

Municipality of South Bruce

Corporate Strategic Plan 2021 – 2025

September 2021



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Mayor's Message

I am pleased that the Municipality of South Bruce is putting forward another Corporate Strategic Plan to continue the good work and progress that took place and is underway as a result of the 2014-2019 Plan.

Both then and now, the community has come together with new ideas, honest input, and a forward-thinking vision of our beautiful Municipality. The Corporate Strategic Plan for 2021-2025 outlined here presents us with great opportunities and concrete actions to undertake in the next few years.

In particular, this Plan identifies areas of importance to focus on, such as attracting and retaining new residents, boosting support for our local businesses to make sure they are sustainable, and ongoing improvement to our vast infrastructure and assets.

As well, this Plan acknowledges other important topics being addressed in many municipalities across Ontario and Canada, such as accessibility standards, emergency management, meaningful Reconciliation and relationships with Indigenous communities, and recovering from the impacts of the COVID-19 Pandemic.

More unique to our community is our ongoing participation in the site selection process for the Nuclear Waste Management Organization's (NWMO) Project to store Canada's used nuclear fuel. The Economic Development Strategy Update assumes normal community growth and does not directly consider the ongoing NWMO Project. The 2021-2025 Corporate Strategic Plan does consider the ongoing NWMO Project. We recognize that it is a major consideration for our community in the next couple of years and will be impactful whether or not South Bruce is the chosen site.

I am confident that together we can build off our achievements thus far and continue to fulfil our mission, "to provide appropriate and efficient services and programs to residents and businesses of the Municipality that will enhance the quality of life and provide a safe, inclusive and desirable environment to work and raise families."

Alongside Council, staff, and each and every one of our residents and ratepayers, I look forward to working together to continue to improve how we operate, offer services, and advance common interests for the betterment of all the communities that make up our Municipality.

In closing, I would like to acknowledge everyone who participated and contributed – your input is valuable and captured in our Strategic Plan. Thank you for all that you do to make South Bruce a great place to live, work and enjoy.

Sincerely,

Robert Buckle, Mayor of the Municipality of South Bruce



Land Acknowledgement

In the spirit of Reconciliation, we recognize the traditional territory of the Saugeen First Nation and the Chippewa of Nawash First Nation on which we are gathered.

The Municipality of South Bruce shares a commitment to stewardship of the land and natural environment in this traditional territory that we stand on.

Land recognition is a way to honour the first inhabitants of this land, the Indigenous people of today and the aspirations they have for future generations.

