



Growth Management Strategy Draft Addendum Report, 2022

Township of Cavan Monaghan

July 25, 2022

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List of Acronyms and Abbreviations

B.U.A.	Built-up area
D.G.A.	Designated greenfield area
G.G.H.	Greater Golden Horseshoe
G.M.S.	Growth Management Strategy
L.N.A.	Land Needs Assessment
M.C.R.	Municipal Comprehensive Review
M.M.A.H.	Ministry of Municipal Affairs and Housing
M.Z.O.	Minister's Zoning Order
N.F.P.O.W.	No fixed place of work
O.P.	Official Plan
P.P.S.	Provincial Policy Statement
P.P.U.	Persons per unit
S.A.B.E.	Settlement Area Boundary Expansion
SSA	Special Study Area
T.A.C.	Technical Advisory Committee



Executive Summary



Executive Summary

Introduction

Watson & Associates Economists Ltd. (Watson) completed the Township of Cavan Monaghan Growth Management Strategy (G.M.S.) in May 2020. This updated Growth Plan has been prepared in conjunction with a “new” Land Needs Assessment (L.N.A.) methodology for the Greater Golden Horseshoe (G.G.H.). In response to Amendment 1 to the Growth Plan, Peterborough County has recently completed a Municipal Comprehensive Review (M.C.R.) which sets out the long-term County (and its member municipalities) outlook for population, housing and employment growth as well as corresponding urban land requirements to the year 2051. The 2051 horizon adds an additional 10 years from the previous G.M.S.

In addition to the above proposed provincial changes to the Growth Plan, the scope of the G.M.S. has been expanded to specifically include a review of Special Study Area No. 1 (SSA-1), as identified in Schedule A in the Township’s Official Plan (O.P.), as a potential location for future development in the Township over the long term. As a result of the above-mentioned provincial and local factors, there is a need for the 2020 Township of Cavan Monaghan G.M.S., hereinafter referred to as the 2020 G.M.S., to be updated. The findings and recommendations of the 2020 G.M.S. still stand unless updated through this addendum report.

Urban Land Needs

Commercial Land Needs

- The total supply of vacant commercial lands in the Millbrook designated greenfield area (D.G.A.) is approximately 7 net ha (17 net acres). The demand for commercial lands over the next 30 years exceeds the supply of vacant commercial lands in the Millbrook D.G.A.
- To accommodate forecast commercial growth to the year 2051, approximately 6 net ha (15 net acres) of additional designated commercial lands are required.

Residential Land Needs

- Approximately 1,640 units were found to be within the development approvals process (registered un-built, draft approved, and currently under review) across



the Township. Slightly over half of the Township's residential supply in the development approvals process is in the form of low-density units.

- The updated Township of Cavan Monaghan G.M.S. forecasts population growth of 7,300 between 2021 and 2051, representing an annual population growth rate of 1.8%. By the year 2051, the Township's population base is forecast to reach approximately 17,600 persons.
- Over the 2021 to 2051 forecast period, approximately 94% of the Township's forecast household growth has been allocated to Millbrook, with the remaining 6% allocated to the Rural Area.
- Through this 2051 G.M.S. update, the revised urban residential land needs for Cavan Monaghan result in an additional urban land requirement of approximately 75 ha (185 acres) by 2051.

Urban Employment Area Land Needs

- There are 45 ha (111 acres) of developable designated Urban Employment Area lands within the current Millbrook Urban Settlement Area. Of this total supply, 40 gross ha (99 gross acres) remain vacant as of May 2022.
- Total employment within the Township is expected to increase from 3,900 in 2021 to 8,100 in 2051, representing an increase of 4,200 jobs or a growth rate of 2.5% annually.
- Land-based commercial, industrial and institutional employment sectors are anticipated to account for approximately 74% of employment growth over the forecast period. The "no fixed place of work" and "work at home" employment categories are forecast to comprise the remaining 26% of employment growth.
- Urban Employment Areas in the Township are forecast to accommodate approximately 1,600 employees over the 2021 to 2051 period. This represents approximately 38% of the Township's total employment growth over that period.
- To accommodate forecast employment growth on Urban Employment Areas to the year 2051, 34 ha (84 acres) of additional designated Urban Employment Areas will be required.

Location Options for Future Urban Expansion and Policy Recommendations

- In order to accommodate future needs, the conversion of several of the Township's current urban Employment Areas to a non-employment use (i.e., Community Area) is recommended.



- There is a need for additional urban Employment Area land and urban Community Area land to 2051. The recommendation to convert the subject urban Employment Area lands to Community Area provides a more compatible urban land use structure for the Millbrook Settlement Area over the long term as the community continues to expand and urbanize.
- Considering the proximity of the subject lands to existing or planned Community Area uses, the recommendation to convert the subject Employment Area lands to a Community Area use is appropriate and represents good planning.
- In accordance with the land needs and findings of the Peterborough County M.C.R., lands outside Millbrook, including those lands in SSA-1, are not required to accommodate Community Area lands to 2051.

Policy Recommendations and Strategic Directions

A set of updated policy recommendations have been provided under the following themes:

- Planning for Population, Housing, and Employment Growth in the Township of Cavan Monaghan;
- Planning for Growth in Urban Employment Areas;
- Planning for Growth in Built-up Areas and Designated Greenfield Community Areas; and
- Planning for Growth in Commercial Areas.



Report



Chapter 1

Introduction



1. Introduction

Watson & Associates Economists Ltd. (Watson) completed the Township of Cavan Monaghan Growth Management Strategy (G.M.S.) in May 2020. The Township G.M.S. provided a long-term land use planning policy framework for urban and rural development across the Township to the year 2041. On August 28, 2020, the Province of Ontario released an Amendment (referred to as Amendment 1) to A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019. The Growth Plan and Amendment 1 have been incorporated into an Office Consolidation, August 2020 document, hereinafter referred to as the Growth Plan, 2019. The updated Growth Plan, 2019 has been prepared in conjunction with a “new” Land Needs Assessment (L.N.A.) methodology for the Greater Golden Horseshoe (G.G.H.). These documents are in effect as of August 28, 2020. In response to Amendment 1 to the Growth Plan, 2019, Peterborough County recently completed its Municipal Comprehensive Review (M.C.R.) which sets out the long-term County (and its member municipalities) outlook for population, housing and employment growth as well as corresponding urban land requirements to the year 2051.

The population and employment growth forecast horizon set out in Schedule 3 of the Growth Plan, 2019 and the applicable time horizon for land use planning has now been extended to 2051 (from the previous 2041 planning horizon). It is further noted that the recommended Schedule 3 growth forecasts are to be treated as minimums, with higher growth forecast alternatives permitted by upper- and single-tier municipalities through their respective M.C.R. process.^[1] If an alternative growth forecast is utilized, which exceeds Schedule 3 of the Growth Plan, 2019, the M.C.R. must demonstrate that the alternate growth scenario meets the Growth Plan, 2019 policy objectives of accommodating a range of housing choices to meet market demand and the needs of current and future residents, as well as providing additional labour opportunities for the G.G.H. labour market.^[2] It should be noted that higher forecasts established by upper- and single-tier municipalities through their M.C.R.s will not apply to provincial ministries and agencies.^[3]

^[1] Growth Plan, Office Consolidation 2020, Policy 5.2.4., p. 56.

^[2] A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Land Needs Methodology for the Greater Golden Horseshoe, p. 5.

^[3] Growth Plan, Office Consolidation 2020, Policy 5.2.4.8., p. 57.



In addition to the above proposed provincial changes to the Growth Plan, the scope of the G.M.S. has been expanded to specifically include a review of Special Study Area No. 1 (SSA-1) lands, as identified in Schedule A in the Township's Official Plan (O.P.), as a potential location for future development in the Township over the long term.

As a result of the above-mentioned provincial and local factors, there is a need for the 2020 Township of Cavan Monaghan G.M.S., hereinafter referred to as the 2020 G.M.S., to be updated. The findings and recommendations of the 2020 G.M.S. still stand unless updated through this addendum report.



Chapter 2

Township of Cavan Monaghan Growth Forecast and Urban Land Needs, 2051



2. Township of Cavan Monaghan Growth Forecast and Urban Land Needs, 2051

2.1 Background

On August 28, 2020, the Ministry of Municipal Affairs and Housing (M.M.A.H.) released the final L.N.A. methodology in accordance with Growth Plan, 2019 policy 5.2.2.1 c).^[1] Upper- and single-tier municipalities in the G.G.H. are required to use this methodology to assess the quantity of land required to accommodate forecast growth in conformity with the policies in the Growth Plan, 2019. In accordance with the Growth Plan, 2019 and the L.N.A. methodology, key areas of consideration related to this review also include requirements to:

- Accommodate all housing market segments;
- Avoid housing shortages;
- Consider market demand;
- Accommodate all employment types including those that are evolving; and
- Plan for all infrastructure that is needed to meet the complete communities objectives to the horizon of the Plan.

The methodology identifies that the results of an L.N.A. can only be implemented through an M.C.R. An M.C.R. is a new Official Plan (O.P.), or an O.P. Amendment initiated by an upper- or single-tier municipality under section 26 of the *Planning Act* that comprehensively applies the policies and schedules in the Growth Plan.

In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas including Community Areas and Employment Areas, as defined below:

“Community Areas: Areas where most of the housing required to accommodate the forecasted population will be located, as well as most population-related jobs, most office jobs and some employment land employment jobs. Community areas include *delineated built-up areas and designated greenfield areas*.

^[1] Land Needs Assessment Methodology for the Greater Golden Horseshoe. Ontario. August 28, 2020.



Employment Areas: Areas where most of the employment land employment jobs are (i.e. employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the *employment area*. *Employment areas* may be located in both *delineated built-up areas* and *designated greenfield areas*.^[1]

In total, the L.N.A. methodology provides six key respective steps to establishing Community Area and Employment Area land needs. The six key steps for Community Area land needs are outlined in section 2 of the L.N.A. methodology, while the Employment Area land needs steps are outlined in section 3.^{[2],[3]}

2.2 Urban Commercial Demand and Land Needs, 2021 to 2051

The Millbrook Urban Settlement Area has approximately 9,200 sq.m (99,000 sq.ft.) of occupied commercial space (office and retail). The ratio of commercial space per resident in Millbrook is approximately 3.5 sq.m (38 sq.ft.), which is considered low compared to markets of a similar size. In addition, there is approximately 1,500 sq.m (16,000 sq.ft.) of office space in Millbrook.

In total, approximately 48% of the commercial space in Millbrook is accommodated by retail and food services (restaurant/drinking places), while over half of the commercial space accommodates services and institutional uses (medical, health services and dental).^{[4],[5]} The composition of the commercial base includes a large services component as compared to other urban areas of comparable size.

While the total commercial building space has remained unchanged since 2019 (i.e., no new commercial building space added), there have been several changes in the use of

^[1] Land Needs Assessment Methodology for the Greater Golden Horseshoe. Ontario. August 28, 2020., pp. 6-7.

^[2] Ibid., pp. 8-9.

^[3] Ibid., p. 15.

^[4] Includes grocery stores, convenience stores and food services (restaurants and establishments that sell food and drink items).

^[5] Services includes commercial establishments that offer non-tangible services, including travel agencies, banks, real estate and insurance agencies, hair salons, automotive repair.



the commercial building space in Millbrook. New businesses occupying commercial space in Millbrook have largely included businesses that provide services which have replaced commercial businesses that sell goods.

Since 2019, the retail vacancy rate has increased slightly from 6% to 8% (870 sq.m/ 9,400 sq.ft. of vacant building space). While the commercial building space vacancy rate has increased, the vacancy rate is still within a healthy commercial vacancy rate range (5% to 10% is considered a balanced market).

Figure 2-1 summarizes the forecast commercial land needs to 2051. Key observations include the following:

- A large portion of the commercial building space in Millbrook is concentrated in the downtown core in older buildings, while vacant commercial lands that offer opportunities for future commercial development are being concentrated in the northeast area of Millbrook (County Road 10/Fallis Line). These commercial lands can accommodate a range of commercial options not easily accommodated in the downtown area, as well as support opportunities for commercial developments that would reduce shopping trips outside the community.
- In order to support the commercial needs of Millbrook and the surrounding area to 2051, Millbrook will require an additional 34,900 sq.m (376,000 sq.ft.) of commercial building space, based on a target per capita ratio of 4.3 sq.m/46 sq.ft. of commercial space per resident.
- In terms of land requirements over the 2021 to 2051 forecast period, the Township is anticipated to generate demand for 13 net ha (32 net acres) of commercial lands associated with forecast commercial growth in Millbrook.
- The development proposal for commercial development at the northeast corner of County Road 10/Fallis Lane (lands subject to a Minister's Zoning Order (M.Z.O.), referred to as the Vargas lands) on approximately 3 ha (7 acres) of commercial land is anticipated to largely satisfy the immediate commercial needs of residents today and over the short term (i.e., 5 to 7 years).
- The total supply of vacant commercial lands in the Millbrook D.G.A. is approximately 7 net ha (17 net acres).^[1] As summarized in Figure 2-1, the

^[1] Excludes approximately 1.7 ha (approximately 4 acres) of small infill sites in the built-up area (B.U.A.).



demand for commercial lands over the next 30 years exceeds the supply of vacant commercial lands in the Millbrook D.G.A.

