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2006

**Intergovernmental Action Plan  
for Simcoe, Barrie & Orillia**

*Implementation Assessment Report*



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## ERRATA SHEET

The following minor changes have been made to the Implementation Assessment Report issued on 30 August 2006. The attached report has been revised to include those changes.

1. Page ii, second paragraph under Section A is changed to read:

"This option anticipates that the upper tier municipality would be responsible for delivering the following planning and development services."

2. Page iv, section i): The first paragraph is replaced with the following:

"The recommendations for two-tier delivery for planning and development services and public works will have implications for the governance structure in Simcoe County. For this reason, a full-scale governance study will be required prior to the implementation of these recommendations."

That paragraph then continues with:

"As part of the governance study, it will be necessary...."

The last paragraph begins:

"In addition, it is acknowledged.....service delivery."

3. Page 6: The full reference for Neptis Foundation is:

Birnbaum, Leah, Lorenzo Nicolet and Zack Taylor, "Simcoe County: The New Growth Frontier." A report prepared for the Neptis Foundation, 2004.

4. Page 31: The full reference for Enid Slack is:

Slack, Enid, "Models of Government Structure at the Local Level," Working Paper 2004(4), Institute for Intergovernmental Relations, Queen's University, December, 2004."

5. Page 34: Footnote 14 is changed to read:

Bahl, Roy and Johannes Linn, 1992, p. 415.

6. Page 53: The first sentence is changed to read:

"This option anticipates that the upper tier municipality would be responsible for delivering the following planning and development services ." It is noted that this is the same comment as on page ii.

7. Page 65: Section 9.1 is changed to read:

"Scope of Public Works."



August 29, 2006

Ministry of Municipal Affairs and Housing  
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Attention: Bruce Singbush, Manager – Planning Projects

**Intergovernmental Action Plan (IGAP) for Simcoe County, Barrie and Orillia - Implementation Assessment Report**

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Dear Mr Singbush:

We are pleased to submit the Implementation Assessment Report to the IGAP Partners. This report, along with the Growth Potential Assessment Report, Existing Capacities Assessment Report and seven foundation reports represents the culmination of a comprehensive sixteen-month effort by our consultant team in conjunction with the Infrastructure Working Group and Growth Potential Working Group for IGAP. As part of the IGAP process, we assessed the existing capacity in the Study Area to accommodate approved development and planned growth, recommended an urban structure to accommodate the growth projected for the Study Area in the Greater Golden Horseshoe Growth Plan and proposed service delivery options to support the recommended urban structure.

This work represents the best efforts of our team to provide the IGAP Partners with a solid information base and sound professional advice as they move forward over the coming months to make strategic decisions on the management of future growth and governance in the Study Area. We believe our work provides a strong foundation and reference point to the Partners in their deliberations.

We have enjoyed the opportunity of working on this challenging growth planning assignment.

Yours sincerely,

**DILLON CONSULTING LIMITED**

Ron Shishido, MCIP RPP  
Partner & Project Manager



## **EXECUTIVE SUMMARY**

*A vision for growth and development in the study area has been recommended as part of the IGAP project. It includes maintaining healthy watersheds and natural heritage systems and providing infrastructure in the most efficient and cost-effective manner. Also important is creating strong, sustainable, complete communities that reflect the diverse character of communities in the study area. Municipalities need to offer a range of housing choices and develop strong live/work connections thus reducing the reliance on the private automobile and increasing alternate modes of transportation including walking, cycling and public transit.*

*Future growth and development presents a number of challenges for municipal governments in the study area. Foremost is the need to enhance and expand their cooperative efforts. How will municipalities address the requirements of the Provincial Policy Statement (2005) and the Growth Plan for the Greater Golden Horseshoe (2006) while responding to significant development pressures? How will they protect watersheds, water quality, rural lands and natural resources? What does it mean to build complete communities and how will it be achieved?*

*The Recommended Urban Structure also raises several challenges for service delivery. By what means should the municipalities in the study area co-ordinate area-wide management of growth and development and integrate long-range land use and infrastructure planning on an area-wide basis? What approach should be taken to incorporate the sophisticated ACS model into ongoing planning decisions? How will targets be monitored for: population and employment growth; intensification; minimum densities; and watershed impacts? It will be important to ensure that both appropriate municipal authority and resources are in place to support growth management activities.*

*The Implementation Assessment (IA) is the final component of the IGAP project. The purpose of the IA is to recommend service delivery options to support management of growth and development, in general, and the Recommended Urban Structure, in particular, over the next 25 years to 2031. Additionally, the IA identifies governance implications and makes recommendations for further analysis, as needed.*

*The following categories of municipal service delivery were considered. Our work focused on Planning and Development Services and Public Works, assessing options to sustain delivery of the recommended urban structure over the long term.*

- **Planning and Development Services** including economic development
- **Public Works**, specifically water, wastewater, and transportation/transit

*We also identified service delivery issues for the following municipal services:*

- **Recreation and Cultural Services**
- **Emergency Services**, specifically, police, fire and land ambulance/paramedicine

- **Social Services**, specifically social assistance and social housing.

### **Preferred Implementation Option**

*Our recommendations for the Preferred Implementation Option are:*

#### **A. Planning & Development Services**

*Achieve area-wide coordination of planning and development through consolidation of services in a two-tier delivery system. Area-wide means the entire study area of Simcoe, Barrie and Orillia.*

*This option anticipates that the upper tier municipality would be responsible for delivering the following planning and development services: growth management studies and creation of an area-wide Official Plan, approval of city and local municipal Official Plans and Official Plan Amendments. Other responsibilities may include approval of Plans of Subdivision and Plans of Condominium or these may be delegated to the local municipalities. The upper-tier municipality would be responsible for GIS services and for some aspects of economic development including marketing and tourism promotion. While the local Conservation Authorities will maintain the Assimilative Capacity (AC) model, the upper-tier municipality would be responsible for the integration of findings from the AC model in planning decisions.*

*The local municipalities would retain responsibility for all other planning approvals, some GIS and maintain the lead role in local economic development.*

#### **B. Public Works**

##### **i) Water and Wastewater Services**

*Achieve area-wide coordination of long range land use and infrastructure planning and service delivery through consolidation of public works in a two-tier delivery system.*

*This would involve the creation of a two-tier municipality to provide water and wastewater services. In particular the upper-tier municipality would be responsible for water and wastewater treatment and regional distribution mains, where applicable, throughout the study area and the lower-tier municipalities would be responsible for water distribution and wastewater collection. In addition, the upper-tier municipality would work with the local Conservation Authorities to integrate the Assimilative Capacity model into its planning and would coordinate long-range infrastructure with long-range land use planning.*



**ii) Transportation and Transit Services**

1. *Provincial highways, County roads and local street requirements need to be addressed in a coordinated manner for the study area in order to support the Recommended Urban Structure over the next 25 years.*
2. *Greater efforts are needed to:*
  - *Expand regional roads to accommodate the movement of people, goods and services in the study area and to support economic growth of the area.*
  - *Link regional roads to regional and local transit in order to reduce the use of private automobiles.*
  - *Improve linkages between regional and local transit to reduce the use of private automobiles.*
3. *The City of Barrie should extend its local transit service to the new greenfield lands intended for residential and employment purposes as recommended in the Recommended Urban Structure.*

**C. Other Services**

- i) *Retain consolidation of the following services:*
  - *Land Ambulance and Paramedic Services (area-wide)*
  - *Social Services (area-wide)*
  - *Court Services and Administration of Provincial Offences Act Revenue (area-wide)*
  - *Waste Management (County-wide)*
- ii) *Retain local responsibility for the following services:*
  - *Recreation and Cultural Service*
  - *Firefighting*
- iii) *Study area-wide consolidation of the following services:*
  - *Police Services*
  - *Waste Management*

## **D. Implementation**

### **i) Further Study and Analysis of the Governance Structure**

*The recommendations for two-tier delivery for planning and development services and public works will have implications for the governance structure in Simcoe County. For this reason, a full-scale governance study will be required prior to the implementation of these recommendations.*

*As part of a governance study, it will be necessary to determine what the outer boundaries of the new structure should be (i.e., should it be based on watershed boundaries, commuting patterns, economic considerations?). It will also be necessary to determine the internal boundaries of the restructured County. For example, should some municipalities be amalgamated? If Barrie is best able to provide services for the growth on adjacent lands, should Barrie's boundaries be extended? In a two-tier structure, it will be necessary to set out clearly what functions will be performed by the upper-tier and what functions by the lower-tiers. Issues around how to account for differences in debt and reserves need to be considered. Finally, the system of representation will need to be set out. How many representatives will there be in each of the lower-tier municipalities? How many representatives will there be on the upper-tier council? Will the upper-tier council be appointed, indirectly elected or directly elected?*

### **ii) Interim Actions**

*The interim actions for Planning and Development Services are:*

- *Prepare growth management strategy for Simcoe, Barrie & Orillia;*
- *Initiate work on local Official Plan conformity; and,*
- *Provincial assistance and, if necessary, intervention.*

*The interim actions for Public Works are:*

- *Seek efficiencies within current service delivery.*

*In addition, it is acknowledged for all services, municipalities in the study area should continue with their continuous improvement processes and seek efficiencies within their current service delivery.*

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## **1.0 INTRODUCTION**

### **1.1 Context for this Report**

The Province and the municipalities in Simcoe County as well as the Cities of Barrie and Orillia recognize the need to plan for long-term population growth and a healthy environment, and to deliver associated services effectively and efficiently. Since August 2004, the Province has been in discussions with municipalities in south Simcoe and Barrie, where growth pressures are most pressing. The purpose of these discussions has been to determine how best to address common concerns in a cost effective and timely manner. In February 2005, the Province and the municipalities in the study area struck a partnership to engage in the Intergovernmental Action Plan (IGAP) for Simcoe, Barrie and Orillia.

The partnership is made up of the following provincial ministries and municipalities:

#### Provincial Ministries

- Municipal Affairs and Housing
- Environment
- Public Infrastructure Renewal
- Natural Resources

#### Municipalities

- Simcoe County
- Township of Adjala-Tosorontio
- City of Barrie
- Town of Bradford-West Gwillimbury
- Township of Clearview
- Town of Collingwood
- Township of Essa
- Town of Innisfil
- Town of Midland
- Town of New Tecumseth
- City of Orillia
- Township of Oro-Medonte
- Town of Penetanguishene
- Township of Ramara
- Township of Severn
- Township of Springwater
- Township of Tay
- Township of Tiny
- Town of Wasaga Beach



The provincial ***Strong Communities*** program includes developing long-range solutions for Central Ontario. Multiple interrelated initiatives are in place including: ***The Places to Grow Act, 2005*** and ***Growth Plan for the Greater Golden Horseshoe, 2006***, planning reform initiatives, changes to the Provincial Policy Statement, watershed-based source water protection measures and, strategic, long-term infrastructure investment.

Unique growth and development challenges exist in Simcoe, Barrie and Orillia. South Simcoe and Barrie, in particular, are experiencing increased development pressure, and are expected to continue to experience rapid growth. A number of the municipalities rely upon inland water systems which have been demonstrated to be under strain as a result of phosphorous loadings. Without intervention, the available potable water and aquaculture of these watersheds are threatened.

Through their approved official plans, the municipalities have made provision for significant growth. Providing water and wastewater services for this growth is proving to be a challenge. Several major development proposals are being proposed that involve the establishment of new urban settlements or expansion of existing urban areas which will increase the challenges for water and wastewater servicing and maintenance of watershed health.

Furthermore, the municipalities in the study area are also under increasing administrative and financial capacity constraints, which have led to various local recommendations for new approaches to service delivery. None of these proposals, however, comprehensively addresses the entire study area and all of the common municipal service delivery needs.

## **1.2 Purpose of IGAP**

The IGAP is a process to undertake a series of studies which, when completed, will be used by the Province and the study area municipalities to assist them in their long-term planning and development decision-making and service delivery. These studies will provide information and recommendations on the direction that IGAP Partners could take in future policy development and implementation to achieve long-term sustainability for the study area.

The four key outcomes of the IGAP are studies, which identify:

- A defined growth (assimilative) capacity for the Lake Simcoe and Nottawasaga River watersheds;
- Development (servicing) certainty for intensification and approved growth;
- Defined capacity for Barrie and area's additional growth; and,
- Effective and sustainable service coordination.

Upon completion of the IGAP, the participating governments will have a basis for:

- A long-term urban structure plan for Simcoe, Barrie and Orillia;
- A sustainable infrastructure strategy for Simcoe, Barrie and Orillia;

- Development certainty for all affected stakeholders; and,
- Service coordination mechanisms to manage future growth and development and a suitable governance structure.

A number of studies have been undertaken as part of the IGAP process. These include:

- An Assimilative Capacity Study (ACS);
- Existing Capacities Assessment (ECA), comprised of seven reports;
- Environmental Scan;
- Strengths, Weaknesses, Opportunities and Threats (SWOT) Assessment;
- Growth Potential Assessment (GPA); and,
- Implementation Assessment (IA).

### **1.3 Purpose of the Implementation Assessment**

The Implementation Assessment (IA) is the final component of the IGAP project. The purpose of the IA is to recommend service delivery options to support management of growth and development, in general, and the Recommended Urban Structure, in particular, over the next 25 years to 2031. Additionally, the IA sets out the governance implications of the preferred implementation option and makes recommendations for further analysis, as needed.

The Recommended Urban Structure (refer to Section 3.2) also raises several challenges for service delivery. By what means should the municipalities in the study area co-ordinate area-wide management of growth and development and integrate long-range land use and infrastructure planning on an area-wide basis? What approach should be taken to incorporate the sophisticated Assimilative Capacity model into on-going planning decisions? How will targets be monitored for: population and employment growth; intensification; minimum densities; and watershed and sub-watershed health? It will be important to ensure that both appropriate municipal authority and resources are in place to support growth management activities.

The Implementation Assessment makes recommendations for an implementation strategy that addresses short-term implementation needs: scope of issues to be resolved; suggested approaches to decision-making; transition activities; and legislative and regulatory matters.

### **1.4 Format of this Report**

This report provides documentation of the Implementation Assessment (IA) component of the Intergovernmental Action Plan for Simcoe, Barrie and Orillia (IGAP). The remainder of this report is structured as follows:

- Section 2.0 provides background information on the study area;
- Section 3.0 summarizes the preferred growth option, referred to as the Recommended Urban Structure for Simcoe, Barrie and Orillia;

- Section 4.0 sets out the Assessment Framework used in evaluating alternative service delivery options to support implementation of the Recommended Urban Structure;
- Section 5.0 provides a high level overview of current service delivery arrangements in the study area;
- Section 6.0 presents advantages and disadvantages of service delivery options drawn from a review of literature and best practices;
- Section 7.0 summarizes the key findings from consultation with the IGAP Partners;
- Section 8.0 provides an assessment of service delivery options for Planning and Development Services;
- Section 9.0 provides an assessment of service delivery options for Public Works;
- Section 10.0 describes the preferred service delivery approach including recommendations for other municipal service areas including Social Services, Emergency Services, and Recreation and Cultural Services;
- Section 11.0 sets out the governance implications and other matters that need to be addressed as part of an implementation strategy; and,
- Appendices contain additional background information and analyses.

## **2.0 BACKGROUND**

### **2.1 Brief History of Governance in the Study Area**

The current governance structure of the study area is a two-tier county system that includes 16 local municipalities, and the two separated cities of Barrie and Orillia. Once a part of the County, the City of Barrie became a separated city in 1959 and the City of Orillia followed in 1969.

In the early 1990s, the County of Simcoe was restructured, starting with the southern municipalities and ultimately involving the entire County. With the passing of the *County of Simcoe Act* in 1993, the number of local municipalities was reduced to the current 16 towns and townships. The County was given greater responsibilities in services such as land use planning, solid waste management, emergency services and, health and social services while the local municipalities retained responsibility for services including local planning and development, public works, recreation and policing.

The Cities of Barrie and Orillia remain outside of the County system but are an integral part of the physical, social and economic area known as the County of Simcoe. Inter-municipal cooperation continues in many service areas.

Growth of the City of Barrie has resulted in several boundary changes in the past 40 years with lands annexed from neighbouring municipalities to the north, west and south of the City. As a result of a request for annexation by the City of Barrie in 1975 and following negotiations between Barrie and the Township of Innisfil, the Province passed *An Act Respecting the City of Barrie and the Township of Innisfil* in 1981. This legislation set out the basis for staged annexation of lands in the 1980s and set guidelines regarding future requests for annexation. The Act also described lands not to be annexed without agreement between Barrie and Innisfil. These "moratorium lands" were to be preserved for agricultural use, aggregate extraction and related uses.

**Table 2.1** provides information on the municipalities in the study area according to the type of municipality (town, township, etc.), the most recent year in which they were restructured and, the nature of the restructuring.

**Table 2.1 - Study Area Restructuring from 1990**

<b>Present Municipality</b>	<b>Type</b>	<b>Year</b>	<b>Restructured Components</b>
Simcoe County	County		
Adjala-Tosorontio	Township		No change
Barrie (Separated)	City		No change
Bradford-West Gwillimbury	Town	1992	Town of Bradford, Town of West Gwillimbury
Clearview	Township	1994	Town of Stayner, Village of Creemore, Townships of Nottawasaga and Sunnidale
Collingwood	Town		No change
Essa	Township	1994	Part transferred to Town of Innisfil
Innisfil	Town	1991 1994	Township of Innisfil, Township of West Gwillimbury (partial), Village of Cookstown Township of Essa (partial)
Midland	Town	1997-1998	Annexation involving the Township of Tay, Town of Penetanguishene
New Tecumseth	Town	1992	Towns of Alliston, Beeton, Tottenham, Tecumseth
Orillia (Separated)	City		No change
Oro-Medonte	Township	1994	Township of Oro, Township of Medonte
Penetanguishene	Town	1997-1998	Annexation involving Township of Tay, Town of Midland
Ramara	Township	1994	Town of Rama, Town of Mara
Severn	Township	1994	Towns of Coldwater, Washago, Severn Falls, Marchmont, Maclean Lake, Hawkins Corner, Ardtrea
Springwater	Township		No change
Tay	Township	1997-1998	Annexation involving Towns of Midland and Penetanguishene
Tiny	Township		No change
Wasaga Beach	Town		No change

Source: Birnbaum, Leah, Lorenzo Nicolet and Zack Taylor, "Simcoe County: The New Growth Frontier". A Report prepared for the Neptis Foundation, 2004.

## **2.2 Relevant Legislation**

There are a number of relevant pieces of legislation that have been considered during the Implementation Assessment component of the IGAP study. These are discussed briefly below.

### **2.2.1 Simcoe County Act**

As described above, with the passing of the *Simcoe County Act* in 1993, the number of local municipalities was reduced from 33 to the current 16 towns and townships. The County was

given greater responsibilities in services such as land use planning, solid waste management, emergency services and, health and social services while the local municipalities retained responsibility for services including local planning and development, public works, recreation and policing.

The City of Barrie and City of Orillia remained separated cities.

### **2.2.2 Bill 156 – An Act Respecting the City of Barrie and Township of Innisfil**

Barrie has traditionally been and continues to be the largest urban centre in the County of Simcoe, dating back to 1843 when the County was formed and Barrie designated as the County seat. Growth pressures in Barrie have resulted in several boundary changes, with nine annexations of land from neighbouring municipalities since 1950.

In 1981, Bill 156, *An Act Respecting the City of Barrie and Township of Innisfil* was passed by the Legislature of Ontario. A staged annexation was set out in Bill 156, which reflects the current boundaries between Innisfil and Barrie. The Act also set guidelines regarding future requests for annexation, and includes a description of lands not to be annexed without agreement between Barrie and Innisfil. These “moratorium lands” were to be preserved for agricultural use, aggregate extraction and related uses. Moratorium lands were not to be part of any annexation request before January 1, 1997, unless agreed to by the Town of Innisfil. Additionally, no other lands in Innisfil were to be part of an annexation application, without the Township’s agreement until 2012.

### **2.2.3 The Municipal Act**

The *Municipal Act*, 2001 establishes a new framework for provincial-municipal relations: municipalities are acknowledged as responsible and accountable governments and their purposes are broadly defined. In the *Municipal Act*, municipalities are categorized as: upper-tier municipalities within a two-tier municipal system; lower-tier municipalities within a two-tier municipal system; and, single-tier municipalities being those that are not part of a two-tier system.

Single-tier municipalities such as the separated Cities of Barrie and Orillia may pass by-laws under all the ten spheres of jurisdiction (outlined below) which gives them direct control over their affairs and service delivery. The basic rule in two-tier municipal systems is that a lower-tier municipality has exclusive authority to pass by-laws under a sphere – unless the sphere or part of the sphere has been assigned to its upper-tier.

Spheres of responsibility include:

- Highways, including parking and traffic on highways;
- Transportation systems other than highways - transit, ferries and airports;
- Waste management – waste collection, recycling, composting and disposal;

- Public utilities - water supply and sewage treatment facilities;
- Culture, parks, recreation and heritage - parks, arenas, museums, art galleries;
- Drainage and flood control, except storm sewers - floodways and purchase of wetlands;
- Structures, including signs and fences - fences surrounding swimming pools;
- Parking, except on highways - parking lots and garages;
- Animals - licensing, spaying clinics, restrictions on exotic animals;
- Economic Development Services - industrial parks, tourism promotion.

#### **2.2.4 Planning Act**

The *Planning Act* provides for a provincial-led planning system, which promotes sustainable economic development within a healthy natural environment. It also provides for an open planning process and recognizes decision-making authority at the municipal level. A summary of the matters addressed by the *Planning Act* is provided below.

The authority over all matters of land use planning is vested with the Minister of Municipal Affairs. The Minister may, by order, delegate responsibilities to municipal councils. However, the Minister retains all responsibilities regarding authority to approve (or exempt from approval) Official Plans and Official Plan Amendments. A municipality can not be delegated the power to self-approve its own Official Plan. Furthermore, by passing a by-law, a municipal Council may subsequently delegate responsibilities conferred to it by the Minister to a Committee of Council or an appointed municipal officer.

Spheres of responsibility include:

- Official Plan and Amendments
- Zoning By-law and Amendments
- Plan of Subdivision
- Plan of Condominium
- Part Lot Control
- Site Plan
- Consent (for Land Severance)
- Minor Variance
- Community Improvement Plan

#### **2.2.5 Other Legislation**

About eighty Acts administered by other ministries also provide authority for important municipal services. Examples of these other statutes are the *Fire Protection and Prevention Act*, the *Police Services Act* and the *Ontario Works Act*, and *Building Code Act*.

### **2.3.5 Other Relevant Studies**

A number of key studies on local government structure have been undertaken in recent years for municipalities in the study area. An overview of some of these is provided below.

*Greater Barrie Area Local Government Review: The Challenge of Managing Growth* (2002, Meridian Planning Consultants) focuses on South Simcoe. It was assumed that Barrie is the urban and economic growth centre of the region and that growth will continue with Barrie reaching a population of approx. 175,000 by 2021. It is anticipated that Barrie will not be able to accommodate development within its current boundaries and another 750 hectares will be required (south of the City boundaries in Town of Innisfil). The report recommends that a system of single tier municipalities be created in South Simcoe with the creation of the cities of: Barrie-Innisfil, Bradford-West Gwillimbury (also taking in portions of Innisfil), New Tecumseth-Adjala and Essa-Tosorontio. The City of Orillia would remain a separated city while the remainder of municipalities in northern Simcoe County would continue to function within a two-tier county system. If restructuring does not proceed, it is recommended that 750 hectares of land in Innisfil should be annexed immediately to the City of Barrie to accommodate residential and employment growth requirements.

*Managing Growth & Protecting Innisfil's Communities* (2002, Marshall Macklin Monaghan) responds to the Meridian report. The report disputes the assumptions and analysis for residential and employment lands found in the Meridian report and concludes that there is no need for annexation of lands from Innisfil by the City of Barrie nor is there a rationale developed in the Meridian report for further restructuring in South Simcoe. This report cautions that some municipalities could be financially unviable under the Meridian scheme and recommends that the Town of Innisfil must resist annexation in order to protect its 'community of communities'.

Finally, the report recommends that the City of Barrie look at opportunities for managing growth within its current boundaries through intensification and redevelopment of under-utilized lands before it looks outwards.