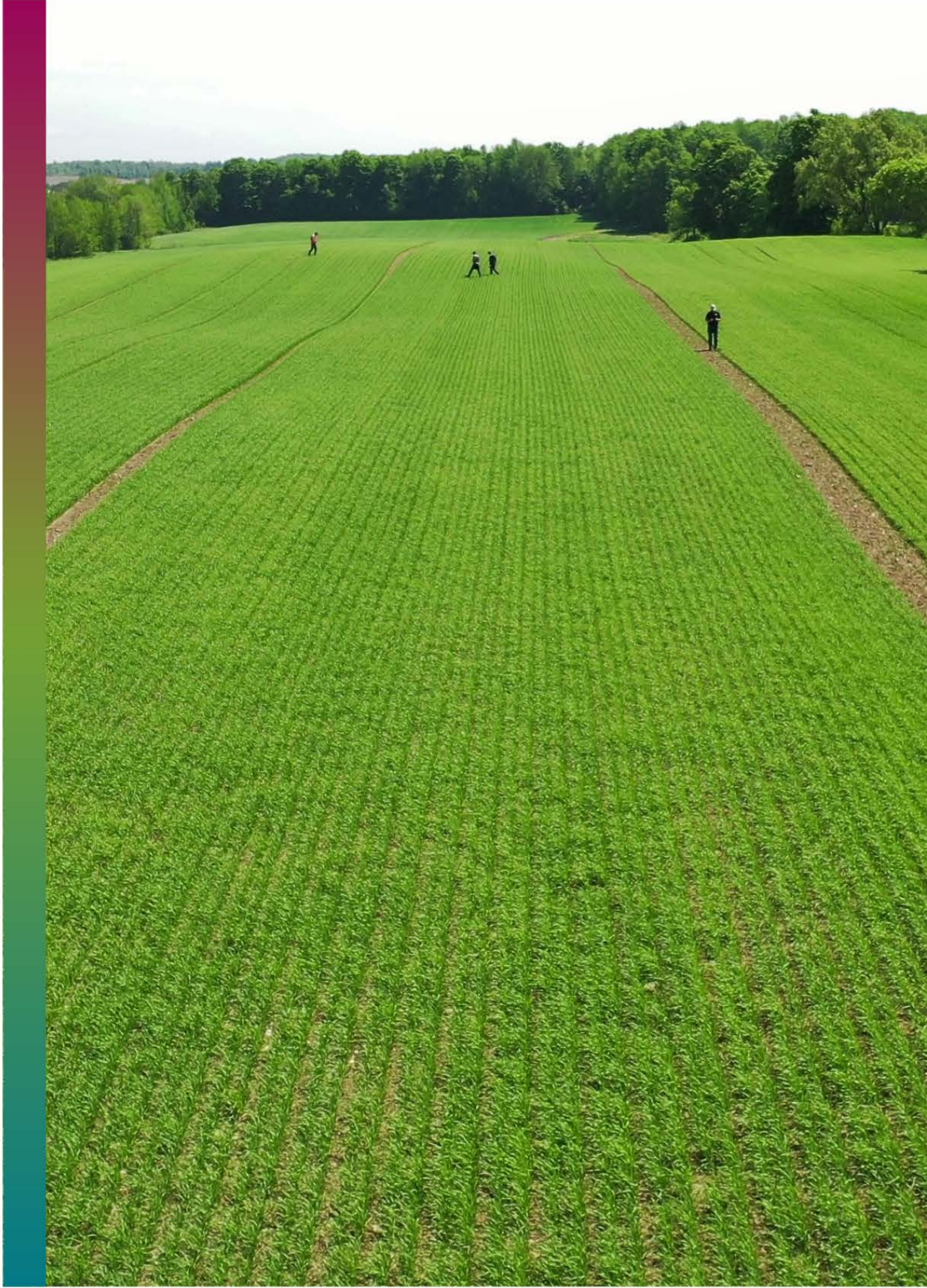


Acronyms

Acronyms	Description
AMP	Asset Management Plan
AODA	Accessibility for Ontarians with Disabilities Act
BMP	Best Management Practices
CEMC	Community Emergency Management Coordinator
CLC	Community Liaison Committee
CRM	Customer Relationship Management
EOC	Emergency Operations Centre
GBLIP	Grey Bruce Local Immigration Partnership
GHG	Greenhouse Gas
MIC	Municipal Innovation Council
NWMO	Nuclear Waste Management Organization
OECD	Organisation for Economic Co-operation and Development
SWIFT	Southwestern Integrated Fibre Technology



Executive Summary



Municipality of South Bruce

Corporate Strategic Plan 2021-2025



What is it?

The 2021-2025 Municipality of South Bruce Corporate Strategic Plan is a roadmap for the community. It defines a shared vision and desired state for the diverse and unique communities that collectively form the municipality and the steps it will need to take to get there.

Why was it developed?

As a roadmap for Council and management, the document informs on-the-ground activities and the human, financial and physical resources needed to implement the plan efficiently and effectively. Rather than simply reacting to change, it provides direction and necessary actions to examine issues and concerns to create a sustainable community while providing economic growth opportunities and protecting natural assets and social and cultural connections.

How was it developed?

The Corporate Strategic Plan was developed through a comprehensive consultation process. Municipal Council, senior management and staff, residents, business owners/managers and community organizations provided a clear picture of the current state of the municipality, reflecting on its structure and function and current strengths and weaknesses.

Municipality of South Bruce

Corporate Strategic Plan 2021-2025



Vision

In South Bruce, people care about one another and enjoy seeing each other succeed. It's common for us to volunteer in local groups and support locally-owned and operated businesses. We're proud to call this community home and won't hesitate to tell others about our piece of paradise.

Corporate Mission

To provide appropriate and efficient services and programs to residents and businesses of the municipality that will enhance quality of life and provide a safe, inclusive and desirable environment to work and raise families.

Corporate Values



Excellent Customer Service



Reliability and Stewardship



Empathy, Respect and Transparency



Sustainability



Informed Decision-Making



Inclusive, Healthy and Safe Living



Progressive Municipality

Municipality of South Bruce

Corporate Strategic Plan 2021-2025



The 2021-2025 Municipality of South Bruce Corporate Strategic Plan establishes five goals for the Municipality. These include two foundational goals and three strategic goals. These goals are highly interrelated, and if implemented effectively, the objectives and actions will ensure a strong and sustainable Corporate function.

Foundational Goals

Strategic Goals

	Open Government	Operational Efficiency	Progressive and Growing Economy	Healthy and Vibrant Communities	Environmental Stewardship
Objectives	<ol style="list-style-type: none"> 1. Enhance internal and external communications for continuous learning and effective distribution of relevant information. 2. Continue to foster partnerships and advocate for local priorities. 	<ol style="list-style-type: none"> 1. Invest in processes and tools for efficient and effective service delivery. 2. Promote a corporate culture that empowers and supports municipal staff. 3. Ensure longer-term fiscal sustainability of the municipality. 	<ol style="list-style-type: none"> 1. Foster a favourable business environment that supports existing businesses, creates local employment opportunities and attracts new business investment. 	<ol style="list-style-type: none"> 1. Celebrate and promote the municipality's strengths to attract investors and residents. 2. Maintain and enhance infrastructure to meet existing and future resident and business needs. 	<ol style="list-style-type: none"> 1. Promote and incorporate environmentally sustainable practices throughout the community.
Outcomes	The Municipality will operate in an open, inclusive and transparent manner to ensure that all residents and stakeholders have easy access to information and effectively participate in the democratic process.	The Municipality demonstrates superior service delivery and responsible financial management to ensure a balanced social, cultural, economic, and environmental approach.	South Bruce is a progressive and growing community and offers a favourable environment that supports a strong business ecosystem, investment and economic growth.	South Bruce is a community that invests in its people and supports physical and mental well-being by encouraging positive lifestyles, preserving natural beauty, and helping people pursue their passions.	South Bruce is a healthy, vibrant, and sustainable community with empowered citizens, conserved natural resources, energy-efficient and sustainable.



Introduction





The Municipality of South Bruce approved its first Corporate Strategic Plan in 2014. The document served as a roadmap for Council and management, informing on-the-ground activities and the human, financial and physical resources needed to implement the plan efficiently and effectively. It presented the desired future vision for South Bruce and a strategic approach to advance actions to address key priority areas.