- To accommodate forecast commercial growth to the year 2051, approximately 6 net ha (15 net acres) of additional designated commercial lands are required.
- Opportunities for mixed-use developments in the D.G.A., such as the development proposal by CSU Developments Inc. and Vargas in the west end of Millbrook (southwest of Fallis Line and County Road 10) would reduce the commercial land required by 1 ha for every 2,500 sq.m/27,000 sq.ft. of commercial space accommodated in a mixed-use development.
- The Township should pursue adding more designated commercial lands to the Millbrook Urban Settlement Area.

Figure 2-1
Township of Cavan Monaghan
Urban Commercial Land Needs, 2021 to 2051

Growth Period	Total Commercial G.F.A. Demand, sq.m	G.F.A. Adjusted for Intensification, sq.m ^[1]	Building Space Converted to Land Area, ha	Total Land Requirement, ha (25% Building Coverage)	Vacant Commercial Land Supply, ha ^[2]	Land Needs, Surplus/ (Shortfall), ha
	A	B = A x 90%	C = B / 10,000	D = C x 4	E	F = E – D
2021-2051	34,900	31,400	3.14	13	7	(6)

^[1] Assumes 10% of commercial development will be accommodated on small infill sites of less than 1 ha. There are approximately 8 vacant small infill sites totaling 1.7 ha (approximately 4 acres).

^[2] Total available commercial lands measuring at least 1 ha.

Source: Watson & Associates Economists Ltd., 2022.

2.3 Township of Cavan Monaghan Community Area Land Needs, 2021 to 2051

2.3.1 Township of Cavan Monaghan Residential Land Supply, 2021

An updated review of active development applications, greenfield supply opportunities, and housing intensification opportunities within the built-up area (B.U.A.) were undertaken to determine the housing potential within Cavan Monaghan. To determine an inventory of D.G.A. lands in Millbrook currently not active in the development approvals process, a desktop review was carried out using mapping data and aerial photography. The housing unit supply potential was calculated on developable lands using residential density and housing mix assumptions based on existing residential



development conditions and residential density trends anticipated in active development plans in Millbrook.

Intensification supply opportunities in Millbrook were identified within the B.U.A. in accordance with the definition of housing intensification as per subsection 1.1.3.3 of the 2020 P.P.S. Vacant lots within the B.U.A. of Millbrook were reviewed for residential intensification opportunities. A potential unit yield for each site was determined based on existing residential development conditions and residential density trends of development activity in Millbrook. Long-term redevelopment opportunities were not considered a part of this intensification supply analysis. This work was also informed by the housing intensification analysis for Cavan Monaghan prepared for the Peterborough County M.C.R.

The potential to accommodate new housing development throughout the Township as of May 2022 is shown in Figure 2-2. A map highlighting the development opportunities within the current Millbrook Urban Settlement Area is shown in Figure 2-3.

- Approximately 1,640 units were found to be within the development approvals process (registered un-built, draft approved, and currently under review) across the Township. Slightly more than half of the Township's residential supply in the development approvals process is in the form of low-density units.
- The total units in active development applications include those associated with the CSU Developments Inc. and Vargas lands, which received an approved M.Z.O. on April 1, 2022.
- Units in the development approvals process represent 86% of the total housing supply across the Township.
- The unit yield of the Township's residential greenfield development opportunities is estimated at only 167 units.^[1]
- There are currently limited opportunities within the Millbrook B.U.A. The estimated unit yield of the residential intensification opportunities in Millbrook is estimated at just over 100 high-density units.^[2]

^[1] Assumed D.G.A. densities of 20 low-density units per ha, 30 medium-density units per ha, and 55 high-density units per ha.

^[2] There are 1.74 ha of vacant available land within the B.U.A. At an assumed density of 60 units per ha, this results in an estimated supply of 104 high-density units.



- It is evident that Millbrook, which is the only settlement area in the Township with full municipal services, will continue to be the focus of current and future development.

Figure 2-2
Residential Supply Opportunities in the Township of Cavan Monaghan
by Type of Opportunity as of May 2022

	Housing Type				
	Low Density	Medium Density	High Density	Total	Share
Millbrook Urban Settlement Area					
Within Built Boundary					
Development Approvals Process	-	-	-	-	0%
Intensification Opportunities	-	-	104	104	5%
Total Within Built Boundary	-	-	104	104	5%
Outside Built Boundary					
Development Approvals Process	855	357	393	1,605	84%
Greenfield Opportunities	108	47	12	167	9%
Total Outside Built Boundary	963	404	405	1,772	93%
Other Settlement Areas					
Development Approvals Process	34	-	-	34	2%
Hamlets	34	-	-	34	2%
Total in Other Settlement Areas	34	-	-	34	2%
Township Total	997	404	509	1,910	
Township Share	52%	21%	27%	100%	

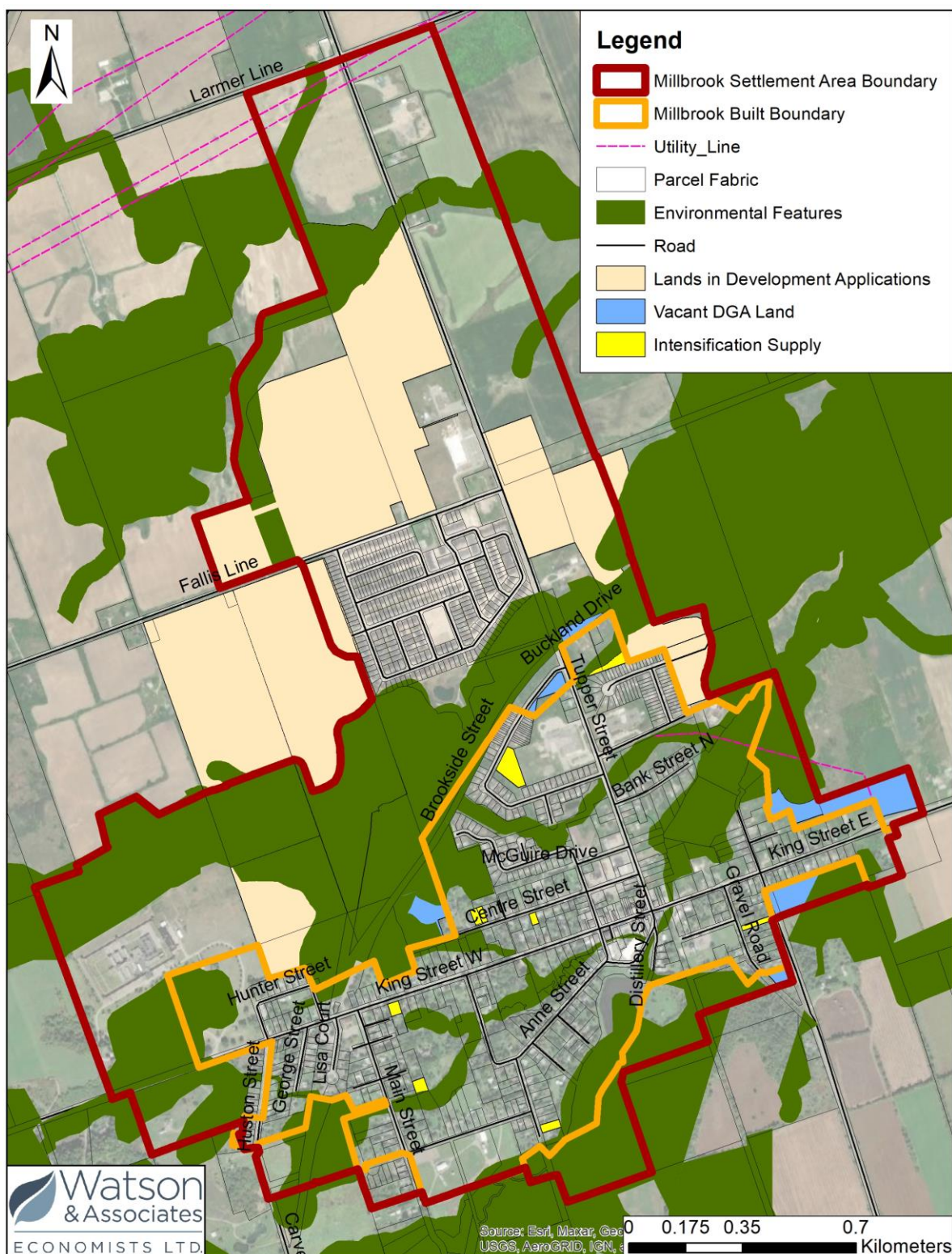
Note: Numbers may not add precisely due to rounding.

Source: Derived by Watson & Associates Economists Ltd. using Township of Cavan Monaghan and County of Peterborough data, and through desktop review. Low density is considered to be singles and semi-detached, medium density is considered to be townhouses and multiples, and high density is considered to be apartments.

Additional opportunities for intensification in a wider-range of housing forms could be achieved through future infill redevelopment opportunities.



Figure 2-3
Residential Supply Opportunities in Millbrook by Type of Opportunity as of May 2022





2.3.2 Township of Cavan Monaghan Population and Housing Growth Forecast, 2021 to 2051

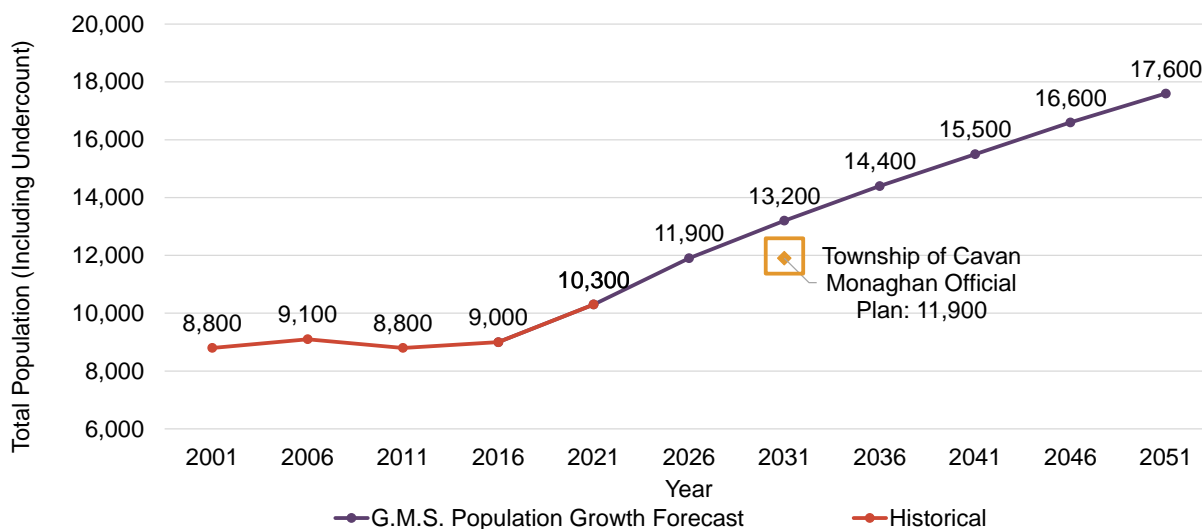
Since the release of the Township of Cavan Monaghan G.M.S. in 2020, Watson and Township staff have been working with Peterborough County and its consultant to ensure the findings of the current County M.C.R. reflect the preferred planning direction for Cavan Monaghan. Accordingly, through this collaboration the Peterborough County M.C.R. is consistent with the G.M.S. work regarding the urban L.N.A. for Cavan Monaghan to the year 2051. The Peterborough County M.C.R. has identified a County-wide population increase of 18,200 between 2021 and 2051, resulting in a need for an additional 9,640 households. The Township of Cavan Monaghan has been allocated the largest share of this County-wide housing growth at approximately 34% of the total, representing an increase of 3,320 housing units between 2021 and 2051. Of this housing unit forecast for Cavan Monaghan, the Peterborough County M.C.R. also identified approximately 3,190 units to be allocated to the Millbrook Urban Settlement Area, representing 96% of total household growth for the Township.

Building on the results of the Peterborough County M.C.R. and the Cavan Monaghan 2020 G.M.S., this G.M.S. update summarizes the population and housing forecast for the Township by planning policy area (i.e. B.U.A, D.G.A. and remaining rural area) from 2021 to 2051. As shown in Figure 2-4, the updated Township of Cavan Monaghan G.M.S. forecasts population growth of 7,300 between 2021 and 2051, which represents an annual population growth rate of 1.8%. By the year 2031, the Township's population base is forecast to reach 13,200, outpacing the Township's current O.P. population forecast by approximately 1,300 people. By the year 2051, the Township's population base is forecast to reach approximately 17,600 persons.

Figure 2-5 summarizes the household growth allocations between the B.U.A., the D.G.A. of the Millbrook Urban Settlement Area and the Rural Area of the Township based on the Cavan Monaghan G.M.S. update. Over the 2021 to 2051 forecast period, approximately 94% of the Township's forecast household growth has been allocated to Millbrook, with the remaining 6% allocated to the Rural Area. This is consistent with the Township's existing O.P. policies which require that most of the Township's growth be directed to the Millbrook Urban Settlement Area. Additional information regarding the population and housing growth forecast for the Township can be found in Appendix A.