## **3.0 GROWTH POTENTIAL ASSESSMENT AND THE RECOMMENDED URBAN STRUCTURE**

### **3.1 Challenges**

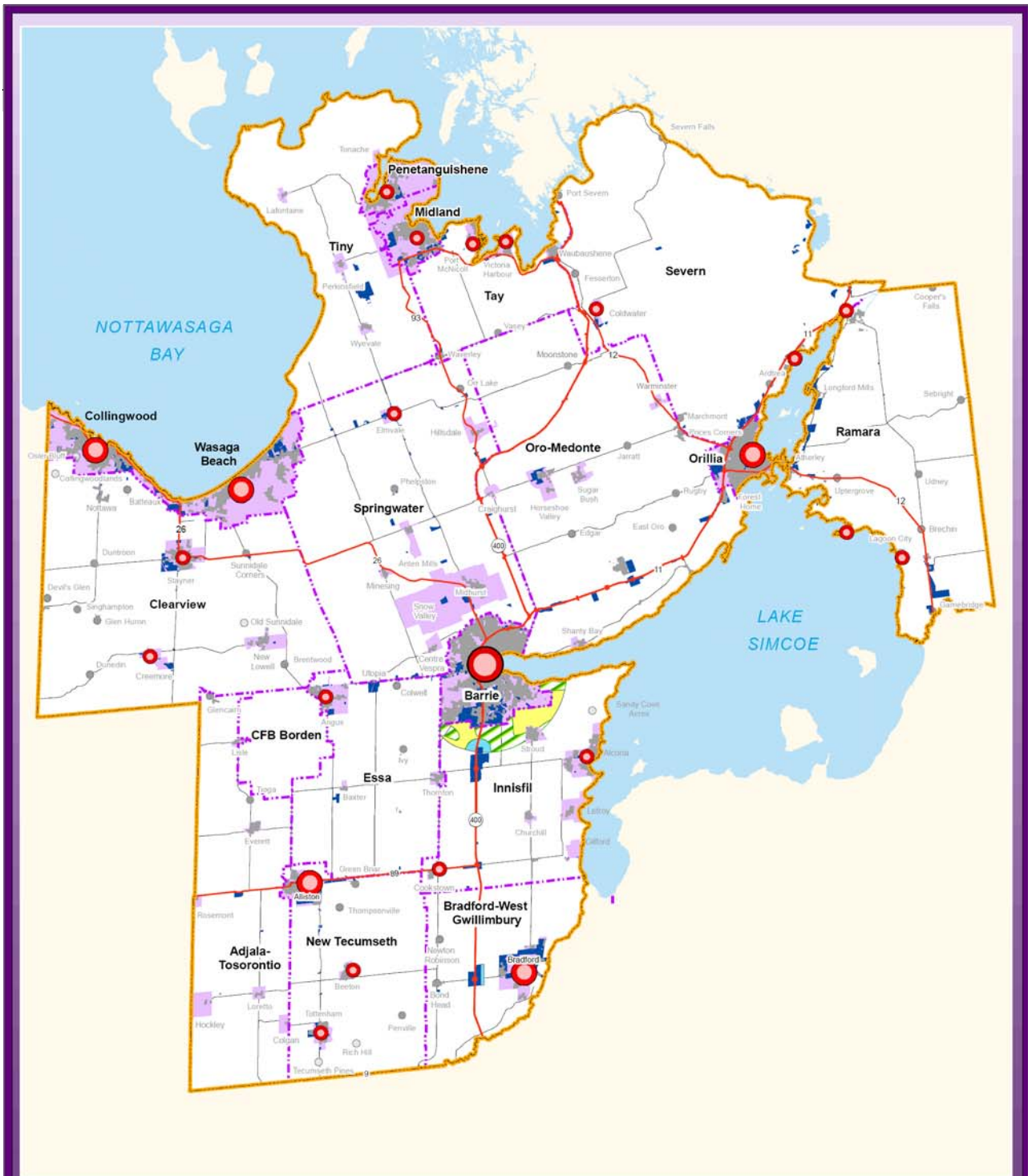
A vision for growth and development in the study area has been recommended as part of the IGAP project. It includes maintaining healthy water and natural heritage systems and providing infrastructure in the most efficient and cost-effective manner. Also important is creating strong, sustainable, complete communities that reflect the diverse character of communities in the study area. Municipalities need to offer a range of housing choices and develop strong live/work connections thus reducing the reliance on the private automobile and increasing alternate modes of transportation including walking, cycling and public transit.

Future growth and development presents a number of challenges for municipal governments in the study area. *Foremost is the need to enhance and expand their cooperative efforts.* How will municipalities address the requirements of the Provincial Policy Statement (2005) and the Growth Plan for the Greater Golden Horseshoe (2006) while responding to significant development pressures? How will they protect watersheds, water quality, rural lands and natural resources? What does it mean to build complete communities and how will it be achieved?

### **3.2 Recommended Urban Structure**

After considering a number of growth options, a Recommended Urban Structure has been created which focuses new urban expansion lands in Barrie and south of the current boundary. The Recommended Urban Structure will provide the framework for healthy watersheds; vibrant, sustainable and complete communities; and, provide for growth in all serviced settlement areas predominantly based on approvals in place for each municipality. The Growth Potentials Assessment Report provides a detailed discussion of this Recommended Urban Structure and a summary is provided below.

The Recommended Urban Structure is an optimized version of Options 2A and 2B from the Growth Potentials Assessment phase of IGAP (refer to the Growth Potentials Assessment Report for details of individual growth options assessed for IGAP). The Recommended Urban Structure allocates a 25-year supply of lands for growth to all study area municipalities. The Recommended Urban Structure assumes a 15% level of residential intensification across the study area; however, it also assumes that further work must be carried out to determine appropriate future residential intensification (to address the Growth Plan's 40% target). The Recommended Urban Structure also includes new employment lands in Barrie and area, as well as in Bradford-West Gwillimbury near Highway 400. **Figure 3.1** on the following page illustrates the Recommended Urban Structure.



## Intergovernmental Action Plan for Simcoe, Barrie and Orillia Figure 4.1: Recommended Urban Structure

- LEGEND**
- IGAP Study Boundary<sup>2</sup>
  - Area Municipalities<sup>2</sup>
  - Provincial Highways<sup>1</sup>
  - County Roads<sup>1</sup>
  - Ontario
  - Built Up Urbanized Area (conceptual)<sup>5</sup>
  - Employment/Industrial<sup>3</sup>
  - Settlement Boundary<sup>3,4</sup>
  - Residential Expansion Area (conceptual)
  - Employment Expansion Area (conceptual)
  - Natural Heritage Constraints (conceptual)
  - Regional Centre (Urban Growth Centre)
  - Major Growth Node (fully serviced settlement area, with 2031 Population > 25,000)
  - Growth Node (other settlement area with full services)
  - Other Settlement Area<sup>3</sup>
  - Settlement Non-Decision<sup>3</sup>

Projection: UTM zone 17N NAD83  
 Data Sources: 1. Ontario Ministry of Natural Resources  
 2. Ontario Ministry of Municipal Affairs and Housing  
 3. Simcoe County  
 4. Note that settlement area boundaries have not been altered to reflect 25 year land surplus.  
 5. Ministry of Public Infrastructure Renewal

### **3.3 Implications of Recommended Urban Structure for Implementation**

The Recommended Urban Structure also raises several challenges for service delivery. By what means should the municipalities in the study area co-ordinate area-wide management of growth and development and integrate long-range land use and infrastructure planning on an area-wide basis? What approach should be taken to incorporate the sophisticated Assimilative Capacity model into on-going planning decisions and the monitoring of targets for watershed and sub-watershed health? How will targets be monitored for: population and employment growth; intensification; minimum densities; and watershed impacts? It will be important to ensure that both appropriate authority and resources are in place to support growth management activities.

## **4.0 IMPLEMENTATION ASSESSMENT FRAMEWORK**

The Framework is composed of several elements. We considered:

1. Five (5) categories of municipal service delivery, with an emphasis on Planning and Development Services and Public Works.
2. Four (4) service delivery options.

The above two elements form the options matrix. We then applied:

3. Six (6) assessment criteria, which are founded upon principles for good municipal service delivery.
4. Four (4) implementation tests.

These elements of the assessment framework and the assessment methodology are described below.

### **4.1 Municipal Service Delivery**

The following categories of municipal service delivery were considered. Our work focused on Planning and Development Services and Public Works and assessing options to sustain delivery of the Recommended Urban Structure over the long term.

- **Planning and Development Services** including economic development
- **Public Works**, specifically water, wastewater, and transportation/transit

We also identified service delivery issues for the following municipal services:

- **Recreation and Cultural Services**
- **Emergency Services**, specifically, police, fire and land ambulance/paramedicine
- **Social Services**, specifically social assistance and social housing.

### **4.2 Service Delivery Options**

The service delivery options that are being considered are:

1. **Efficiencies** within current service delivery arrangements
2. **Joint Services and Special Service Districts**
3. **Inter-Municipal Agreements**
4. **Service Consolidation**

A brief description of the options follows:

#### **4.2.1 Efficiencies within Current Service Delivery Arrangements**

There are many approaches that can be used to gain greater efficiencies within existing service delivery arrangements and many of the following are currently being used in the study area:

- Competitive tendering;
- Competitive financing arrangements;
- Business case development and corporate performance model;
- Contracting out service delivery (e.g., operation of recreation facilities by YMCA);
- Public/private partnerships and privatization;
- Reducing/consolidating facilities (e.g., consolidation of public works yards);
- Elimination of duplication;
- Better use of technology and computerization (e.g., SCADA systems); and,
- Efficiencies in equipment use.

#### **4.2.2 Joint Services and Special Service Districts**

Special service districts may be established to deliver services across municipal boundaries. The municipal service board of a district is a corporate body controlled by the constituent municipalities through the delegation of decision-making and operational/financial management powers and the appointment of Board members by the municipal Councils. They do not have borrowing powers. A district can be responsible for the management of such services as transportation, water and wastewater management, and economic development.

Joint ownership of facilities such as airports exists in the study area. These joint facilities are operated and administered by joint service boards established by the participating municipalities.

The five municipalities in South Simcoe have been exploring this option for the delivery of water and wastewater services.

#### **4.2.3 Inter-Municipal Agreements**

Inter-municipal agreements are formal or informal agreements between municipalities to provide use of facilities and access to services typically on a fee basis across municipal boundaries. They are voluntary and less structured than a jointly owned service or special service district. They are subject to regular review and renewal and no separate administrative body is set up to oversee the agreements.

Many inter-municipal agreements exist in the study area for such things as: purchase of services on a fee basis for recreation, library and fire services; joint purchasing of police

services from the OPP and operation of water/wastewater facilities and systems by OCWA; bulk purchasing; and, joint ownership and operation of airports.

Recently established are agreements for the delivery of water from one municipality to another as a means of overcoming local resource constraints.

#### **4.2.4 Service Consolidation at One Level of Government**

Rather than having the same service delivered by all or several municipalities, service consolidation means that delivery is done by one municipality on behalf of all. Consolidation at one level of government can be done under a one-tier or two-tier government structure. In a two-tier system, the consolidation can be at the upper-tier or local municipality.

Examples of consolidation in the study area include Ontario Works services which are delivered by the County for all municipalities in the study area and court services and *Provincial Offences Act* (POA) revenue which are delivered by Barrie on behalf of all municipalities.

### **4.3 Options Matrix**

**Table 4.1** sets out the options matrix for municipal service delivery categories and service delivery options.

**Table 4.1 – Service Delivery Options for Each Municipal Service Delivery Category**

Service Category \ Service Option	Efficiencies	Joint Services/ Special Service Districts	Inter-Municipal Agreements	Service Consolidation
Planning and Development				
Public Works				
... and as needed				
Recreation and Cultural Services				
Emergency Services				
Social Services				

### **4.4 Assessment Criteria**

The criteria have been developed in conjunction with the Growth Potential Assessment to ensure consistency of direction and a smooth transition of approach from the GPA to the IA. The criteria listed below respond to growth management requirements, fiscal considerations and, service quality and accessibility.

1. **Capacity for Long Range Planning and Strategic Decision-Making:** The criterion will assess the extent to which an option enhances the ability of municipalities to engage in long range planning and strategic decision-making. It will assess the ability of study area municipalities to coordinate land use and long-range infrastructure planning.
2. **Efficient Provision of Services:** The criterion will assess the extent to which an option ensures that resources are used efficiently. For example, this criterion will assess the extent to which municipalities are able to achieve economies of scale in service delivery.
3. **Limited Financial Impact:** The criterion will assess the extent to which an option minimizes the financial impact upon municipal operations, including the cost of administration.
4. **Inter-Municipal Equity:** The criterion will assess the extent to which an option ensures municipalities are paying their fair share for the services received.
5. **Effective Service Delivery:** The criterion will assess the extent to which an option can achieve the intended results.
6. **Access and Accountability:** The criterion will assess the extent to which an option supports citizens' access to services, and to which decision-making is accountable, transparent and responsive to the community. Accountability requires monitoring and performance measurement.

The four service delivery options will be assessed for each municipal service delivery category using the assessment criteria. See **Table 4.2** for an example of the format for assessing each option.

**Table 4.2 – Assessing Service Delivery Options**

Service Option Service Category	Efficiencies					
	Assessment Criteria					
Planning and Development	Capacity for Planning	Efficiency	Limited Financial Impact	Inter-Municipal Equity	Effectiveness	Access & Accountability
		High/ Medium/ Low				

High means the criterion is fully met by the option. Medium means the criterion is partially met by the option. Low means the criterion is not met by the option.

#### **4.5 Implementation Tests**

Beyond the assessment criteria described above, the service delivery options emerging from the evaluation are tested to determine whether, as a package, they can be implemented with a high expectation for success. It is at this phase of work that the ability of the municipalities in the study area to administer the service delivery package is considered. The tests are:

1. The governance model has been demonstrated to work in other jurisdictions and/or is used in the study area;
2. Matching and/or combining service options can achieve greater capacity for long range planning and strategic decision-making;
3. Implementation is facilitated by existing municipal structure for administration of service and municipal experience in delivery of service; and,
4. Transition costs and impacts on service delivery during transition are acceptable.

#### **4.6 Method of Assessment**

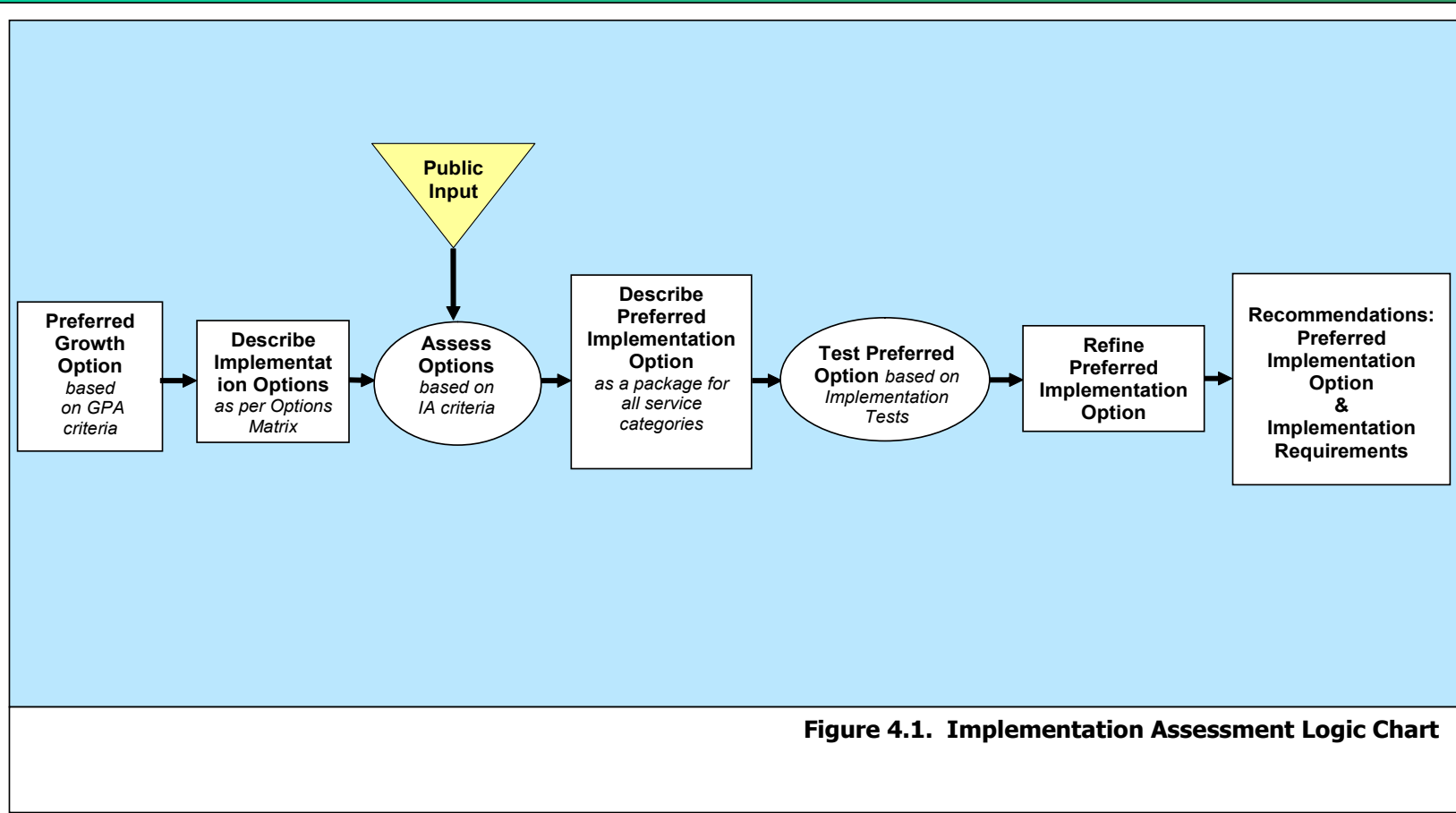
The Growth Potential Assessment provided a Recommended Urban Structure, made recommendations for the best means of providing water and wastewater, and provided a high level analysis of the financial ability of municipalities to move forward with anticipated growth and development.

The Implementation Assessment developed and assessed options for delivering municipal services consistent with the Recommended Urban Structure. The steps followed in the Implementation Assessment process are shown on **Figure 4.1** and described below.

Consultation with the IGAP Partners was a critical element of the process. Data was collected from each municipal partner concerning current service delivery arrangements. This information, found in Section 5.0 of the report, was reviewed for accuracy by the partners. Extensive interviews were conducted with the IGAP Partners. This information is summarized in Section 6.0 of the report and provides a range of opinions on current service delivery and on options for future delivery.

The Implementation Assessment framework and a preliminary assessment of options were presented at several public open houses which are described more extensively in the Growth Potential Assessment report. Comments from this source were limited but were, nonetheless, useful in our assessment.





**Figure 4.1. Implementation Assessment Logic Chart**

#### **4.6.1 Description of Options**

The options matrix (*Table 4.1*) was used to describe options, where applicable. For example, where a service category is currently delivered on a consolidated basis through a provincial contract, this was noted and assessment of options reduced in scope. If regulatory requirements restrict delivery options, these were noted. In the case of Public Works, financial analysis initiated as part of the Growth Potential Assessment phase of work has been brought forward into this analysis.

The range of services found in each category has been addressed separately. For example, under Public Works, water and wastewater services have each been evaluated.

#### **4.6.2 Assessment of Options**

The assessment applies the Assessment Criteria, described above, to each option. Based on the assessments, a ranking of the options for both Planning and Development Services and Public Works is derived.

#### **4.6.3 Description of Preferred Option**

Based on the assessment, a preferred implementation option has been recommended. The Implementation Tests, described above, also have been applied to further assess and refine the preferred implementation option, especially as it relates to other services such as Recreation and Cultural Services, Emergency Services and Social Services.

#### **4.6.4 Scoping of Implementation Requirements**

The final component of this addresses short-term implementation needs including need for further study and analysis (i.e. financial and governance), legislative and regulatory matters and, transition issues.

## **5.0 CURRENT SERVICE DELIVERY ARRANGEMENTS**

Our work focuses on Planning and Development Services and Public Works and assesses options to sustain delivery of the preferred growth option over the long term. Other municipal services have been considered as needed where service delivery issues have arisen from the preferred growth option.

### **5.1 Overview of Services**

The following description is a high level overview of who-does-what in each service category as well as a summary of inter-municipal cooperation.

#### **5.1.1 Planning and Development Services**

The County of Simcoe has two-tier planning services with the County responsible for: county-wide growth management; County official plan; review and approval of local official plans; and; review of development applications where responsibility has not been delegated to the local municipality.

The Cities of Barrie and Orillia are responsible for growth management in their jurisdictions. Official Plans for the two Cities are approved by the Minister of Municipal Affairs. The Cities approve their own Official Plan amendments.

Cooperation occurs between the County and the Cities of Barrie and Orillia on development of growth strategies.

The Cities of Barrie and Orillia and all of the local municipalities in the County are responsible for the following services within their jurisdictions: local growth management and official plans; zoning administration; review of development applications; consents; area plans and strategies; building administration; by-law enforcement; and, economic development. The County of Simcoe is responsible for the Huronia Tourism Association while the City of Barrie operates Tourism Barrie.

A detailed discussion of Planning and Development Services is found in Section 8.0 of this report.

#### **5.1.2 Public Works**

The Cities of Barrie and Orillia and all of the local municipalities in the County are responsible for the following services within their jurisdictions: water and wastewater services; transportation – roads, bridges, sidewalks, street lighting and, as applicable, harbours, airports and transit; storm water management; and, engineering. The County maintains County roads and bridges throughout the County.

The County of Simcoe delivers solid waste management services throughout the County while the Cities of Barrie and Orillia are responsible for solid waste management in their jurisdictions.

A detailed discussion of Public Works is found in Section 9.0 of this report.

### **5.1.3 Recreation and Cultural Services**

The County of Simcoe delivers the county-wide library cooperative for inter-library services. The County of Simcoe maintains the County museum with financial support from the Cities of Barrie and Orillia. County archives are a County responsibility.

The Cities of Barrie and Orillia and the local municipalities in the County deliver library services within their jurisdictions. Cultural services vary greatly. Several municipalities operate museums; the City of Orillia maintains the Opera House; and, the City of Barrie financially supports Georgian Theatre and MacLaren Art Gallery.

The Cities of Barrie and Orillia and the local municipalities in the County deliver the following recreation services within their jurisdictions: parks; recreational programs; and, operation of arenas, community centres and other built facilities.

### **5.1.4 Emergency Services**

The County of Simcoe delivers paramedic and land ambulance service throughout the study area. The County is responsible for 911 services throughout the study area with the exception of the City of Orillia, Townships of Ramara and Severn which is delivered by the City of Orillia.

The Cities of Barrie and Orillia and the local municipalities in the County deliver fire and rescue services and police services within their jurisdictions. Police services may be delivered through a local police service or by the OPP, on a detachment basis or through contracted services. A number of inter-municipal arrangements exist and are described below.

### **5.1.5 Social Services**

The County of Simcoe delivers the following services throughout the County and the Cities of Barrie and Orillia: Long-Term Care; Ontario Works/ODSP; Social Housing; and, Children's Services.

## **5.2 Inter-Municipal Cooperation**

In addition to the service delivery described above, some unique inter-municipal service delivery arrangements exist. These are described below.

### **5.2.1 Planning & Development Services**

Municipalities jointly fund two conservation authorities in the study area – Lake Simcoe Region and Nottawasaga Valley. In addition, the City of Orillia, Towns of Midland and Penetanguishene and Townships of Tay, Tiny, Springwater, Severn and Oro-Medonte are members of the Severn Sound Environmental Association.

South Simcoe Economic Alliance is a cooperative effort to market South Simcoe on behalf of the Towns of Bradford West Gwillimbury, Innisfil and New Tecumseth and the Townships of Essa and Adjala-Tosorontio. Ontario's Lake Country is a tourism marketing consortium financially supported by the City of Orillia, Townships of Ramara and Oro-Medonte and the Mnjikaning First Nation. The Towns of Midland and Penetanguishene and Townships of Tiny and Tay financially support the economic development efforts of the South Georgian Bay Chamber of Commerce. The Central Ontario Marketing Alliance is a joint economic development initiative of the Cities of Barrie and Orillia, Towns of Wasaga Beach and Collingwood and the Greater Georgian Bay Chamber of Commerce.

### **5.2.2 Public Works**

A number of municipalities have agreements for water and wastewater servicing across municipal boundaries, generally serving a small number of properties. More significant are the water supply agreements between the Towns of New Tecumseth and Collingwood and the Towns of Bradford-West Gwillimbury and Innisfil.

City of Orillia accepts septage from neighbouring municipalities for treatment at their sewage treatment plant while the Cities of Barrie and Orillia both receive hazardous household waste from neighbouring municipalities.

The Town of Bradford-West Gwillimbury operates the Holland Marsh Drainage System with the Township of King in the Region of York. The Cities of Barrie and Orillia and Township of Oro-Medonte jointly own and operate the Lake Simcoe Regional Airport through a joint commission while the Towns of Collingwood and Wasaga Beach and Township of Clearview own and operate the Collingwood Airport through the Collingwood Airport Service Board. The Towns of Midland and Penetanguishene and Township of Tiny own and operate the Huronia Airport through a joint commission. And finally, the City of Barrie (through a community development corporation) and Town of Collingwood jointly own and operate a short line railroad.

### **5.2.3 Recreation and Cultural Services**

A number of municipalities purchase library services, use of recreation facilities and access to recreational and cultural programs for their residents from neighbouring municipalities on a fee basis.

### **5.2.4 Emergency Services**

A number of municipalities purchase fire and rescue services for their property owners and residents from neighbouring municipalities on a fee basis. The City of Barrie provides fire dispatch service to Towns of Wasaga Beach, New Tecumseth and the Townships of Essa and Adjala-Tosorontio, Oro-Medonte and Springwater and the village of Rosemont in Dufferin County. The City of Orillia provides fire dispatch services to the Townships of Ramara and Severn, the Mnjikaning First Nation and the Town of Gravenhurst in the District of Muskoka.

The Towns of Bradford-West Gwillimbury and Innisfil deliver police services through a joint service board. OPP services are contracted on a detachment basis by: the Town of New Tecumseth and the Townships of Essa and Adjala-Tosorontio; the Townships of Springwater and Clearview and Town of Wasaga Beach; and by, the City of Orillia and the Townships of Ramara and Severn.

### **5.3 Service Arrangements Under Consideration**

A number of new service arrangements are under consideration.

Town of Collingwood and the Town of The Blue Mountains, in Grey County, have agreed to establish the Nottawasaga Bay Municipal Services Board to jointly address a range of services including: planning and development; water; transportation; economic development, recreation; and, emergency services. The Town of Wasaga Beach and the Township of Clearview have been invited to join the Board.

*South Simcoe Servicing Co-operative: Governance Options* (2005, Hugh Thomas Consulting) was commissioned by the Towns of Innisfil, Bradford-West Gwillimbury, and New Tecumseth and the Townships of Essa and Adjala-Tosorontio to look at governance options for joint operation of water and sewer facilities in their municipalities. This study considered the specific needs of the South Simcoe municipalities as well as best practices in other jurisdictions and the recommendations of the *Watertight Report* (2005, Ministry of Public Infrastructure Renewal). Several options were assessed: maintain the status quo; establish a municipal service board; collectively contract with a private corporation for operation of municipally-owned services and facilities; transfer service responsibility to the County. In *South Simcoe Servicing Co-operative*, it is recommended that a joint municipal service board be created. This option has been recommended on the basis of service effectiveness and cost efficiency. Future transfer to a municipally-owned corporation is suggested.