Since then, significant changes are underway in the community, driven by local, regional and provincial trends. This includes the advent and rapid adoption of new technologies and place-based development. Corporate structures are also changing, focusing on being more customer-centric and investing in processes, technology and tools that provide efficient service delivery. There is also an increasing focus on understanding the current economic realities of Indigenous communities and supports needed to secure and safeguard their traditional values, lands and rights. Protecting lives and livelihoods remain at the forefront, particularly given the impact of COVID-19. Coordinated efforts are underway in almost all municipalities across Canada as they continue to respond to the immediate needs of their residents, community groups and business owners.

This *2021-2025 Corporate Strategic Plan* is being prepared at a critical point in South Bruce's existence. The municipality is at the cusp of change, with growth predicted into the future. The community is embracing opportunity by building on its strengths as "Ontario's Cooperative Community" and the "Gateway to the Bruce". Moreover, as part of the community's continued participation in the Nuclear Waste Management Organization (NWMO) site selection process, the Municipality will continually assess NWMO's Project, including potential contribution to community wellbeing and the community's willingness to host the Project.

In creating and implementing this Corporate Strategic Plan, the Municipality has made a conscious effort to invest in its assets. In essence, the Corporate Strategic Plan is a plan for the community. It defines a shared vision and desired state for the diverse and unique communities that collectively form the municipality. Residents are co-creators and investors in the Municipality's development. Equally important, the Corporate Strategic Plan provides Council and staff with a framework for decision making. Rather than simply reacting to change, it enables them to objectively examine issues and concerns to create a sustainable community while providing business, employment and economic growth opportunities and protecting its natural assets and social and cultural connections.

Key Objectives

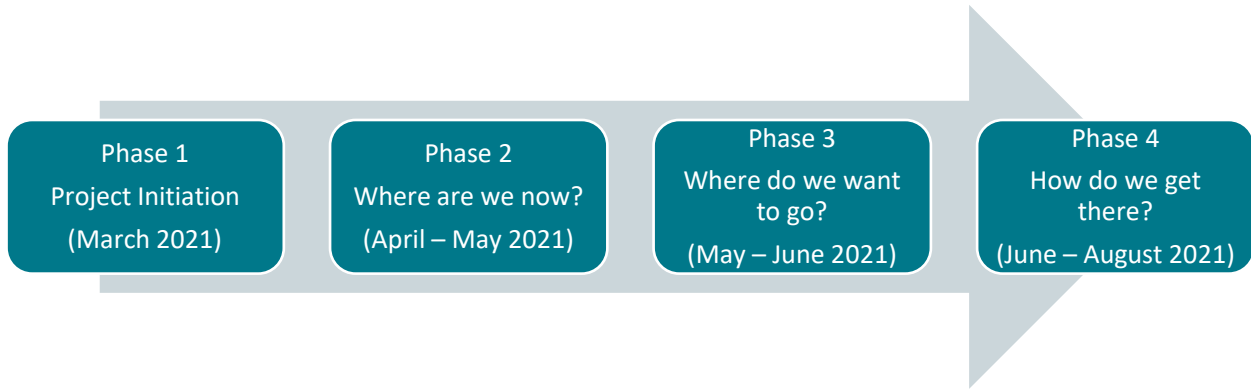
The 2021-2025 Corporate Strategic Plan considers the ongoing NWMO (Nuclear Waste Management Organization) Project. The key objectives of the Plan are to:

- Provide a long-term vision, medium-term objectives and action plans
- Articulate relevant performance metrics and identify alignment within municipal departments and partners that support the plans' successful implementation.



Strategic Planning Process

The process to develop the 2021-2025 Corporate Strategic Plan followed four interconnected steps, as illustrated below.



Following the project launch in March 2021, the strategy planning process started with a review of relevant documents, including the previous Corporate Strategy, budget documents and Asset Management Plan. Community consultations were a core aspect of the project. Interviews and group workshops were conducted with local and county-level municipal leaders, local business owners and civic champions. A survey of Municipal staff and residents provided critical input.

Beyond this final report, market analysis and community engagement results were captured in two technical reports: *Appendix I – Research & Analysis Report* and *Appendix II – Consultation Insights*. Those are provided under separate cover.

Public Engagement for Corporate Strategic Plan





South Bruce Today





The Community

The municipality of South Bruce has a unique character and spirit, shaped by the individual communities that make it, including the villages of Teeswater, Formosa and Mildmay and the former townships of Carrick and Culross. Created in 1999 as part of a county-wide municipal restructuring, the community is a blend of urban cores, agricultural lands, aggregate resources, and villages. This blend ensures access to essential products and services while ensuring the importance of retaining small-town character, local cultural heritage and agricultural roots.

Located on the southern border of Bruce County, South Bruce is connected to Ontario's most populous regions through well-maintained highways, including Highway 9, which runs through Mildmay. As the "Gateway to the Bruce," South Bruce provides one of a few well-worn paths to the beautiful beaches of Lake Huron's eastern shores and cottage country further north.

South Bruce's location offers the opportunity for future growth, and the population is anticipated to increase to 7,400 residents by 2046¹. That said, population growth is expected to be greater in Bruce County's urban centres as places like Kincardine and Saugeen Shores have anticipated growth and invested in advanced planning and infrastructure.