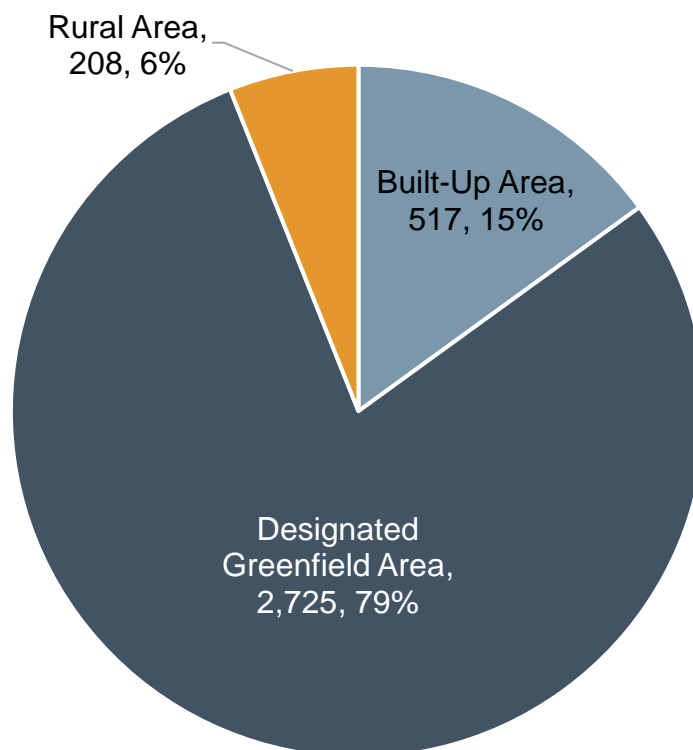
Figure 2-4
Township of Cavan Monaghan Population Growth Forecast, 2021 to 2051



Note: Population includes the net Census undercount estimated at 2.5%.

Source: 2001 to 2021 from Statistics Canada Census. Forecast by Watson & Associates Economists Ltd., 2022.

Figure 2-5
Allocation of Township of Cavan Monaghan Household Growth Forecast, 2021 to 2051



Source: Watson & Associates Economists Ltd., 2022.



2.3.3 Township of Cavan Monaghan Community Area Urban Land Needs, 2051

The 2020 G.M.S. identified a residential land need of 49 ha (121 acres) by 2041. Through this 2051 G.M.S. update, the revised urban residential land needs for Cavan Monaghan result in an urban land requirement of approximately 75 ha (185 acres) by 2051. The residential shortfall of 75 ha (185 acres) aligns with the results of the Peterborough County M.C.R. The Peterborough County M.C.R. concluded that additional urban lands beyond those identified in the Millbrook Urban Settlement Area are not required within the 2051 planning horizon. Based on our review of the County's long-term urban land needs analysis for the Township of Cavan Monaghan, Township staff and their Consultant Team support these findings. Accordingly, urban land expansion within the area of SSA-1 is not required within the 2051 planning horizon to accommodate urban population as set out in the Peterborough County M.C.R.

It is noted that the land need of 75 gross ha (185 gross acres) is in addition to the CSU Developments Inc. and Vargas lands which were recently approved through an M.Z.O by the Province and considered part of the existing supply within active development applications. Figure 2-6 displays the Community Area Urban Land Needs analysis for Millbrook to 2051.

Figure 2-6
Millbrook Settlement Area Growth Forecast, 2021 to 2051

Item	Calculation	Result
Net Population Demand, 2021 to 2051	A	7,939
Population in Active Development Applications ^[1]	B	3,910
Intensification Allocation (15%)	C	637
Vacant Greenfield Population Supply	D	438
Population Shortfall	$E = A - B - C - D$	2,954
Shortfall of Community Area Jobs	F	1,152
Shortfall of Community Area People and Jobs (P&J)	$G = E + F$	4,106
Greenfield P&J Density, 2021 to 2051	H	55
Community Area Land Requirement at 2051 (gross ha)	$I = G / H$	74.7

^[1] Population in Active Development Applications includes land area and units associated with the recently approved M.Z.O.s of CSU Developments Inc. and Vargas. Source: Watson & Associates Economists Ltd., 2022.



It is further noted that an additional M.Z.O. has been approved by the Province within the northeast area of the Township (Kawartha Downs). The population and employment potential associated with this M.Z.O. is considered to be in addition to the Township's 2051 population and employment allocation as per the Peterborough County M.C.R.

2.4 Township of Cavan Monaghan Employment Area Land Needs, 2021 to 2051

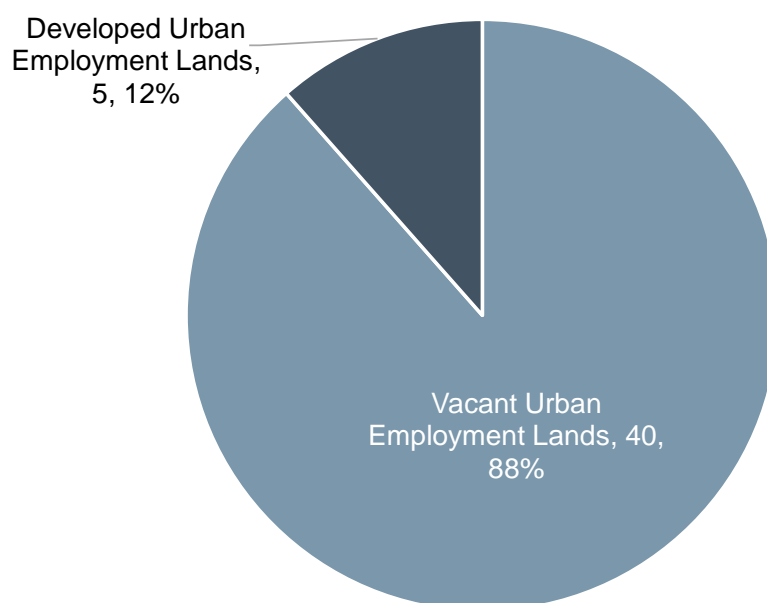
2.4.1 Township of Cavan Monaghan Employment Area Land Supply, 2021

The Township of Cavan Monaghan consists of 905 gross ha (2,236 gross acres) or 589 net ha (1,456 net acres) of designated Employment Areas. A significant amount of these designated Employment Areas can be found in the Rural Areas and under the Rural Employment Area designation, while a small portion is within the current Millbrook Urban Settlement Area and designated as Urban Employment Area. For the purposes of this report addendum, the Urban Employment Area land supply and Employment Area land needs for Millbrook have been updated and re-evaluated within the context of anticipated urban development within Millbrook to the year 2051. For details on the rural employment land supply, refer to the Township of Cavan Monaghan G.M.S, 2020.

There are 45 ha (111 acres) of developable designated Urban Employment Area lands within the current Millbrook Urban Settlement Area. As shown in Figure 2-7, of this total supply, 40 gross ha (99 gross acres) remain vacant as of May 2022.



Figure 2-7
Developed and Vacant Urban Employment Lands in Millbrook (gross ha)



Note: Numbers may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd., 2022

2.4.2 Township of Cavan Monaghan Employment Growth Forecast, 2021 to 2051

Building on the Township of Cavan Monaghan G.M.S., 2020 an employment forecast by major sector to 2051 has been prepared herein. As shown in Figure 2-8, total employment within the Township is expected to increase from 3,900 in 2021 to 8,100 in 2051, representing an increase of 4,200 jobs or a growth rate of 2.5% annually.^[1] The Township's employment activity rate is anticipated to continue to increase from 42% in 2021 to 48% by 2051.^[2] This steady increase is anticipated to be largely driven by local employment opportunities within the local and regional export-based employment sectors (e.g. transportation, wholesale trade, construction, small-scale manufacturing and agri-business) as well as population-related employment sectors such as retail, accommodation and food, professional, scientific and technical services and health

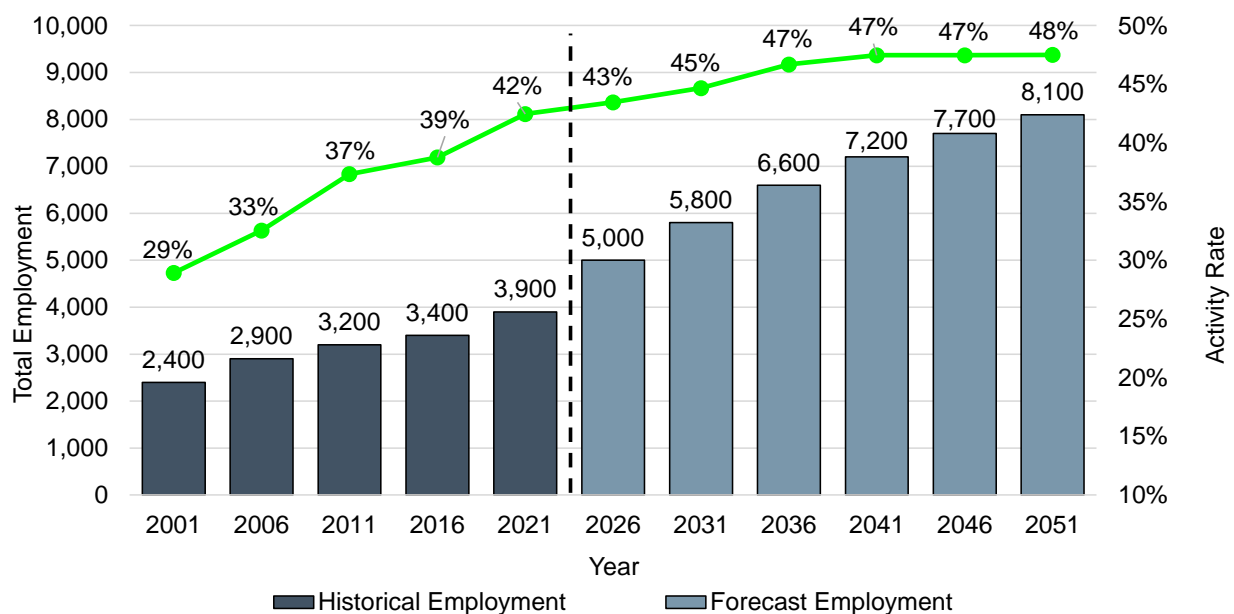
^[1] Watson & Associates Economists Ltd. has assumed 8,140 jobs in Cavan Monaghan by 2051 and the Peterborough M.C.R. has assumed 7,440. This increase is largely driven by increased outlook in rural areas, compared to the Peterborough County M.C.R. allocation to Cavan Monaghan.

^[2] An activity rate is the ratio of jobs to population.



care. Forecast job growth is also anticipated to be accommodated through home occupations, home-based businesses and off-site employment.

Figure 2-8
Township of Cavan Monaghan
Historical and Forecast Employment Forecast, 2006 to 2051



Note: Numbers have been rounded.

Source: 2001 to 2016 from Statistics Canada place of work data including work at home and no fixed place of work. Forecast by Watson & Associates Economists Ltd., 2022.

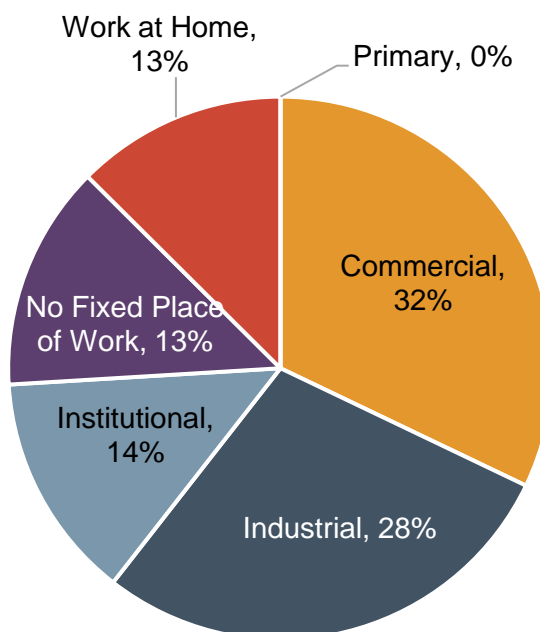
Figure 2-9 displays the share of growth by employment sector during the 2021 to 2051 forecast period. Land-based commercial, industrial and institutional employment sectors are anticipated to account for approximately 74% of employment growth over the forecast period. No fixed place of work and work at home employment categories are forecast to comprise the remaining 26% of employment growth.^[1] The primary sector (i.e. agriculture and other resource-based employment) has not experienced employment growth by usual place of work from 2006 to 2016 and this trend is anticipated to continue over the forecast period. Notwithstanding this trend, agricultural-related economic development activity is anticipated within the Township's rural areas

^[1] No fixed place of work employment represents persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.



over the long-term planning horizon. To accommodate future growth in the agricultural sector, there is a need to facilitate new development, as well as the expansion of existing businesses that support the agricultural economy.