The five municipalities have received this report.

## 5.5 Staffing Levels

The County of Simcoe, with a staff of over 1,200 and an annual budget exceeding \$280,217,000 in 2004 is, by far, the largest municipal government in the study area. It should be noted that 75% of County staff and 82% of its expenditures relate to its role and responsibilities in health and social services. The County delivers these responsibilities on behalf of all municipalities in the study area and receives an annual grant from the Province as well as transfers of funds from the Cities of Barrie and Orillia for these services.

For the other municipalities, the largest staff group is found in public works (water, wastewater, solid waste, and transportation/transit).

<b>2005 Staff Complements* By Municipality</b>	
<b>Municipality</b>	<b>Staff Positions (FTE)</b>
County of Simcoe	1233
City of Barrie	664
City of Orillia	209
Town of Bradford West Gwillimbury	110
Town of Innisfil	102
Town of New Tecumseth	105
Township of Adjala-Tosorontio	21
Township of Essa	31
Township of Oro-Medonte	38 plus outside workers
Township of Springwater	44
Township of Clearview	49
Town of Collingwood	114
Town of Wasaga Beach	99
Township of Tiny	42
Township of Tay	23 plus outside workers
Town of Penetanguishene	45
Town of Midland	155**
Township of Severn	44
Township of Ramara	25 plus outside workers

\* All of the nineteen (19) municipalities use additional seasonal and part-time staff, contracted services and volunteers in their delivery of services.

\* Staffing does not include elected and appointed officials or boards, agencies or commissions.

\*\* Includes part-time and seasonal staffing.

Services such as policing are major areas of spending for municipalities but do not appear in their staffing complement as the service is either operated through a police service board or contracted from the OPP.

Municipalities are delivering fire service using several approaches: contracted services from neighbouring municipalities; volunteer fire services; a combination of volunteers and professional firefighters; or, employment of professional firefighters only.

The use of contracted staff and volunteers is more prevalent among the smaller, rural municipalities as is the purchase of services from neighbouring municipalities.

## **5.6 Financial Picture**

A series of detailed financial tables and charts, that describe the current financial picture in the study area, are found in **Appendix A**. The data is drawn from 2004 Financial Information Returns (FIRs).

### **5.6.1 Revenues**

The County of Simcoe receives 50% of its revenues from federal and provincial grants largely associated with its delivery of health and social services. Taxation, user fees/charges and other municipalities are the other prime sources of County revenue. All other municipalities rely upon the tax base for their primary source of revenue with fees/charges/permits/etc. being the next most important source. Among the cities and towns, taxation provides approximately 50-60% of revenue, while providing 60-80% for the townships. Fees and charges provide approximately 20-35% of revenue for cities and towns and a lesser amount (10-30%) for townships.

### **5.6.2 Expenditures**

The County of Simcoe, with annual expenditures at \$281,217,497 in 2004, and the City of Barrie at \$173,758,161 have the largest municipal budgets in the study area. These two municipalities represent 60% of total municipal spending in the study area. As noted earlier, the County spends 82% of its budget on health and social services while the other municipalities spend the largest proportion of their budgets on public works, emergency services and recreation and cultural services. The Cities of Barrie and Orillia each spend a portion of their budgets (12.6% and 21.4% respectively) for the delivery of health and social services by the County.

### **5.6.3 Per Capita Spending**

In per capita terms, the townships tend to spend more on roadways than do the cities and towns, but in all other categories, the cities and towns tend to spend more. It should be noted that some of the services are only available in the cities and towns.



#### **5.6.4 Municipal Performance Measures**

The municipal performance measures provide comparable measures of municipal efficiency and effectiveness across the Province. **Appendix A** provides 2004 efficiency measures for the study area, showing expenditures per household, lane-kilometre, or other relevant unit of measure.

## **6.0 ADVANTAGES AND DISADVANTAGES OF SERVICE DELIVERY OPTIONS: REVIEW OF THE LITERATURE AND BEST PRACTICES**

### **6.1 Efficient Delivery of Services**

There are many approaches that can be used to gain greater efficiencies within existing service delivery arrangements and many are currently used in the study area, for example, contracting out and public-private partnerships.

#### **6.1.1 Contracting Out**

Contracting out service delivery through competitive tendering has a long history in Canadian municipalities for construction projects and for services such as engineering design and legal advice. In recent years, contracting out has been extended to most service delivery areas.

##### i) Potential Advantages

It introduces competition in service delivery and thereby reduces the per-unit operating costs. Competition means that contractors face positive incentives to be efficient – they are more likely to be awarded the contract if they are efficient. Competitive tendering does not necessarily mean a shift of jobs to the private sector. Rather, it can be designed to stimulate greater efficiency and productivity among municipal personnel.<sup>1</sup> It provides greater flexibility for management in allocating human resources, increased ability to hire specialized expertise when needed, and reduced employee turnover.<sup>2</sup>

##### ii) Potential Disadvantages

In some instances, private-sector delivery is of lower quality and requires significant monitoring by the local government. Unions have also complained that their members will lose their jobs.

#### **6.1.2 Public-Private Partnerships**

The private sector can be even more directly involved in the provision and financing of public sector services through explicit public-private partnerships. Public-private partnerships involve

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<sup>1</sup>Experience in the US demonstrates the success of municipal staff in competing with the private sector. See C. Richard Tindal and Susan Nobes Tindal, *Local Government in Canada*, Fourth Edition, Toronto: McGraw-Hill Ryerson, 1995 and Harry M. Kitchen, *Municipal Revenue and Expenditure Issues in Canada*, Toronto: Canadian Tax Foundation, 2002, p.280.

<sup>2</sup> See Harry M. Kitchen, *Municipal Revenue and Expenditure Issues in Canada*, Toronto: Canadian Tax Foundation, 2002, p.280.

the direct participation of one sector in a venture controlled by the other sector. Both partners contribute funds or services in exchange for the enjoyment of certain rights or future income.

Partnerships may involve private participation in public works or public participation in private ventures. Under such an arrangement, a local government becomes a partner in a private profit-making project in return for its assistance in establishing the project. For example, the government might provide property (usually land) or services in return for a share of the revenues. The private sector clearly gains from such an arrangement because its repayment to the public sector depends on the profitability of the venture (i.e., the government shares the risk). On the other hand, the resulting uncertainty of the revenue stream to the local government is one reason why such ventures are not common.

Perhaps the most common form of involvement of the private sector in the provision of public services is one in which a private firm contributes part of the initial capital cost of a facility and operates it under the city's guidance for some years, ultimately transferring the facility to the municipality. Under this arrangement, the developer finances the facility and then recovers its investment through operating revenues. The government avoids the initial capital costs and gives up any profits associated with the operation but gets the facility in the end.

i) Potential Advantages

They relieve municipalities of the financial responsibility for up-front capital costs and enable the needed infrastructure to be built even at times when government funding is constrained. Partnerships let municipalities get facilities built without incurring municipal debt. The operation of facilities and programs by private or not-for-profit operators reduces municipal operating expenditures and may enable additional revenue to be collected. They permit the public sector to draw on private sector expertise.

ii) Potential Disadvantages

For the private sector, there are risks that the regulatory framework could change and cause delays in the project. For the public sector, there is the risk that the public services provided may not be what the public wants or that the private sector may not be able to carry out its expected role. There is also a risk that the long-run cost of private sector financing may turn out to be greater than the cost of public sector financing would have been.

Of course there are many more types of public-private partnership arrangements than have been described here. As always, the details of how such arrangements are structured and how the risks are shared will determine whether or not they will be successful from a public policy perspective.

Region of York has used a public-private partnership to speed implementation of its rapid transit network - *Viva*. In 2002, following a world-wide competition, an agreement was signed by York

Regional Council and York Consortium 2002. This is the first public-private partnership in Canada for a rapid transit project of this magnitude. The Region retains control of all the assets, including the vehicles and the terminals, as well as control of public policy, including the determination of fares.

***Viva*** and ***York Region Transit (YRT)*** are part of one system that is seamless and economical. ***YRT*** is the local service provider that feeds passengers into the major corridors where ***Viva*** is operating. Passengers pay one fare and are able to transfer easily between the two services.

The Sports Village in Vaughan was developed, built and operated as a public/private partnership. The Mentana Group (a consortium of local companies) owns and operates the facility under a 40-year agreement with the City of Vaughan. The facility is controlled by a Board of Management comprising members from Mentana Sports Management and the City of Vaughan. The facility consists of four indoor skating rinks, baseball diamonds, a SportsPark, and parking plus a restaurant, food concessions, a sports retail outlet, full service pro-shop, meeting and party rooms, interactive sports skills area, and offices. The facility, which cost about \$20 million, is financed over 40 years with loan guarantees from the City. The City is the prime tenant using all prime time for local minor hockey at a subsidized rate. The facility was expected to break even after three years of operation but it is felt to be close to break even in the second year of operation.

Source: Waterfront Regeneration Trust. 2002. "Toronto's Waterfront Renaissance: Building Community with Recreation." A report submitted to the Trillium Foundation on behalf of the Waterfront Regeneration Trust, the Sport Alliance of Ontario, and S.C.O.R.E. Waterfront Regeneration Trust. 2002.

## **6.2 Inter-Municipal Agreements**

Inter-municipal agreements are formal or informal agreements between municipalities to provide services. They are less structured than a service district in that an official board is not generally set up to oversee the arrangements. Such agreements are generally entered into to reduce costs or sometimes to establish specific joint obligations for different municipalities. There are a number of inter-municipal agreements across Canada but these are mainly found in smaller municipalities.

i) Potential Advantages

They can work well for small services that can be contracted out or to share clearly identifiable costs. These types of agreements have generally been effective for services such as fire fighting (through mutual aid agreements) and emergency dispatch, maintenance of boundary roads, purchasing in bulk, and issuing debentures. Municipalities can retain their autonomy with respect to expenditure and tax decisions but, at the same time, achieve economies of scale in service delivery and address spillovers associated with service provision across municipal boundaries.<sup>3</sup>

ii) Potential Disadvantages

There can be problems of accountability when services are provided by another jurisdiction. Inter-municipal agreements generally provide no clear public accountability except through the contract or agreement. If something goes wrong, it is sometimes difficult for citizens to know whether to complain to their local government or to the local government that has been contracted to provide the service. Experience suggests also that inter-municipal agreements may actually increase the likelihood of inter-municipal litigation and conflicts.<sup>4</sup> As one author notes, the municipality buying the service eventually gets upset with the cost; the municipality selling the service feels it is being unfairly compensated.<sup>5</sup>

Although inter-municipal agreements can work well when policy objectives are shared by all policy-makers in the various municipal governments, they may not work so well when there are divergent objectives or where there are wide differences in local resources. Cooperation usually involves bargaining and some municipalities may not have anything with which to bargain. Inter-municipal agreements offer no solution to the basic problems of area-wide coordination. Moreover, these types of agreements on a service-by-service basis do not ensure that strategic infrastructure investment decisions are made nor do they result in integrated planning throughout the region.<sup>6</sup> Such agreements have been described as second-best solutions to reorganization that can lead to "an impenetrable jungle of *ad hoc* commissions and complex arrangements that even the most conscientious municipal voter will never understand."<sup>7</sup>

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<sup>3</sup> See L.J. Sharpe, "The Future of Metropolitan Government," in Sharpe, L.J. (ed.) *The Government of World Cities: The Future of the Metro Model*, Chichester: John Wiley and Sons, 1995, p. 13.

<sup>4</sup> See GTA Task Force. *Greater Toronto*, 1996, p. 163.

<sup>5</sup> See Harry M. Kitchen, 2002, p. 317.

<sup>6</sup> GTA Task Force, 1996, pp. 163-4.

<sup>7</sup> See Andrew Sancton, "Local Government Reorganization in Canada Since 1975," Toronto: Intergovernmental Committee on Urban and Regional Research, 1993. pp. 33-34.

### **6.3 Joint Services and Special Service Districts**

Joint services and special service districts can be created to deliver services that cross municipal boundaries. Special-purpose bodies of this nature generally operate as a separately functioning business entity. Generally, each service district is responsible for only one service (for example, water/sewage, transportation, or economic development). The board of a special service district is a corporate body controlled by the constituent municipalities through the delegation of decision-making, operational, and financial management powers. The appointment of board members is made by the municipal councils and can include elected and non-elected officials. Each district usually has its own accounting and financial system and frequently has its own work force and capital equipment. It is responsible for monitoring and reporting on its own activities.<sup>8</sup> In the Ontario context, special service districts do not have taxing or borrowing powers but they can levy user fees.

Special districts are used most widely in countries in which there is a history of strong and autonomous local governments. In the US, for example, one-third of all local governments are special districts or school districts.<sup>9</sup> The boards of such special districts are usually indirectly controlled by the constituent municipal councils and are responsible for taxing, price setting, and other policy-making.

In Southwestern Ontario, inter-connected service boards operate the Lake Huron Primary Water Supply System and the Elgin Area Primary Water Supply System. These systems bring water from Lake Huron to the City of London as well as municipalities along the route and from Lake Erie to St. Thomas and London as well as municipalities along the route. The City Engineer for the City of London is the CAO reporting to the two service boards which are composed of representatives of the municipalities served by the systems. The systems are operated by a private firm, American Water Service Inc.

#### **i) Potential Advantages**

A special service district that covers a number of municipalities has the ability to deliver services more efficiently. In particular, a service district can achieve economies of scale in service delivery and it can address spillovers across municipal boundaries. Single-purpose special districts may provide similar municipal services for several municipalities or manage county-wide services with significant spillovers. In this way, service spillovers can be addressed on an individual basis. Since it is unlikely that the spillover boundaries are the same for each service, separate districts could be established such as a water and

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<sup>8</sup> See Harry M. Kitchen, 2002, pp.267-8.

<sup>9</sup> Slack, Enid, "Models of Government Structure at the Local Level", Working Paper 2004(4), Institute for Intergovernmental Relations, Queen's University, December, 2004.

wastewater district or a recreation district. Services are delivered by professionals with specific technical expertise and decision-making can be somewhat removed from political influence. Dedicated revenues from user fees can be used to finance capital expenditures. User fees can only be used, however, for those services where the beneficiaries can be identified such as water provision and sewage treatment or solid waste collection and disposal. Where specific charges are not imposed such as for land ambulance, social housing and policing, however, the district would only be able to finance these services fairly and equitably by allocating their costs on the basis of the property tax base.

ii) Potential Disadvantages

If each district has responsibility for a single service, it is not required to make the tradeoffs between, for example, expenditures on roads and expenditures on water and sewers. Special purpose districts do not have to match services (such as water, sewer and road infrastructure) with the planning objectives for the region. As one author notes, decisions made by special-purpose bodies over which municipal councils have no control can frustrate efforts by those councils to conduct overall planning or even to provide some services.<sup>10</sup>

The proliferation of decision-making of special districts can result in “a diffuseness of government organizations that is difficult for citizens to understand.”<sup>11</sup> There is no citizen control and confused accountability.

There is no direct link between the expenditure decisions made by the special purpose districts and the local council that collects property taxes to fund them (for those services paid for from property tax revenues). The absence of a link between expenditures and revenues seriously reduces accountability. Where accountability is lacking, there is no incentive to be efficient.

Where there are many independent special-purpose districts, it is difficult to coordinate interrelated activities. For example, land use planning and transportation decisions may be made by different bodies.<sup>12</sup>

Examples of joint ownership of facilities already exist in the study area. For example, airport facilities are operated and administered by joint service boards established by the participating municipalities. A second example is an agreement among the five

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<sup>10</sup> See Harry M. Kitchen, 2002, p. 272.

<sup>11</sup> See Harry M. Kitchen, “Efficient Delivery of Local Government Services,” Government and Competitiveness Project, School of Policy Studies, Queen's University, 1993.

<sup>12</sup> Three ways have been suggested to address the problems of coordination. The first is to have overlapping membership so that some of the same people are on a number of district boards. The second is to encourage the formation of districts with multiple functions instead of single-purpose districts. The third is to control the operations of the districts so that they remain separate authorities but are still subject to political considerations in the decision-making process. See Bahl, Roy and Johannes Linn, *Urban Public Finance in Developing Countries*. New York: Oxford University Press, 1992, p. 419.

municipalities in South Simcoe to examine the establishment of a municipal service board for the delivery of water and wastewater services. These municipalities have identified common interests and needs with respect to water and wastewater. Further work has been proposed to develop a business plan for this initiative before a final decision is made by the municipalities.

The County of Frontenac was restructured in 1998 with the creation of four local municipalities. The County, with a Council composed of the 4 local mayors, manages 'all centralized services' on a county-wide basis. The County is functioning as a service board and delivers: social services; land ambulance; and, marketing and tourism. The County coordinates with the City of Kingston in the delivery of social services. Two other discreet functions are: operation of the Howe Island ferry; and, delegated authority for approval of plans of subdivision and condominium which it delivers through a planning consultant.

#### **6.4 Consolidating Services**

Under the service consolidation option, services are delivered by one municipality on behalf of all municipalities rather than each municipality delivering the service on its own behalf. Service consolidation can be achieved in a one-tier or two-tier government system. Where a large government unit delivers a service, it is possible that services will be uniform throughout the jurisdiction, but this is not necessary. There is the option of maintaining different service levels that exist in different parts of the jurisdiction. For example, rural municipalities may receive different services than urban municipalities. Special area rates can be used to reflect that different services are being provided in different parts of the jurisdiction.

The Province has contracted with local municipalities or established agencies to deliver services on a regional basis for a number of health and social services:

- Social Housing
- Long Term Care
- Ontario Works
- Court Services and *Provincial Offences Act* revenue
- Child and Family Services
- Local Health Integration Networks
- Paramedic Services

The County of Simcoe administers social housing, operates long term care facilities and delivers Ontario Works while the City of Barrie administers court services and POA revenue.



The County of Huron delivers planning and development services on behalf of all municipalities in the County.

When restructured in the 1980s, separated cities once again became part of the County of Oxford. Among other things, the County assumed responsibility for water and wastewater services. The County operates all treatment plants and regional collection and distribution systems and contracted the local collection and distribution systems back to the local municipalities.

The District of Muskoka was established in the 1970s. The District closely parallels regional government in the Province with delivery of land use planning, water, wastewater, solid waste management, health and social services, police and land ambulance services occurring on a district-wide basis.

i) Potential Advantages

Where one government unit (such as the County) delivers services over a large area, there can be better service coordination, clearer accountability, more streamlined decision-making, and greater efficiency.<sup>13</sup> Delivering services over a larger jurisdiction can result in economies of scale – although, as noted above, economies of scale can also be achieved through the use of special districts or inter-municipal agreements.

The need to match or combine different services to achieve region-wide planning goals works best when the responsibility for planning and investment in hard infrastructure are at the same level of government and at the level that covers the region.

There is likely to be funding fairness in the provision of services over a larger jurisdiction because there is a wider tax base for sharing the costs of services that benefit taxpayers across the region. The larger taxable capacity of the government delivering the service increases its ability to borrow and to recover capital and operating costs from user fees.<sup>14</sup>

ii) Potential Disadvantages

Consolidation at one level of government can reduce access and accountability if that government unit becomes too large and bureaucratic, especially if it is large enough to contain spillovers and provide a basis for rational region-wide planning. Smaller units of government are considered to be more responsive, give more access to citizens and be more accountable.

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<sup>13</sup> See George Boyne, 1992, p. 333.

<sup>14</sup> Bahl, Roy and Johannes Linn, 1992, p. 415.

Service consolidation may mean higher costs. A review of the empirical evidence in the US on fragmented versus consolidated local governments concludes that lower spending is a feature of fragmented local government systems; consolidated structures are associated with higher spending.<sup>15</sup> One of the reasons for higher spending is that there is less competition between municipalities because there is less incentive to be concerned with efficiency and less incentive to be responsive to local needs. The lack of competition can reduce efficiency in the delivery of services and result in higher costs. Another reason for higher costs, and an important equity consideration, is that there is likely to be an increase in the quality of services provided in the smaller and poorer municipalities.

In 2002, the Association of Municipalities of Ontario and the Province of Ontario established the Ontario Centre for Municipal Best Practices ([www.municipalbestpractices.ca](http://www.municipalbestpractices.ca)). The Centre is a valuable municipal resource offering an ongoing stream of information on means of improving municipal service delivery. The Centre focuses on the topics of roads, transit service, solid waste management, and water/wastewater service.

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<sup>15</sup> See George Boyne, 1992, *Supra*, pp. 344-46.

## **7.0 CONSULTATION WITH IGAP PARTNERS**

### **7.1 Approach**

Interviews were conducted with representatives of study area municipalities during the weeks of March 27<sup>th</sup> and April 3<sup>rd</sup>, 2006. The purpose of these interviews was to solicit municipal perspectives on current service delivery challenges and options for future service delivery arrangements.

Meetings were set up with the municipalities approximately two weeks in advance of the interviews and an information package with interview questions and a draft *Implementation Assessment Framework* was provided prior to the interviews. A copy of this package is provided in **Appendix B**.

The interviews addressed both Growth Potential Assessment and Implementation Assessment components of the IGAP project and lasted two hours on average.

The number of interviewees per session varied significantly by municipality, with the CEO/CAO attending on behalf of some municipalities and a panel of senior staff, council members and invited guests attending on behalf of others. A few municipalities also provided staff presentations and written answers to the interview questions.

### **7.2 Findings**

#### **7.2.1 Challenges**

Interviewees were asked about the challenges they have with current service delivery arrangements.

A general challenge expressed by most interviewees pertained to the level of increased provincial regulations and lack of funds to implement policy requirements.

Another general comment on challenges related to the public's view of the lack of upper-tier accountability and access for some services such as solid waste management, resulting in additional hassles for 'front line' municipal office workers who have had to deal with complaints by local residents.

Some representatives of northern study area municipalities also expressed concerns about inequities in the level of services and means of paying for them between the north and south, with South Simcoe seen as having a higher quality of services and funding. Some interviewees in the southern part of the County indicated that the South subsidizes the North and the North has inordinate political clout at County Council and effect upon decision-making.

Reported challenges pertaining to specific services are summarized below:

i) Planning and Development Services

- Planning policy requirements and targets (e.g. 'Places to Grow') are not attainable for small, rural communities.
- OPA approval process takes too long with delays at the County level; some interviewees indicated that the approval power should be delegated to the local level.
- While some interviewees indicated limited inter-municipal cooperation on planning issues, others indicated a high level of cooperation.
- Some interviewees indicated that economic development service delivery was working well while others indicated that a more coordinated, regional approach was needed.

ii) Public Works

- Increased provincial requirements, but insufficient funding to implement improvements.
- Transportation was of critical concern to many with road congestion noted on many provincial highways and County roads as well as the need to upgrade local intersections with these roads.
- Concerns were expressed that solid waste management and planning for new disposal sites is not meeting current needs and will not meet future needs.
- Increasing difficulty was noted in providing water and wastewater service, and this is expected to increase with growth. Ground water sources are 'maxed out' in the South and all municipalities are struggling with the costs of treatment and meeting new provincial standards. A coordinated approach to septic waste disposal is also needed.
- Concerns were expressed on water/wastewater debt levels, with a suggestion that this be removed from the municipal debt cap.
- Several interviewees mentioned local or jointly owned municipal airports and that a more coordinated management approach is needed to make the most optimal use of municipal airports and increase economic development benefits.

iii) Recreation and Cultural Services

The growing demand for more and new recreational services from a changing population was identified. While trying to address these needs, most municipalities note that recreation and cultural facilities are secondary in their planning to hard services due to financing constraints.

iv) Emergency Services

Financial accountability of the land ambulance service between the County as the service provider and the two separated cities is a point of contention. Funding formula is a concern.

v) Social Services

The County of Simcoe delivers social services for the entire study area and other municipalities expressed concern with lack of accountability and limited direct representation in decision-making. They also believe that residents and ratepayers are unclear concerning who-is-responsible-for-what and why the municipalities can not control these costs.

### **7.2.2 Impact of New Growth on Service Delivery**

Interviewees were asked their opinion on how future growth will affect their municipality's ability to deliver services.

In the North, representatives of most municipalities indicated that their municipalities are well positioned to accommodate new growth. In the South, where growth pressures are more significant, the challenges of providing both hard and soft services are also significant. While foundation planning documents are in place to guide and manage new growth and hard services can be financed through the *Development Charges Act*, it was noted that constraints under the *Development Charges Act* and mandatory reductions mean that Development Charges revenues do not cover all growth-related costs, particularly soft services and administrative services. It was also noted that new staffing may be needed to assist in managing new growth, and finding qualified new staff may be a challenge.

Some interviewees representing small rural municipalities noted that these municipalities do not have sufficient financial resources to implement all required service upgrades to accommodate growth. Concern was raised that provincial funding has not kept pace with the provincial requirements for servicing upgrades, and this will be an even greater problem when addressing growth requirements.

It was also noted that there will be a point at which service levels will fall below the acceptable levels as a result of growth pressures/competing demands, and inadequate funding.

### **7.2.3 Strengths and Weaknesses of Specific Delivery Options**

Interviewees were asked their opinion on the strengths and weaknesses of four specific delivery options.

i) Efficiencies within Current Service Delivery Arrangements

This option was considered to be basically the status quo – interviewees indicated they are always looking for greater efficiencies but did not see significant opportunity for increased capacity from this approach.

No weaknesses were identified with regard to increased efficiencies in existing service delivery at the local level. Identified strengths included optimal control of planning and development, efficient use of community infrastructure, transparency, accountability and access, and governance and administration structures are already in place.

ii) Joint Services and Special Service Districts

Joint services, such as those that exist for operation of airports, generally work well. A special service district is being considered in the South for water and wastewater but is still subject to further analysis and development of a business case (see section 6.3). However, for the most part, special service districts were not considered to be a viable option for most services for reasons related to control, accountability, access, increased costs related to new investment in setting up boards, coordination costs, inefficiencies, ineffectiveness, and loss of community identity (in the case of recreation service districts).

iii) Inter-Municipal Agreements

Most of the municipal representatives interviewed indicated that inter-municipal agreements are widely in use and are considered the preferred means of inter-municipal cooperation. They are considered to be efficient, especially where the municipalities are equal partners in the service.

