"> <li>Halton Region</li> <li>Ministry of Economic Development, Employment and Infrastructure</li> <li>Canadian Trade Commissioners Service</li> <li>Consulate General of the Kingdom of the Netherlands</li> <li>Embassy of Japan in Canada</li> </ul>
<b>Ensure that physical incubation / early stage business and creativity space is available to support new ventures</b>	BEDC / City of Burlington	High – Moderate	<ul style="list-style-type: none"> <li>Local Realtors, Land Owners, and Development Community</li> <li>Industry and Business Stakeholders</li> </ul>
<b>Create an Incubation / Start-up Coordinator position and hire a Coordinator dedicated to supporting new ventures and fostering entrepreneurship and innovation</b>	BEDC	High	<ul style="list-style-type: none"> <li>City of Burlington</li> <li>Halton Region Small Business Enterprise Centre</li> </ul>



**Goal:**

**Create a business and innovation ecosystem that encourages new start-ups, provides supports to small business, and drives creativity, investment, and industry expansion in Burlington**

Recommended Objectives	Suggested Lead	Priority	Stakeholder Collaborators
			<ul style="list-style-type: none"> <li>■ Post-secondary / Innovation Partners</li> <li>■ HalTech (RIC) and ONE</li> </ul>
<p><b>Develop the environment for an ecosystem cluster to evolve that will be operated by the private sector or alternative service delivery mechanism</b></p>	<p>BEDC</p>	<p>High –Ongoing</p>	<ul style="list-style-type: none"> <li>■ City of Burlington</li> <li>■ Halton Region</li> <li>■ Post-secondary / Innovation Partners</li> <li>■ HalTech (RIC) and ONE</li> <li>■ Ministry of Economic Development, Employment and Infrastructure</li> <li>■ Industry and Business Stakeholders</li> </ul>



## 4.2 Performance Measurement

The nature of economic development in North America is changing. Traditional forms of economic development based on attracting investment into a community by enticing and recruiting outside industry are being replaced by the desire to build economies from within the community based on innovation, knowledge, creativity, talent, and fostering entrepreneurial skills. This shift in the economic development landscape from the “production of goods and commodities” to the less tangible knowledge and creative based economies has contributed to the ever increasing focus by economic development practitioners on performance measurement of their programming.<sup>48</sup>

As defined by the Ontario Ministry of Agriculture, Food and Rural Affairs, performance measurement is “the process of collecting, assessing and reporting on data in order to evaluate progress towards a desired outcome or objective.”<sup>49</sup> By carefully tracking and reporting on the performance of their programs, economic development practitioners are able to improve the effectiveness and efficiency of their work while also creating an accountable, transparent, and consistent structure of reporting for political decision-makers and the public to access information on how public resources are being used.

Performance measurement serves a number of other important functions for economic development practitioners, including:

- Informing the design, scope, and purpose of economic development programs
- Evaluating the efficiency and effectiveness of management decisions
- Creating statistical benchmarks that can be built on over time to illustrate trends and support evidence based decision-making
- Aiding in decision-making for organizational resource management and budget allocations
- Reinforcing confidence in organizational operations and reporting practices
- Demonstrating and documenting success (or failure) and change over time
- Building momentum and generating buy-in among stakeholders

While performance measurement is widely recognized as an important part of any economic development practitioner’s work, a number of challenges persist that can make performance measurement a difficult undertaking. These challenges include trying to measure elements that are less tangible (i.e. qualitative measures require more judgement and can be easily challenged), issues in attributing credit (or blame) to specific organizations based on broad economy wide

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<sup>48</sup> Ontario Ministry of Agriculture, Food and Rural Affairs, “Measuring Up! Performance Measurement for Economic Development”, 2013, pg. 7

<sup>49</sup> Ibid, pg. 2



outcomes, and a recognition that performance measurement can be a burdensome and costly process for which few resources are allocated. In addition, there are some that see performance measurement as an exercise that yields little helpful information and that fails to accurately capture difficult to understand economic outcomes.

There is no simplistic one size fits all answer in creating successful performance measurement systems. Each economic development practitioner must consider what measures are most useful for their unique situation and build from their base. Regardless of their focus and the challenges that need to be overcome, economic development practitioners must create rigorous and meaningful justification of their work in order to adhere to the strong call by stakeholders and the public to be accountable and effective in creating programming that produces incremental and measurable results for the community.

#### 4.2.1 Moving Beyond “Activities”

The most commonly reported element of a performance measurement system is to report on “activities”. Activities represent the physical, tangible actions taken by an economic development practitioner to achieve a specific goal or objective. Examples of commonly reported activities by economic development practitioners include the number of workshops or meetings hosted or attended, the number of marketing materials created, the creation of a training or mentorship program, and the development of a strategic or economic plan.