Figure 2-9
Township of Cavan Monaghan
Share of Employment Growth, 2021 to 2051



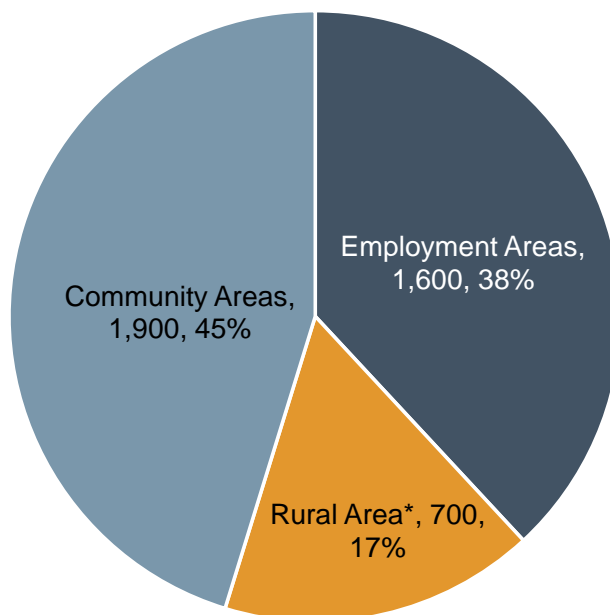
Source: Forecast by Watson & Associates Economists Ltd., 2022.

2.4.2.1 *Employment Growth Allocations in the Millbrook Urban Settlement Area, 2021 to 2051*

As summarized in Figure 2-10, Employment Areas in the Township are forecast to accommodate approximately 1,600 employees over the 2021 to 2051 period. This represents approximately 38% of the Township's total employment growth over the period. It is assumed that 80% of the Township-wide industrial employment growth and 28% of the Township's commercial/population-related employment will be accommodated in Urban Employment Areas. It is further assumed that 48% of the Township's institutional employment growth will occur in Employment Areas. Additional details can be found in Appendix B.



Figure 2-10
Township of Cavan Monaghan
Employment Growth Distribution by Location, 2021 to 2051

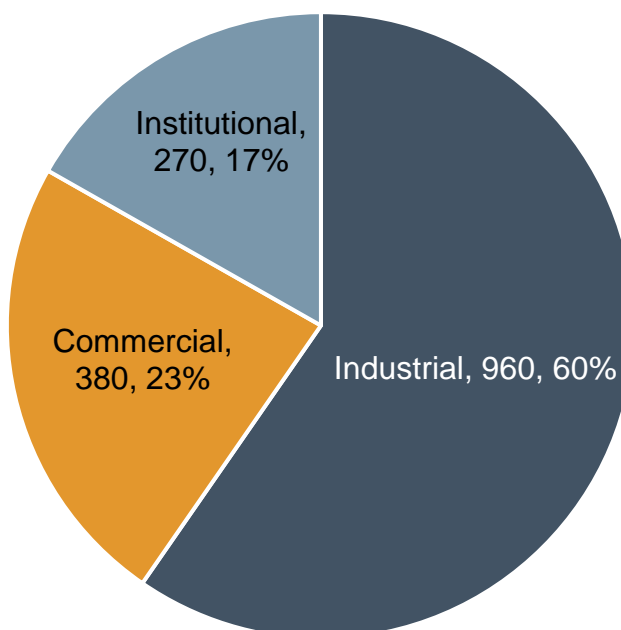


Note: Numbers may not add precisely due to rounding.
* The Rural Employment Areas surrounding Peterborough Airport are considered part of the Rural Area.
Source: Watson & Associates Economists Ltd., 2022.

Figure 2-11 summarizes the share of forecast employment growth in Employment Areas by sector between 2021 and 2051. The industrial sector represents the greatest share of the forecast employment growth in Employment Areas, followed by commercial/population-related and institutional employment growth.



Figure 2-11
Township of Cavan Monaghan
Forecast Employment Growth on Employment Lands by Employment Sector,
2021 to 2051



Note: Numbers may not add precisely due to rounding.
Source: Watson & Associates Economists Ltd., 2022

2.4.3 Township of Cavan Monaghan Employment Area Urban Land Needs, 2051

Figure 2-12 summarizes forecast demand for Urban Employment Areas from 2021 to 2051. Key observations include the following:

- The Township of Cavan Monaghan G.M.S., 2020 identified an average employment density of 25 jobs per net ha on urban employment lands. Through further review and re-evaluation, it was determined that an average employment density of 30 jobs per ha (12 jobs per acres) is appropriate over the long-term forecast period.^[1]
- Over the planning horizon, an estimated 10% of the total employment growth in Employment Areas is expected to be accommodated through intensification. It is anticipated that most of this intensification will be accommodated through infill,

^[1] The Peterborough County M.C.R. identifies an employment density of 20 jobs per net ha, which includes both rural and urban employment lands in Cavan Monaghan.



redevelopment and expansion of existing developed Employment Areas in the Millbrook Urban Settlement Area.

- Over the planning horizon, urban land demand in Employment Areas is forecast to total 48 net ha (119 net acres) or 74 gross ha (183 gross acres).
- As previously discussed, the Township has a vacant designated Employment Area land supply of 40 gross ha (99 gross acres). As summarized in Figure 2-12, the demand for Employment Areas over the next 30 years exceeds the supply of vacant Employment Areas lands.
- To accommodate forecast employment growth on Urban Employment Areas to the year 2051, 34 ha (84 acres) of additional designated Urban Employment Areas will be required.
- The Township should pursue adding more designated Urban Employment Areas to the current Millbrook Urban Settlement Area.

Figure 2-12
Township of Cavan Monaghan Forecast Urban Land Demand in Employment Areas,
2021 to 2051

Item	Calculation	Result
Total Employment Forecast on Urban Employment Lands	A	1,605
Intensification on Employment Lands ^[1]	$B = A * 10\%$	161
Total Employment on Employment Lands Adjusted for Intensification	$C = A - B$	1,445
Employment Density (Jobs per net hectare)	D	30
Total Urban Employment Area Land Demand (net ha)	$E = C / D$	48.2
Total Urban Employment Area Land Demand (gross ha) ^[2]	F	74.1
Total Urban Employment Area Land Supply	G	40.0
Total Urban Employment Area Land Needs	$H = F - G$	34.1

^[1] Assumes 10% of employment will be accommodated through intensification.

^[2] Assumes a gross-to-net ratio of 65%.

Source: Watson & Associates Economists Ltd., 2022.



Chapter 3

Location Options for Future Urban Expansion and Policy Recommendations



3. Location Options for Future Urban Expansion and Policy Recommendations

3.1 Introduction

Building on the residential and non-residential land needs established in Chapter 2, this chapter summarizes the proposed Settlement Area Boundary Expansion (S.A.B.E.) for the Millbrook Urban Settlement Area. As part of this process, consideration has been given to developing an urban land use structure that provides for a contiguous supply of designated Community Area and Employment Area lands over the long-term planning horizon. Location options regarding future Community Area and Employment Area expansion within the current Millbrook Urban have been assessed and evaluated considering connectivity and compatibility to designated land uses, development phasing, municipal servicing and local site attributes influencing real estate market demand. In accordance with this review, the conversion of the Township's existing urban Employment Areas to a non-employment use is recommended.

3.2 Urban Employment Area Conversions

Changes to the designation of a site currently designated as “Urban Employment” to allow for uses not permitted for that designation, including residential, mixed-use and specific commercial uses, is considered an Employment Area land conversion. The conversion of Employment Area lands generally occurs during the M.C.R. process as there is a need to understand the broader impacts of the conversion under the policy framework of the Growth Plan, 2019, the P.P.S., 2020, as well as regional and local site-specific considerations. As part of this G.M.S., several Employment Area conversions have been reviewed and evaluated.^[1] Based on this review, a series of recommendations have been made with respect to all the designated lands within the current Millbrook Urban Employment Area.

^[1] This review and evaluation process has been conducted for municipalities across Ontario and has been successfully defended at the Ontario Land Tribunal. Refer to subsections 2.2.5.9 and 2.2.5.10 of the Growth Plan, 2019.



3.2.1 Policy Context

The Growth Plan, 2019 and the P.P.S, 2020 provide a framework for assessing the conversion of lands within Employment Areas. The following briefly summarizes the Growth Plan, 2019 policies in regard to Employment Area conversions (Policies 2.2.5.9 and 2.2.5.10).

Within an M.C.R.:

- Conversions of Employment Areas to non-employment uses may be permitted only through an M.C.R., where it is demonstrated that:
 - there is a need for the conversion;
 - the lands are not required over the horizon of this Plan for the employment purposes for which they are designated;
 - the municipality will maintain sufficient employment lands to accommodate forecast employment growth to the horizon of this Plan;
 - the proposed uses would not adversely affect the overall viability of the Employment Area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan; and
 - there are existing or planned infrastructure and public service facilities to accommodate the proposed uses.

Outside an M.C.R.:

- Lands within an existing Employment Area may be converted to non-employment uses outside a municipally initiated M.C.R. (until the next M.C.R) where certain criterion can be met:
 - there is a need for the conversion;
 - the proposed uses would not adversely affect the overall viability of the Employment Area or the achievement of the minimum intensification and density targets in this Plan, as well as the other policies of this Plan;
 - there are existing or planned infrastructure and public service facilities to accommodate the proposed uses;
 - the conversion must maintain a “significant number” of jobs on the subject lands through the establishment of a development criteria; and
 - the site must not be a part of a provincially significant employment zone.



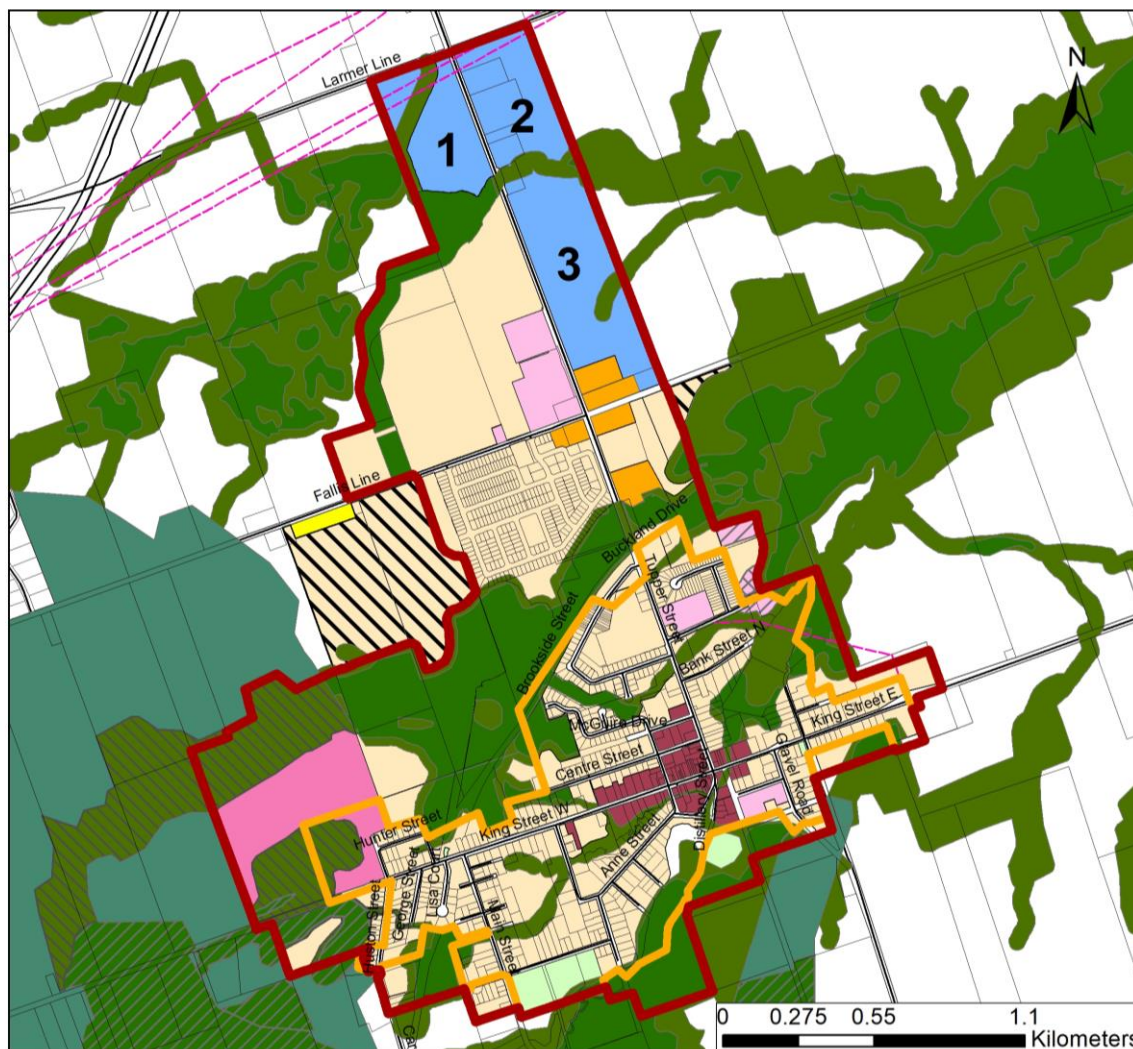
Subsection 2.2.5.11 of the Growth Plan, 2019 further states that any change to an O.P. to permit new or expanded opportunities for major retail in an Employment Area may only occur in accordance with Policy 2.2.5.9 or Policy 2.2.5.10.