For smaller rural municipalities, agreements are vital to the provision of services such as recreation, library and fire. For the larger, urban municipality, agreements can be a challenge in ensuring that the full costs of providing service to outside residents are reflected in the agreements.

Recently, municipalities have entered into inter-municipal agreements for the supply of water. These have proven challenging. For example, the Collingwood-New Tecumseth and the Innisfil-Bradford West Gwillimbury water lines have required the development of complex inter-municipal agreements which will involve significant on-going administration by both parties to the agreement. Each project was a major engineering and construction project with cost overruns. The Collingwood-New Tecumseth water line, which has been in place for some years, has proven a financial challenge for New Tecumseth affecting their debt load and their ability to finance other capital projects.

On the positive side, it was noted that inter-municipal agreements allow some types of services such as recreation to be delivered at a consistent level throughout the municipality and allow for easy access for residents. An identified strength is that inter-municipal agreements are mutually arrived at by individual municipalities and as such staff can coordinate a win-win situation. Inter-municipal agreements were considered to be cost effective by offering economies of scale, access to skilled staff, and administrative efficiencies. However, it was noted that for such agreements to work well, the partners need to be 'like-minded' and able to co-operate as equal partners. It was mentioned that inter-municipal agreements do not work well when the partners do not come to the table as equal partners and that uneven partnerships – due to varying size of municipal partners and contribution levels – are difficult. Additionally, it was noted that more complex arrangements have greater operational difficulties and are not as accessible and accountable to municipal partners and taxpayers.

It was also noted that it is difficult to have a financially equitable agreement – for example, one municipality builds and maintains the facility and neighbouring municipalities pay for use but does not contribute to the actual cost. Additionally, unforeseen future operating and capital costs may not be recoverable through Servicing Agreements.

iv) Service Consolidation at One Level of Government

The general consensus on service consolidation at one level is that it lacks accountability to municipalities and provides uneven access to service for ratepayers.

Identified strengths included: the ability to afford highly qualified in-house expertise; reduced need for outside consultants; and, elimination of duplication of effort among municipalities.

There was no consensus on which services could be more optimally provided at one level. However those that were identified by some interviewees as possibly being more optimally delivered at one level include:

- Emergency services
- Water and waste water
- Solid waste management
- Transportation planning
- Economic development
- Social services

#### **7.2.4 Preferred Service Delivery Options**

Most interviewees indicated that a mixed package of service delivery approaches was needed to address the wide range of municipal service obligations. Again, one size does not fit all.

Incremental change in current arrangements was emphasized by most and a combination of service delivery approaches including increased efficiencies, inter-municipal agreements and special service districts.

There was little support for service consolidation at one level except by the County and separated cities. Service consolidation at one level was not generally favoured by lower-tier municipalities on the grounds that it lacks accountability to residents, provides uneven access to residents, lacks response to varying needs of communities, is ineffective and inefficient, and has higher costs.

Uploading of service responsibility to the Provincial level was suggested by some interviewees for social services, solid waste and large scale water facilities. Uploading to the county level was also suggested for water and wastewater servicing. However, some interviewees indicated that water and wastewater services would be best provided through inter-municipal agreements.

Service boards were considered a viable option for economic development services, as was a regional or county level responsibility.

Finally, as mentioned previously, a recurring theme in the interviews was that the north and south of the study area as well as the Greater Barrie area are very different in terms of issues, geographic scale, development pressures, culture and community identity – and that no “one size fits all” approach will work for service delivery. It was suggested that service delivery approaches should be tailored to the specific needs and individual situations of communities in the study area, and what is appropriate for one area may not necessarily be the most optimal approach in others.



## **8.0 ASSESSMENT OF PLANNING & DEVELOPMENT SERVICES**

This section of the report provides an assessment of service delivery options for Planning and Development Services in the study area.

### **8.1 Scope of Municipal Planning & Development Services**

To assess service delivery, the functions of municipal planning and development departments have been categorized into four service delivery areas:

1. Strategic / long-range and Official Plan policy ("Policy");
2. Development approvals ("Development");
3. Geographic Information Systems ("GIS"); and,
4. Economic development.

It is recognized that many municipalities may treat economic development separately from planning services or incorporate economic development under another department; however, economic development has been dealt with under planning services for the IA.

All options must conform to the requirements of the planning system established under the *Planning Act*.

#### **8.1.1 Municipal Approvals Authority**

**Table 8.1** sets out the planning approval authority that currently exists in the study area.

#### **8.1.2 Description of Economic Development Services**

There are a number of economic development related organizations operating in the study area including those involved in economic development information and marketing and tourism promotion. An overview of the organizations involved in economic development services in the study area is provided below.

**Table 8.1 – Matrix Chart of Planning Approval Authority**

Municipality in which approval is sought	Planning Matter									
	Official Plan	Official Plan Amendments	Zoning By-law and Amendments	Plan of Subdivision	Plan of Condominium	Part Lot Control	Site Plan	Consent for Land Severance	Minor Variance	Community Improvement Plan
Simcoe	MAH approves	MAH approves	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable
Adjala-Tosorontio	County approves	County approves	Municipality approves	County approves	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Barrie	MAH approves	Exempt from approval	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Bradford-West Gwillimbury	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Clearview	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Collingwood	County approves	County approves	Municipality approves	County approves	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Essa	County approves	County approves	Municipality approves	County approves	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Innisfil	County approves	County approves	Municipality approves	County approves	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Midland	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
New Tecumseth	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Orillia	MAH approves	Exempt from approval	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Oro-Medonte	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Penetanguishene	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Ramara	County approves	County approves	Municipality approves	County approves	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Severn	County approves	County approves	Municipality approves	County approves	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Springwater	County approves	County approves	Municipality approves	County approves	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Tay	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Tiny	County approves	County approves	Municipality approves	County approves	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves
Wasaga Beach	County approves	County approves	Municipality approves	County approves	County approves	County approves	Municipality approves	Municipality approves	Municipality approves	MAH Approves

i) Economic Development Organizations

The Cities of Barrie and Orillia each have their own economic development department which is responsible for various economic development functions including assisting existing businesses and attracting new businesses. Some municipalities are represented through inter-municipal agreements under 'umbrella' agencies such as the South Simcoe Economic Alliance, and others work together for specific regional marketing initiatives, as follows:

- City of Barrie Economic Development Corporation;
- Nottawasaga Community Economic Development Corporation/South Simcoe Economic Development Alliance (Adjala-Tosorontio, Essa, Innisfil, and New Tecumseth) market South Simcoe as a place for business;
- Orillia Economic Development Commission;
- Georgian Triangle Economic Development Corporation.

ii) Chambers of Commerce

Chambers of Commerce are operating in communities throughout the study area with the support of municipalities and local businesses. Some of these are involved in economic development initiatives, with most having a passive role – i.e. providing information on tourism and economic development as requested.

iii) Tourism Organizations

The Huronia Tourist Association is the largest tourism information and marketing organization in the study area, operating out of the Simcoe County administrative offices. The Huronia Tourist Association's tourism partners include local chamber of commerce groups which may provide tourism information upon request, and the tourism specific organizations such as Tourism Barrie, Ontario's Lake County, the Georgian Triangle Tourist Association and a few other tourism consortiums as noted below:

- Tourism Barrie;
- Ontario's Lake Country (a tourism marketing consortium financially supported by the City of Orillia, Townships of Ramara and Oro-Medonte and the Mnjikaning First Nation);
- Midland-Penetanguishene Tourism Consortium;
- Georgian Triangle Tourist Association; and,
- G'Nadjiwon Ki Aboriginal Tourism Association.

ii) Regional Marketing Initiative

The Central Ontario Marketing Alliance is a recently formed joint economic development initiative of the Cities of Barrie and Orillia, Towns of Wasaga Beach and Collingwood and the Greater Georgian Bay Chamber of Commerce. A recent focus of this group has been a growth strategy for the automotive sector.

The Ontario Ministry of Tourism also markets the study area for tourism as part of its provincial wide tourism marketing efforts.

## **8.2 Issues Associated with Current Service Delivery in the Study Area**

Effective growth management in the Greater Golden Horseshoe is based on a planning system which is led by policy set out in the Provincial Policy Statement, coordinated through regional inter-municipal growth plans, and delivered through local implementation. All parts of the system need to work together to create livable communities, stimulate economic development, and protect the natural environment.

Currently, there is some capacity among study area municipalities to reach consensus on key issues related to growth management in the study area, but this capacity has been recently challenged by the significant growth in the study area. The Growth Plan for the Greater Golden Horseshoe provides an additional layer of policy direction for study area municipalities in terms of growth management, but planning remains a matter of local implementation. In terms of moving forward collectively into the future, the study area municipalities need to understand the issues associated with current service delivery as well as those issues emerging from current changes to the planning regime in southern Ontario. This section of the report describes these issues for each service delivery area.

### **8.2.1 Policy Planning Service Delivery Issues**

#### **i) Conformity of OPs and OPAs to the Growth Plan**

The Growth Plan provides a development concept for the Greater Golden Horseshoe which, to some degree, illustrates a growth pattern that is not influenced by existing municipal boundaries. The Growth Plan states that it “works within the existing planning framework to provide growth management policy direction for the GGH.” Municipal Official Plans in the study area need to establish a coordinated framework and area-specific policies for growth. There also is a need for the type of “thinking beyond boundaries” inherent to the Growth Plan at the scale of Simcoe, Barrie, and Orillia. This can help provide a consistent voice and authority over the primary mechanism for growth management – municipal Official Plans – leading towards coordinated growth planning and Official Plan policy among the study area municipalities. This coordination is key to preparing to face the challenges that lie ahead.

#### **ii) Ensuring 5-year update of Official Plans**

All municipalities need to be able to meet the statutory requirement of the *Planning Act* to review/update their Official Plans every five years. The 5-year update provides an opportunity to reflect on current trends and pressures, and modify the plan where necessary to ensure that the vision is realized.

iii) Long-range demographic forecasting and growth projections

The Growth Plan has established a target population for Simcoe, Barrie and Orillia. Separate forecasts for Barrie and Orillia and the County will be determined. The County, in consultation with the lower-tier municipalities, must be able to allocate the growth forecasts to the lower-tiers as per Growth Plan policy.

iv) Prioritizing and conducting area plans and strategies

Sub-area planning (commonly referred to as or ultimately resulting in "Secondary Plans") is the principal vehicle by which major development areas are planned in the other urbanized areas of the Province. To ensure that these Secondary Plans are consistently comprehensive and to ensure that growth is properly phased over time, there is a need to prioritize area plans/strategies and provide a consistent framework under which area plans/strategies are conducted through inter-municipal co-operation.

v) OMB appeals on land use policy where matters are materially related to the Growth Plan

A framework is needed where all IGAP partnership municipalities can participate directly in study area wide land use policy making, in particular where regional growth management interests are given primary regard during decision-making with some sensitivity to local concerns. In some ways, the Ontario Municipal Board should be viewed as a last resort, rather than a default approach.

vi) Area-wide coordination on growth management

For growth to be well-managed, there must be acceptance/agreement on the share of growth among all municipalities. It is imperative that the County, in consultation with lower-tier municipalities, allocate the growth forecasts in Schedule 3 of the Growth Plan and that separated city forecasts for Barrie and Orillia be determined.

vii) Coordination of land use planning with long range infrastructure planning

Provincial policy is promoting the creation of more compact communities that support a range of travel modes including walking, cycling and public transit. The need to coordinate land use planning with transportation/transit is paramount to building strong communities.

There is also a strong relationship between land use planning and public works. It is widely agreed that "pipes should follow planning." The *Provincial Policy Statement* establishes a hierarchy of servicing for development and the Growth Plan includes policies which direct development to settlement areas with full servicing. The need to coordinate land use planning with public works is necessary for cost-effective and environmentally-responsible urban development.

viii) Community improvement planning

Community Improvement Plans (CIP) and the financial incentives which they offer are important means of encouraging development activities that effectively use, reuse, and restore lands, buildings and infrastructure. There is a relationship between the Growth Plan's vision and the potential use of various CIP's to stimulate/support redevelopment and revitalization.

### **8.2.2 Development Planning Service Delivery Issues**

i) Compliance of development applications to area-wide growth strategy

Implementation of a growth strategy can substantially be attributed to the approval of development applications which are consistent with the PPS and conform to the Growth Plan. A system of checks and balances by a decision-making body carrying sufficient area-wide authority may help ensure that development applications maintain conformity to a growth strategy for the study area.

ii) Review/decision on zoning changes

Planning literature suggests that the historic approach to zoning as a mechanism for development control has helped contribute to sprawl. Consideration should be given to amending municipal zoning by-laws so that they encourage densities and forms of development which are supportive of the Growth Plan and the Recommended Urban Structure.

iii) Timely review/decision on Plans of Subdivision or Plans of Condominium

There appears to be an issue with the County's timely review/decision on Plans of Subdivision and Plans of Condominium as reported by the lower-tier municipalities. There appears to be a need for more staff to address the work load or action is needed to delegate this function to local municipalities.

iv) Review/decision on Site Plan Approval

Site Plan Approval is usually considered a local planning matter but the arguments made for Zoning can similarly be made for Site Plan Approval. In the instances where there is opposition to applications seeking greater densities and a wider range of residential housing types, policy support for these developments is needed.

v) OMB appeals on development applications where matters are materially related to provincial policy

One way of addressing OMB appeals is to establish common study/submission requirements across the entire study area to provide consistency in the information submitted for review and approval of development applications. The studies can also be used to help planning authorities better evaluate how a development proposal achieves targets and/or conforms to the Growth Plan.

vi) Monitoring of greenfield development applications

It is important to monitor greenfield development applications to ensure that new development is achieving a compact urban form and to ensure that the requirements for available land for growth as stated in the PPS and the Growth Plan are being met. While every municipality in the study area monitors development, they each have their own unique methodology. The Growth Plan includes policies outlining the methodology for measuring the density target over the entire designated greenfield area. If development can be monitored consistently and regularly, then this can help inform planning decisions regarding future phasing, urban form, and help achieve the Growth Plan for the study area.

vii) Monitoring of applications for intensification

The Growth Plan indicates that 40% of all new residential units in Barrie, Orillia and Simcoe County need to be developed through intensification in the built-up area from 2015 onwards. Specific monitoring of intensification for the period from now to 2015 will help these municipalities determine whether they are likely to meet the 40% intensification target in 2015 and what steps may be necessary to ensure that their intensification target is achieved.

viii) Building permit administration

The issuance of building permits is principally a local matter to be administered locally and not usually considered part of planning service delivery (since building permits are not matters under the *Planning Act*). In terms of monitoring, the issuance of building permits for subdivisions is used to determine whether there are any vacant lots available to absorb growth. As a result, there is a need for building permit status of Plans of Subdivision to feed into the system for growth monitoring.

ix) Development approval fees

Across the study area, development application fees for the same application vary by municipality. Although application fees for development approvals are not a major issue, any consideration of service delivery provides an opportunity to consider how these fees can be dealt with equitably across the study area.

### **8.2.3 GIS Service Delivery Issues**

i) Up-to-date mapping of existing land use, planned land use, etc.

There is already a strong partnership in place for GIS service delivery between the County and several of the local municipalities, and the IGAP partners need to build on this co-operation in order to monitor growth and enhance planning processes. Through the IGAP process, the Partnership was provided with electronic mapping which will assist with future monitoring. The mapping must be updated for it to be useful, however. Standards for the creation and maintenance of the data are needed if individual municipalities are contributing to a study area wide data warehouse of land use mapping. Adequate GIS resources will be required to implement and monitor Growth Plan policies such as intensification rates within the built boundary, urban growth centre densities, Greenfield densities, etc.

ii) Up-to-date mapping of zoning

It is important to maintain up-to-date mapping of zoning, which helps improve municipal efficiency and client/customer service. Zoning by-laws are regularly amended for site-specific development proposals or to put in place special zoning for secondary plan areas (e.g. zoning which is permissive to intensification). If individual municipalities are contributing to a study area wide data warehouse of zoning, then standards for the creation and maintenance of the data is needed.

iii) Staff access to mapping and map products

Staff access to mapping and map products is required daily for the effective delivery of policy, development and economic development planning services. If a centralized data warehouse is intended to provide an economy of scale, then planning staff at all levels of government need a mechanism to access mapping and map products. This is delivered through Enterprise GIS and, to some extent, web-enabled GIS. All staff will need to be trained for use of the system and all staff must have adequate computing resources to access the Enterprise/web-enabled GIS.

iv) Public access to mapping and map products

Public access to mapping and map products is valuable for client/customer self-service, is a means to stimulate public involvement in planning, and provides a way for stakeholders to develop an understanding of their community. If a centralized data warehouse results in economies of scale, public access to mapping and map products through web-enabled GIS is needed for dissemination of mapping (it is recognized that the County of Simcoe currently offers on-line some mapping tools).



v) Assimilative Capacity model

An important consideration for IGAP is that the Assimilative Capacity Study (“ACS”) uses a sophisticated GIS-based model to evaluate watershed impacts, and if the Assimilative Capacity model is to inform future planning decisions, there will be a need to address the adequacy of GIS service delivery across the study area.

#### **8.2.4 Economic Development Service Delivery Issues**

i) No County level/‘big picture’ economic development planning or marketing

The lack of an overall agency responsible for economic development planning and investment attraction at the county/ regional level has resulted in an uncoordinated approach to economic development, inefficiencies, inter-jurisdictional competition and conflicts which could impede economic growth.

ii) Unrealistic economic development/employment growth aspirations

Several municipalities have undertaken employment land demand and commercial demand studies using aggressive assumptions on employment growth, without consideration of the overall mandated employment threshold for growth in *Places to Grow* (254,000 jobs in the study area in 2031) and without consideration to the most optimal allocation of growth and type of growth by municipality. This discrepancy has led to unrealistic expectations and potential conflicts on ‘growth share’.

iii) Limited resources and fractured interests

Local municipalities have limited resources to spend on economic development and tourism promotion. Some municipalities, such as the South Simcoe municipalities, have pooled resources in the South Simcoe Economic Alliance to undertake targeted studies focused on investment attraction. However, it is noted that even initiatives such as this have been somewhat fractured as some municipalities within that Alliance have declined cost sharing/involvement in recent strategy studies (e.g. Bradford-West Gwillimbury was not part of the recent Business Attraction Strategy and Competitiveness Analysis undertaken for *South Simcoe Economic Alliance*).

### **8.3 Options Matrix for Planning Services**

**Table 8.2** provides the options matrix for municipal service delivery categories and service delivery options, as they relate to the four categories of planning and development services. The following provides a description of each service delivery option:

**Table 8.2 - Options Matrix for Planning Services**

<b>Service Option</b> <b>Service Category</b>	<b>Efficiencies</b>	<b>Joint Services/Special Service Districts</b>	<b>Inter-Municipal Agreements</b>	<b>Service Consolidation at One Level of Government: Single-Tier</b>	<b>Service Consolidation at One Level of Government: Two-Tier</b>
Policy Planning	Efficiencies sought within departmental delivery; staff hired as needed and/or contracting-out of certain functions to consultants.	Joint Planning Area established to address certain matters related to strategic, long-range and policy planning.	The <i>Planning Act</i> does not permit a local municipality to conduct policy planning on behalf of another local municipality. A municipality can purchase staff services if they retain decision-making locally.	All policy planning conducted by a consolidated single-tier of government.	Upper-tier policy plan establishes policy framework for entire study area; lower-tier municipalities' plans must conform to upper-tier plan. Upper-tier responsible for approval of lower-tier Official Plans and OPAs.
Development Approvals	Same as above.	Joint Planning Area established to address certain "major" development approvals.	The <i>Planning Act</i> does not permit a local municipality to conduct development approvals on behalf of another local municipality. A municipality can purchase staff services if they retain decision-making locally.	All development approvals conducted by a consolidated single-tier of government.	All development approvals of a regional interest conducted by the upper-tier level of government in a two-tier system; local development approvals remain at the local level.
GIS	Same as above.	Joint Planning Area established to manage and deliver certain GIS services.	A group of municipalities agree that certain municipalities will provide GIS service delivery on behalf of others.	All GIS services delivered by a consolidated single-tier of government.	Nearly all GIS services delivered by the upper-tier level of government in a two-tier system; some municipalities may opt to provide local GIS services if they have resources.
Economic Development	Same as above	Joint Economic Development Board established to address certain matters related to strategic, long-range economic development planning/investment attraction.	Inter-municipal agreements are already in place – e.g. South Simcoe Economic Alliance.	All economic development planning including strategy development, business retention activities, and investment attraction/marketing.	Upper-tier economic development strategy provides the framework for entire study area. Upper-tier responsible for overall economic development strategy and investment attraction/promotion, and 'one stop shop' for economic development information. Lower-tier economic development agencies focus on services to existing businesses/business retention.

### **8.3.1 Efficiencies**

This option anticipates that the current service delivery system would remain largely unchanged. Each municipal planning and development department would be responsible for finding efficiencies in their system which could include better use of technology, contracting out services, cooperation with other municipalities on studies, etc.

### **8.3.2 Joint Services/Special Service Districts**

This option anticipates that a Joint Planning Area and a Municipal Planning Authority would be established to address planning service delivery for the entire study area. The municipalities represented on the Authority would include the County of Simcoe, City of Barrie and the City of Orillia.

It is anticipated that the area-wide joint service would deliver planning services as allowed for in the *Planning Act* including growth management studies and creation of an area-wide Official Plan, approval of city and local municipal Official Plans and Official Plan Amendments. Other responsibilities may include approval of Plans of Subdivision and Plans of Condominium.

The area-wide service would not be responsible for GIS but likely purchase this service from the County or other municipality. It would therefore not likely be able to make direct use of the Assimilative Capacity model in land use planning decisions. It would not be responsible for economic development or long range infrastructure planning.

The cities and local municipalities would retain responsibility for all other planning approvals, some GIS and maintain the lead in local economic development.

### **8.3.3 Inter-Municipal Agreements**

Based on a review of the *Planning Act*, the legislation does not contemplate or enable local municipalities to enter into agreements by which another municipality makes planning decisions on the other's behalf. Only services can be purchased. This approach does not address the requirements of the Recommended Urban Structure for area-wide growth management and long range planning.

This option has not been further assessed.

### **8.3.4 Service Consolidation: One-Tier Delivery**

This option anticipates that a single, area-wide municipality would be created to deliver all planning and development services: growth management studies, area-wide Official Plan, approval of Official Plan Amendments, approvals of all development applications, GIS service delivery, economic development, and make use of the Assimilative Capacity model to inform future planning decisions.

### **8.3.5 Service Consolidation: Two-Tier Delivery**

This option anticipates that the upper-tier municipality would be responsible for delivering the following planning and development services: growth management studies and creation of an area-wide Official Plan, approval of city and local municipal Official Plans and Official Plan Amendments. Other responsibilities may include approval of Plans of Subdivision and Plans of Condominium or these may be delegated to the local municipalities. The upper-tier municipality would be responsible for GIS services and for some aspects of economic development including marketing and tourism promotion. The upper-tier municipality would be responsible for the application of the Assimilative Capacity model in appropriate planning matters.

The local municipalities would retain responsibility for all other planning approvals, some GIS and maintain the lead in local economic development.

## **8.4 Assessment of Planning Service Delivery Options**

**Tables 8.3 to 8.6** employ the assessment framework to evaluate each service delivery option. Discussions of the individual assessments are provided in the following subsections and a final evaluation with recommendation is provided in subsection 8.4.5.

**Table 8.3 – Assessment of “Efficiencies” Service Delivery Option**

Service Option Service Category	Efficiencies					
	Assessment Criteria					
	Capacity for Long-Range Planning	Efficiency	Limited Financial Impact	Inter-Municipal Equity	Effectiveness	Access & Accountability
<b>Policy Planning</b>	Low, not area-wide	Low	High	Low	Low	High
<b>Development Approvals</b>	Medium	Medium	High	Low	Medium	High
<b>GIS</b>	Low , lack integration of AC model	Low	High	Low	Low	High
<b>Economic Development</b>	Low	Medium	High	Low/Medium	Medium	High

**Table 8.4 – Assessment of “Joint Services/Special Service Districts” Service Delivery Option**

Service Option Service Category	Joint Planning Area with a Municipal Planning Authority					
	Assessment Criteria					
	Capacity for Long-Range Planning	Efficiency	Limited Financial Impact	Inter-Municipal Equity	Effectiveness	Access & Accountability
<b>Policy Planning</b>	Medium, no integration with infrastructure planning	High	Medium	Medium	Medium	Low
<b>Development Approvals</b>	Medium	Medium	Medium	Medium	Medium	Medium
<b>GIS</b>	Medium	Medium	Medium	Medium	Medium	Medium
<b>Economic Development</b>	Low	Medium	Medium	Medium	Medium	High

**Table 8.5 – Assessment of “Service Consolidation: Single-Tier” Service Delivery Option**

Service Option Service Category	Service Consolidation: Single-Tier					
	Assessment Criteria					
	Capacity for Long Range Planning	Efficiency	Limited Financial Impact	Inter-Municipal Equity	Effectiveness	Access & Accountability
<b>Policy Planning</b>	High	High	Low/Medium	N/A	High	Medium
<b>Development Approvals</b>	High	Medium	Low/Medium	N/A	Medium	Low/Medium
<b>GIS</b>	High	High	Low/Medium	N/A	High	Medium/High
<b>Economic Development</b>	High	High	Low/Medium	N/A	Medium/High	Low/Medium

**Table 8.6 – Assessment of “Service Consolidation: Two-Tier” Service Delivery Option**

Service Option Service Category	Service Consolidation: Two-Tier					
	Assessment Criteria					
	Capacity for Long Range Planning	Efficiency	Limited Financial Impact	Inter-Municipal Equity	Effectiveness	Access & Accountability
<b>Policy Planning</b>	High	High	Low/Medium	Medium/High	High	High
<b>Development Approvals</b>	High	High	Low/Medium	Medium/High	High	Medium/High
<b>GIS</b>	High	High	Low/Medium	High	High	Medium/High
<b>Economic Development</b>	High	High	Low/Medium	High	High	Medium/High

#### **8.4.1 Assessment of Efficiencies Option**

Limited improvement in the capacity of the study area municipalities for area-wide growth management and long range planning is expected. Integration of long range land use and infrastructure planning will still be lacking. Application of the Assimilative Capacity model in planning decisions will be constrained.