While activities are an important part of any performance measurement system, the best and most effective systems focus on measuring the “outputs” and “outcomes” of economic development work.<sup>50</sup> By focusing beyond activities, economic development practitioners are better able to measure the effectiveness and efficiency of their actions, quantifying the results of an activity and helping reveal the relationship between economic development programming and performance and resource allocation.

The most important elements for economic development performance measurement systems to report on are:<sup>51</sup>

- **Inputs** – the resources needed for an economic development plan or program to work. Examples include human, financial, organizational, and community resources.
- **Activities** – the physical actions taken that ultimately support the goals and objectives of an economic development plan or program. Examples include reporting on the number of events hosted, the creation of websites and other marketing material, and the number of meetings attended.

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<sup>50</sup> Theodore H. Poister, “Measuring Performance in Public and Nonprofit Organizations”, 2003

<sup>51</sup> Ontario Ministry of Agriculture, Food and Rural Affairs, “Measuring Up! Performance Measurement for Economic Development”, 2013, pg. 5



- **Outputs** – the measures that help define and quantify the results of an activity. Examples include reporting on the number of people who received training, the number of hits to a website, the number of brochures distributed, or the number of participants at events. Outputs should not be used in isolation to measure the performance of an activity.
- **Outcomes** – the specific changes in behaviours, knowledge, skills, status, level of understanding, and functioning associated with activities and outputs. Outcomes help illustrate the relationship between overall performance and the resources used to achieve the particular outcome. Outcomes are often classified as short, intermediate, and long-term.

A focus on inputs, activities, outputs, and outcomes help economic development practitioners ensure that their actions contribute to their overall objectives and goals, and that they reach those goals in a responsible and resource appropriate manner.

## 4.2.2 Models of Performance Measurement

Performance measurement can be split into two broad categories:

- External measurements – providing a focus on the external or stakeholder oriented processes
- Internal measurements – providing a focus on the management or internal business processes

It is important to note that both the external and internal measurement systems are most effective when they build off of already established strategic or economic plans created by an organization. These performance measurement systems support the achievement of established goals and objectives as outlined in the strategic or economic plans.

A best-practice example of each system is presented below, with the “logic model” illustrating external measurements and the “balanced scorecard” illustrating internal measurements.