3.2.2 Evaluation of Employment Area Conversions

The existing Urban Employment Areas within Millbrook have been reviewed with Township staff on a site-by-site basis to determine if potential conversions are appropriate and justified from a planning and economic development perspective. This review examined three subject sites, which are located in the north of the existing Millbrook Settlement Area boundary. Figure 3-1 identifies these lands as designated Urban Employment Areas.



Figure 3-1
Township of Cavan Monaghan
Official Plan – Schedule A-1



Legend

- Millbrook Settlement Area Boundary
- Millbrook Built Boundary
- Utility_Line
- Parcel Fabric
- Residential Approved through M.Z.O.
- Mixed-Use Commercial Approved through M.Z.O.

Land Use description

- Agricultural
- Community Commercial
- Community Core
- Institutional
- Institutional Special Policy Area # 1
- Institutional Special Policy Area # 2
- Millbrook Special Development Area
- Mineral Aggregate Extractive
- Natural Core Area
- Natural Linkage Area
- ORM - Natural Core Area
- ORM - Natural Linkage Area
- ORM - Prime Agricultural
- Parks & Open Space
- Residential
- Urban Employment Area



All sites identified in Figure 3-1 were subject to a detailed evaluation to assess the merits for conversion based on a broad range of evaluation criteria as outlined below. This evaluation has been conducted within the framework of the P.P.S., 2020, section 1.3.2.4., which states:

“Planning authorities may permit conversion of lands within *employment areas* to non-employment uses through a comprehensive review, only where it has been demonstrated that the land is not required for employment purposes over the long term and that there is a need for the conversion.”

Figure 3-2
Township of Cavan Monaghan
Details of Sites under Conversion Pressure

Site Number	OP Designation / Zoning	Current Use of Site	Total Site Area (ha)
Site 1	Urban Employment Area	Vacant	11.5
Site 2	Urban Employment Area	Partially Vacant	13.3
Site 3	Urban Employment Area	Vacant	21.8

Source: Derived from GIS (geographic information system) data received from the Township of Cavan Monaghan by Watson & Associates Economists Ltd., 2022.

The sites identified in Figure 3-2 were subject to a detailed evaluation to assess the merits for conversion based on a broad range of evaluation criteria as outlined below. This evaluation has been conducted within the framework of the P.P.S., 2020, subsection 1.3.2.4., which states:

“Planning authorities may permit conversion of lands within *employment areas* to non-employment uses through a comprehensive review, only where it has been demonstrated that the land is not required for employment purposes over the long term and that there is a need for the conversion.”

In addition to the above policy, subsection 1.3.2.5 of the P.P.S., 2020 states:



“Notwithstanding policy 1.3.2.4, and until the official plan review or update in policy 1.3.2.4 is undertaken and completed, lands within existing *employment areas* may be converted to a designation that permits non-employment uses provided the area has not been identified as provincially significant through provincial plan exercise or as regionally significant by a regional economic corporation working together with affected upper and single-tier municipalities and subject to the following:

- a) There is an identified need for the conversion and the land is not required for employment purposes over the long term;
- b) The proposed uses would not adversely affect the overall viability of the *employment area*; and
- c) Existing or planned *infrastructure* and *public service facilities* are available to accommodate the proposed uses.”

Each potential conversion site was further reviewed against a series of localized evaluation criteria to determine its merits for conversion from a site-specific perspective. These criteria are informed by a broader series of principles for approaching the evaluation of employment conversions. Details regarding the principles can be found in Appendix C.

The localized criteria consider land use and real estate market factors related to location, size, configuration of the site as well as compatibility and continuity with surrounding urban lands uses. The localized criteria are intended to provide further insight with respect to the quality of the subject sites in addition to the broader urban land needs assessment required by the P.P.S., 2020. It is recommended that the enhanced evaluation framework should be used by the Township, in conjunction with the Cavan Monaghan O.P., in reviewing Employment Area conversion applications or other candidate Employment Areas for conversion to non-employment uses on both vacant and developed Employment Area sites. A summary of the evaluation under the P.P.S., 2020 as well as the localized criteria is provided for each of the employment conversion sites as shown in Figure 3-3 and Figure 3-4. Additional details regarding the site-specific evaluation against the conversion criteria can be found in Appendix C.



Figure 3-3
Township of Cavan Monaghan
Planning and Economic Development Evaluation Criteria – Candidate Employment
Area Conversion Sites

	Criteria	Description
A	P.P.S (Provincial Criteria)	There is an identified need for the conversion and the land is not required for employment purposes over the long term.
B	P.P.S (Provincial Criteria)	The proposed uses would not adversely affect the overall viability of the Employment Area.
C	P.P.S (Provincial Criteria)	Existing or planned <i>infrastructure</i> and <i>public service facilities</i> are available to accommodate the proposed uses.
D	Location (Localized Criteria)	The site is not located in proximity to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).
E	Access (Localized Criteria)	The site does not offer direct access to major transportation corridors (e.g., highways, goods movement network, cross-jurisdictional connections) and Goods Movement infrastructure (e.g., airports, intermodal yards, and rail).
F	Employment Area Configuration (Localized Criteria)	The site is located outside or on the fringe of an assembly of Employment Areas.
G	Site Configuration (Localized Criteria)	The site offers limited market supply potential for Employment Area development due to size, configuration, access, physical conditions, servicing constraints, etc.
H	Land Use (Localized Criteria)	The proposed conversion to non-employment uses is compatible with surrounding land use permissions and potential land use conflicts could be mitigated.
I	Supply (Localized Criteria)	The conversion of the proposed site to non-employment uses would not compromise the overall supply of large Employment Area sites for the Township.
J	Jobs (Localized Criteria)	The conversion request demonstrates total job yield of the site can be maintained or improved.



Figure 3-4
Township of Cavan Monaghan
Summary of Planning and Economic Evaluation Results for Conversion Sites

Site Name	A	B	C	D	E	F	G	H	I	J	Recommendation
Site 1	Does Not Meet Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Meets Criteria	Does Not Meet Criteria	Meets Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Recommended for Conversion
Site 2	Does Not Meet Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Meets Criteria	Does Not Meet Criteria	Meets Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Recommended for Conversion
Site 3	Does Not Meet Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Meets Criteria	Does Not Meet Criteria	Meets Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Does Not Meet Criteria	Recommended for Conversion

Meets Criteria Does Not Meet Criteria

Source: Watson & Associates Economists Ltd., 2022.

The following is a summary of the results of employment conversion analysis for the three subject sites:

- Considering the proximity of the subject lands to existing or planned Community Area uses, the recommendation to convert the subject Employment Area lands to a Community Area use is appropriate and maintains a contiguous structure of urban designated lands.
- There is a need for both additional urban Employment Area land and additional urban Community Area land to 2051. The recommendation to convert the subject urban Employment Area lands to Community Area provides a more compatible urban land use structure for the Millbrook Settlement Area over the long-term as the community continues to expand and urbanize. The recommended Employment Area conversions along with the corresponding proposed Community Area and Employment S.A.B.E. (refer to section 3.3.) satisfy the long-term urban land needs identified for the Millbrook Urban Settlement Area.
- The conversion of the existing Urban Employment Area lands will allow for a more contiguous urban form within the future Millbrook settlement area, with a natural extension of Community Area uses. The southern portion of Site 3 is recommended to be designated for major retail/commercial uses to promote employment growth within the settlement area consistent with the approved M.Z.O. for a portion of these lands. This southern commercial portion would be a



logical extension of the surrounding lands designated as Community Commercial.

- The recommended Employment Area conversions and proposed Employment Area S.A.B.E. location options also capitalize on the local physical attributes of the future Millbrook Settlement Area expansion with respect to transportation connectivity as well as highway access and exposure. This is discussed in the following section.

3.3 Location Options for Future Urban Expansion

Location options for future urban land expansion in Millbrook to the year 2051 were discussed with Township staff and the Township's Technical Advisory Committee (T.A.C.), comprising senior staff and members of Township Council. This chapter presents the overall approach that was undertaken and describes the location options and recommendations to accommodate growth.

3.3.1 *Approach to Assessing Location Options for Urban Land Expansion*

The following considerations were explored while working with staff and the T.A.C. to assess broad location options for S.A.B.E. lands in Millbrook:

- The presence of environmental and development constraints and their impact on developable potential;
- Servicing options, with the benefit that the Township's water and wastewater allocation policies are being updated during the time of the study (further discussed in section 3.2.3);
- Urban structure, contiguousness, and land use compatibility between existing and planned S.A.B.E. lands; and
- Local site attributes influencing market demand of proposed residential and non-residential S.A.B.E. lands.

While this report identifies broad location options for future urban expansion, additional technical studies related to land use planning, servicing, and agricultural impacts, as outlined in the Growth Plan, 2020 and 2020 P.P.S., will be required as part of the Township O.P. amendment process.



3.3.2 Overview of Broad Location Options for Future Urban Expansion

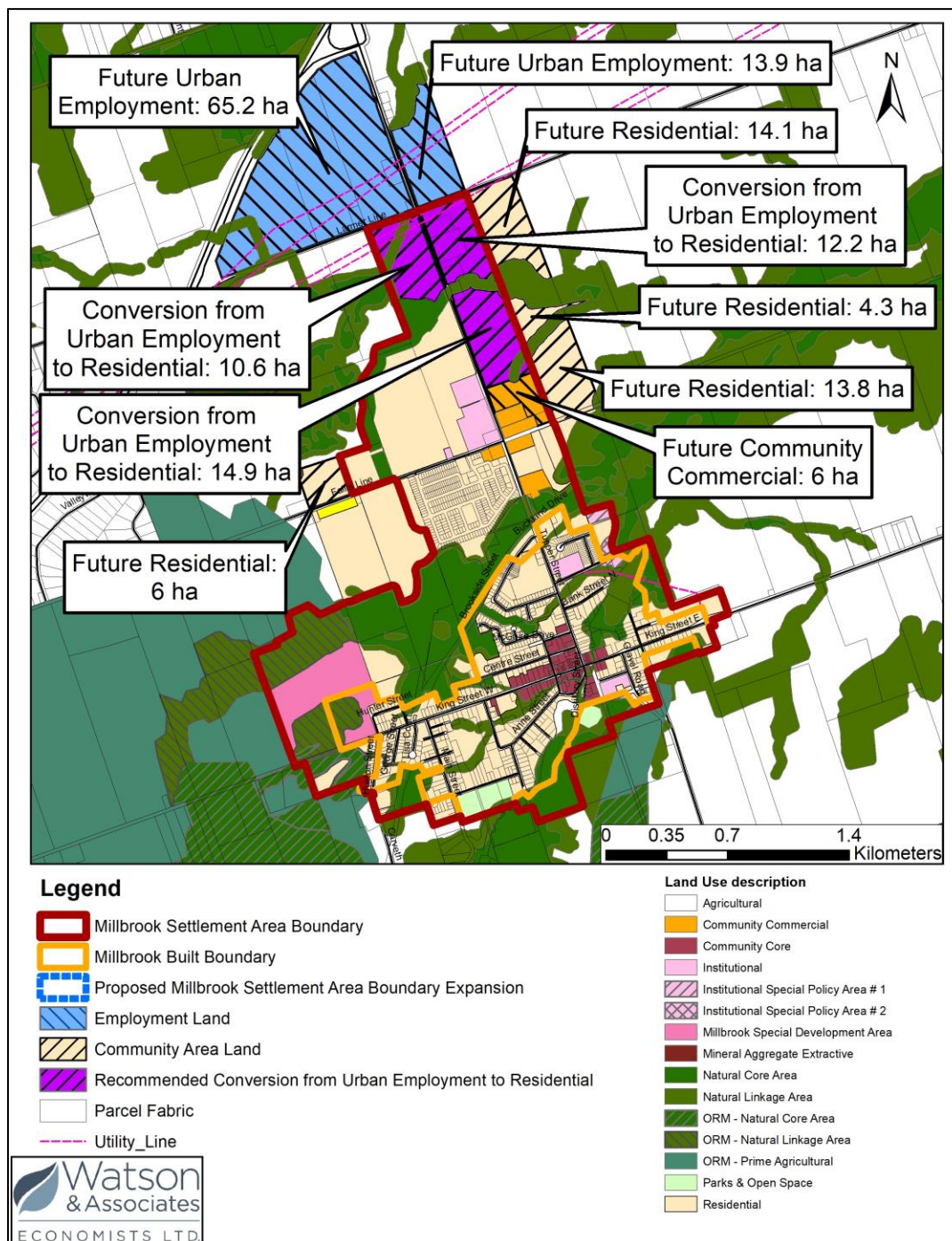
In collaboration with Township staff and the T.A.C., this study recommends that all existing Urban Employment Area lands within the current Millbrook Settlement Area be converted to a Community Area use. As previously discussed in section 3.1, the conversion of these Employment Area lands would allow for the development of a more cohesive, new Urban Employment Area that benefits from direct access and exposure along Highway 115 and County Road 10. Prospective Urban Employment Areas in this location would offer sites with direct exposure and access to highways, adequate buffers from residential uses, with large parcels which could attract and accommodate a wide range of industrial type uses over the long term.