South Bruce is "Ontario's Cooperative Community" with leading local cooperative businesses like Gay Lea and Ontario Dairy Goat Cooperative. Farming and agriculture continue to be the economic mainstays for the community. In addition, South Bruce's economy is led by sectors including construction, manufacturing, real estate, retail trade and professional services. Furthermore, recent investments by Bruce Power and Kinectrics, including the latter's 40,000 square foot facilities, are a testament to the community's focus on environmental stewardship and local investment growth.

South Bruce's future employment growth will be primarily driven by work-at-home opportunities, particularly through diversified on-farm uses and knowledge-based occupations. Industrial employment within utilities, small/medium-scale manufacturing, construction, trades and transportation are also expected to grow.

Capitalizing on these opportunities will require the Municipality to address certain challenges. This includes lack of investment-ready growth areas, an aging population, ensuring community unity through the site selection process for the NWMO Project, difficulties related to attracting and retaining younger workers and young families, and a lack of support for seniors will affect the ability for residents to age in place.

Having a clear understanding of these opportunities and challenges is essential when developing the strategic plan, as these have longer-term implications for the municipality, and therefore require strategic goals and objectives to address them.

¹ Projections as part of the upcoming update to the Plan the Bruce: Good Growth project.



The Municipality's Facilities and Services

The Municipality of South Bruce provides a wide range of facilities, programs and services that play an important role in the day-to-day lives of South Bruce residents. These community assets contribute to making the municipality a more attractive and healthier place to live, work and play.

The Municipality owns facilities in Formosa, Mildmay and Teeswater. Recreation and outdoor activities are a priority for residents, as evidenced by the well-cared-for recreation centres and parks. Significant municipally-owned facilities include the Formosa Recreation Centre, the Mildmay-Carrick Recreation Complex, Formosa Community Centre and Teeswater-Culross Community Centre. The Municipality also offers two outdoor, heated pools within the community, namely, the Teeswater-Culross swimming pool and Mildmay-Carrick Swimming Pool. The municipality is also home to ball diamonds in Formosa, Mildmay and Teeswater. Recreational parks, including the Formosa Lions Park, Mildmay Rotary Park, Mildmay Optimist Arena Park, Mildmay Lions Wilderness Park and Teeswater Kinsmen Park, offer expansive greenspaces, playgrounds and picnic areas for the whole community.

In addition to the above, the community is also home to the Teeswater Town Hall. The Teeswater Town Hall has been the community focus of the village for more than a 130 years. This historic building offers modern updates and finishes and operates as a performance and event venue. Pre-pandemic on offer were recreational activities for seniors to enjoy, including the cards and crokinole.

The Municipality also has two fire stations within the community, namely, the Mildmay Carrick Station and the Teeswater Culross Station, providing a variety of fire rescue services and promoting fire safety. In addition to hospitals in the region, the Mildmay Community Medical Clinic, housed in an office space leased from the Municipality and operated by the Brockton and Area Family Health Team, provides critical health services to residents. The Municipality is also exploring options for retaining a medical facility in Teeswater. Currently, the Teeswater Medical Centre Development Steering Committee is collecting feedback from the community to understand the professional services that are most important to include in this facility.

Library services in the community is provided by Bruce County. The County operates libraries in Mildmay and Teeswater, providing residents with library materials, information and related programs and services.

These municipality-owned, County/municipality-maintained, and non-municipally owned facilities are community assets and speak to key strengths of the community and highlight the volunteer civic partnerships that have benefited the community for so many years.

To provide clarity on the current state of municipal services in South Bruce and where gaps may exist, the service levels of each asset were analyzed and compared to the insights obtained through community consultations. These observations are provided in *Appendix I – Research & Analysis Report*.

In response to provincial regulation that called for a comprehensive asset management plan, South Bruce's Asset Management Plan (AMP) was adopted by Council in 2015. It provides a 10-year financial plan and strategy for the municipality's assets. It notes that more than 30% of assets, with a valuation of \$60 million, are in poor to very poor condition, while 47% are in good to very good condition.



The Community's Voice

As detailed earlier, a comprehensive consultation process was undertaken to develop this Corporate Strategic Plan. The perspectives of Council, municipal staff, residents, business owners/managers and community organizations provide a clear picture of the current state of the municipality. The insights detailed here reflect the structure and function and the current strengths and weaknesses of the municipality. A summary is detailed below, and a complete list of consultation insights is provided in *Appendix II – Consultation Insights*.

The Community is engaged, involved and supportive

- South Bruce boasts a healthy sense of community stability and pride, backed by a supportive environment bolstered by local government, service clubs, volunteer groups, and dedicated, philanthropic citizens.
- Residents choose to live in South Bruce as it is a unified, safe and welcoming community. The community's affordability, laid-back and easy-going lifestyle and access to nature were also cited as the most appealing reasons for residents choosing to live in South Bruce.
- Volunteerism is high and local organizations have an interest in supporting the community.

Council and Staff are invested

- Stakeholders feel Mayor and Council are supportive and open to listening to the community's needs. They are also focused on growth, understand priorities (e.g. culture and infrastructure) and what needs to happen in the community.
- Considering the internal resourcing and corporate environment, working relationships within the Municipality are strong. Council support is high and Municipal leadership and staff are invested in the community.
- Stakeholders expressed a desire to see Council take bold actions and become a growth leader in the region.