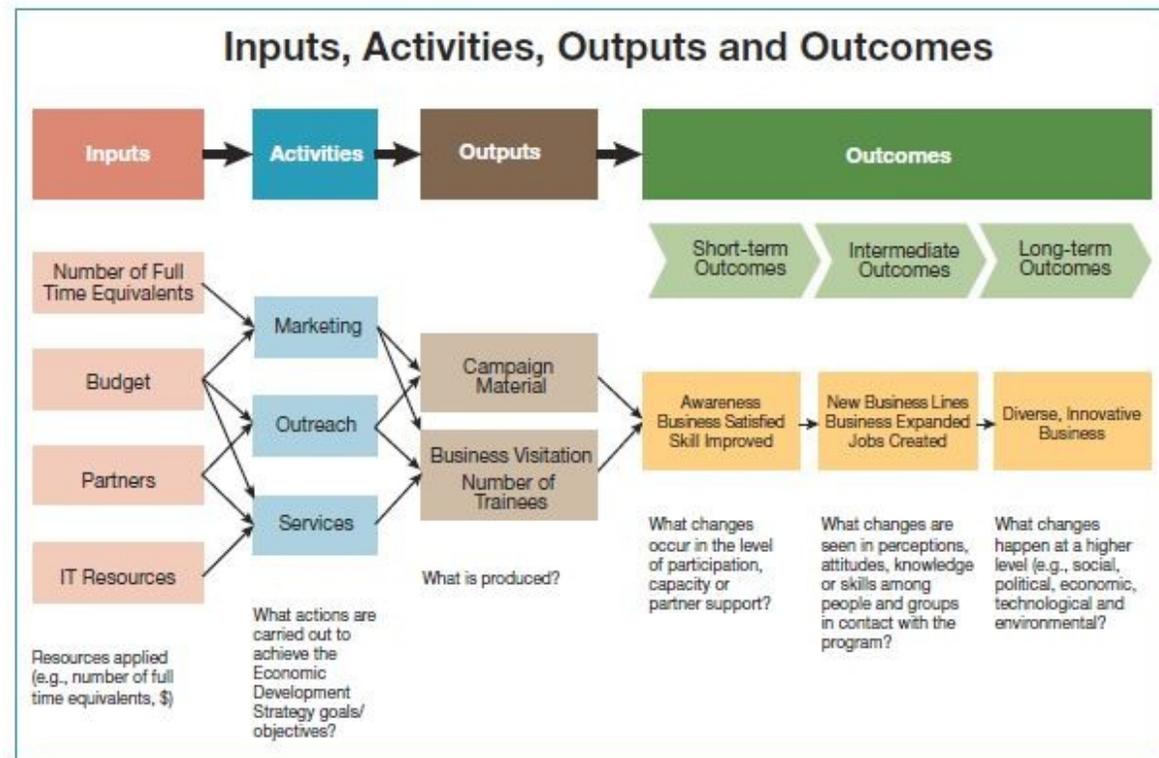
## The Logic Model

The “logic model” is a commonly used economic development performance measurement tool that creates a graphic illustration highlighting the connections and relationships between inputs, activities, outputs, and outcomes of economic development work (as seen in Figure 8).

The logic model is particularly important in helping to illustrate the connection between what is invested (i.e. inputs), how that investment is used (i.e. activities), what products/services emerge from the investment and what groups it helps to reach (i.e. outputs), and what the overall changes in the system are from that investment (i.e. outcomes).

The logic model identifies short-term, intermediate, and long-term outcomes to help track the various stages of change that may occur due to the input, activities, and outputs.

FIGURE 8: THE LOGIC MODEL OF EXTERNAL PERFORMANCE MEASUREMENT



Source: Ontario Ministry of Agriculture, Food and Rural Affairs, “Measuring Up! Performance Measurement for Economic Development”, 2013, pg. 15



## The Balanced Scorecard<sup>52</sup>

The “balanced scorecard” is a strategic planning and management system used by business, industry, government, and non-profit organizations to align internal business activities to the vision and strategy of the organization. The balanced scorecard gives managers and executives a “balanced” view of organizational performance by exploring a variety of areas important to the success of the organization (not simply the financial performance as has often been the focus for organizations). In this way, the balanced scorecard is seen to operationalize an organization’s strategic plan, providing feedback around the internal and external activities and outcomes important for that organization.

The balanced scorecard has four main perspectives from which to measure organizational performance (as seen in Figure 9):

- **The Financial/Stewardship Perspective** – including metrics based on the timely and accurate analysis of financial data
- **The Internal Business Process Perspective** – including metrics based on organizational efficiency and whether products and services are meeting customer requirements
- **The Organizational Capacity Perspective** – including metrics based on organizational knowledge and innovation, such as employee training and corporate cultural attitudes related to both individual and corporate self-improvement
- **The Customer/Stakeholder Perspective** – including metrics based on customer satisfaction and the importance of customers to the success of the organization

FIGURE 9: THE BALANCED SCORECARD FOR INTERNAL PERFORMANCE MEASUREMENT



Source: The Balanced Scorecard Institute, <http://balancedscorecard.org/Resources/About-the-Balanced-Scorecard>, adapted from Robert S. Kaplan and David P. Norton, “Using the Balanced Scorecard as a Strategic Management System,” Harvard Business Review (January-February 1996): pg. 76

<sup>52</sup> The Balanced Scorecard Institute, <http://balancedscorecard.org/Resources/About-the-Balanced-Scorecard>



### 4.2.3 Key Considerations in Creating a Performance Measurement System

Key considerations when creating or implementing a successful performance measurement system include:<sup>53</sup>

- **Select a handful of measures rather than measuring everything** – outcomes should be the main focus of the performance measurement system and it is important to balance the desire for information about performance with an organization's ability to collect and use it. Too many performance measures increase the cost and complexity of measuring performance, often to the point where the entire process can become paralyzed. It is important to brainstorm a large list of performance measures and to select a critical few for ongoing collection and analysis (between six and 12 per program area).
- **Reflect the goals of the organization through the measures selected** – metrics should come directly from the goals of an already established strategic or economic plan. All measures must be explicitly defined.
- **Include a few measures to show activity and outputs** – even though the end goal is to focus on measuring outcome, activity and output are useful measures to track what an economic development office is doing and how busy they are (which can be helpful when trying to get budget approval for more resources)
- **Identify a data source for all metrics** – some measures are easier to collect through internal sources whereas others take more time and are reliant on external sources. Some measures may make sense to track on a monthly basis, whereas others will only be meaningful on a quarterly, semi-annual or even annual basis.
- **Survey your clients** – some measures require client input/feedback and will involve the development of data collection instruments and tools
- **Claim only what your organization played a role in** – only report on outcomes in which your organization can legitimately claim credit. Attribution is difficult when assessing broad outcomes that may have been contributed to by a number of other organizations.
- **Report outcomes over time** – it takes time for economic development projects to take hold, so showing their impacts over time can help illustrate that expenditures in economic development are good long-term investments in the community. All measures should be revisited following a period of data collection (for at least six months) to determine their usefulness and value.