The conversion of the existing Urban Employment Lands to Community Area uses would further allow for the contiguous expansion of residential and commercial uses within the current Millbrook Urban Settlement Area, limiting potential land use compatibility conflicts associated with residential and non-residential uses. The proposed Community Area S.A.B.E. lands would be buffered from the proposed Urban Employment Area S.A.B.E. by Larmer Line. Converting the remaining vacant Urban Employment Area lands within Millbrook would allow for the extension of Community Area land directly to the east of the existing settlement area boundary to accommodate the 75 ha (185 acres) shortfall previously identified in subsection 2.3.2. A part of the 75 ha (185 acres) Community Area S.A.B.E., a Community Commercial land use designation of approximately 6 ha (15 acres) is recommended along Fallis Line, as a logical extension of the existing Community Commercial lands currently located directly to the south.

As previously discussed, it is suggested that the Township undergo additional technical studies, such as land use, servicing, fiscal and agricultural impact assessment, as outlined by the requirements of the Growth Plan, 2019 and the 2020 P.P.S. in order to fully assess impacts and determine the exact locations for future urban expansion. As a future exercise, a Secondary Plan should be undertaken by the Township to provide more specific direction to issues related to hard and soft servicing requirements, land use, transportation access, fiscal impacts, urban design guidelines and planning policy.



Figure 3-5
Township of Cavan Monaghan
Proposed Location Options for Settlement Area Boundary Expansion (S.A.B.E.)





3.3.3 Servicing Considerations for Future Urban Expansion

Township staff and the T.A.C. provided insight on existing servicing conditions and future servicing directions throughout the course of assessing these broad location options for future urban expansion. As such, the location options presented in the previous section consider servicing potential at a high level. To further inform the exact location and nature of future urban expansion to accommodate Community and Employment Land Area land needs, the Township has retained R.V. Anderson Associates Ltd., to complete a master servicing study. This will further inform servicing options and development phasing related to the recommended S.A.B.E. location options.

3.4 Policy Recommendations

Policy recommendations and strategic directions have been provided in the Township of Cavan Monaghan G.M.S., 2020. This G.M.S. update continues to reinforce and support these recommendations and directions. Building on these directions, updated policy recommendations are provided in Figure 3-6, where applicable. These recommendations and strategic directions are captured under the following themes:

- Planning for Population, Housing, and Employment Growth in the Township of Cavan Monaghan;
- Planning for Growth in Urban Employment Areas;
- Planning for Growth in Built-up Areas and Designated Greenfield Community Areas; and
- Planning for Growth in Commercial Areas.



Figure 3-6
Township of Cavan Monaghan Policy Recommendations

No.	Theme	Recommendation	Opportunities and Challenges	Recommended Actions
1	Planning for Population, Housing, and Employment Growth in the Township of Cavan Monaghan	Growth associated with the Kawartha Downs M.Z.O. is considered in addition to the Township of Cavan Monaghan growth forecast provided in the G.M.S.	According to the Growth Plan, 2019, the forecasts established in Schedule 3 are to be treated as minimum targets.	In the next Township of Cavan Monaghan Official Plan Update, examine the growth potential associated with the Kawartha Downs M.Z.O. and update the residential and non-residential forecasts accordingly.
2	Planning for Growth in Urban Employment Areas	Plan for future employment lands within the Township of Cavan Monaghan.	The Township has an insufficient supply of urban Employment Area lands to accommodate forecast urban land demand in Employment Areas to the year 2051.	Designate an additional 34.1 ha (84 acres) of urban Employment Area lands within Millbrook. In accordance with the land needs and findings of the Peterborough County M.C.R., lands outside Millbrook are not required to accommodate urban Employment Area lands to 2051.



No.	Theme	Recommendation	Opportunities and Challenges	Recommended Actions
3	Planning for Growth in Built-up Areas and Designated Greenfield Community Areas	Plan for future Community Area lands within Millbrook in the Township of Cavan Monaghan.	The Township has an insufficient supply of Community Area lands to accommodate forecast land demand to the year 2051.	Designate an additional 74.7 ha (185 acres) of Community Area lands within Millbrook. Of this total, designate 6 ha (15 acres) of land for Community Commercial uses in addition to the provincial M.Z.O. In accordance with the land needs and findings of the Peterborough County M.C.R., lands outside Millbrook are not required to accommodate Community Area lands to 2051.
4	Planning for Growth in Built-up Areas and Designated Greenfield Community Areas	Establish a 15% intensification target to the year 2051.	The Township's O.P. sets an intensification target that 20% of the Township's housing needs to the year 2031 shall be provided through residential infilling, intensification, and redevelopment within the B.U.A. The intensification target should be updated in order to consider the planning horizon that has been extended from the year 2031 to 2051.	It is recommended that the Township amend its intensification target such that 15% of the Township's housing needs to the year 2051 be provided within the B.U.A. of Millbrook.



No.	Theme	Recommendation	Opportunities and Challenges	Recommended Actions
5	Planning for Growth in Built-up Areas and Designated Greenfield Community Areas	Plan to meet a minimum D.G.A. target of 55 people and jobs per ha.	The Cavan Monaghan O.P. does not currently establish a D.G.A. density target. Policy 2.2.7.2 b) of the Growth Plan requires that the County of Peterborough achieve a minimum density target that is not less than 40 residents and jobs combined per ha within the horizon of this Plan.	In accordance with the Peterborough M.C.R. and the findings of this G.M.S., the Township establish a minimum D.G.A. density target of 55 people and jobs per ha.
6	Planning for Growth in Commercial Areas	Protect the designated commercial land supply for long-term needs.	Commercial uses in Millbrook may take longer to develop than residential uses. Given the significant demand for residential uses, the Township should ensure that commercial areas are protected from conversion pressures for residential uses.	Require a market impact study to be completed for applications that involve a reduction in commercial lands.
7	Planning for Population, Housing, and Employment Growth in the Township of	The Township should conduct additional studies associated with the subsections 1.1.3.8 c, d and e of the P.P.S., 2020, as well as the outstanding	The land use, servicing implications and financial impacts surrounding the recommended land use structure within Millbrook are not fully understood at this time.	Once the Millbrook Master Servicing Study has been completed, the Township should conduct a fiscal impact and development feasibility study to assess the servicing and financial implications associated with anticipated urban development within the Millbrook Urban



No.	Theme	Recommendation	Opportunities and Challenges	Recommended Actions
	Cavan Monaghan	requirements of subsection 2.2.8 of the Growth Plan, 2019.		Settlement Area over the 2051 planning horizon. Other appropriate studies in accordance with subsections 1.1.3.8 c, d and e of the P.P.S., 2020, as well as outstanding requirements of subsection 2.2.8 of the Growth Plan, 2019 should also be conducted.
8	Planning for Population, Housing, and Employment Growth in the Township of Cavan Monaghan	The Township should consider embedding annual growth monitoring tools to track residential and non-residential development patterns against the prescribed growth forecasts.	Without monitoring growth on an annual basis, the Township does not fully comprehend the short-term development pressures and associated land requirements/ constraints over time.	The Township should acquire tools that facilitate the annual tracking of population, housing, and employment development activity, as well as development densities. Such tools would better inform the Township on how growth is tracking against anticipated development patterns and, for example, how future growth of the Kawartha Downs M.Z.O. influences this growth trajectory.



Chapter 4

Conclusions and Next Steps



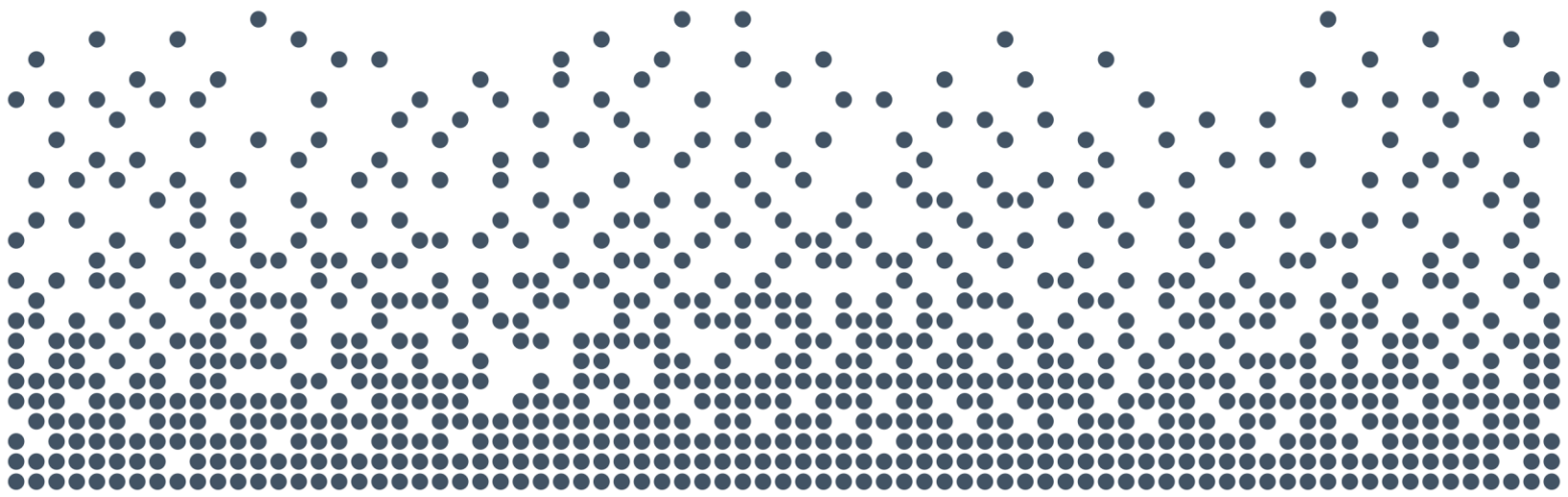
4. Conclusion and Next Steps

This study provides an update to the Township of Cavan Monaghan G.M.S., 2020.^[1] The population, housing, and employment forecast has been extended to 2051 from the previous 2041 time horizon, in accordance with the planning horizon established in the Growth Plan, 2019. Reflective of this 2051 update, this addendum report has provided an updated commercial, residential, and employment urban land needs analysis in accordance with the Peterborough M.C.R. Accordingly, the updated land needs for Millbrook to 2051 are as follows:

- The commercial land needs for Millbrook have been updated from 5 ha (12 acres) in 2041, to 6 ha (15 acres) by 2051;
- The residential land needs for Millbrook have been updated from 45 ha (111 acres) in 2041, to 75 ha (185 acres) by 2051; and
- The Employment Area land needs for Millbrook have been updated from 29 ha (72 acres) in 2041, to 34 ha (84 acres) by 2051.

This addendum report demonstrates that there is no need for urban land expansion in Cavan Monaghan beyond that identified for the Millbrook Settlement Area Boundary expansion. Future work should be conducted through the Township's O.P. Review exercise to formalize the Millbrook Settlement Area Boundary expansion. Furthermore, the Township should consider embedding monitoring tools to track population, housing, and employment growth and urban land absorption within the Township against the longer-term growth forecasts and urban land needs established in this report.

^[1] The results of this addendum report do not reassess land needs across the Township's Rural Areas.



Appendices



Appendix A

Residential Growth Forecast, 2021 to 2051



Appendix A: Residential Growth Forecast, 2021 to 2051

Figure A-1 summarizes the population growth forecast for the Township from 2021 to 2051 in five-year increments.

Figure A-1
Township of Cavan Monaghan
Population Growth Forecast, 2021 to 2051

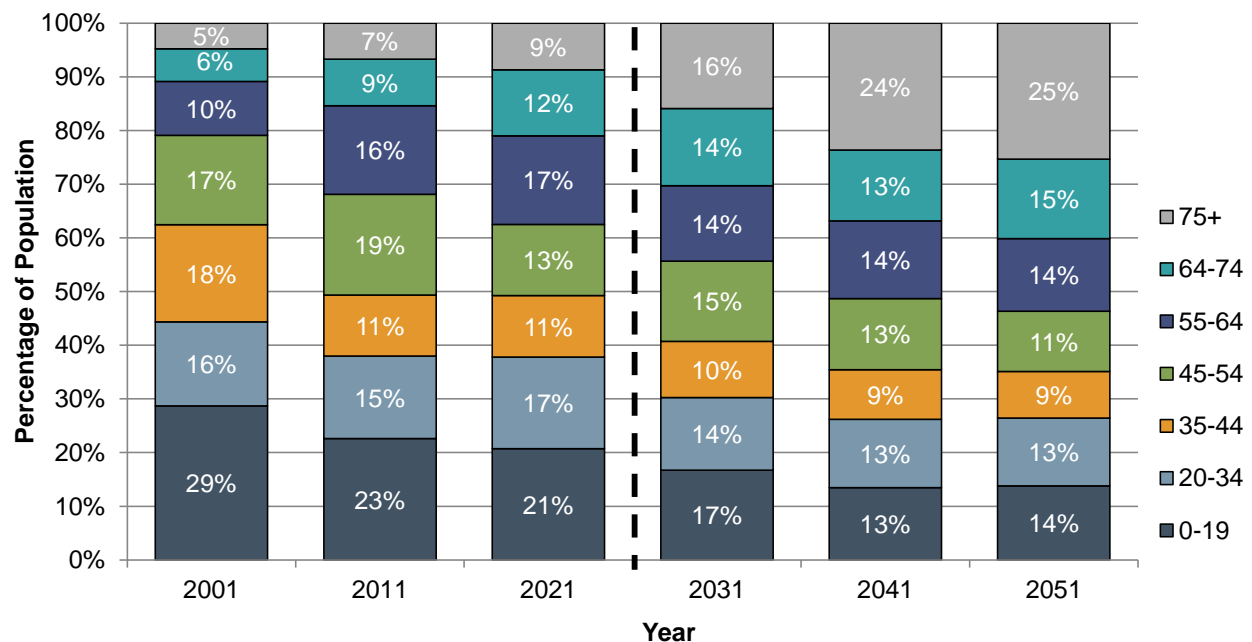
Year		Population (Including Census Undercount) ¹	Population (Excluding Census Undercount)
Historical	Mid-2001	8,780	8,455
	Mid-2006	9,130	8,835
	Mid-2011	8,820	8,605
	Mid-2016	9,020	8,815
	Mid-2021	10,260	10,016
Forecast	Mid-2026	11,890	11,600
	Mid-2031	13,200	12,890
	Mid-2036	14,390	14,040
	Mid-2041	15,510	15,130
	Mid-2046	16,550	16,150
	Mid-2051	17,570	17,140
Incremental	Mid-2001 to Mid-2006	350	380
	Mid-2006 to Mid-2011	-310	-230
	Mid-2011 to Mid-2016	200	210
	Mid-2016 to Mid-2021	1,240	1,201
	Mid-2021 to Mid-2026	1,630	1,584
	Mid-2021 to Mid-2031	2,940	2,874
	Mid-2021 to Mid-2036	4,130	4,024
	Mid-2021 to Mid-2041	5,250	5,114
	Mid-2021 to Mid-2046	6,290	6,134
	Mid-2021 to Mid-2051	7,310	7,124

¹ Population figures have been rounded and include the net Census undercount
Source: Data from 2001 to 2021 from Statistics Canada Demography Division
by Watson & Associates Economists Ltd., 2022.