#### **8.4.2 Assessment of Joint Services/Special Service Districts Option**

The establishment of a joint planning area and municipal planning authority will allow greater area-wide growth management and long range planning. This option does not address the need to integrate long range land use and infrastructure planning.

There is concern that this option is not sustainable. Experience elsewhere demonstrates that these joint services are subject to disagreements in planning philosophies which may carry forward to the authority, thereby decreasing its effectiveness over time.

This is a two-tier option with the cities and local municipalities continuing to deliver local planning and development services making this option more accessible to residents and ratepayers.

#### **8.4.3 Assessment of Service Consolidation (Single-Tier) Option**

This option offers strong area-wide coordination but at the expense of local access and accountability. It requires the greatest change in the system of service delivery and governance and creates the greatest challenges for transition and interim service delivery.

Although the assessment gives this option a high score on several criteria, other options score better overall.

#### **8.4.4 Assessment of Service Consolidation (Two-Tier) Option**

This option balances the need for area-wide coordination and local access and accountability.

There are examples across the Province of this model working effectively in the form of regional government and restructured county and district systems.

#### **8.4.5 Summary of the Evaluation and Recommendation**

The overall ranking of the options is as follows:

Efficiencies	Lowest Ranking
Service Consolidation: One-Tier	Second Lowest Ranking
Joint Service	Second Highest Ranking

Service Consolidation: Two-Tier      Highest Ranking

Service Consolidation: Two-Tier was ranked the highest due to important differences in terms of capacity for area-wide delivery policy planning, efficient and effective local delivery of development approvals and accessibility and accountability to study area municipalities and ratepayers. This reflects an important difference between this option and Joint Services and Service Consolidation: One-Tier.

Based on the above evaluation, it has been determined that **Service Consolidation: Two-Tier** would be the most appropriate service delivery option for the delivery of Planning and Development Services in the study area.

## **8.5 Description of the Preferred Option: Service Consolidation of Planning & Development Services (Two-Tier)**

### **8.5.1 General Responsibilities**

In general terms, a new upper-tier planning department would be responsible for:

- Ensuring compliance of planning and development with the Growth Plan;
- Dealing with all policy and development matters which provide for well-managed growth across the entire study area;
- Conducting and/or directing studies/strategies which provide for well-managed growth across the entire study area;
- In consultation with lower-tier municipalities, allocate the growth forecasts of the Growth Plan;
- Monitoring development to meet Growth Plan targets;
- Identify intensification targets and density targets of the lower-tier municipalities;
- Ensuring co-operation of municipalities (i.e., County of Simcoe, lower-tier municipalities in the County of Simcoe, as well as Barrie and Orillia) in land use planning;
- Ensuring co-ordination of land use planning with transportation and public works;
- Supporting planning activities by delivering GIS services; and,
- Supporting economic development activities.

### **8.5.2 Specific Roles**

**Tables 8.7 to 8.10** on the following pages summarize the role of the upper-tier planning and development department as it relates to the service areas and issues discussed earlier in this report. It also identifies the adjustments in roles that will result for the existing County of Simcoe, the lower-tier municipalities in the County of Simcoe, the Cities of Barrie and Orillia and the Province.



**Table 8.7 - Preferred Option: Service Consolidation of Planning & Development Services (Two-Tier)  
Adjustments to Planning & Development Services – Policy Planning**

	<b>Conformity of OPs and OPAs to Growth Plan (policy, urban boundary changes, Secondary Plans, etc.)</b>	<b>Ensuring 5-year update of Official Plans</b>	<b>Long-range demographic forecasting and growth projections</b>	<b>Prioritizing and conducting area plans and strategies</b>	<b>OMB appeals on land use policy</b>	<b>Inter-municipal co-operation on growth planning</b>	<b>Coordination of land use planning with transportation/transit</b>	<b>Coordination of land use planning with public works (water and wastewater)</b>	<b>Community Improvement Plans</b>	<b>Management of Assimilative Capacity Study model</b>
<b>Possible role of new upper-tier in planning co-ordination</b>	New upper-tier approves all Official Plans and Official Plan Amendments (secondary plans, urban boundary changes, policy modifications, etc.)	New upper-tier provides direction to municipalities on matters to be addressed for 5-year update based on monitoring of Greenfield and intensification development; RPA approves all 5-year Official Plan updates.	New upper-tier, in consultation with lower-tiers, allocates growth forecasts of the Growth Plan.	New upper-tier identifies and leads the preparation of area plans and strategies for growth nodes.	Provides framework where study area wide growth management issues are given primary regard.	New upper-tier in consultation with lower-tiers, allocates growth forecasts of the Growth Plan.	New upper-tier provides "one-window" service to ensure co-ordinated land use planning at single/lower-tier levels with transportation/transit.	New upper-tier provides "one-window" service to ensure co-ordinated land use planning at single/lower-tier levels with water/wastewater.	New upper-tier circulated for comment where local municipality CIP has a material affect on matters of growth plan. <sup>16</sup>	New upper-tier uses ACS model to help inform policy planning.
<b>Possible role of County of Simcoe</b>	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.
<b>Possible role of lower-tier municipality</b>	Municipalities maintain their Official Plans; municipal Council adopts any amendments.	Municipality responsible for 5-year update of Official Plan; municipal Council adopts any amendment.s	Comments relating to matters of local interest.	Municipality to participate in any area plans and strategies led by new upper-tier; municipality identifies and conducts area plans / strategies for non-growth node areas.	Municipalities to actively participate in regional growth management planning; appeal to OMB treated as last resort.	Comments relating to matters of local interest.	Lower-tier planning has regard for study area transportation/transit plans; lower-tier planning integrates local transportation/transit plans.	Lower-tier planning has regard for study area water/wastewater plans.	Prepare, consult with stakeholders, and adopt CIP.	Comments relating to matters of local interest.
<b>Possible role of single-tier municipality</b>	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.
<b>Possible role of Province</b>	Empowers new upper-tier as approval authority for local Official Plans and Official Plan Amendments; Province is approval authority for new upper-tier's Official Plan and Amendments.	Acts as an advisor on an as-needed basis.	Acts as an advisor on an as-needed basis.	Acts as an advisor on an as-needed basis; Province is approval authority where an area plan or strategy leads to an amendment of the new upper-tier Official Plan.	Establishes Provincial interest at OMB Hearings as appropriate.	Acts as an advisor on an as-needed basis.	Acts as an advisor on an as-needed basis.	Acts as an advisor on an as-needed basis.	MMAH retains approval authority over CIP's.	Acts as an advisor on an as-needed basis.

<sup>16</sup> It is recognized that Bill 51 (as of First Reading, December , 2005) contemplates that upper-tier municipalities would be permitted to establish CIP's for limited purposes, and municipalities at each level may participate financially in the other level's CIP.

**Table 8.8 – Preferred Option: Service Consolidation of Planning & Development Services (Two-Tier)  
Adjustments to Planning & Development Services – Development Approvals**

	<b>General compliance of development applications to provincial policy</b>	<b>Review/ decision on Zoning changes</b>	<b>Timely review/ decision on Plans of Subdivision and Plans of Condominium</b>	<b>Review/ decision on Site Plan Approval</b>	<b>Review/ decision on consents for land severance and minor variances</b>	<b>OMB appeals on development applications</b>	<b>Monitoring of Greenfield development applications</b>	<b>Monitoring of "intensification" development applications</b>	<b>Use of Assimilative Capacity model</b>	<b>Building permit administration</b>	<b>Development approval fees</b>	<b>Development Charges</b>
<b>Possible role of New upper-tier for planning co-ordination</b>	Circulated on all development applications and raises potential issues of compliance with Growth Plan or matters of Provincial interest.	Circulated as noted in first column.	Provides sufficient staff to manage approvals of Plans of Subdivision and Plan of Condominium.	Circulated as noted in first column.	Circulated as noted in first column.	Establishes minimum expectations / criteria upon which major development applications are deemed suitable / in conformity to Growth Plan and consistent with PPS.	Maintains inventory of Plans of Subdivision and vacant designed land; compiles other data from municipalities; reporting occurs regularly.	Compiles data from municipalities; reporting occurs regularly.	Incorporates Assimilative Capacity model into decision-making, as appropriate.	Compiles data from local municipalities to assist with monitoring.	Fee to be levied where approval is required; lesser fee to be levied where circulation is required.	Establishes Development Charges By-law to ensure that capital costs for area planning studies related to growth are recovered.
<b>Possible role of County of Simcoe</b>	No role; replaced by new upper-tier	No role; replaced by new upper-tier	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	Status quo (no role anticipated).	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.
<b>Possible role of lower-tier municipality</b>	Comments relating to matters of local interest.	Status quo (local municipality provides zoning approval).	Lower-tier municipality provides comment only on Plans of Subdivision.	Local municipality provides Site Plan approvals.	Status quo (local municipality provides approvals for consents and variances).	Use of new upper-tier criteria to help evaluate major development proposals.	Reporting of development applications in Greenfield growth areas to new body.	Reporting of development applications in intensification areas to new body.	Incorporates Assimilative Capacity model into decision-making, as appropriate.	Status quo (local municipality provides building permit administration); reports data as requested.	Adjustment of fee structure to recognize fee charged by new upper-tier.	Status quo (municipality reviews and amends D.C. By-law as needed).
<b>Possible role of single-tier municipality</b>	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.
<b>Possible role of Province</b>	Acts as an advisor on an as-needed basis.	Acts as an advisor on an as-needed basis.	Delegates Plan of Subdivision and Plan of Condo approval authority to new body; acts as an advisor on an as-needed basis.	Acts as an advisor on an as-needed basis.	Acts as an advisor on an as-needed basis.	Establishes Provincial interest at OMB Hearings as appropriate...	Acts as an advisor on an as-needed basis.	Acts as an advisor on an as-needed basis.	Status quo (no role anticipated).	Status quo (no role anticipated).	Status quo (no role anticipated).	Acts as an advisor on an as-needed basis.

**Table 8.9 – Preferred Option: Service Consolidation of Planning & Development Services (Two-Tier)  
Adjustment to Planning & Development Services – GIS**

	Up-to-date mapping of existing land use, planned land use, etc.	Up-to-date mapping of zoning	Staff access to mapping and map products	Public access to mapping and map products
<b>Possible role of new upper-tier for planning co-ordination</b>	Provides Enterprise GIS for datasets related to land use and growth planning.	Has access to local municipality zoning layers through Enterprise GIS.	GIS Administrator; responsible for all data management; prepares map products for own purposes.	Offers web-enabled GIS to public at-large as part of an area-wide service.
<b>Possible role of County of Simcoe</b>	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.	No role; replaced by new upper-tier.
<b>Possible role of lower-tier municipality</b>	Provides data as necessary to new upper-tier.	Maintains their own zoning data layers; serves zoning data to new upper-tier through Enterprise GIS.	Prepares map products for own purposes as a user of Enterprise GIS.	Offers locally-derived map products to public; may provide for web-enabled GIS to public at-large through computer(s) at municipal facilities.
<b>Possible role of former single-tier municipality</b>	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.	Becomes subordinate to new upper-tier; same role as lower-tier municipality.
<b>Possible role of Province</b>	Establishes “built boundary” as contemplated in Growth Plan.	Licensee of data when needed for Provincial functions.	Licensee of data when needed for Provincial functions.	Licensee of data when needed for Provincial functions.

**Table 8.10 – Preferred Option: Service Consolidation of Planning & Development Services (Two-Tier)  
Adjustments to Planning & Development Services – Economic Development**

	Strategic Economic Development Planning	Business Retention and Expansion	General Marketing and Promotion	Targeted Investment Attraction
<b>Possible role of new upper-tier in economic development &amp; tourism</b>	Develop overall high level economic development and tourism strategy for the restructured County.	Support to lower-tier municipalities as needed through provision of economic data, and information on provincial and federal funding programs in place to help businesses.  Site selection assistance to existing businesses that want to expand in the County.  Develops partnerships to promote, support and sustain economic growth.	Promoting the region to attract new business and tourism investment.  'One stop' source for economic information on County and municipalities – labour, economic activity, real estate, sites, etc.  Operates tourism information and business advisory centres.  Maintains County economic development and tourism web site.	Single point of contact for new investment opportunities.  Liaises with provincial and federal economic development departments on investment attraction opportunities.  Provide assistance to lower-tier municipalities as needed for targeted investment attraction initiatives.
<b>Possible role of Local Economic Development Agencies</b>	Local economic development strategies/sector studies, consistent with overall strategy outlined in County Economic Development Strategy	Key role in assistance and support to local businesses.  Business retention activities.  Coordination with chambers of commerce and other agencies involved in business support and retention activities.	Provide input and municipal economic information to the County as needed.  Maintain local economic development web sites.	Targeted investment attraction initiatives.
<b>Possible role of lower-tier municipality</b>	Comments relating to matters of local interest; represented by existing local economic development agencies.	Comments relating to matters of local interest; represented by existing local economic development agencies Same as lower-tier municipalities.	Comments relating to matters of local interest; represented by existing local economic development agencies.	Comments relating to matters of local interest; represented by existing local economic development agencies.
<b>Possible role of former single-tier municipality</b>	Same as lower-tier municipalities.	Same as lower-tier municipalities	Same as lower-tier municipalities.	Same as lower-tier municipalities.
<b>Possible role of Province</b>	Advisory	Advisory	Advisory	Advisory

### **8.5.3 Resource Implications**

Resource needs can be broken down into human resource needs and other departmental requirements for space, equipment, etc.

A Commissioner and/or Director of Planning would be required to oversee the entire department which could be organized into four service groups (policy, development, GIS, and economic development). It is anticipated that each group would require a manager, a group of staff to address day-to-day planning service/functions, and administrative support personnel.

It is anticipated that there will be transitional costs for both staffing and equipment needs. Although there is expected to be some movement of staff between municipalities and related transfer of equipment, other new costs will have to be incurred to ensure that there is a fully staffed and functional department.

### **8.5.4 Regulatory Implications**

The recommended change in planning and development service delivery requires that the authority of the Minister under the *Planning Act* be delegated to the appropriate municipal tier within the recommended two-tier delivery system.

The structure of delegations based on the recommended service delivery model at the outset of the reorganization is as follows (it is assumed that all existing delegations by the Minister's are rescinded):

Approval Authority Retained by the Minister:

- Upper-Tier Official Plan and Amendments
- Community Improvement Plans

Delegations from Minister to the upper-tier municipality:

- Approval of local municipality Official Plan and Official Plan Amendments
- Approval of Plans of Subdivision
- Approval of Plans of Condominium
- Approval of Part Lot Control
- Consent for Land Severance

Subsequent delegation of authority from the upper-tier to local municipalities:

- Zoning By-law and Amendments
- Approval of Plans of Subdivision
- Approval of Plans of Condominium
- Part Lot Control
- Site Plan Approval
- Consent for Land Severance

Given that the County has currently delegated a variety of approval responsibilities to lower-tier municipalities and given that Barrie and Orillia are currently the approval authority for all planning matters (except for approving their own Official Plans), then there is some rationale to delegate these approval authorities to the lower-tier municipalities over time in the new service delivery model. It is anticipated that the upper-tier municipality in the new service delivery model would retain approval authority for Official Plans and Official Plan amendments; it could delegate all other planning matters to the lower-tier municipalities. It is suggested that the delegation of approval authority be considered if the lower-tier municipality is able to demonstrate conformity with the *Provincial Policy Statement*, the *Growth Plan for the Greater Golden Horseshoe*, and the Official Plan of the upper-tier municipality (including any growth management strategy for the study area), as well as co-operate with the upper-tier municipality in reporting/monitoring of greenfield and intensification development.

### **8.5.5 Land Supply and Demand Implications**

A specific challenge for the implementation of land use planning by the IGAP partnership is the need to address the Growth Plan requirement to plan for the target population (667,000 persons by 2031) of the study area. As identified through the work in the Growth Potential Assessments phase of IGAP, there are lands throughout the study area which are designated for growth but which may not develop by 2031 due to factors such as poor location, lack of market interest, lack of available municipal servicing, etc. There are also existing lots of record in Plans of Subdivision which have never been built out (i.e., the lot exists but a dwelling unit was never constructed).

The existence of these already-designated and approved lands for development contributes to the land supply to serve the future population, even though these lands may not build-out by 2031. When accounted for, the total of all lands in the study area illustrates a potential surplus of designated lands in certain municipalities. To resolve this situation and provide for well co-ordinated growth planning these already-designated lands need to be rationalized. Ideally, the solution would harmonize the land supply with the anticipated demand, such that the lands designated for growth equates to the land demand within each municipality and across the study area.

There are three possible approaches to addressing the harmonization of land supply and projected demand in the study area:

1. De-Designation of Lands;
2. Policy Triggers for Development; and,
3. Phasing of Development through Policy.

These approaches are discussed below and are evaluated based on their effectiveness in matching supply to demand, the political will required, the extent of landowner concern, the potential costs of the approach, and whether the approach is customary.

i) De-Designation of Lands

This approach would require that excess lands designated for urban development in Official Plans (within a defined urban area boundary and/or designated for an urban land use) are redesignated to their former rural or agricultural designation. The provisions of Section 50(4) of the *Planning Act* would be utilized to deem that a registered Plan of Subdivision is not registered if the plan has been registered for eight years but has not been built-out (either the whole subdivision or certain parts). Additionally, the provisions of Section 51(32) of the *Planning Act* might also be utilized to lapse approval of draft Plans of Subdivisions after three years of issuing draft plan approval.

This approach would be highly effective in matching supply to demand, since all excess lands designed for growth could be eliminated. This approach may not be politically feasible because the municipality would be significantly intervening on a landowner's development rights and inherent property value. There is the likelihood that landowners would seek the recourse of appeal to the Ontario Municipal Board where possible if de-designation was undertaken by the municipality. The potential for further legal action by landowners who felt that their property values have been significantly impacted should be recognized and this could possibly lead to the municipality making a payment of damages to the affected landowner. This was a concern raised by municipalities during the IA interviews.

This approach of de-designation is not common in Ontario but it has occurred. During the IA interviews, it was identified that Oro-Medonte had de-designated certain lands to help rationalize development in other areas of the municipality.

ii) Policy Triggers for Development Approach

This approach would require that municipalities amend their Official Plans to establish policies with triggers for the release of lands for development. It is expected that the triggers would be based on a the municipality attaining certain thresholds for greenfield and intensification development; if the triggers are not met, then the municipality would not be able to approve further development and in particular not be able to expand settlement area boundaries.

This approach is somewhat effective in matching supply to demand, although the excess lands will remain in the inventory of lands designated for growth until the triggers are met and the surplus lands are built-out. The approach appears to be politically feasible, especially given that the IGAP partners want to be pro-active about growth management. This type of trigger system for development is used in other jurisdictions (although not extensively in Ontario) and best practices from other jurisdictions can be applied to Simcoe, Barrie, and Orillia.

It should be recognized that there is the possibility of an appeal of these Official Plan amendments to the Ontario Municipal Board by affected landowners. If required to defend an appeal, the municipality would have to ensure that the appropriate analysis was

conducted, although the research conducted for IGAP provides a strong foundation upon which a municipality could build its case. While the policy triggers approach is used in other jurisdictions, the use of this approach would be new to the study area, and might require some time to develop and implement.

iii) Phasing through Policy

This approach would require that excess lands designated for urban development in Official Plans be delineated for phased development beyond the 20-year horizon of the Official Plan (for example, 30-year and 40-year phases of development). It is expected that a municipality with excess lands would amend the land use map in the Official Plan to delineate the approximate boundaries of the lands which are to be phased. Furthermore, policies in the Official Plan would identify the indicators and monitoring mechanisms needed to ensure that the excess lands are not prematurely developed.

This approach is expected to be potentially effective in addressing surplus designated lands, although the excess lands will remain in the inventory of lands designated for growth until the lands are built-out. Since this approach considers the phasing of development (which is expected to be based on an analysis of market demand) it can be viewed as an expression of how the market is expected to correct for the surplus through the take up of designated lands over time. This approach is anticipated to be acceptable to a municipal Council which generally understands the pace of development in their community and would accept that certain lands are designated beyond the municipality's planned growth potential. Another benefit of this approach is that it is used in many municipalities in Ontario and is a commonly accepted practice.

There is the possibility of an appeal of these Official Plan amendments by affected landowners to the Ontario Municipal Board. A thorough market analysis would need to be conducted if the municipality was required to defend an appeal.

iv) Recommended Approach to Addressing Surplus Designated Lands

It is recommended that the **Policy Triggers for Development** approach be used to address any surplus designated lands in study area municipalities. Of the three options above, this approach provides an effective planning framework for addressing surplus designated lands as they relate to future demand. It is also an approach that could be accepted by municipal Councils and, although may be of concern to some landowners, would be in the broader public interest of effectively managing growth. Furthermore, the approaches used in other jurisdictions can be tailor-made to suit the needs of the study area, in order to create a set of policy triggers which are customized to the needs of Simcoe, Barrie and Orillia.

## **9.0 ASSESSMENT OF PUBLIC WORKS**

### **9.1 Scope of Public Works**

This study has considered four functional areas associated with municipal delivery of Public Works<sup>17</sup>:

1. Water Services;
2. Wastewater Services;
3. Transportation Services; and,
4. Transit Services.

The four functional areas are described in detail below. Issues associated with current service delivery also are identified.

#### **9.1.1 Description of Water Services**

There are 89 municipal water supply systems within the study area, servicing approximately 325,000 persons. The facilities have been approved under the *Safe Drinking Water Act* and a Consolidated Certificate of Approval has been issued for each facility.

The Infrastructure Assessment Report, dated March 2006 including the Addendum dated August 2006, written as part of the Existing Capacities Assessment phase of IGAP, presents specific information related to the analysis of the aforementioned facilities.

Specific information with respect to ownership and operation of these facilities has been provided in ***Appendix C***.

#### **9.1.2 Description of Wastewater Services**

There are 25 municipally owned wastewater treatment facilities across the study area, serving approximately 278,000 persons. The design of each of the facilities has been approved under the *Ontario Water Resources Act* and a Certificate of Approval has been issued for each facility.

The Infrastructure Assessment Report, written as part of the Existing Capacities Assessment, presents specific information related to the analysis of the aforementioned facilities.

Specific information with respect to ownership and operation of these facilities has been provided in ***Appendix C***.

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<sup>17</sup> It is recognized that municipalities may arrange their departments such that some of these functions (i.e., transportation and transit) are delivered by departments not responsible for water and wastewater services but for the purposes of this study, the four functions have been included under Public Works.



### **9.1.3 Financial Considerations**

The infrastructure assessment has identified \$650 million in water and wastewater capital costs needed to accommodate growth in the Recommended Urban Structure. Since these costs are by definition growth related, it is assumed that they will be paid for primarily by development charges or developer contributions, not (for the most part) by the municipalities themselves.

The average cost per unit works out to approximately \$5,500. While this is a substantial amount, it is not unaffordable; some municipalities in the study area already have development charges with a water and wastewater plant component higher than this. However, these capital costs are not distributed evenly, either in space or in time: in space, because some municipalities have much higher costs per unit than others; and in time, because in many cases, large capital expenditures are needed up front, whereas development (and therefore development charge revenue to pay for these costs) is likely to be spread over many years.

The engineering analysis, covering 18 municipalities and well over 100 water and wastewater systems, provides a high-level estimate of the plant expansion costs likely to be incurred over the next 25 years. However, the analysis provides no indication of *when* these expenses will be incurred, and are no substitute for the detailed cost estimates that will be needed for each phase of expansion in each system. As part of the financial analysis, growth projections for each municipality were developed and used to estimate approximately when each system will run out of capacity. From this, it was possible to estimate:

- when each component of the \$650 million will need to be spent;
- when development charge revenue will be received;
- the magnitude of the interest charges that will be incurred;
- the magnitude of the water and wastewater plant component of development charges that would need to be charged in order to recover the full capital cost plus interest; and
- the magnitude of the debt that each municipality will need to take on in order to finance these capital expenditures, and how this compares to their borrowing capacity as determined by their Annual Debt Repayment Limit.

These estimates provide an indication of the types of problems that may be encountered by some municipalities in financing water and wastewater plant expansion; however, there are too many uncertainties to reach definite conclusions with respect to specific municipalities. Some of the findings of this analysis with respect to specific municipalities are discussed below, but these should be considered as examples of the types of problems that may occur in some municipalities, rather than predictions that those problems will occur in the municipalities named.

One type of problem that may be encountered is per unit costs that are very high, either in comparison to other municipalities or to the existing level of development charges. These costs may result in development charges that are so high that they discourage developers from building. This could potentially leave a municipality without adequate development charge revenue to pay for infrastructure development. Again, much more detailed analysis would be needed to be certain

of the costs that municipalities will incur. The only conclusion that can be drawn is that this is a potential problem area.

A related problem is that costs per unit may be much higher than the water and wastewater plant expansion component of current development charges. If development charges are not updated quickly, municipalities could lose substantial amounts of development charge revenue.

A final problem that some municipalities may encounter is the need to borrow more money to finance water and wastewater plant expansions than they are allowed to borrow based on provincial regulations.