Gaps in servicing capacity

- The Municipality needs to ensure corporate resources are aligned with the needs of the growing community. Gaps relate to the lack of serviced industrial land, housing shortage, infrastructure including broadband connectivity, and recreational and cultural amenities.
- Priorities for South Bruce residents include road and bridge maintenance and improvement, improved broadband, access to doctors and medical care, public transit, a broad range of housing options including senior-friendly accommodations and enhanced recreational, active transport and outdoor (parks/trails) facilities and programming.

Need to focus a long-term economic vision for the community

- There is an opportunity for the mayor and council members to develop a more unified vision of the community and leverage growth trends that strategically align with that vision.
- Opportunities exist to create a favourable environment investment and address infrastructure gaps such as water and sanitary sewer, transit, housing and broadband. There is an expressed desire to



streamline development processes and reduce red tape. Business needs include more supports through grants, economic development programming and other services.

- Opportunity to focus on the needs of the people the community wants to attract. With limited housing options for the aging demographic, aging in place will also be increasingly difficult for rural residents. Similarly, attracting immigrants and young professionals, and families requires good rental options, sufficient water and wastewater servicing, and diverse cultural and recreational amenities.

A good base of partnerships in place with the opportunity for growth

- Municipal Staff are invested and have taken a collaborative approach in working with partners, including local businesses, Bruce County, local organizations, support services and community groups.
- Opportunities to grow partnerships with Bruce County and other levels of government to ensure local priorities are addressed.

Opportunity to commit and learn about NWMO Project and address divisions in the community

- The current division in the community related to the NWMO Project will need to be addressed in the long term whether the Project is approved or not. Community concern, fear and lack of information dissemination need to be addressed.
- Council is dedicated to being open and learning about the NWMO Project and verifying any challenges. By doing this, they have made learning about the Project a priority.
- Broader communication is needed within the community as it relates to the NWMO Project. There are strong opinions on either side of the decision, and the public is concerned that this can fracture the community over the long term. This has implications on civic pride, volunteerism and investment.

Staffing capacity to improve service delivery performance

- Opportunities exist to improve staff capacity (e.g. economic development and finance departments) and staff support to perform duties.
- A lack of internal communication between departments and awareness of what was going on within other departments is a major barrier to performing current roles effectively. This also affects the ability of staff to liaise or refer residents and businesses effectively.

Opportunity to invest in technology-based tools

- The municipality has already invested in tools to support staff and municipal operations, including MESH (Asset and Work Management) program, online payments and building permits and live-streamed Council meetings.

Funding and advocacy is needed

- Gaps in funding may affect the Municipality's ability to provide services efficiently. Funding shortfalls also have to be balanced with fiscal realities and property tax policy.

Designing the Strategic Direction





The 2014-2019 Corporate Strategic Plan

The 2014-2019 Corporate Strategic Plan outlined a shared vision for the municipality to define the success of South Bruce and the diverse and unique ward areas that collectively form the municipality. Equally important, the Plan provided Council and staff with a framework or roadmap for decision making.

The goals and objectives contained in the plan build on the mission, vision and principles established throughout the strategic planning process and reflect the community engagement and input. The goals of the plan were:

- Create a strong corporate climate that supports local business growth and sustainability
- Create and promote a culture that practices clear communication, inclusiveness, transparency and accountability
- Secure the fiscal capacity necessary to develop and maintain infrastructure improvements that address bridge replacements, road resurfacing, and drainage concerns
- Create a strong corporate environment that supports retention and succession planning for municipal staff
- Support existing and new opportunities to attract new residents and retain young adults and senior populations

Trends in Municipal Governance

While we address day-to-day corporate operations, it can be challenging to keep an eye on future opportunities that will inform how we conduct business. It can be beneficial to scan the local government landscape and assess the initiatives and policies that other municipalities are adopting and determine if those are scaled and appropriate for our context. Below are some current trends in Canadian local governments that are worthy of consideration for South Bruce.

Inclusivity and Equity

The Accessibility for Ontarians with Disabilities Act (AODA) was established in 2005 to develop, implement, and enforce accessibility standards for people with disabilities within both the private and public sectors. There are currently five standards within the Act that address Information and Communications, Employment, Transportation, Design of Public Space, and Customer Service. Health Care and Education are two new AODA standards that are being developed. The AODA speaks to the municipalities responsibility to identify, prevent and remove barriers for people with disabilities. The compliance deadline for the public sector to adhere to the Act was January 2, 2021. The South Bruce Multi-Year Accessibility Plan 2019-2024, developed in accordance with the AODA, assists the Municipality in identifying, preventing and removing barriers to accessibility in each of the Municipality's by-laws, policies, practices and services. Provisions are in place to request accessible document through the Municipality's website. The Integrated Accessibility Standards Policy and Customer Service Accessibility Policy are also in place for staff to provide customer services.



Emergency Management

The Emergency Management and Civil Protection Act of Ontario details the requirements for local governments to have an emergency management program. Recognizing that emergencies can take varied forms (flooding, high wind events etc.), each municipality strives to have senior administration and other key staff members trained in emergency management. If the emergency exceeds the capacity of local government, then Council can establish an Emergency Operations Centre (EOC) and access Provincial support programs. The Municipality has a Community Emergency Management Coordinator (CEMC) to provide centralized direction and coordination of emergency response and recovery operations.