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<sup>53</sup> EDAC "Performance Measurement in Economic Development", September 2011, pg.28-29 and Andrew Young School of Policy Studies at Georgia State University "Performance Measurement in State Economic Development Agencies", 2004 from EDAC "Performance Measurement in Economic Development", September 2011, pg. 2



## 5 Appendix

One of the key considerations during this project was to ensure that the Economic Vision strategic planning process was conducted from a position that was grounded strongly in evidence. During the project's life, a significant level of background research was conducted, along with considerable quantitative and qualitative analysis surrounding the engagement process, particularly in relation to the online survey, stakeholder consultations, Advisory Committee workshops and focus group sessions.

Due to the sheer volume of research report components generated, and in the interest of keeping this documents length to a minimum, the following list of Technical Documents can be requested should any reader or interested party wish to review the complete analyses that underpin this report.

The appendicized research documents for the Burlington Economic Vision 2025 are as follows:

- Burlington Economic Base Analysis
- Burlington Competitive Analysis
- Burlington Key Sector Analysis
- Burlington Economic Vision Online Survey Results
- Consultation Analysis: One-on-One Stakeholder Interviews
- Key Strategic Areas Discussion Summary

To request a copy of any or all of these Technical Documents please contact:

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## 5.1 Performance Measurement Template

In an effort to demonstrate how to link the goals and objectives listed in the Burlington Economic Vision Action Plan to BEDC's future planning, a template example drawn from the Ontario Ministry of Agriculture, Food, and Rural Affairs (OMAFRA) for the logic model of performance measurement described above is provided in this section.

The table in Figure 10 below is a detailed template for performance management of a theoretical economic development office created by OMAFRA. This was designed by the Ministry to support economic development organizations in how they can look at approaching the complex and difficult task of assigning performance measures to their offices (and attempt to overcome the attribution issues mentioned above).

The diagram provided in Figure 11 has been adapted from this model and one of the Action Plans above (4.1.4



Strategic Direction: Development and Intensification of Employment Lands) has been used to illustrate how the logic model for performance measurement can be applied.

The Goal, “Achieve maximum development potential of key employment districts in a manner that supports the needs of modern industry and workers that is in line with shared developer and community interests” for the Strategic Direction falls into the Long Term Outcome column at the far right.

For the purposes of this example, the Recommended Objective, “Ensure that key lands are ‘shovel ready”” is assigned to the Short Term, or Initial Outcomes representing the impact of activities. The Intermediate Outcome or the meeting objectives section is where the two ‘next step’ elements (or actions) of the Recommended Objective are slotted:

- Establish a tiered system for profiling employment lands based on development preparedness
- Leverage Ontario pre-certified sites program