#### **9.1.4 Description of Transportation Services**

The Infrastructure Assessment Report, written as part of the Existing Capacities Assessment, presents a description of the transportation network in the study area (see section 9.0 of the Infrastructure Assessment Report). Drawing upon a 2002 study, entitled *Simcoe Area Transportation Network Needs Assessment* by URS Cole Sherman for the Ministry of Transportation, provincial, county and local roads are discussed.

Provincial highways are a significant component of the transportation system. A number of expansions within existing corridors and proposed realignments are under study to address increasing traffic volumes on Highways 400, 11, 26, 12 and 9. Two new corridors are in the concept stage – Bradford Bypass and Highway 427/GTA North. Timing for development of these corridors is beyond the time frame of this study.

The County of Simcoe is responding to growth-related traffic pressures with projects affecting County Roads 88, 90 and 21/Innisfil Beach Road. Additional road expansions, primarily in South Simcoe and affecting County Roads 4, 21, 27, 90 and 50 also have been noted. No new exchanges with Highway 400 are currently planned.

The City of Barrie has been assessing all of its roads that cross Highway 400, noting the need for several widenings and for two new crossings in the southern end of the City. Barrie has identified many streets requiring expansion to accommodate growth-related increases in traffic volumes. While more limited in scale, the City of Orillia also is responding to growth-related demands.

During interviews with the municipal IGAP Partners, transportation was of critical concern to many municipalities in both the northern and southern portions of the study area. Road congestion was noted on many provincial highways and County roads as well as the need to upgrade local intersections connected to these highways and roads to accommodate expanding traffic volumes. Realignments also were considered desirable by several municipalities.

### **9.1.5 Description of Transit Services**

Currently rail transit service exists between Bradford and Toronto. Expansion of GO Transit's rail service into Barrie is progressing with preliminary designs completed for the Barrie station and layover facility.

GO Transit delivers bus transit service between Barrie, Bradford and Toronto. Greyhound is relocating and expanding its facilities to offer greater inter-city bus service.

Local transit service exists in Barrie, Orillia, Midland and Collingwood including accessible transit for persons with disabilities. It was noted in the interviews with municipal IGAP partners that connections to regional service are required.

During interviews with municipal IGAP Partners, several municipalities that currently have no service noted that local transit had been considered. Requests for transit service, from seniors and persons with disabilities, had triggered the local review. Most indicated that transit service was not financially feasible at this time. The cost of expanding existing local transit service was considered a challenge and would need to wait until additional growth and development, especially of lifestyle housing and intensification projects, increased service demand.

Similarly, regional public transportation also was considered inadequate to meet the growing need of the study area.

Reliance on the private automobile was expected to continue in most parts of the study area.

### **9.1.6 Issues Associated with Current Delivery of Water and Wastewater Services in the Study Area**

Currently, there is some sharing and/or cooperation among study area municipalities to meet water and wastewater treatment demands. Due to the significant growth throughout the study area, most municipalities have been reluctant to share these facilities without significant financial assurances that protect their ability to finance local requirements and provide full cost recovery. In terms of moving forward collectively into the future, the study area municipalities will need to:

- Ensure that the safest possible drinking water is provided to the existing and future residents within the study area throughout the next 25 years and beyond;
- Protect the health of the watersheds within the study area by reducing and where possible eliminating the contaminants that are being discharged into the watershed by existing and future residents in the study area; and,
- Ensure each municipality within the Study Area has continued and controlled growth.

To achieve these objectives the study area municipalities will need to:

- Ensure that the Assimilative Capacity model is utilized to monitor and identify areas where the health of the watersheds can be improved while still allowing continued growth throughout the study area;
- Maximize the use of existing water and wastewater treatment facilities;
- Ensure that the future infrastructure planning for water and wastewater treatment facilities is coordinated throughout the entire study and particularly across municipal boundaries; and,
- Continue to implement best management practices.

In addition to achieving the aforementioned, each community in the study area has a number of challenges unique to their size, history and location relating to water and wastewater services. However, all municipalities will face a number of common pressures that, together and over a period of years, could increase costs and risks substantially. The most serious of these is that water and wastewater related assets are wearing out, and most communities are not replacing them quickly enough. The current stock of water and wastewater assets in the study area is approximately \$720 million for Wastewater Treatment Plants and approximately \$370 million in Water Treatment Plants alone. In addition, based on information from Ministry of Public Infrastructure Renewal, over the next 15 years, water and wastewater investment needs will to be approximately 50% of the current capital values just to keep the infrastructure in acceptable working condition.<sup>18</sup>

In the 1990s, the Province required that Public Utilities Commissions be disbanded. The hydro services of the former PUCs would henceforth be operated through corporate bodies, either privately held or publicly held through share companies. The water and/or sewer services of the former PUCs were moved into municipal operations. With increasing concerns for the safe provision of potable water, the Province established the Water Strategy Panel to review municipal service delivery. Among other things, the Panel, in its report *Watertight: The case for change in Ontario's water and wastewater sector*, recommended the creation of corporate bodies to deliver water service on a regional basis. A summary of the main recommendations follows.

The main recommendations from the 2005 report of Ontario's Water Strategy Expert Panel - ***Watertight: The case for change in Ontario's water and wastewater sector***.

**1. The scale and capacity of systems must increase.**

Systems must join together to better manage risks, increase the depth of their expertise, gain economies of scale and scope, and help the highest-cost customers. There are many ways in which communities can achieve this. Because the answers will not be the same in every part of the province, local communities must develop local solutions – and an objective, professional regulator must ensure that those solutions are comprehensive and rigorous.

**2. Governance must be strong and effective.**

Water and wastewater systems are becoming increasingly complex, and in most cases – especially after consolidation into larger units – a municipally-owned corporation would be the best vehicle to own these assets. Those who oversee them, whether drawn from municipal

<sup>18</sup> See Watertight Report: "The case for change in Ontario's water and wastewater sector," page 7.

councils or private life, need to understand a wide range of issues that are often specific to utility operations. For transparency, the finances of water services should be kept separate from those of their municipal owners. Finally, water services need the flexibility and tools to achieve cost savings through contracting out and other delivery options.

**3. Regulation should be results-based and as light-handed as is compatible with the goal of safe, affordable water services.**

Ontario's water services will need a new style of regulator that looks at business plans and proposed rates from the perspective of optimal scale and scope, and measures performance to produce improvement. With the creation of the larger water services that this report foresees, and new licensing requirements in place, the focus of water-quality regulation should shift from detailed prescription to the results that systems are expected to achieve. Inspection and enforcement should be carried out by qualified staff who are expert in results-based regulation that takes risk management into account.

**4. Systems must look to their customers for financial sustainability.**

Consumers should pay the full cost of the services they consume, which will require full metering. This will help to ensure that systems are not overbuilt, conservation is encouraged and nature is respected. With full-cost recovery and improved economies of scale, most water systems in Ontario will be able to rely on their customer base to maintain and operate their assets over the long term. Only where systems are shown to be unsustainable should the Province provide subsidies, and in those cases it should act as trustee of the assets until the system can be made sustainable.

**5. Innovations in technology and training should be used to reduce costs.**

Active support from the Province will allow water services to benefit from cost-saving technologies in a more timely fashion. There is also a role for the Province to play in making training programs more easily accessible, especially for staff of remote and isolated systems.

**6. The Ontario Clean Water Agency (OCWA) should be revitalized.**

OCWA's front-line staff have a wealth of skills and experience, but lack of direction has led to uncertainty about its role and increasing competition in the sector has hurt its financial results. OCWA needs a revised mandate, a true arm's-length relationship with the Province and a business-oriented board.

## **9.2 Transportation and Transit Summary**

The recommended vision for growth in the study area includes the following goals:

- Reducing the reliance on the private automobile and increasing alternate modes of transportation including walking, cycling and public transit; and,
- Providing infrastructure in the most efficient and cost-effective manner.

The Growth Potential Assessment also recognizes that Barrie and Bradford have the most developed local and inter-regional transit services while Highway 400 offers good transportation access for the movement of people and goods.

The report, *Simcoe Area Transportation Network Needs Assessment (2002)* notes that over 99% of trips in the study area are by private automobile and that travel volumes are expected to double over the next 20 to 30 years.

If the vision is to be achieved, a number of urban planning and design requirements need to be addressed including: more compact urban design for greenfield development; intensification of built up areas; long-range planning of facilities to support transit, walking and cycling; improved live/work connections; etc. To the greatest extent possible, new developments should support several modes of travel.

*Simcoe Area Transportation Network Needs Assessment (2002)* provides the framework for a greater focus on the regional road system.

Our recommendations are:

1. Provincial highways, County roads and local street requirements must be addressed in a coordinated manner to support the Recommended Urban Structure over the next 25 years.
2. Greater efforts are needed to:
  - a. Expand regional roads to accommodate the movement of people, goods and services in the study area and to support economic growth of the area;
  - b. Link regional roads to regional and local transit in order to reduce the use of private automobiles; and,
  - c. Improve linkages between regional and local transit, again, to reduce the use of private automobiles.
3. Finally, it is recommended that the City of Barrie extend its local transit service to the new greenfield lands intended for residential and employment purposes as recommended in the Recommended Urban Structure.

### **9.3 Description and Assessment of the Water and Wastewater Services Delivery Options**

#### **9.3.1 Efficiencies**

The Efficiencies option anticipates that all existing service delivery for water and wastewater services would remain unchanged, with each municipality continuing to find efficiencies, either financial, operational or capital, within their systems. During the interviews with municipal IGAP Partners, it was indicated by each municipality that they are continually trying to find efficiencies

associated with the operation of their systems. Therefore, as a result, the “Efficiencies” option essentially reflects the status quo for service delivery.

This option has a number of advantages and disadvantages including the following:

i) Advantages

- Requires no change to the existing service delivery system.

ii) Disadvantages

- Does not address the need to have the Assimilative Capacity model managed in conjunction with area wide infrastructure planning;
- Does not address the need to coordinate long range land use planning and infrastructure planning; and,
- Does not ensure joint decision-making on a watershed-basis occurs.

### **9.3.2 Joint Services/Special Service Districts**

The Joint Services option would involve the creation of a Special Service District/Board to serve as an agent of the municipalities.

In particular, this option would involve a single or multiple special service district(s)/board(s) with each one being responsible for the treatment and distribution of water to the end user and the collection and treatment of wastewater from the end user throughout the study area.

This option provides flexibility for the municipalities involved on the service board. Different participating municipalities may provide for control and management of different services to the same board and for different operation and management of that service in a participating municipality.

This option has a number of advantages and disadvantages including the following:

i) Advantages

- Independent boards could maximize the efficiencies and minimize the costs associated with the required water and/or wastewater expansions;
- Provide opportunity to bring in additional expertise; and,
- Could be utilized to deliver multiple services.

ii) Disadvantages

- Under existing *Municipal Act* regulations, service boards cannot extend, enlarge a municipal service or supply a customer outside the municipality without permission.

- Its powers are limited to those delegated by Council excluding the authority to borrow money.
- Terms ends with Council term.
- Does not address the need to have the Assimilative Capacity model managed in conjunction with area wide infrastructure planning.
- Does not address the need to coordinate long range land use planning and infrastructure planning.

### **9.3.3 Inter-Municipal Agreements**

This would involve the use of inter-municipal agreements between municipalities to provide water and/or wastewater services.

These are currently in use in the study area for facilities and access to services typically on a fee basis across municipal boundaries. They are voluntary and less structured than a jointly owned service or special service district. They are subject to regular review and renewal and no separate administrative body is set up to oversee the agreements.

Recently established are agreements for the delivery of water from one municipality to another as a means of overcoming local resource constraints.

This option has a number of advantages and disadvantages including the following:

i) Advantages

- Requires no change to the existing service delivery system.

ii) Disadvantages

- Does not address the need to have the Assimilative Capacity model managed in conjunction with infrastructure planning.
- Does not address the need to coordinate long range land use planning and infrastructure planning.

### **9.3.4 Service Consolidation: One-Tier Delivery**

This would involve the creation of a single-tier body to provide water and wastewater services. In particular one body would be responsible for the treatment and distribution of water to the end user and the collection and treatment of wastewater from the end user throughout the Study Area. In addition the single tier would be responsible for the continued application of the Assimilated Capacity Study (ACS) Model for the Watersheds and ensuring that Infrastructure Planning is coordinated with the Long Range Land Use Planning.



This option has a number of advantages and disadvantages including the following:

i) Advantages

- Would maximize the efficiencies and minimize the costs associated with the required water and/or wastewater expansions.
- Economies of scope are also available where a single entity has responsibility for a suite of services e.g. sourcing, treating and delivering quality drinking water, and collecting, treating and disposing of sewage.
- Provide opportunity to bring in more expertise.
- Could be utilized to deliver multiple services.
- Supports integration of the Assimilative Capacity model into area wide land use and infrastructure planning as well as monitoring of watershed health with neighbouring municipalities who share the watersheds.
- Complies with the recommendations of the Watertight Report.

ii) Disadvantages

- Loses the local contact with the users in the delivery of the services.
- The diverse servicing arrangements found in the study area makes this option less efficient and less responsive to local needs.

### **9.3.5 Service Consolidation: Two-Tier Delivery:**

This would involve the creation of a two-tier body to provide water and wastewater services. In particular the upper-tier would be responsible for water and wastewater treatment and regional distribution mains, where applicable, throughout the study area and the lower-tier would be responsible for water distribution and wastewater collection. In addition the upper-tier would be responsible for the continued application of the Assimilated Capacity model for the watersheds and ensuring that infrastructure planning is coordinated with the long-range land use planning.

This option has a number of advantages and disadvantages including the following:

i) Advantages

- Would maximize the efficiencies and minimize the costs associated with the required water and/or wastewater expansions.
- Provide opportunity to bring in more expertise.
- Could be utilized to multiple services.
- Supports integration of the Assimilative Capacity model into area wide land use and infrastructure planning as well as monitoring of watershed health with neighbouring municipalities who share the watersheds.
- Complies with the recommendations of the Watertight Report that call for regional delivery of services and the inclusion of separated cities in regional delivery.
- Maintains local contact with the users in the delivery of the services.

ii) Disadvantages

- Some loss of local autonomy, especially for Barrie and Orillia.
- Requires reorganization of existing service delivery.

### **9.3.6 Utility Model**

This would involve the creation of a separate corporation or special area corporation(s) to provide water and wastewater services. In particular the corporation(s) would be responsible for the treatment and distribution of water to the end user and the collection and treatment of wastewater from the end user throughout the study area. In addition the corporation(s) would be responsible for the continued application of the Assimilative Capacity model for the watersheds and ensuring coordinated delivery of long-range infrastructure and land use planning.

This option has a number of advantages and disadvantages including the following:

i) Advantages

- Would maximize the efficiencies and minimize the costs associated with the required water and/or wastewater expansions.
- Provide opportunity to bring in more expertise.
- Could be utilized to multiple services.
- Supports integration of the Assimilative Capacity model into area wide land use and infrastructure planning as well as monitoring of watershed health with neighbouring municipalities who share the watersheds.
- Comply with the recommendations of the Watertight Report.
- More transparent arrangement with the municipal owner because it must file separate financial statements.
- Able to borrow on its own behalf to fund major projects without competing against other needs and constraints in the *Municipal Act*.
- Through co-operation with Conservation Authorities, it would address the need to coordinate long range land use planning and infrastructure planning.

ii) Disadvantages

- In 2003, the *Municipal Act* was amended to allow municipalities to own corporations to deliver services, but owing to the need for a more thorough review of the sector, the subsequent regulation did not include water and wastewater services.
- Loses the local contact with the users in the delivery of the services.
- Extremely diverse study area.
- Does not address the need to coordinate long range land use planning and infrastructure planning.

- Does not take advantage of the synergies inherent in delivering both Planning and Development Services and Public Works through a two-tier municipal delivery system.

The following six tables provide an assessment of each service delivery option for water and wastewater services.

**Table 9.1 – Assessment of “Efficiencies” Option**

<b>Service Option</b> <b>Service Category</b>	<b>Efficiencies</b>					
	<b>Assessment Criteria</b>					
	<b>Capacity for Long Range Planning</b>	<b>Efficiency</b>	<b>Limited Financial Impact</b>	<b>Inter-Municipal Equity</b>	<b>Effectiveness</b>	<b>Access &amp; Accountability</b>
<b>Water Services</b>	Low	Medium	High	High	Low	High
<b>Wastewater Services</b>	Low	Medium	High	High	Low	High

**Table 9.2 – Assessment of “Joint Services/Special Service Districts” Option**

<b>Service Option</b> <b>Service Category</b>	<b>Joint Services/Special Service Districts</b>					
	<b>Assessment Criteria</b>					
	<b>Capacity for Long Range Planning</b>	<b>Efficiency</b>	<b>Limited Financial Impact</b>	<b>Inter-Municipal Equity</b>	<b>Effectiveness</b>	<b>Access &amp; Accountability</b>
<b>Water Services</b>	Low	Medium	Medium	Medium	Medium	Medium
<b>Wastewater Services</b>	Low	Medium	Medium	Medium	Medium	Medium

**Table 9.3 – Assessment of “Inter-Municipal Agreements” Option**

<b>Service Option</b> <b>Service Category</b>	<b>Inter-Municipal Agreements</b>					
	<b>Assessment Criteria</b>					
	<b>Capacity for Long Range Planning</b>	<b>Efficiency</b>	<b>Limited Financial Impact</b>	<b>Inter-Municipal Equity</b>	<b>Effectiveness</b>	<b>Access &amp; Accountability</b>
<b>Water Services</b>	Low	Medium	Low	Medium	Low	Medium
<b>Wastewater Services</b>	Low	Medium	Low	Medium	Low	Medium

**Table 9.4 – Assessment of “Service Consolidation: One-Tier Delivery” Option**

<b>Service Option</b> <b>Service Category</b>	<b>Service Consolidation</b>					
	<b>Assessment Criteria</b>					
	<b>Capacity for Long Range Planning</b>	<b>Efficiency</b>	<b>Limited Financial Impact</b>	<b>Inter-Municipal Equity</b>	<b>Effectiveness</b>	<b>Access &amp; Accountability</b>
<b>Water Services</b>	High	Medium	Medium	High	High	Low
<b>Wastewater Services</b>	High	Medium	Medium	High	High	Low

**Table 9.5 – Assessment of “Service Consolidation: Two-Tier Delivery” Option**

<b>Service Option / Service Category</b>	<b>Service Consolidation</b>					
	<b>Assessment Criteria</b>					
	<b>Capacity for Long Range Planning</b>	<b>Efficiency</b>	<b>Limited Financial Impact</b>	<b>Inter-Municipal Equity</b>	<b>Effectiveness</b>	<b>Access &amp; Accountability</b>
<b>Water Services</b>	High	Medium	Medium	High	High	High
<b>Wastewater Services</b>	High	Medium	Medium	High	High	High

**Table 9.6 – Assessment of “Utility Model”**

<b>Service Option / Service Category</b>	<b>Utility Model</b>					
	<b>Assessment Criteria</b>					
	<b>Capacity for Long Range Planning</b>	<b>Efficiency</b>	<b>Limited Financial Impact</b>	<b>Inter-Municipal Equity</b>	<b>Effectiveness</b>	<b>Access &amp; Accountability</b>
<b>Water Services</b>	Medium	High	Medium	High	High	Low
<b>Wastewater Services</b>	Medium	High	Medium	High	High	Low

## 9.4 Summary of Assessment of Options

The overall ranking of the options is as follows:

Inter-Municipal Agreements	Lowest Ranking
Joint Services/Special Service Districts	Second Lowest Ranking
Efficiencies	Third Lowest Ranking
Service Consolidation: One-Tier	Tied for Second Highest Ranking
Utility Model	Tied for Second Highest Ranking
Service Consolidation: Two-Tier	Highest Ranking

Service Consolidation: Two-Tier was ranked the highest due to important differences in terms of capacity for area-wide treatment of water and wastewater, efficient and effective collection and distribution of water and wastewater and accessibility and accountability to study area municipalities and ratepayers. This reflects an important difference between this option and the Utility Model and/or the Service Consolidation: One-Tier.

Based on the above evaluation, it has been determined that **Service Consolidation: Two-tier** would be the most appropriate service delivery option for the delivery of Public Works, as defined herein, in the study area.

## 9.5 Detailed Description of the Preferred Option: Municipal Delivery of Public Works: Water and Wastewater Services

### 9.5.1 General Responsibilities

With the creation of a two-tier body to provide water and wastewater services, the upper-tier would be responsible for water and wastewater treatment and regional distribution mains, where applicable, throughout the study area and the lower-tier would be responsible for water distribution and wastewater collection. In addition the upper-tier would be responsible for the continued implementation of the Assimilative Capacity Study model for the watersheds and ensuring coordinated long-range infrastructure and land use planning.

### 9.5.2 Resource Implications

Transferring responsibility for water and wastewater plants and trunk mains to an upper-tier body would address all of these problems:

- The continued implementation and expansion of the Assimilative Capacity model for the watersheds;
- Long-range infrastructure planning is coordinated with land use planning;
- If development in one area occurs more slowly than expected, either because of very high development charges in that area or for other reasons, the revenue shortfall can be offset, at least partially, by revenue from development in other areas;

- The upper-tier body would be large enough that no single project would use up a large portion of its borrowing capacity. Capital expenditures and development charge revenue would be spread more evenly from year to year, rather than being concentrated in a short period as they would be for small municipalities.

However, there are some challenges to be faced and decisions to be made in the transition to this new system, in particular in the treatment of existing debt and reserve funds. It is assumed that the upper-tier body would take over all reserve funds and debts specifically identified as being water and wastewater-related. But it may not be fair to treat a municipality which has accumulated a large water/wastewater reserve fund in the same way as one which is carrying a large water/wastewater debt.

Other issues to be addressed are: water and wastewater rates and development charges. Will these be area-rated and, if so, on what basis? If a system of different rates is maintained, then all water and wastewater-related debts and reserve funds will need to be allocated to a specific system or area, along with capital and operating costs. Rates will need to be set in each area to cover capital costs, net of reserve funds; contributions to reserve funds for future capital costs; debt services costs; and, a share of head office costs for shared services.

If, on the other hand, there is a partial or full move to uniform rates and charges, then it may be appropriate to give some kind of compensation in municipalities that have accumulated significant reserve funds in excess of immediate needs. This compensation could take many forms, including payments directly to the municipalities, or temporary rate reductions to customers.

### **9.5.3 Regulatory Implications**

To implement the two-tier service delivery system, a restructured County government is contemplated. Legislation will be needed to implement the restructured County and it is contemplated that the legislation will establish the parameters for the allocation of water and wastewater systems and facilities between the upper and lower-tier municipalities. Financial matters also need to be addressed in the legislation once decisions are made on the matters discussed above.



## **10.0 PREFERRED IMPLEMENTATION OPTION**

### **10.1 Implementation Tests**

The service delivery options emerging from the evaluation have been tested to determine whether, as a package they can be implemented with a high expectation for success. It is at this phase of work that the ability of the municipalities in the study area to administer the service delivery package was considered. The tests are:

1. The governance model has been demonstrated to work in other jurisdictions and/or is used in the study area;
2. Matching and/or combining service options can achieve greater capacity for long range planning and strategic decision-making;
3. Implementation is facilitated by existing municipal structure for administration of service and municipal experience in delivery of service; and,
4. Transition costs and impacts on service delivery during transition are acceptable.

### **10.2 Planning and Development Services and Long-Range Infrastructure Planning**

As stated in section 8.0 of this report, it is recommended that area-wide service delivery through a two-tier system be implemented.

### **10.3 Public Works**

As stated in section 9.0 of this report, it is recommended that area-wide service delivery through a two-tier system be implemented.

### **10.4 Other Services**

The focus of the Implementation Assessment has been Planning and Development Services and Public Works. Nonetheless, there are a number of other services that require consideration. They are:

- **Recreation and Cultural Services;**
- **Emergency Services**, specifically, police, fire and land ambulance/paramedicine; and,
- **Social Services**, specifically social assistance and social housing.

Our recommendations for these other services have taken into account the Implementation Tests. The tests have been used to determine whether, as a package, the service delivery options can be implemented with a high expectation for success.

### **10.4.1 Recommendations for Other Services**

i) Retain Consolidated Services

A number of services are currently delivered by one municipality on behalf of all the municipalities in the study area. Although some concerns were expressed with the quality of the service, improvements can be instituted that will enhance service efficiency and effectiveness. Retaining the current service delivery arrangements facilitates implementation and minimizes transition costs.

In light of the recommendations to achieve area-wide service delivery for both Planning and Development Services and Public Works, maintaining consolidation of the following services will enhance the ability of the study-area municipalities to support implementation of the Recommended Urban Structure over the long term:

- **Land Ambulance & Paramedic Services (area-wide)**
- **Social Services (area-wide)**
- **Court Services & Administration of POA Revenue (area-wide)**
- **Waste Management (County-wide)**

ii) Retain Local Responsibility

A number of services are currently delivered by the local municipalities. Retaining the current service delivery arrangements facilitates implementation and minimizes transition costs. It also recognizes that local delivery is the most efficient and effective approach.

In light of the recommendations to retain some aspects of service delivery for both Planning and Development Services and Public Works at the local level through a two-tier system, maintaining local delivery of the following services will reinforce local accessibility to service and local responsiveness to user needs:

- **Recreation & Cultural Service; and,**
- **Firefighting.**

iii) Study Area-Wide Consolidation

Similarly to the reasons for retaining consolidation of services, it is recommended that two services be studied to determine if area-wide consolidation is appropriate:

- **Police**
- **Waste Management**

iv) Seek Greater Efficiencies

A wide range of approaches can be used to enhance existing service delivery (see Section 6.0).