Figure A-2 summarizes population growth by major age group over the 2021 to 2051 forecast period for the Township. The percentage of the Township's largest age cohort, 20 to 54 years of age, is forecast to decline from 41% in 2021 to 33% in 2051. Over the forecast period, the Township's population base is expected to age significantly. Most notably, the percentage of population in the 75+ age group (older seniors) is forecast to almost triple over the forecast period from 9% in 2021 to 25% in 2051. The aging of the population and declining population growth resulting from natural increase (i.e. births less deaths) is anticipated to place downward pressure on the rate of population and labour force growth within the Township, and subsequently the regional labour force participation rate. Similar to the Province as a whole, the Township will increasingly become more reliant on net migration as a source of population growth as a result of these demographic conditions.

Figure A-2
Township of Cavan Monaghan
Population by Age Forecast, 2021 to 2051



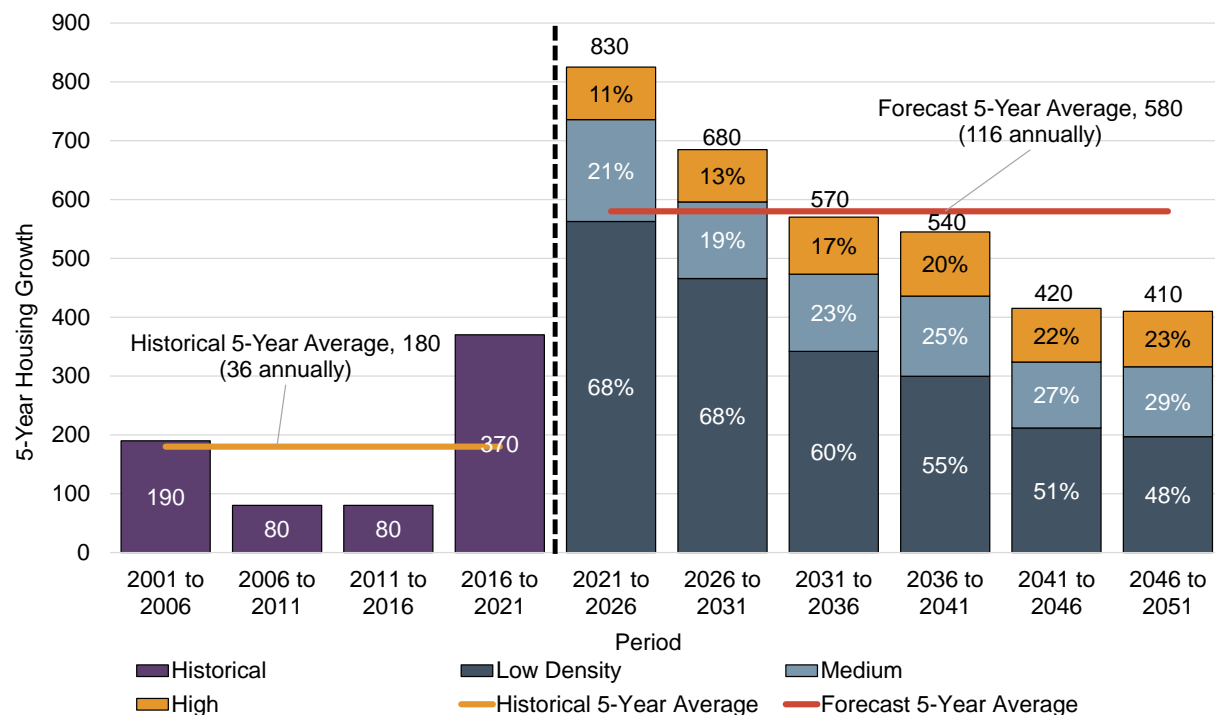
Source: Population forecast by age derived from 2001 to 2021 Statistics Canada Census by Watson & Associates Economists Ltd. 2021 to 2051 population forecast by age prepared by Watson & Associates Economists Ltd., 2022. Note: Population includes net Census undercount estimated at 2.5%.

Figure A-3 summarizes the Township's household forecast from 2021 to 2051 in five-year growth increments and by structure type. Housing trends between 2001 and 2021 are also provided for historical context. Key observations include the following:



- Housing activity over the past five years has been significantly higher than the 2001 to 2016 historical period.
- Between 2021 and 2051, forecast housing development is expected to average 116 units annually compared to an historical average of 36 units annually over the past 20 years.
- Consistent with projected population trends over the longer term, the rate of future housing growth is expected to steadily slow over the forecast period.
- Over the 2021 to 2051 forecast period, new housing is forecast to comprise 60% low-density (singles and semi-detached), 23% medium-density (townhouses) and 17% high-density (apartments) units. A modest increase in the share of medium- and high-density housing forms is anticipated, largely driven by the aging of the population, potential opportunities in some settlement areas for communal servicing, and continued upward pressure on local housing prices.

Figure A-3
Township of Cavan Monaghan
Five-Year Incremental Housing Growth – Historical and Forecast, 2001 to 2051



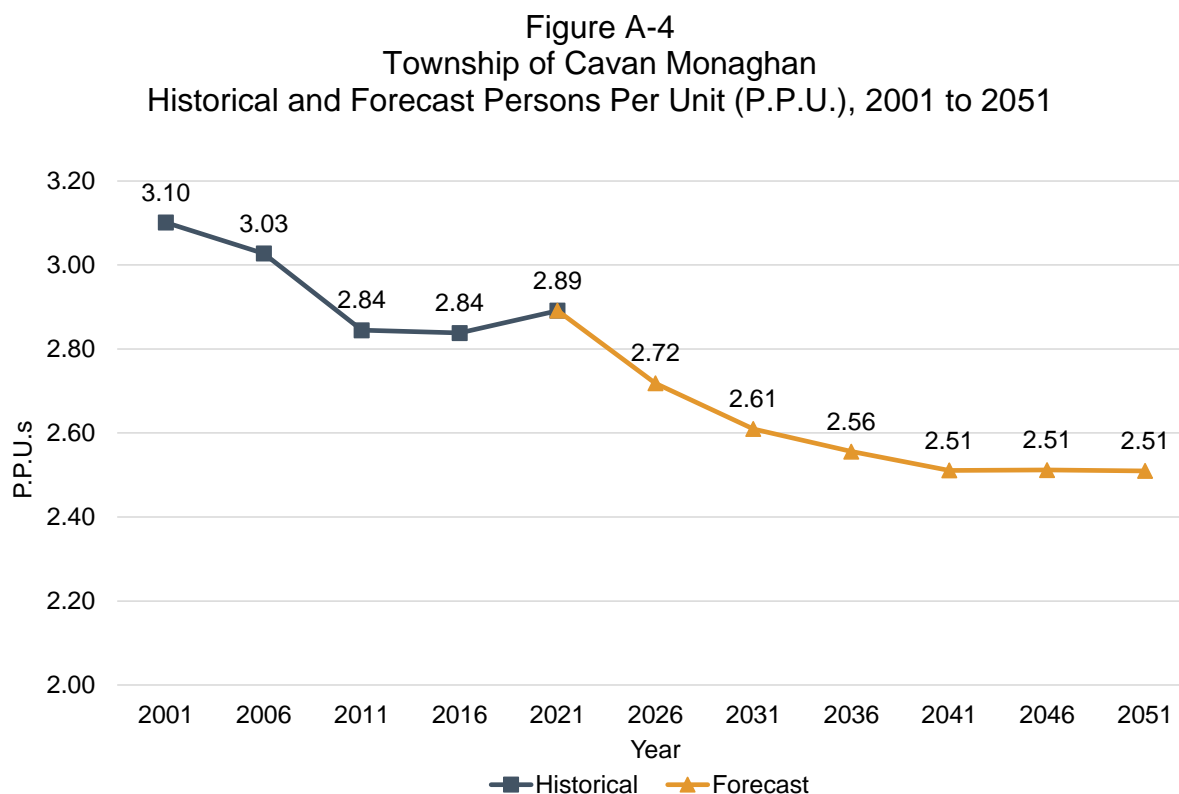
Source: Statistics Canada Census, 2001 to 2021. Forecast by Watson & Associates Economists Ltd., 2022.



Figure A-4 summarizes anticipated trends in long-term housing occupancy, or average persons per unit (P.P.U.), for the Township within the 2021 to 2051 forecast period.

Key observations include the following:

- Between 2001 and 2021, the average P.P.U. for the Township declined from 3.10 to 2.89.
- Over the forecast period, the average P.P.U. for the Township is anticipated to continue to gradually decline from 2.89 in 2021 to 2.51 in 2051, largely as a result of the aging of the Township's population and a gradual shift towards medium- and high-density forms of housing.



Note: Figure includes net Census undercount estimated at 2.5%.

Source: Statistics Canada Census and Demography Division, 2001 to 2021. Forecast (2021 to 2051) estimated by Watson & Associates Economists Ltd., 2022.

Figure A-5 displays the housing and population growth in Cavan Monaghan by policy area, in five-year increments. As shown, the Millbrook D.G.A. is anticipated to accommodate the largest share of population and housing growth over the next 30 years.



Figure A-5
Township of Cavan Monaghan Residential Growth Allocation by Policy Area in Five-Year Increments, 2021 to 2051

Development Location	Timing	Single & Semi-Detached	Multiples ^[1]	Apartments ^[2]	Total Residential Units	Gross Population In New Units	Existing Unit Population Change	Net Population Increase, Excluding Institutional	Institutional Population	Net Population Including Institutional
Millbrook Built-Up Area	2021 to 2026	0	7	76	83	132	-117	15	16	31
	2021 to 2031	0	12	151	163	258	-220	38	30	68
	2021 to 2036	0	17	234	251	396	-276	120	42	162
	2021 to 2041	0	23	326	349	551	-328	223	53	276
	2021 to 2046	0	27	404	431	680	-324	356	64	420
	2021 to 2051	0	32	484	516	814	-322	492	74	566
Millbrook Designated Greenfield Area	2021 to 2026	506	166	13	686	1,830	-13	1,817	21	1,838
	2021 to 2031	926	291	27	1,244	3,325	-24	3,301	36	3,337
	2021 to 2036	1,233	417	41	1,692	4,496	-31	4,465	51	4,516
	2021 to 2041	1,503	548	58	2,109	5,569	-36	5,533	65	5,598
	2021 to 2046	1,694	656	71	2,421	6,360	-36	6,324	78	6,402
	2021 to 2051	1,871	770	86	2,726	7,126	-36	7,090	91	7,181
Rural	2021 to 2026	56	-	-	56	164	-444	-280	0	-280
	2021 to 2031	103	-	-	103	301	-837	-536	0	-536
	2021 to 2036	137	-	-	137	401	-1,053	-652	0	-652
	2021 to 2041	167	-	-	167	488	-1,248	-760	0	-760
	2021 to 2046	188	-	-	188	550	-1,235	-685	0	-685
	2021 to 2051	208	-	-	208	608	-1,227	-619	0	-619
Cavan Monaghan	2021 to 2026	563	173	89	825	2,126	-574	1,552	37	1,589
	2021 to 2031	1,029	303	178	1,510	3,883	-1,081	2,803	66	2,869
	2021 to 2036	1,371	434	275	2,080	5,293	-1,360	3,933	93	4,026
	2021 to 2041	1,670	571	384	2,625	6,608	-1,612	4,996	118	5,114
	2021 to 2046	1,882	683	475	3,040	7,590	-1,596	5,994	142	6,136
	2021 to 2051	2,079	802	570	3,450	8,547	-1,584	6,963	165	7,128

^[1] Includes townhouses and apartments in duplexes.