Indigenous Relations

Many municipalities across Canada have sought to improve their relationships with indigenous peoples, whether through a formal arrangement with local First Nations or with residents that identify as Indigenous. Section 43 of the Truth and Reconciliation Commission of Canada: Calls to Action (2015) addresses the role of government to establish the foundations for a positive working relationship whereby:

43. We call upon the federal, provincial, territorial, and municipal governments to fully adopt and implement the United Nations Declaration on the Rights of Indigenous Peoples as the framework for reconciliation.

Many Canadian local governments have taken this action and sought means by which to engage with First Nations to participate in decision-making in land use, economic and social development initiatives. Additionally, some local governments will acknowledge that their local government is located on the traditional territory at government functions such as Council meetings. It is becoming customary for local governments to invite First Nation representatives to important municipal events and ceremonies.

Governments as Economic Stewards Post-COVID-19

There has been a significant amount of discussion of what government's role should be as the economy begins to recover from COVID-19. Many local governments quickly responded to the private sector requests for assistance to meet COVID-19 requirements by modifying how public facilities operated through relaxing zoning bylaws (e.g. permitting outdoor dining spaces). The pandemic has brought to light discussions of the government's role as economic stewards and reviewing core business services, such as exploring local government interest in broadband connectivity as a government-owned/operated utility function.

Customer Centricity and Digitalization

Local governments have begun to respond to resident, business and other community stakeholders' concerns that they are not adequately engaging with them as customers. The shift in how governments share information, streamline procedures and meaningfully engage with their customers has taken several different forms. Many larger municipalities in Canada have created Open Data programs and policies that share data to make government more accessible and transparent.

The digitalization of government was front and centre during the COVID-19 pandemic as governments were forced to utilize new technologies to continue to perform their duties. From live streaming of Council meetings to the creation of online permit applications, governments across Canada became far



more agile in their policymaking and approach to customer service delivery.

Some governments have created new positions of Chief Customer or Experience Officer, and in smaller communities, the role of the Chief Administrative Officer has become more focused on customer engagement.

The shift towards a customer-centric approach for local governments has resulted in greater inclusivity and equity for those that government serves. South Bruce has been innovative in this space. For example, the South Bruce Switchboard allows their customers to complete online forms and submit them to South Bruce staff. South Bruce is also using online feedback for reporting a concern and for information relating to construction and road closures.

Sustainability and Environmental Stewardship

In many ways, when local governments consider environmental impacts, it is with a lens on emergency preparedness. Examining a municipality's carbon footprint (often in parallel to asset management programs) speaks to the government's commitment to environmental best practices and operational cost reductions. Seeking to offset Greenhouse Gas Emissions, for example, will inform future procurement considerations and land-use decisions. The Federation of Canadian Municipalities – Green Municipal Fund has successfully financed numerous local government initiatives across the country.

Identifying Goals for the Municipality

Council members, senior management and municipal staff identify that the goals of the 2014-2019 Corporate Strategic Plan are still relevant and reflective of current community conditions. Creating a solid corporate climate that supports local business growth and sustainability was identified as '*highly relevant*', followed by supporting existing and new opportunities to attract new residents, retain young adults and senior populations, and secure the fiscal capacity necessary to develop and maintain infrastructure.

The Strategic Goals rating 'highly relevant' (1) to 'least relevant' (5). Council Members.





In addition to the above, other priorities identified for the Municipality over the next five years include creating a favourable development environment that supports investment and economic growth. Favourable planning processes that reduce red tape and keep costs reasonable were identified as key considerations. Business attraction and retention and industrial land acquisition and development in the municipality's communities, including Teeswater and Mildmay were also identified.

Residential growth, including attracting new residents and young families, retaining youth and providing services and facilities for senior populations, remains a continued priority for the Municipality. Given the residential growth projected in the region, opportunities exist to increase the variety of housing, densify and infill vacant properties in Teeswater and Mildmay, and create aging-in-place options for seniors.

The municipality's physical infrastructure has seen improvements over the years; examples include road improvements, Town Hall repurposing as a community centre, improved fire services, and renovations to Mildmay Arena. The SWIFT initiatives and planned building of a new medical centre are steps in the right direction for the community. Stakeholders identify that South Bruce's service levels are high compared to municipalities of the same size and thus can meet current and future needs. There needs to be continued Council commitment, and long-term planning is needed to ensure sustainable infrastructure. For example, any industrial and residential investment efforts should consider the current water and wastewater servicing limitations. Similarly, waste management and fire services will require more equipment (e.g. trucks) to continue service delivery at current levels. This need is projected to increase as residential growth continues.

Considering the internal resourcing and corporate environment, Council support is high and Municipal leadership and staff are invested in the community. Furthermore, working relationships within the Municipality are strong. In addition to strengthening internal communication and Council transparency, opportunities exist to improve staff capacity and staff support to perform duties through training and succession planning. Stakeholders identified the need to enhance the Economic Development function of the Municipality. This was also identified as a priority in the 2014-2019 Corporate Strategic Plan. A similar need was identified within the Finance department as staff would be retiring within the next five years.

The Municipality has already invested in tools to support staff and municipal operations, including MESH (Asset and Work Management) program, a work order and asset management software designed to help governments evolve their operations. A budgeting system to support new staff is also being investigated. Online payments on the Municipal website through eCommerce software, online building permit software through Cloudpermit and South Bruce Switchboard have been introduced to support residents and businesses. Council meetings are streamed live through Zoom and are open to the public to help with decision-making transparency and clear communications. Digital infrastructure improvements, including online staff training and customer relationship management (CRM) tools, are new opportunities and services that can strengthen the Municipality's corporate position.