During interviews with municipal IGAP Partners, it was clear that a process of continuous improvement exists in each municipality. They are seeking out best practices from other jurisdictions and employing them locally. Municipalities are encouraged to continue this process, making good use of techniques such as competitive tendering, public-private partnerships and, inter-municipal cooperation.

v) Further Study Required

Further study of these other services is required in order to fully evaluate and describe the service delivery approach.

However, it must be recognized that due to a number of issues being outside the scope of the IGAP study, additional study will be required prior to the implementation of these recommendations.

In addition it also is acknowledged that the IGAP Partners may, through further study, develop additional options and recommendations for service delivery.

## **11.0 IMPLEMENTATION STRATEGY**

### **11.1 Governance implications**

The IA has recommended area-wide, two-tier service delivery for planning and development services and for water and wastewater services. It recognizes that some services are already provided on an area-wide basis in the study area and that these services should continue to be provided area-wide: land ambulance and paramedic services, social services (e.g., provided by the County through the provincial CMSM system), and court services and POA revenues. It has also recommended that the recreation and culture and firefighting services continue to be a local responsibility. Area-wide consolidation should be considered for police and waste management.

The implications of these recommendations for governance are clear. If water and wastewater services and planning and development services are going to be provided on an area-wide basis through two-tier delivery system and other services are to be retained on an area-wide basis, it is necessary to undertake a more comprehensive study of area-wide, two-tier governance for Simcoe, Barrie and Orillia.

Others bodies also have recommended area-wide government structures including separated cities where possible:

*County Government in Ontario, 1989* recognized the shared interests between separated cities and the counties in which they are located. The report also recognized the problems in maintaining separate status: "Separated municipalities and their surrounding counties share many interests such as solid waste management, economic development, servicing demands for water and sewer, and land use development issues. Currently, there is no forum for policy development in these shared areas. This causes duplication, competition for land and development, and a lack of coordination in service delivery. There is a focus on dispute rather than on cooperation and working together" (p. 17). The Report recommended a strengthened county system in which counties and separated municipalities join forces either by integrating the separated municipalities into the county structure or through improved, more stable working relationships. The report argued that integration would avoid future boundary disputes, remove competition for assessment, promote shared interests and create a strong focus of local government in the area (p. 35).

*The Who Does What Panel, 1996*, noted that ad hoc annexation of lands by separated cities on a periodic basis erodes a county's assessment base, and inhibits sharing of expertise and the efficiencies of area-wide service delivery. The panel's vision for counties included a stronger two-tier county system with fewer, stronger lower-tier municipalities capable of funding and delivering services, and a directly-elected county council that includes cities and separated towns in the county federation. Although the panel recognized that some counties are likely to go to a single-tier structure, it argued that the two-tier structure will remain appropriate for most of Ontario's rural areas for some time to come. (*Who Does What Panel Recommendations on Local Governance*, December 6, 1996). The Panel recommended bringing separated cities and towns back into the county federation

where separated cities or towns have smaller or similar population base to the surrounding county. The Panel believed that bringing cities back into the county would result in sharing of resources and comprehensive area-wide planning and decision-making.

*The Watertight Report, 2005* made recommendations on service delivery for water and wastewater. The report emphasized the need for business planning. To create appropriate business plans, counties need to work with their lower-tier municipalities and the separated cities in their boundaries. Where the customer base of a separated city is significantly larger than that of the county, planning should be done jointly (p. 22). The report goes on to say that business planning will provide the opportunity to reduce risks and costs and increase technical capacity by consolidating systems, especially where counties, their lower-tier municipalities and separated cities are involved.

## **11.2 Further Study and Analysis**

As part of a governance study, it will be necessary to determine what the outer boundaries of the new structure should be (e.g., should it be based on watershed boundaries, commuting patterns, economic considerations?). It will also be necessary to determine the internal boundaries of the restructured County. For example, should some municipalities be amalgamated? If, as the IGAP technical analysis suggests, Barrie is best able to provide services for the growth on adjacent lands, should Barrie's boundaries be extended? In a two-tier structure, it will be necessary to set out clearly what functions will be performed by the upper-tier and what functions by the lower-tiers. Issues around how to account for differences in debt and reserves need to be considered. Finally, the system of representation will need to be set out. How many representatives will there be in each of the lower-tier municipalities? How many representatives will there be on the new upper-tier council? Will the new upper-tier council be appointed, indirectly elected or directly elected?

### **11.2.1 Financial Considerations**

A comprehensive study will be needed to consider transitional costs and financial details concerning the new area-wide delivery of water and wastewater service. Among other matters, this study should:

- Document existing water- and wastewater-related debts and reserve funds that would be transferred to the new service entity, and immediate needs for system repair, replacement and expansion;
- Recommend a formula for equitably treating existing debts and reserve funds;
- Recommend an ultimate rate structure, which could be uniform across the Simcoe area or different within each system, and could be similar to, or quite different from, existing rate structures; and,
- Recommend specific rates for each area for the next few years as a transition (slow or quick) from current rates to the recommended ultimate rate structure.

## **11.3 Interim Actions**

### **11.3.1 Planning & Development Services**

The interim actions for Planning and Development Service Delivery are:

i) Seek Efficiencies

Many of the municipalities in the IGAP partnership indicated that they are continuously seeking opportunities for efficiency in the delivery of services. This on-going efficiency-seeking is encouraged among all the municipal planning departments in the study area. Most importantly, while there are staff constraints, seeking efficiencies also means that municipalities should consider mechanisms to deliver certain planning services without necessarily increasing the number of staff (e.g. contracting consultants to prepare policy documents or conduct peer reviews of development applications) as an interim measure.

ii) Prepare Growth Management Strategy for Simcoe, Barrie and Orillia

The IGAP study has provided a strong foundation of research upon which a growth management strategy for Simcoe, Barrie and Orillia can be prepared. The partnership has already established working groups and communication protocols which can continue through to an area-wide growth management strategy. The growth management strategy is expected to be consistent with the PPS and conform to the Growth Plan. The steps involved in taking the results of the IGAP studies and turning them into a growth management strategy include the creation of policies addressing growth, servicing, wise use of resources, environment, transportation and community services, refinement of the GPA preferred option if necessary, and seeking ratification of the growth management strategy of all study area Councils.

iii) Initiate Work on Local Official Plan Conformity

One of the findings from the Existing Capacities Assessment phase of IGAP was that municipal Official Plans in the study area have different horizons for the future and different bases upon which the plans are developed. There is a need to ensure that all local Official Plans are consistent with the PPS and conform to the Growth Plan, as well to ensure that these local Official Plans share similar horizons and common bases. This will help all the study area municipalities move closer to a common planning framework which is generally co-ordinated rather than discordant.

iv) Provincial Assistance

The municipalities of the IGAP partnership are in a period of transition and would benefit from assistance in a variety of ways. The Province may wish to assist with monitoring of development applications and land use changes across the study area until such time that a formal organization is in place with appropriate jurisdiction.

A greater degree of Provincial involvement may take the form of intervention. With respect to matters before the Ontario Municipal Board, the Province has declared an interest in certain matters and has intervened. At this time, it is difficult to gauge what other circumstances and what degree of intervention the Province may chose to exercise in the future.

### **11.3.2 Public Works**

i) Seek Efficiencies

As noted above, seek efficiencies within water and wastewater systems should be on-going as part of the municipal continuous improvement process.

ii) South Simcoe Service Board

It is recommended that the municipalities in South Simcoe further explore use of a service district in their area. To ensure the greatest benefit, there should be some reconsideration of which municipalities are participating in this joint service.

## **APPENDIX A**

2004 Financial Summary  
IGAP Study Area Municipalities



The following tables are generated from the 2004 Financial Information Returns (FIRs) submitted by the IGAP Study Area Municipalities.

No changes to information found in these returns have been made.

**TABLE 1 – 2004 REVENUE – IGAP Study Area Municipalities**

	<b>Simcoe (County)</b>	<b>Barrie (City) (including Victoria Village)</b>	<b>Orillia (City)</b>	<b>Collingwood (Town)</b>	<b>Midland (Town)</b>	<b>Penetanguishene (Town)</b>	<b>Wasaga Beach (Town)</b>	<b>Innisfil (Town)</b>	<b>Bradford- West Gwillimbury (Town)</b>	<b>New Tecumseth (Town)</b>
Population	234,131	100,825	28,096	15,287	15,993	7,961	11,766	26,979	20,501	24,371
Households	119,688	42,973	12,447	11,174	6,967	3,527	9,079	12,438	7,716	9,802
Taxable Assessment (million \$)	24,342	8,830	2,023	1,763	1,138	562	1,594	2,874	1,900	2,405
PIL Assessment (million \$)	476	38	86	8	11	2	66	14	4	5
Taxation and payments-in-lieu	69,488,794	103,815,885	28,670,248	15,541,164	12,563,928	5,932,753	11,409,526	15,429,487	13,600,850	13,107,180
Federal and provincial grants	141,960,810	5,615,544	1,913,830	86,029	310,553	143,724	105,366	248,901	243,955	100,402
Revenue from other municipalities	25,079,556	345,707	402,999	833,727	225,898	50,417	479,996	623,857	260,592	314,396
User fees, service charges, licenses	37,679,325	47,033,603	10,656,147	10,923,801	5,784,351	3,970,638	5,576,026	5,673,122	6,656,155	8,671,060
Fines and penalties	965	8,861,806	766,254	319,074	371,897	107,273	374,437	620,994	910,741	336,132
Revenues from business enterprise	0	0	3,700,000	390,000	696,878	0	0	238,000	0	0
Gaming and casino revenues	0	0	0	0	0	0	0	4,556,443	0	0
Other revenue	1,116,617	725,028	590,441	444,506	169,683	104,561	68,656	77,302	853,267	418,134
Investment income	886,309	2,920,964	1,574,696	250,505	146,173	51,824	599,417	265,094	185,028	93,387
Transfers from own funds	3,636,760	4,244,007	1,661,937	630,010	97,008	1,140,853	1,183,863	709,301	86,841	3,973,049
<b>Total revenue</b>	<b>279,849,136</b>	<b>173,562,544</b>	<b>49,936,552</b>	<b>29,418,816</b>	<b>20,366,369</b>	<b>11,502,043</b>	<b>19,797,287</b>	<b>28,442,501</b>	<b>22,797,429</b>	<b>27,013,740</b>
<b>Property Tax Rates (LT + UT, occupied)</b>										
Residential		1.038846	1.096060	1.065977	1.199146	1.155882	0.778775	0.795792	0.728523	0.854463
Multi-Residential		1.120603	1.775617	1.838064	2.067686	1.993087	1.342841	1.372184	1.256192	1.473333
Commercial		1.447944	1.843848	1.334710	1.501451	1.447280	0.975103	0.996411	0.912184	1.069874
Industrial		1.497081	1.863302	1.819090	2.046342	1.972512	1.328979	1.358019	1.243225	1.458142
	<b>Essa (Township)</b>	<b>Tiny (Township)</b>	<b>Adjala- Tosorontio (Township)</b>	<b>Clearview (Township)</b>	<b>Oro-Medonte (Township)</b>	<b>Ramara (Township)</b>	<b>Severn (Township)</b>	<b>Springwater (Township)</b>	<b>Tay (Township)</b>	<b>Total</b>
Population	16,103	9,498	9,963	13,197	17,983	8,631	11,200	15,466	9,232	<b>363,052</b>
Households	5,005	8,799	4,032	5,722	10,142	8,029	6,382	6,085	4,789	<b>175,108</b>
Taxable Assessment (million \$)	1,073	1,838	1,031	1,293	2,207	1,192	1,283	1,516	667	<b>35,188</b>

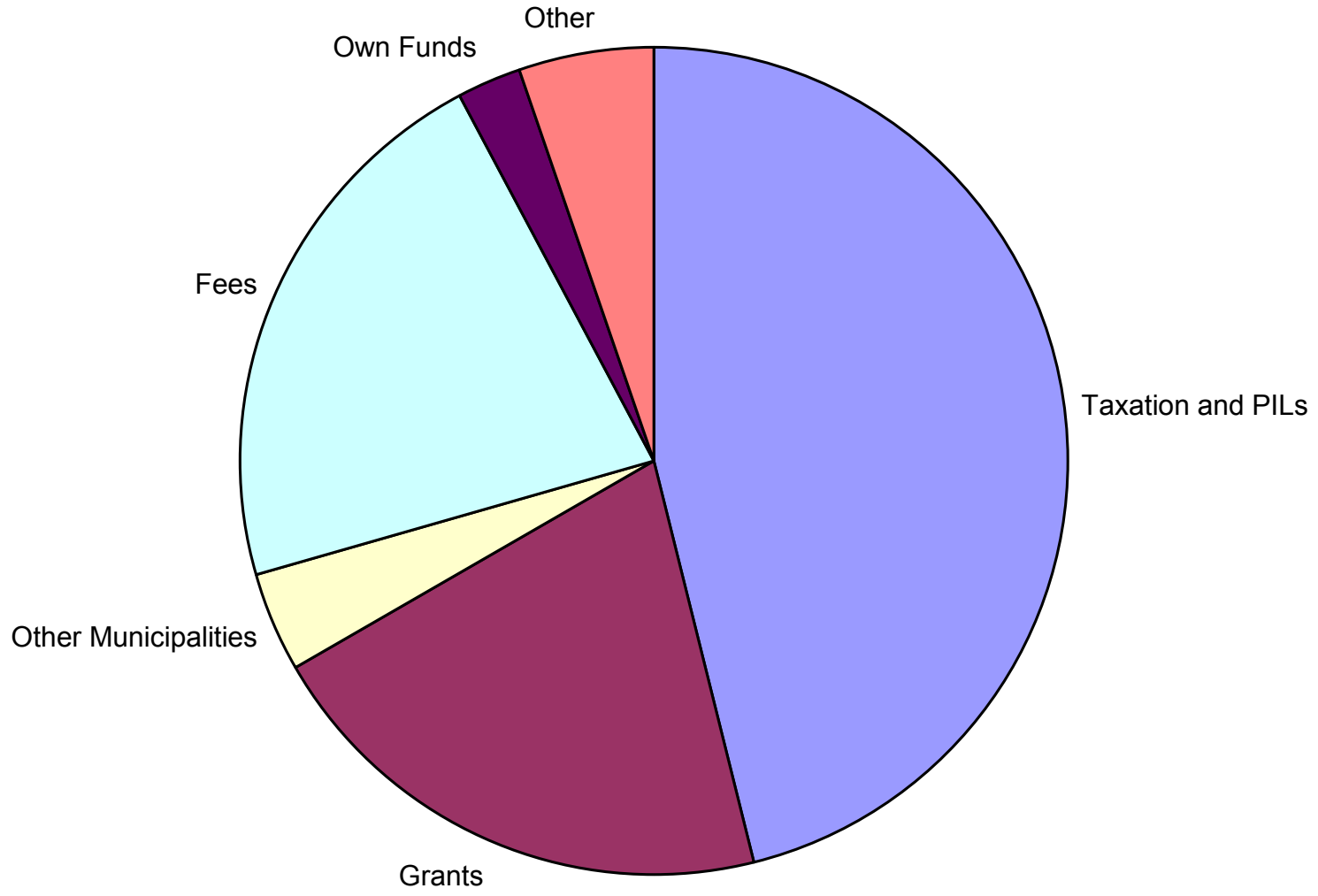
**Intergovernmental Action Plan for Simcoe, Barrie and Orillia  
Implementation Assessment**

PIL Assessment (million \$)	204	21	55	17	18	12	20	16	4	<b>600</b>
Taxation and payments-in-lieu	6,486,413	8,034,892	4,476,443	5,901,656	8,609,477	6,111,341	6,275,533	7,205,911	4,787,506	<b>347,448,987</b>
Federal and provincial grants	623,409	94,144	402,948	1,528,935	160,018	49,510	107,156	171,035	637,764	<b>154,504,033</b>
Revenue from other municipalities	223,431	6,991	158,480	292,566	553,793	95,554	127,338	93,106	54,123	<b>30,222,527</b>
User fees, service charges, licenses	2,806,322	1,269,868	1,032,426	3,950,841	2,300,559	853,305	1,783,864	3,104,286	2,842,846	<b>162,568,545</b>
Fines and penalties	172,391	311,874	150,300	263,725	345,175	387,328	308,356	298,891	181,968	<b>15,089,581</b>
Revenues from business enterprise	0	0	0	0	0	0	0	0	126,354	<b>5,151,232</b>
Gaming and casino revenues	0	0	0	0	0	0	0	0	0	<b>4,556,443</b>
Other revenue	0	188,118	0	40,330	349,029	357,146	76,829	17,938	684,765	<b>6,282,350</b>
Investment income	148,838	95,427	88,719	20,911	157,286	1,129	73,810	101,585	114,747	<b>7,775,849</b>
Transfers from own funds	60,500	327,451	-849,550	90,261	106,743	595,003	145,526	2,007,983	420,291	<b>20,267,837</b>
<b>Total revenue</b>	<b>10,521,304</b>	<b>10,328,765</b>	<b>5,459,766</b>	<b>12,089,225</b>	<b>12,582,080</b>	<b>8,450,316</b>	<b>8,898,412</b>	<b>13,000,735</b>	<b>9,850,364</b>	<b>753,867,384</b>
<b>Property Tax Rates (LT + UT, occupied)</b>										
Residential	0.584679	0.600353	0.515500	0.789338	0.613414	0.669046	0.604633	0.643192	1.048196	
Multi-Residential	1.008161	1.035190	n/a	1.361056	1.057709	n/a	1.042568	1.109056	n/a	
Commercial	0.732076	0.751703	0.647300	0.988331	0.768056	0.837713	0.757061	0.805342	1.312447	
Industrial	0.997754	1.024503	0.875200	1.347005	1.046791	1.141728	1.031806	1.097608	1.788746	

**TABLE 2 – 2004 REVENUE SPLIT BY SOURCE – IGAP Study Area Municipalities**

	<b>Simcoe (County)</b>	<b>Barrie (City) (including Victoria Village)</b>	<b>Orillia (City)</b>	<b>Collingwood (Town)</b>	<b>Midland (Town)</b>	<b>Penetanguishene (Town)</b>	<b>Wasaga Beach (Town)</b>	<b>Innisfil (Town)</b>	<b>Bradford- West Gwillimbury (Town)</b>	<b>New Tecumseth (Town)</b>
Taxation and payments-in-lieu	24.8%	59.8%	57.4%	52.8%	61.7%	51.6%	57.6%	54.2%	59.7%	48.5%
Federal and provincial grants	50.7%	3.2%	3.8%	0.3%	1.5%	1.2%	0.5%	0.9%	1.1%	0.4%
Revenue from other municipalities	9.0%	0.2%	0.8%	2.8%	1.1%	0.4%	2.4%	2.2%	1.1%	1.2%
User fees, service charges, licenses, permits, rents, etc.	13.5%	27.1%	21.3%	37.1%	28.4%	34.5%	28.2%	19.9%	29.2%	32.1%
Fines and penalties	0.0%	5.1%	1.5%	1.1%	1.8%	0.9%	1.9%	2.2%	4.0%	1.2%
Revenues from business enterprise			7.4%	1.3%	3.4%			0.8%		
Gaming and casino revenues								16.0%		
Other revenue	0.4%	0.4%	1.2%	1.5%	0.8%	0.9%	0.3%	0.3%	3.7%	1.5%
Investment income	0.3%	1.7%	3.2%	0.9%	0.7%	0.5%	3.0%	0.9%	0.8%	0.3%
Transfers from own funds	1.3%	2.4%	3.3%	2.1%	0.5%	9.9%	6.0%	2.5%	0.4%	14.7%
<b>Total revenue</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
	<b>Essa (Township)</b>	<b>Tiny (Township)</b>	<b>Adjala- Tosorontio (Township)</b>	<b>Clearview (Township)</b>	<b>Oro- Medonte (Township)</b>	<b>Ramara (Township)</b>	<b>Severn (Township)</b>	<b>Springwater (Township)</b>	<b>Tay (Township)</b>	<b>Total</b>
Taxation and payments-in-lieu	61.7%	77.8%	82.0%	48.8%	68.4%	72.3%	70.5%	55.4%	48.6%	<b>46.1%</b>
Federal and provincial grants	5.9%	0.9%	7.4%	12.6%	1.3%	0.6%	1.2%	1.3%	6.5%	<b>20.5%</b>
Revenue from other municipalities	2.1%	0.1%	2.9%	2.4%	4.4%	1.1%	1.4%	0.7%	0.5%	<b>4.0%</b>
User fees, service charges, licenses, permits, rents, etc.	26.7%	12.3%	18.9%	32.7%	18.3%	10.1%	20.0%	23.9%	28.9%	<b>21.6%</b>
Fines and penalties	1.6%	3.0%	2.8%	2.2%	2.7%	4.6%	3.5%	2.3%	1.8%	<b>2.0%</b>
Revenues from business enterprise									1.3%	<b>0.7%</b>
Gaming and casino revenues										<b>0.6%</b>
Other revenue		1.8%		0.3%	2.8%	4.2%	0.9%	0.1%	7.0%	<b>0.8%</b>
Investment income	1.4%	0.9%	1.6%	0.2%	1.3%	0.0%	0.8%	0.8%	1.2%	<b>1.0%</b>
Transfers from own funds	0.6%	3.2%	-15.6%	0.7%	0.8%	7.0%	1.6%	15.4%	4.3%	<b>2.7%</b>
<b>Total revenue</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

**CHART 1 – 2004 REVENUE SPLIT BY SOURCE  
Total of IGAP Study Area Municipalities**



**TABLE 3 – 2004 EXPENDITURES – IGAP Study Area Municipalities**

	<b>Simcoe (County)</b>	<b>Barrie (City) (including Victoria Village)</b>	<b>Orillia (City)</b>	<b>Collingwood (Town)</b>	<b>Midland (Town)</b>	<b>Penetanguishene (Town)</b>	<b>Wasaga Beach (Town)</b>	<b>Innisfil (Town)</b>	<b>Bradford- West Gwillimbury (Town)</b>	<b>New Tecumseth (Town)</b>
Population	234,131	100,825	28,096	15,287	15,993	7,961	11,766	26,979	20,501	24,371
Households	119,688	42,973	12,447	11,174	6,967	3,527	9,079	12,438	7,716	9,802
General government (including planning and development)	6,023,748	17,503,238	3,973,312	3,545,862	4,456,793	2,019,112	2,473,715	7,217,753	2,867,040	2,954,861
Fire	0	13,433,826	3,189,760	1,988,331	1,552,792	375,093	1,846,687	2,008,177	1,632,769	1,607,995
Police	0	26,636,206	4,919,170	3,167,583	3,525,805	1,217,358	2,036,128	6,213,128	4,092,296	3,423,113
Other protection services	155,247	10,733,472	683,378	742,470	284,391	306,461	951,979	963,138	714,334	744,360
Roadways including winter control	19,528,304	16,140,029	5,265,945	2,637,819	2,568,462	1,374,773	3,224,667	3,660,979	4,714,615	4,500,749
Transit	0	10,720,936	945,793	210,130	129,374	0	0	0	0	72,123
Other transportation services	0	2,412,169	1,303,896	1,028,930	622,989	228,810	914,481	173,454	182,005	242,190
Sanitary sewer system	0	11,354,412	3,262,182	4,471,271	2,298,655	1,660,543	2,648,429	1,805,208	2,235,072	3,443,509
Storm sewer system	0	839,826	145,937	0	136,300	0	70,241	0	0	53,937
Waterworks system	0	14,418,074	3,274,458	4,349,680	1,766,971	2,194,416	2,331,997	2,963,059	2,410,389	5,428,689
Waste	22,299,047	7,539,836	1,866,201	984,627	949,909	558,232	1,414,344	20,609	1,164,206	186,878
Health and social services	231,508,827	21,882,904	10,732,763	0	30,309	4,188	251,204	0	30,282	130,650
Recreation and cultural services	1,702,324	20,143,233	10,500,583	5,874,681	2,860,499	1,480,205	1,656,653	3,560,737	3,349,802	3,713,744
<b>Total expenditures</b>	<b>281,217,497</b>	<b>173,758,161</b>	<b>50,063,378</b>	<b>29,001,384</b>	<b>21,183,249</b>	<b>11,419,191</b>	<b>19,820,525</b>	<b>28,586,242</b>	<b>23,392,810</b>	<b>26,502,798</b>
	<b>Essa (Township)</b>	<b>Tiny (Township)</b>	<b>Adjala- Tosorontio (Township)</b>	<b>Clearview (Township)</b>	<b>Oro-Medonte (Township)</b>	<b>Ramara (Township)</b>	<b>Severn (Township)</b>	<b>Springwater (Township)</b>	<b>Tay (Township)</b>	<b>Total</b>
Population	16,103	9,498	9,963	13,197	17,983	8,631	11,200	15,466	9,232	<b>363,052</b>
Households	5,005	8,799	4,032	5,722	10,142	8,029	6,382	6,085	4,789	<b>175,108</b>
General government (including planning and development)	1,008,568	843,147	950,655	1,613,476	2,088,288	1,806,311	1,790,110	2,051,840	1,445,500	<b>66,633,329</b>
Fire	512,528	835,082	343,372	809,198	959,563	736,565	616,941	1,108,290	465,186	<b>34,022,155</b>
Police	1,578,867	1,351,192	837,366	1,631,548	1,563,594	549,388	976,948	1,534,933	1,397,703	<b>66,652,326</b>