^[2] Includes accessory apartments, bachelor, 1-bedroom and 2-bedroom+ apartments.

Source: Watson & Associates Economists Ltd., 2022.



Appendix B

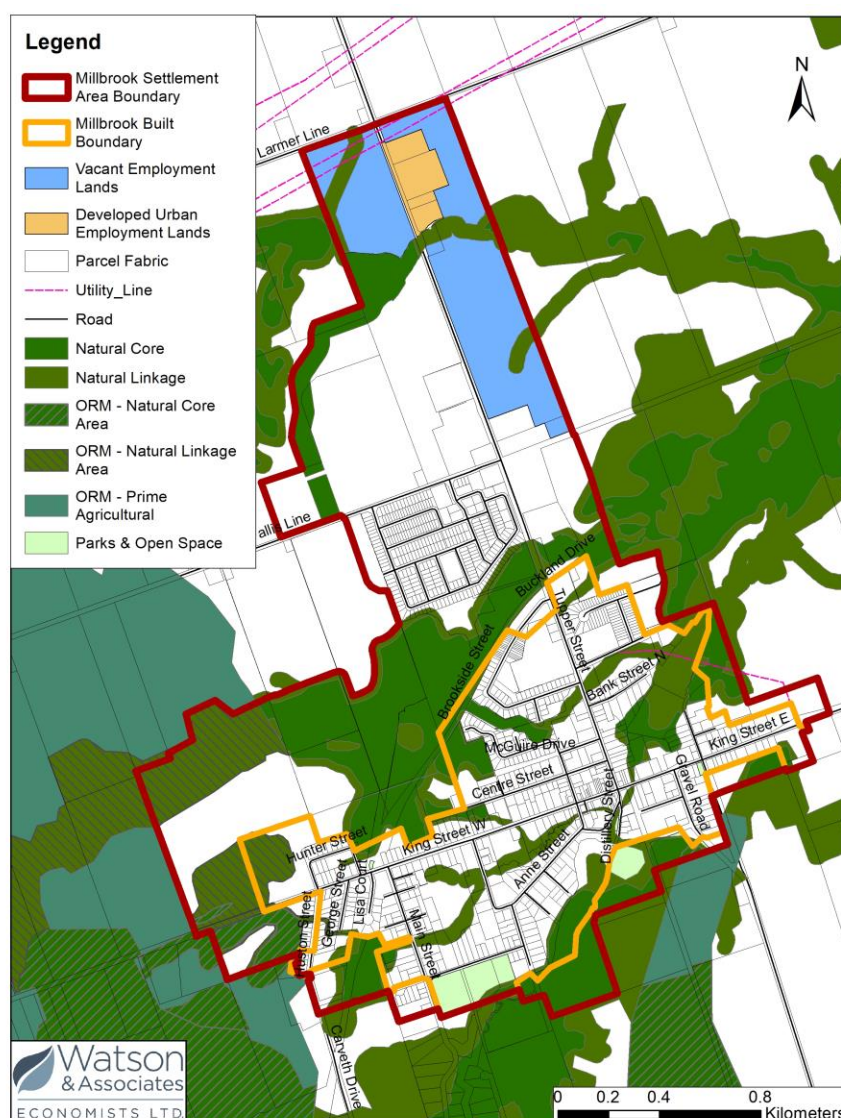
Supplemental Urban Employment Area Supply and Forecast Information



Appendix B: Supplemental Urban Employment Area Supply and Forecast Information

Figure B-1 summarizes the Township of Cavan Monaghan's vacant Urban Employment Area land supply within the Millbrook Settlement Area. There are 40.2 ha (99 acres) of Urban Employment Area land vacant and 6.2 ha (15 acres) developed.

Figure B-1
Map of the Vacant and Developed Urban Employment Land Supply in Millbrook,
May 2022





Forecast Employment on Urban Employment Lands, 2021 to 2051

summarizes forecast employment on Urban Employment Areas over the short-, medium- and long-term forecast periods, based on the assumed allocation of growth on Employment Areas assigned by primary, industrial, commercial and institutional sector. Over the 2021 to 2051 period, the Township's Urban Employment Lands are anticipated to accommodate approximately 46% of the Township's total employment growth, resulting in approximately 1,600 jobs.



Figure B-2 displays the allocation of usual place of work employment by major sector, between 2021 and 2051. Figure B-3 summarizes forecast employment on Urban Employment Areas over the short-, medium- and long-term forecast periods, based on the assumed allocation of growth on Employment Areas assigned by primary, industrial, commercial and institutional sector. Over the 2021 to 2051 period, the Township's Urban Employment Lands are anticipated to accommodate approximately 46% of the Township's total employment growth, resulting in approximately 1,600 jobs.



Figure B-2
Employment Growth on Urban Employment Lands, 2021 to 2051

Employment Sector	Employment Growth, 2021 to 2051				Percent of Township Employment Growth on Employment Lands, 2021 to 2051
	Township Wide	Urban Employment Areas	Community Areas	Rural Areas	
Primary	0	0	0	0	
Industrial	1,194	955	0	239	80%
Commercial/Population-Related	1,349	378	870	101	28%
Institutional	567	272	284	11	48%
N.F.P.O.W.	564	0	254	310	0%
Total Employment Growth	3,673	1,605	1,408	660	44%
Share of Total Employment Growth		44%	38%	18%	

Note: Work at Home Employment is not included.

Source: Watson & Associates Economists Ltd., 2022.

Figure B-3
Employment Growth on Urban Employment Lands, 2021 to 2051

Employment by I.C.I.	Employment Growth by Sector						Employment Growth on Urban Employment Lands						Percent on Employment Lands
	2021-2026	2021-2031	2021-2036	2021-2041	2021-2046	2021-2051	2021-2026	2021-2031	2021-2036	2021-2041	2021-2046	2021-2051	
Primary	-	-	-	-	-	-	-	-	-	-	-	-	0%
Work at Home	81	153	225	267	326	382	-	-	-	-	-	-	0%
Industrial	360	556	770	952	1,066	1,194	288	445	616	762	853	955	80%
Commercial	344	568	838	1,058	1,207	1,349	96	159	235	296	338	378	28%
Institutional	164	252	359	432	504	567	79	121	172	207	242	272	48%
Total	949	1,529	2,192	2,709	3,103	3,492	463	725	1,023	1,265	1,433	1,605	46%

Note: Numbers may not add precisely due to rounding

Source: Watson & Associates Economists Ltd., 2022.



Appendix C

Evaluation of Urban Employment Area Conversions



Appendix C: Evaluation of Urban Employment Area Conversions

Principles for Employment Area Conversions in Cavan Monaghan

It is important to recognize that structural changes in the broader economy continue to alter the nature of economic activities in Employment Areas, which in turn impacts the built form and character of these lands. It is also important to address that tomorrow's industries will have siting, space and built-form requirements that are fundamentally different from traditional industrial sites which exist today. This may include requirements related to broad infrastructure, transit access, energy efficiency, building and urban design standards, eco-industrial design principles and labour force access. Site configurations and the integration of uses are also evolving particularly in prestige Employment Areas which often integrate operations combining office, research and development, warehousing and logistics, and on-site manufacturing in a "campus-style" setting.

Due to potential negative impacts resulting from the inappropriate conversion of Employment Areas, it is recognized that there is a need to plan for optimal and marketable employment uses within the Township. It is also recognized that under some circumstances an Employment Area conversion may be justified for planning and economic development reasons provided such decisions are made through using a systematic approach and methodology as set out herein.

Given the importance of planning for and protecting Employment Areas, a series of principles, as listed below, for approaching the evaluation of employment conversions has been established. These principles are meant to provide further rationale to guide local decision making regarding the conversion of Employment Areas. Again, it is noted that these principles were developed using policy directions and guidance from the Provincial Policy Statement (P.P.S.), 2020, A Place to Grow: Growth Plan for the Greater Golden Horseshoe, 2019 (the Growth Plan, 2019), as well as reference to best practices in protecting, planning, and developing employment lands. In total, seven broad Employment Area principles have been established for the Township and are summarized below.



1) Protect Employment Areas in proximity to major transportation corridors and Goods Movement infrastructure to ensure businesses have access to a transportation network that safely and efficiently moves goods and services.

In contrast to other urban land uses (e.g., commercial, mixed-use and residential areas), Employment Areas provide the opportunity to accommodate industrial sectors that cannot be easily accommodated in other areas of the County. The Growth Plan, 2019 and the P.P.S., 2020 contain policies that protect Employment Areas in proximity to major Goods Movement facilities and corridors that require those locations. To continue to be competitive and attractive to a broad range of industrial and commercial sectors, municipalities need to ensure that medium- to large-scale vacant sites have good access to trade corridors near major highway interchanges as well as other major Goods Movement and transportation facilities such as ports, rail yards, intermodal facilities, and airports.

2) The configuration, location, and contiguous nature of Employment Areas need to be maintained in order to prevent fragmentation and provide business-supportive environments.

Preserving the overall configuration, location, and contiguous nature of Employment Areas ensures the Township and County can continue to be competitive and attractive to a broad range of industrial and commercial sectors. Potential risks of Employment Areas becoming fragmented over time are to be anticipated and mitigated. Encouraging contiguous Employment Areas of critical mass supports market choice and municipal competitiveness, while also enabling businesses to establish relationships and synergies, thereby developing strong business-supportive environments to various scales (i.e., locally and regionally).

3) Provide a variety of Employment Area lands in order to improve market supply potential and regional attractiveness to a variety of employment sectors and business sizes.

The Township and County needs to ensure a sufficient supply of municipally serviced (and/or serviceable) lands within Employment Areas, by location, access, site size, zoning, tenure, etc., are offered. This will ensure a sufficient market choice of designated Employment Areas is provided to accommodate a variety of employment



sectors and business sizes. The Township and County will need to ensure that they offer a diverse supply of employment land supply, including a range of parcel sizes.

4) Retain the employment and job potential of Employment Areas.

Recommended Employment Area conversions should maintain or improve the County's overall ratio of jobs to population (i.e., employment activity rate), without undermining the functionality and competitive position of existing Employment Areas.

5) Align Township and County interests and policies related to Employment Areas in order to support achieving municipal goals and mandates of planning for, protecting, and preserving Employment Areas.

It is recognized that there are various municipal interests and policies related to Employment Areas that speak to planning for, protecting, and preserving Employment Areas. As such, the purpose of this principle is for the Township to align as best as possible to County mandates, goals, and objectives, for example, included in the County's Strategic Plan, O.P., Secondary Plans, etc., which provide insight related to the County's vision towards planning for, protecting, and preserving Employment Areas.

6) Limit and/or mitigate land use incompatibilities where necessary.

The Growth Plan, 2019 and the P.P.S., 2020 contain policies that speak to avoiding or limiting land use incompatibilities with sensitive land uses (e.g., residential uses, education and health care facilities, day care centres). Employment Areas may also accommodate industries that require adequate separation from sensitive land uses.

7) Site-Specific Conversion Criteria Evaluation.

As shown in Figure 3-4 of the report, all existing urban Employment Area sites have scored the same on the evaluation criteria matrix. Accordingly, Figure C-1 evaluates the conversion of all three Employment Areas sites.



Figure C-1
Township of Cavan Monaghan
Planning and Economic Development Evaluation Results for Conversion: Sites 1 to 3

Meets Criteria
 Does Not Meet Criteria

		Comments	
Provincial Policy Statement 1.3.2.5	A	Based on employment land demand in Cavan Monaghan, there is a need for residential, commercial, and urban employment land over the planning horizon. The amount of urban employment land required over the long term is being provided through the designation of urban employment lands to the	
	B	The proposed conversion to non-employment use would not adversely affect the overall viability of the Employment Area. The urban employment lands within Millbrook are in close proximity to residential uses. Converting the lands and designating urban employment lands closer to the highway would result in a more cohesive and contiguous land use structure.	
	C	Existing or planned infrastructure and public service facilities are available to accommodate the proposed uses.	
Localized Criteria	D	The sites are in close proximity to Highway 115; however, they do not offer direct access to major transportation corridors.	
	E		
	F	The three sites compose the entirety of the existing Millbrook Urban Employment Area. All sites could be considered as a fringe location.	
	G	The sites offer limited market supply potential for Employment Areas. Their location in close proximity to residential uses acts as a barrier to attracting prospective businesses. Moving the employment lands north towards Highway 115 mitigates these constraints and improves marketability.	
	H	Conversion to residential and commercial uses is more compatible than the existing Urban Employment Area designation. Accommodating residential and commercial development would remove the existing land use conflicts and create a more cohesive urban structure within the Millbrook Settlement Area.	
	I	While converting these lands would remove a supply of large Employment Area sites within the Township, the designation of new urban Employment Area lands to the north as part of a Millbrook Settlement Area boundary expansion would provide Cavan Monaghan with a supply of larger sites.	
	J	Designating a portion of these lands for Community Commercial development would result in jobs being maintained within the existing settlement area boundary. Relocating the Urban Employment lands closer to Highway 115 would result in the number of jobs being maintained or increased.	
Recommended for Conversion			

Source: Watson & Associates Economists Ltd., 2022.