Main Street revival is another area of focus. However, Council members and staff highlight the need for a clear definition of the revitalization and the return on investment for South Bruce. Efforts should focus on filling empty storefronts, focusing events and programming on main streets, and shop local initiatives.

The NWMO Project site selection decision, anticipated by 2023, is likely the most significant decision the community will make since it was amalgamated in 1999. As part of the community's continued participation in the NWMO's site selection process, the Municipality will continually assess the Project's



potential contribution to community wellbeing and the community's willingness to host the Project. The municipality's 2021 Resource Budget from NWMO is \$2.2 million. Other contributions include \$30K annually for Education and Skills training, \$30K annually for Community Well Being and \$4M over 2020 to 2022 period for near-term investment in the community. These funding contributions have significant impacts on community growth, particularly as the community desires to expand the residential and non-residential tax bases. The Municipality and public are aware that will require advanced planning and investment in services and facilities. Thus, ongoing efforts to analyze the economic, social, environmental and fiscal impact of the NWMO Project on South Bruce are priorities. Partnerships and collaborators were identified as central to development, including those with the County of Bruce, local businesses and community groups.

Fiscally responsible decisions were forefront at the discussions to ensure that the Municipality continues to be financially stable, and that land acquisition funds, and infrastructure improvements and upgrades have minimal impact. A long-term fiscal vision is needed to sustain and improve existing infrastructure, facilities and services. Enhancing the corporate function in terms of staff, equipment and tools, and services will also have a parallel impact on funding and financing.



2021-2025 Corporate Strategic Plan





Overview

Building on the insights and goals identified by Council, Municipal staff, business leaders, residents and community members, the 2021-2025 Municipality of South Bruce Corporate Strategic Plan was developed. The Plan is an update to the 2014-2019 Corporate Strategic Plan and is a vision of where a municipality wants to be in the future and the steps it will need to take to get there. The Strategic Planning Framework for the 2021-2025 Municipality of South Bruce Corporate Strategic Plan is described below.

- The **Vision** represents the future desired state of South Bruce. It comprises aspirations and identifies the community's long-term future state and what the community chooses to be.
- The **Corporate Mission** builds on the vision and captures why the Municipality of South Bruce exists and guides the actions of the Municipality.
- **Corporate Values** lay the foundation and direction by which the municipality will conduct its affairs and are grounded in key principles that reflect the community's needs, values, aspirations, and goals at large.

A core purpose of the strategic planning process is to identify the goals that Council and Municipal Staff will focus on during Council's term. This helps focus energy and resources and ensures that Council, staff and partners are working toward a shared purpose to achieve established outcomes and results. It also enables the organization to assess and adjust direction in response to a changing environment. Effective strategic planning articulates where an organization is going, and the actions needed to make progress and know if it is successful.

- Goals focus energy and resources to achieve the core mission statement and vision
- Objectives anchor and qualify all ensuing actions
- Actions are key to achieve desired results over a specific time

The Vision for the Municipality of South Bruce

As part of the Corporate Strategy update, Municipal Council, senior management and staff, local businesses and community organizations were asked to provide their vision for South Bruce to 2031. The following input was used to craft the current vision for the municipality.

The 2031 Vision for South Bruce is a vibrant, welcoming and multicultural community that residents are proud to call home. While preserving the small-town closeness and community, South Bruce provides accessible and affordable amenities for residents and businesses. Residential growth is realized, and the community is vibrant with new subdivisions and commercial and industrial development.

Farming and agriculture will continue to be supported with new investments that drive opportunities in agribusiness and agri-tourism. South Bruce will drive local and regional impact, allow for business attraction, retention, and growth, focusing on agriculture, manufacturing, construction, transportation, and nuclear. Residents have good jobs, youth are supported, and volunteers and community organizations are recognized. South Bruce supports retirement living, recreational facilities and year-round experiences.



Word Cloud Based on Stakeholder Input to the 2031 Vision for South Bruce



Based on the above input, the following vision has been created. The vision was updated to represent current community priorities based on stakeholder input.

The Vision for the Municipality of South Bruce follows:

In South Bruce, people care about one another and enjoy seeing each other succeed. It's common for us to volunteer in local groups and support locally-owned and operated businesses. We're proud to call this community home and won't hesitate to tell others about our piece of paradise.



The Corporate Mission of the Municipality of South Bruce

The mission statement was developed through the strategic planning session for the 2014-2019 Corporate Strategic Plan and remains relevant for the 2021-2025 planning period.

The Corporate Mission of the Municipality of South Bruce follows:

To provide appropriate and efficient services and programs to residents and businesses of the municipality that will enhance quality of life and provide a safe, inclusive and desirable environment to work and raise families.

Corporate Values

The Corporate Values for the Municipality of South Bruce Corporate Strategic Plan lays the foundation and direction by which the Municipality will conduct its affairs and is grounded in beliefs that reflect the community's aspirations.

Excellent Customer Service

- We deliver professional, consistent, and excellent customer service through our every interaction. Ongoing communications are established with the community to understand better how best to serve their needs and ensure they have had a quality experience.

Empathy, Respect and Transparency

- As an organization, we demonstrate transparency, both internally and externally. An empathetic approach is taken, based on respect for our neighbours and a greater appreciation of community expectations.

Informed Decision-Making

- We engage in well-informed decision-making and seek to utilize all the necessary background facts and relevant information to make the best decisions for our residents.