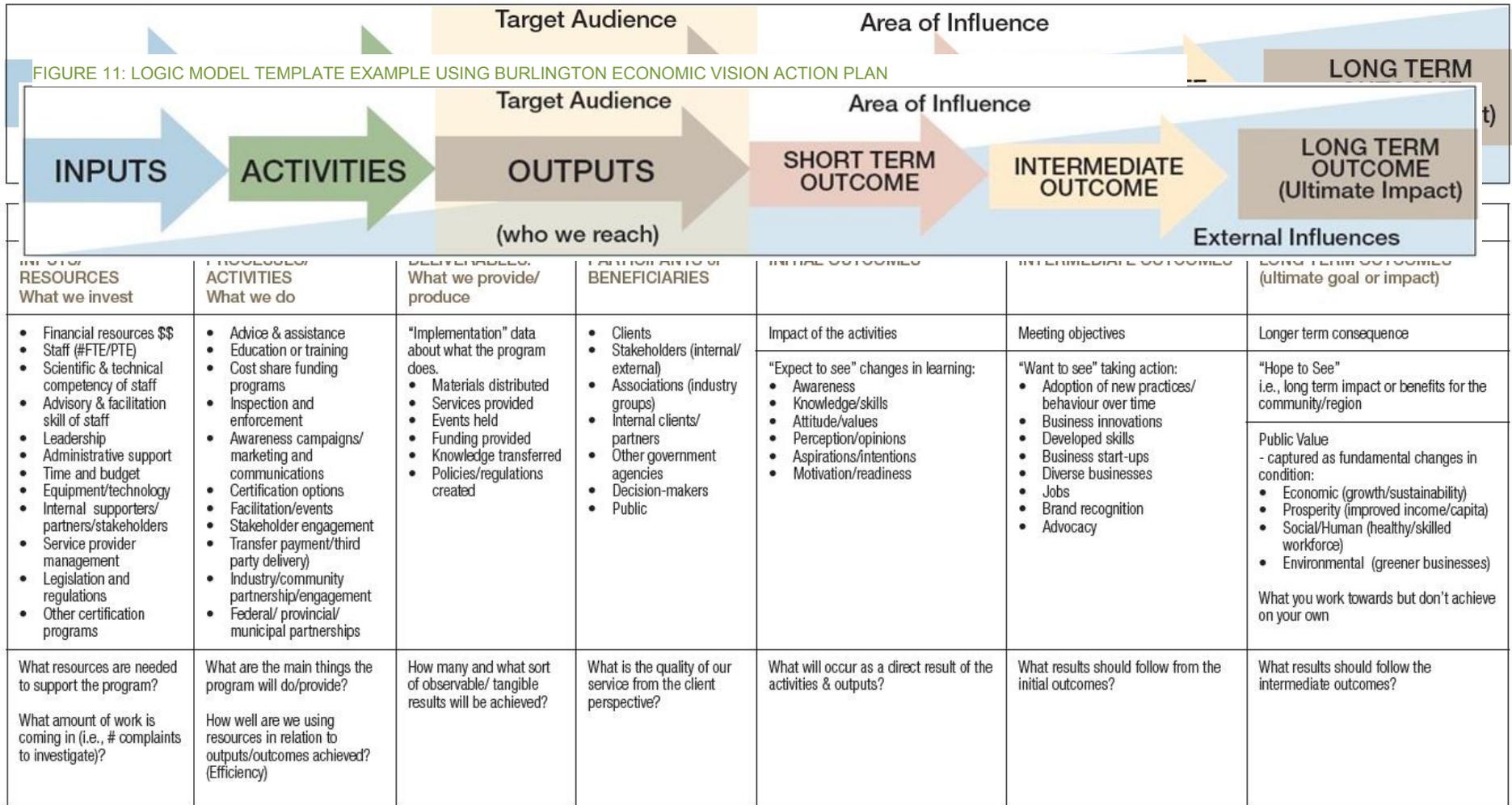
Along the continuum from Inputs → Activities → Outputs the columns have been populated with examples of theoretical resources, processes, and deliverables that represents key elements of the tactical level business planning that is needed in order to execute on the Action Plans.

It is important to keep in mind that this model is being provided for reference purposes only, and the BEDC will need to ensure that the internal business plans align with the steps required in order to implement the Action Plans and their Recommended Objectives.

The next stage for Burlington’s Economic Vision exercise will be to develop (in collaboration with partners and stakeholders) more complete templates for each of the identified Strategic Directions focus presented in this report.



FIGURE 10: DETAILED TEMPLATE FOR THE LOGIC MODEL OF PERFORMANCE MEASUREMENT



Source: Ontario Ministry of Agriculture, Food and Rural Affairs, "Measuring Up! Performance Measurement for Economic Development", 2013, pg. 53





## 5.2 Advisory Committee Members

There were 19 Advisory Committee members that helped oversee and direct the process in creating Burlington's Economic Vision 2025. Each member is identified in Figure 12 below.

FIGURE 12: BURLINGTON'S ECONOMIC VISION 2025 ADVISORY COMMITTEE MEMBERS

Sector Representation	Name	Organization
Business	Archie Bennett	Zeton International
Aldershot BIA	Bob Meehan	Aldershot BIA
BEDC Board	Bonnie Prior	Appraisal Institute of Canada
BDBA	Brian Dean	BDBA
Top Employer	Brian Ferguson	VM Ware
Realtor	Dean Morrison	Cushman & Wakefield
Hydro	Gerry Smallegange /Dan Guatto	Burlington Hydro
Conservation Halton	Hassaan Basit	Conservation Halton
City	James Ridge	City of Burlington
Business	John Chisholm	SB Partners
Halton Region	John Davidson	Region of Halton
Start-ups	Karen Grant / Colin Wyatt	Angel One Investment Network
Chamber	Keith Hoey	Burlington Chamber of Commerce
HIEC	Kelly Hoey	HIEC
Post-Secondary Institution	Len Waverman	McMaster University
Developer	Michael Shih	EmShih Development
City	Mike Spicer	City of Burlington
Tourism	Pam Belgrade	Tourism Burlington
City	Scott Stewart	City of Burlington