***Intergovernmental Action Plan for Simcoe, Barrie and Orillia  
Implementation Assessment***

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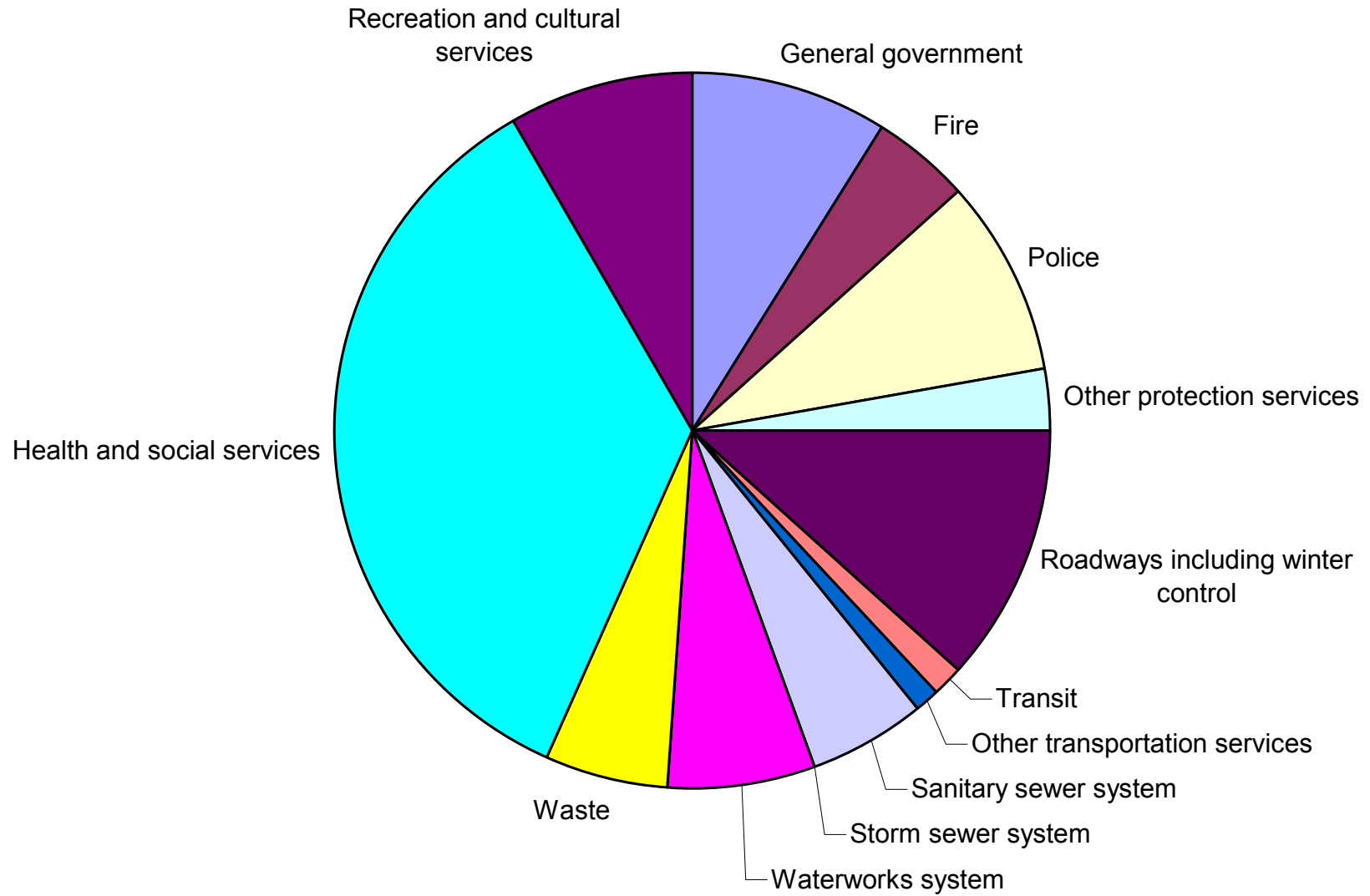
Other protection services	558,305	541,039	223,374	418,284	917,586	492,865	387,225	706,820	369,388	<b>20,894,116</b>
Roadways including winter control	3,307,076	2,569,635	1,852,509	3,936,792	3,057,035	2,569,092	2,555,288	2,959,241	2,054,247	<b>88,477,257</b>
Transit	0	0	0	0	0	0	0	0	0	<b>12,078,356</b>
Other transportation services	89,620	53,436	88,988	124,701	896,690	65,629	57,761	79,013	76,674	<b>8,641,436</b>
Sanitary sewer system	651,114	0	18,009	1,173,751	0	825,669	366,915	619,240	1,940,095	<b>38,774,074</b>
Storm sewer system	0	0	0	0	0	732	0	0	0	<b>1,246,973</b>
Waterworks system	756,738	2,630,084	530,953	994,590	1,227,358	1,067,913	596,243	1,361,493	1,974,931	<b>50,278,036</b>
Waste	806,434	82,873	516,810	2,918	1,078,910	0	782,795	996,457	0	<b>41,251,086</b>
Health and social services	20,980	0	5,225	94,946	0	22,607	19,442	29,666	0	<b>264,763,993</b>
Recreation and cultural services	1,484,826	966,294	99,087	1,362,362	947,778	678,122	604,115	1,446,283	848,798	63,280,126
<b>Total expenditures</b>	<b>10,775,056</b>	<b>9,872,782</b>	<b>5,466,348</b>	<b>12,162,566</b>	<b>12,736,802</b>	<b>8,814,893</b>	<b>8,753,783</b>	<b>12,893,276</b>	<b>10,572,522</b>	<b>756,993,263</b>

**TABLE 4 – 2004 EXPENDITURES SPLIT BY FUNCTION – IGAP Study Area Municipalities**

	Simcoe (County)	Barrie (City) (including Victoria Village)	Orillia (City)	Collingwood (Town)	Midland (Town)	Penetanguishene (Town)	Wasaga Beach (Town)	Innisfil (Town)	Bradford- West Gwillimbury (Town)	New Tecumseth (Town)
General government (including planning and development)	2.1%	10.1%	7.9%	12.2%	21.0%	17.7%	12.5%	25.2%	12.3%	11.1%
Fire		7.7%	6.4%	6.9%	7.3%	3.3%	9.3%	7.0%	7.0%	6.1%
Police		15.3%	9.8%	10.9%	16.6%	10.7%	10.3%	21.7%	17.5%	12.9%
Other protection services	0.1%	6.2%	1.4%	2.6%	1.3%	2.7%	4.8%	3.4%	3.1%	2.8%
Roadways including winter control	6.9%	9.3%	10.5%	9.1%	12.1%	12.0%	16.3%	12.8%	20.2%	17.0%
Transit		6.2%	1.9%	0.7%	0.6%					0.3%
Other transportation services		1.4%	2.6%	3.5%	2.9%	2.0%	4.6%	0.6%	0.8%	0.9%
Sanitary sewer system		6.5%	6.5%	15.4%	10.9%	14.5%	13.4%	6.3%	9.6%	13.0%
Storm sewer system		0.5%	0.3%		0.6%		0.4%			0.2%
Waterworks system		8.3%	6.5%	15.0%	8.3%	19.2%	11.8%	10.4%	10.3%	20.5%
Waste	7.9%	4.3%	3.7%	3.4%	4.5%	4.9%	7.1%	0.1%	5.0%	0.7%
Health and social services	82.3%	12.6%	21.4%		0.1%	0.0%	1.3%		0.1%	0.5%
Recreation and cultural services	0.6%	11.6%	21.0%	20.3%	13.5%	13.0%	8.4%	12.5%	14.3%	14.0%
<b>Total expenditures</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
	Essa (Township)	Tiny (Township)	Adjala- Tosorontio (Township)	Clearview (Township)	Oro- Medonte (Township)	Ramara (Township)	Severn (Township)	Springwater (Township)	Tay (Township)	Total
General government (including planning and development)	9.4%	8.5%	17.4%	13.3%	16.4%	20.5%	20.4%	15.9%	13.7%	<b>8.8%</b>
Fire	4.8%	8.5%	6.3%	6.7%	7.5%	8.4%	7.0%	8.6%	4.4%	<b>4.5%</b>
Police	14.7%	13.7%	15.3%	13.4%	12.3%	6.2%	11.2%	11.9%	13.2%	<b>8.8%</b>
Other protection services	5.2%	5.5%	4.1%	3.4%	7.2%	5.6%	4.4%	5.5%	3.5%	<b>2.8%</b>
Roadways including winter control	30.7%	26.0%	33.9%	32.4%	24.0%	29.1%	29.2%	23.0%	19.4%	<b>11.7%</b>
Transit										<b>1.6%</b>
Other transportation services	0.8%	0.5%	1.6%	1.0%	7.0%	0.7%	0.7%	0.6%	0.7%	<b>1.1%</b>
Sanitary sewer system	6.0%		0.3%	9.7%		9.4%	4.2%	4.8%	18.4%	<b>5.1%</b>
Storm sewer system						0.0%				<b>0.2%</b>
Waterworks system	7.0%	26.6%	9.7%	8.2%	9.6%	12.1%	6.8%	10.6%	18.7%	<b>6.6%</b>
Waste	7.5%	0.8%	9.5%	0.0%	8.5%		8.9%	7.7%		<b>5.4%</b>
Health and social services	0.2%		0.1%	0.8%		0.3%	0.2%	0.2%		<b>35.0%</b>
Recreation and cultural services	13.8%	9.8%	1.8%	11.2%	7.4%	7.7%	6.9%	11.2%	8.0%	<b>8.4%</b>
<b>Total expenditures</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>



**CHART 2 – 2004 EXPENDITURES SPLIT BY FUNCTION  
Total of IGAP Study Area Municipalities**



**TABLE 5 – 2004 EXPENDITURES PER CAPITA – IGAP Study Area Municipalities**

	Simcoe (County)	Barrie (City) (including Victoria Village)	Orillia (City)	Collingwood (Town)	Midland (Town)	Penetanguishene (Town)	Wasaga Beach (Town)	Innisfil (Town)	Bradford- West Gwillimbury (Town)	New Tecumseth (Town)
General government (including planning and development)	26	174	141	232	279	254	210	268	140	121
Fire	n/a	133	114	130	97	47	157	74	80	66
Police	n/a	264	175	207	220	153	173	230	200	140
Other protection services	1	106	24	49	18	38	81	36	35	31
Roadways including winter control	83	160	187	173	161	173	274	136	230	185
Transit	n/a	106	34	14	8	n/a	n/a	n/a	n/a	3
Other transportation services	n/a	24	46	67	39	29	78	6	9	10
Sanitary sewer system	n/a	113	116	292	144	209	225	67	109	141
Storm sewer system	n/a	8	5	n/a	9	n/a	6	n/a	n/a	2
Waterworks system	n/a	143	117	285	110	276	198	110	118	223
Waste	95	75	66	64	59	70	120	1	57	8
Health and social services	989	217	382	n/a	2	1	21	n/a	1	5
Recreation and cultural services	7	200	374	384	179	186	141	132	163	152
<b>Total expenditures</b>	<b>1,201</b>	<b>1,723</b>	<b>1,782</b>	<b>1,897</b>	<b>1,325</b>	<b>1,434</b>	<b>1,685</b>	<b>1,060</b>	<b>1,141</b>	<b>1,087</b>
Total excluding waste and health and social services		1,432	1,333	1,833	1,263	1,364	1,543	1,059	1,083	1,074
	Essa (Township)	Tiny (Township)	Adjala- Tosorontio (Township)	Clearview (Township)	Oro- Medonte (Township)	Ramara (Township)	Severn (Township)	Springwater (Township)	Tay (Township)	Total
General government (including planning and development)	63	89	95	122	116	209	160	133	157	<b>184</b>
Fire	32	88	34	61	53	85	55	72	50	<b>94</b>
Police	98	142	84	124	87	64	87	99	151	<b>184</b>
Other protection services	35	57	22	32	51	57	35	46	40	<b>58</b>
Roadways including winter control	205	271	186	298	170	298	228	191	223	<b>244</b>
Transit	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	<b>33</b>
Other transportation services	6	6	9	9	50	8	5	5	8	<b>24</b>
Sanitary sewer system	40	n/a	2	89	n/a	96	33	40	210	<b>107</b>
Storm sewer system	n/a	n/a	n/a	n/a	n/a	0	n/a	n/a	n/a	<b>3</b>
Waterworks system	47	277	53	75	68	124	53	88	214	<b>138</b>
Waste	50	9	52	0	60	n/a	70	64	n/a	<b>114</b>
Health and social services	1	n/a	1	7	n/a	3	2	2	n/a	<b>729</b>
Recreation and cultural services	92	102	10	103	53	79	54	94	92	<b>174</b>
<b>Total expenditures</b>	<b>669</b>	<b>1,039</b>	<b>549</b>	<b>922</b>	<b>708</b>	<b>1,021</b>	<b>782</b>	<b>834</b>	<b>1,145</b>	<b>2,085</b>
Total excluding waste and health and social services	618	1,031	496	914	648	1,019	710	767	1,145	<b>1,242</b>

**TABLE 6 – 2004 MUNICIPAL PERFORMANCE MEASURES (OPERATING COST) – IGAP Study Area Municipalities**

	<b>Simcoe (County)</b>	<b>Barrie (City) (including Victoria Village)</b>	<b>Orillia (City)</b>	<b>Collingwood (Town)</b>	<b>Midland (Town)</b>	<b>Penetanguishene (Town)</b>	<b>Wasaga Beach (Town)</b>	<b>Innisfil (Town)</b>	<b>Bradford- West Gwillimbury (Town)</b>	<b>New Tecumseth (Town)</b>
General government, percent of total expenditures	3.1%	2.0%	4.9%	8.8%	6.1%	8.5%	9.2%	9.4%	7.2%	1.0%
Fire, per \$1000 of assessment	n/a	\$1.32	\$1.43	\$1.00	\$1.21	\$0.53	\$0.81	\$0.57	\$0.70	\$0.47
Police, per household	n/a	\$534	\$394	\$347	\$490	\$345	\$224	\$491	\$501	\$328
Maintenance of paved roads, per lane kilometer	\$3,314	\$1,269	\$827	\$4,114	\$1,853	\$1,041	\$489	\$1,061	\$467	\$679
Maintenance of unpaved roads, per lane kilometer	\$7,488	n/a	n/a	\$14,275	n/a	\$774	\$1,271	\$3,850	\$5,166	\$2,033
Winter maintenance, per lane kilometer	\$1,908	\$4,437	\$2,450	\$2,342	\$2,717	\$2,224	\$1,476	\$1,344	\$1,165	\$1,227
Transit, per passenger trip	n/a	\$3.85	\$3.07	\$3.10	\$21.46	n/a	n/a	n/a	n/a	n/a
Wastewater collection, treatment and disposal, per megalitre	n/a	\$519	\$327	\$305	\$385	\$566	\$624	\$549	\$533	\$686
Stormwater, per kilometer of drainage system	n/a	\$530	\$199	n/a	\$1,514	n/a	n/a	n/a	n/a	n/a
Water treatment and distribution, per megalitre	n/a	\$380	\$373	no data	\$473	\$403	\$516	\$822	\$515	\$1,394
Solid waste management, per household	\$157	no data	\$124	\$111	n/a	n/a	n/a	n/a	n/a	n/a
Parks and recreation, per person	n/a	\$108	\$121	\$179	\$125	\$117	\$102	\$70	\$87	\$77
Library, per person	n/a	\$25	\$43	\$60	\$35	\$35	\$6	\$40	\$32	\$35
	<b>Essa (Township)</b>	<b>Tiny (Township)</b>	<b>Adjala- Tosorontio (Township)</b>	<b>Clearview (Township)</b>	<b>Oro- Medonte (Township)</b>	<b>Ramara (Township)</b>	<b>Severn (Township)</b>	<b>Springwater (Township)</b>	<b>Tay (Township)</b>	<b>Range (Lower-Tier Only) 1.0% - 15.8%</b>
General government, percent of total expenditures	5.8%	4.8%	15.8%	no data	14.3%	13.7%	15.3%	12.2%	8.9%	
Fire, per \$1000 of assessment	\$0.26	38.2%	\$0.28	no data	\$0.31	\$0.50	\$0.47	\$0.44	\$0.59	<b>\$0.26 - 1.43</b>
Police, per household	\$315	\$153	\$232	no data	\$183	\$91	\$153	\$243	\$292	<b>\$91 - 534</b>
Maintenance of paved roads, per lane kilometer	\$1,070	\$613	\$622	\$245	\$478	\$585	\$148	\$426	\$1,174	<b>\$148 - 4,114</b>
Maintenance of unpaved roads, per lane kilometer	\$1,094	\$1,851	\$1,415	\$511	\$1,402	\$1,380	\$888	\$584	\$3,449	<b>\$511 - 14,275</b>
Winter maintenance, per lane kilometer	\$757	\$1,050	\$469	\$835	\$651	\$674	\$774	\$385	\$1,131	<b>\$385 - 4,437</b>
Transit, per passenger trip	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	<b>\$3.07 - 21.46</b>
Wastewater collection, treatment and disposal, per megalitre	\$607	n/a	n/a	\$896	n/a	\$729	\$2,011	\$780	\$537	<b>\$305 - 2,011</b>
Stormwater, per kilometer of drainage system	n/a	n/a	n/a	n/a	n/a	\$915	n/a	n/a	n/a	<b>\$199 - 1,514</b>

***Intergovernmental Action Plan for Simcoe, Barrie and Orillia  
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Water treatment and distribution, per megalitre	\$769	\$1,935	\$1,748	\$676	\$968	\$1,082	\$1,604	\$855	\$914	<b>\$373 - 1,748</b>
Solid waste management, per household	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	<b>\$111 - 124</b>
Parks and recreation, per person	\$58	\$60	\$5	\$56	\$32	\$48	\$33	\$81	\$51	<b>\$5 - 179</b>
Library, per person	\$20	\$11	\$22	\$27	n/a	\$26	\$14	\$17	\$30	<b>\$6 - 60</b>

## **APPENDIX B**

Interviews with  
IGAP Study Area Municipalities

March 17, 2006

Dear IGAP Partners,

**Subject: Growth Potential Assessment & Implementation Assessment  
Interviews with Partners – Growth and Service Delivery Options**

As you are aware, the IGAP Consultant Team has set up appointments to visit your offices during the week of March 27<sup>th</sup> and April 3<sup>rd</sup> to interview CAOs regarding your perspectives on options for growth and service delivery. We anticipate that these interviews will require 2-3 hours. Senior staff persons as well as interested elected officials are welcome to participate in the interviews at your request.

We have enclosed an information package which includes questions that we wish to cover during the interview and some supporting background information. We would appreciate it if you would review the information prior to the meeting date. Two of our GPA and IA team members will be carrying out the interviews and recording your input. All opinions will be considered in our development and analysis of the growth and service delivery options for the Study Area.

If you have any questions regarding the scheduling of the Partner interviews, please contact Emma West at 416-229-4646 Ext. 339 ([ewest@dillon.ca](mailto:ewest@dillon.ca)). For other questions please contact me at 416-229-4646 Ext. 301 ([rshishido@dillon.ca](mailto:rshishido@dillon.ca)).

Our IGAP consultants look forward to meeting with you and obtaining your input on growth and service delivery options.

Yours truly,

Ron Shishido, MCIP, RPP  
Project Manager  
Dillon Consulting Limited

c.c. Bruce Singbush, MCIP, RPP  
Acting Director, Community Planning & Development  
Ministry of Municipal Affairs

**PARTNER INTERVIEW QUESTIONS FOR MUNICIPALITIES - IA COMPONENT**

1. The scope of work is to consider the delivery of the following municipal services: planning and development, public works, recreation and library services, emergency services, social services, governance and administration.
  - a. How are these services provided currently within your municipality? i.e. contracted out, in house, or upper-tier?
  - b. What challenges are you facing with current service delivery arrangements for these specific services?
  - c. Are there efficiencies that could be attained within the existing service delivery arrangements?
  - d. How do you see future growth affecting your current ability to delivery services?
  
2. Some of the delivery options being considered are:
  - Efficiencies within the existing service delivery arrangements.
  - Special service districts.
  - Inter-municipal agreements for facilities and services.
  - Service consolidation at one level of government.

- a. What are the perceived strengths and weaknesses of these options from the perspective of your municipal stakeholders? – from the perspective of the IGAP study area stakeholders in general?
  - b. Are there any other service delivery options you think should be considered? Please explain.
  - c. What is your preferred option and why is it preferred?
  - d. What criteria do you think are essential when evaluating service delivery options, for example: efficiency, effectiveness, financial impact, access and accountability, capacity for long range planning and strategic decision-making, others?
3. Do you have any other comments on service delivery that you want us to take into consideration in this study?



## **Intergovernmental Action Plan for Simcoe, Barrie & Orillia Implementation Assessment Framework (draft)**

The municipal service delivery areas under consideration are:

- **Planning and Development Services** including economic development
- **Public Works**, specifically, water, sewer and transportation/transit services
- **Recreation and Cultural Services** including libraries
- **Emergency Services**, specifically, police, fire and ambulance
- **Social Services**, specifically social assistance and social housing

The following criteria will be used to assess the service delivery options:

1. **Efficient Provision of Services:** The criterion will assess the extent to which an option ensures that resources are used efficiently. In other words, the option should ensure that the desired quantity and quality of services are provided using the least amount of resources.
2. **Effective Service Delivery:** The criterion will assess the extent to which an option can achieve the intended results.
3. **Financial Impact:** The criterion will assess the extent to which an option minimizes the financial impact upon the municipal operations, including the costs of administration.
4. **Access and Accountability:** The criterion will assess the extent to which an option supports: citizens' access to services; and, decision-making that is accountable, transparent and responsive to the community. Accountability requires monitoring and performance measurement.
5. **Capacity for Long Range Planning and Strategic Decision-Making:** The criterion will assess the extent to which an option enhances the ability of municipalities to engage in long range planning and strategic decision-making.

Although financial considerations (for example, financial impact) will permit a strong quantitative analysis, non-financial matters (such as capacity for long range planning) will require a more qualitative analysis.

Service delivery options that are being considered are:

5. Efficiencies within existing service delivery arrangements.
6. Joint services and/or service districts.
7. Intermunicipal agreements
8. Service consolidation at one level of government.

Implications of the options for governance structures are also being identified.

## **APPENDIX C**

Water and Wastewater Systems



**Appendix C  
Water & Wastewater Systems**

Water							Municipality	Wastewater									
Additional Comments	Operator of Water System	Owner of Water System	Source of Water Supply	Committed Capacity Increases (m <sup>3</sup> /day) (as Identified by Class EA's and Design Briefs)	Current Rated Capacity (m <sup>3</sup> /day)	System Name		System Name	Current Rated Capacity (m <sup>3</sup> /day)	Committed Capacity Increases (m <sup>3</sup> /day) (as Identified by Class EA's and Design Briefs)	Discharge Point	Owner of Wastewater System	Operator of Wastewater System	Additional Comments			
	Town of Penetanguishene	Town of Penetanguishene	Ground Water	3,300	11,000	Payette	Town of Penetanguishene	Fox Street	1,500	0	Penetanguishene Bay	Town of Penetanguishene	Town of Penetanguishene				
				0	432	Lepage		Main Street	4,545	2,205	Penetanguishene Bay						
	Township of Ramara	Township of Ramara	Ground Water	0	1,244	Bayshore Village	Township of Ramara	Bayshore Village	399	0	Spray Irrigation on two fields adjacent to the WWTP.	Township of Ramara	Township of Ramara				
					0	50		Park Lane									
					Surface Water	0		4,000	Lagoon City/Brechin	Lagoon City/Brechin	1,713	0	Wetland Area draining to Lake Simcoe	Township of Ramara	Township of Ramara		
					Ground Water	0		76	Davy Drive								
					Surface Water	0		387	South Ramara								
					Ground Water	0		207	Val Harbour								
	Township of Severn	Township of Severn	Ground Water	0	109	Severn Estates	Township of Severn										
					0	818		Bass Lake Woodlands									
					Surface Water	0		389	Sandcastle Estates								
						0		544	Washago	Washago	228	0	Severn River	Township of Severn	Township of Severn		
					Ground Water	0		2,138	Coldwater	Coldwater	545	0	Coldwater River				
					Surface Water	0		2,780	West Shore	West Shore	1,390	0	Lake Couchiching				
	Ontario Clean Water Agency	Township of Springwater	Ground Water	0	1,558	Anten Mills	Township of Springwater										
					0	786		Del Trend									
						0		4,546	Elmvale	Elmvale	1,800	0	Wye River	Township of Springwater	Ontario Clean Water Agency		
						0		1,185	Hillsdale								
						0		6,850	Midhurst								
						0		740	Minesing								
						0		1,400	Snow Valley	Snow Valley	225	0	Ground, via leaching beds	Township of Springwater	Ontario Clean Water Agency		
						0		169	Vespra Downs								
In March 2006, the Midland Bay Woods and Bayberry Estates Water Treatment Plants (WTP) were eliminated and are now serviced by the Victoria Harbour WTP. By December 31, 2006, the Waubaushene WTP will be eliminated and serviced by the Victoria Harbour WTP.	Township of Tay	Township of Tay	Surface Water	0	7,845	Victoria Harbour/Port McNicoll	Township of Tay	Victoria Harbour/Port McNicoll	4,282	0	Sturgeon Bay and Hogg Bay (respectively) of Severn Sound	Township of Tay	Township of Tay				
					0	274		Rope									
						0		301	Midland Bay Woods								
					Ground Water	0		392	Bay Berry								
					Surface Water	0		1,225	Waubaushene								
	Township of Tiny	Township of Tiny	Ground Water	0	1,382	Perkinsfield	Township of Tiny										
					0	836		Bluewater									
						0		949	Georgian Bay Estates								
						0		3,145	Georgian Sands								
						0		198	LA Place								
						0		123	TeePee Points								
						0		490	Sand Castle Estates								
						0		360	Vanier Woods								
						0		920	Wyevale Central								
						0		400	Cook's Lake								
						0		752	Georgian Highlands								
						0		309	Lefaive								
						0		61	Pennorth								
						0		194	Rayko								
						0		189	Sawlog Bay								
						0		200	Thunder Bay								
						0		360	Whip-Poor-Will 2								
						0		170	Woodland Beach								
	Ontario Clean Water Agency	Town of Wasaga Beach	Ground Water	0	31,415		Town of Wasaga Beach		15,433	0	Nottawasaga River	Town of Wasaga Beach	Ontario Clean Water Agency				