Progressive Municipality

- The Municipality is positioned well for the future to encourage growth through innovative approaches. Leadership will embrace the future with integrity and not default to the status quo.

Reliability and Stewardship

- Council and staff will ensure the public are treated fairly and conduct the Municipality's business in an open, trustworthy, and reliable manner that illustrates return on investment. "We do what we say we are going to, and people can rely on us for our promises."



Sustainability

- The decisions we make are made on behalf of both present and future generations. We think about and balance our current needs with financial and environmental considerations towards the future.

Inclusive, Healthy and Safe Living

- We are an accessible community inclusive of all people. Decisions will be made to balance growth and foster smaller town living where families can be comfortable and safe.

Goals for the Municipality

As identified in the section above, several priorities emerged through the consultation and research process. The priorities were analyzed and determined to be both foundational and strategic. Foundational goals ensure that the Municipality is progressive, financially sound, and operates in an open, trustworthy, and reliable manner. These foundational goals will ensure that the Municipality can effectively capitalize on opportunities and address challenges. Achieving foundational goals will also ensure that the Municipality can address the community's priorities.

The 2021-2025 Municipality of South Bruce Corporate Strategic Plan establishes five goals for the Municipality. These include two foundational goals and three strategic goals.

Foundational Goals

- Open Government
- Operational Efficiency

Strategic Goals

- Progressive and Growing Economy
- Healthy and Vibrant Communities
- Environmental Stewardship

The goals, objectives and actions form the Corporate Strategic Action Plan and are detailed below.

Action Plan

The goals for South Bruce's Corporate Strategic Action Plan update are highly interrelated, and if implemented effectively, the objectives and actions will ensure a strong and sustainable Corporate function. The timing for the associated actions that serve to implement the strategy is categorized as either short term (S = 1-2 years), medium-term (M = 3-4 years) and long term (L = 5 years or longer). The framework for the Corporate Strategic is illustrated below. The acronyms used in the action plan are described in Page 2.





Foundational Goal #1: Open Government

Open government makes government more accessible to everyone, following the principles of transparency, accountability and participation. The Organisation for Economic Co-operation and Development (OECD) defines open government as "a culture of governance based on innovative and sustainable public policies and practices inspired by the principles of transparency, accountability, and participation that fosters democracy and inclusive growth."

Rationale

In being transparent, inclusive and participatory, the Municipality can ensure that citizens are aware of its actions, budgets and performance. Citizens are co-creators involved in formulating, implementing and following public policies for better public management. Furthermore, in promoting open government principles, the Municipality will continue to be receptive to citizen needs and adapt to become a more open and effective institution.

The Municipality of South Bruce is committed to being open through initiatives such as Committees of Council and Freedom of Information Requests. Council meetings are live-streamed, and agendas and minutes are posted on the municipal website. Annual budget and financial statements are also published to ensure financial transparency. Opportunities exist for the Municipality to build on these existing initiatives, enhance internal and external communications, foster partnerships and advocate for local priorities.

Outcome

The Municipality of South Bruce will operate in an open, inclusive and transparent manner to ensure that all residents and stakeholders have easy access to information and effectively participate in the democratic process.

Alignment with the 2014-2019 Corporate Strategic Plan

- Create and promote a culture that practices clear communication, inclusiveness, transparency and accountability.
- Create a strong corporate climate that supports local business growth and sustainability.

Objectives

- Enhance internal and external communications for continuous learning and effective distribution of relevant information.
- Continue to foster partnerships and advocate for local priorities.



#	Objectives and Actions	Lead/Partner	Timing		
			S	M	L
F1	Enhance internal and external communications for continuous learning and effective distribution of relevant information				
F1.1	Review the Communication Strategy to assess the effectiveness of the current methods used to engage and report to residents, businesses, and community organizations.	South Bruce			
F1.2	Develop an Annual Corporate Report that informs citizens on the corporate goals and Municipality's progress, highlighting the status of priority actions and success stories.	South Bruce			
F1.3	Conduct representative annual citizen satisfaction surveys to be continually aware of citizen needs.	South Bruce			
F1.4	Engage with and provide opportunities for youth in the community, including establishing a Youth/Young Professionals Sub-Committee.	South Bruce/NWMO			
F1.5	Conduct corporate-wide communication and public relations training for Council and staff to improve awareness of municipal operations across all departments and the strategic plan.	South Bruce			
F2	Continue to foster partnerships and advocate for local priorities				
F2.1	Continue to advocate the County, Province and Federal governments for funding, policy change and infrastructure improvements to support local business and community priorities.	South Bruce			
F2.2	Actively participate in the Municipal Innovation Council to uncover best practices, service opportunities and knowledge exchange.	South Bruce/MIC			
F2.3	Continuously engage with local community groups and volunteer organizations to ensure support and operate facilities and deliver programs and services.	South Bruce			
F2.4	Continue to maintain open lines of communications with NWMO to learn and understand the impact of the NWMO Project on the community.	South Bruce/NWMO			
F2.5	Advance the Municipality's learning and participation to continue creating a meaningful pathway for reconciliation and indigenous inclusion ² .	South Bruce/ Bruce County; CLC, NWMO			

² In partnership with the CLC, further Indigenous Knowledge through cultural awareness training.



Foundational Goal #2: Operational Efficiency

Operational efficiency ensures good governance by demonstrating superior service delivery and responsible financial management. With the right combination of people, processes and technology, a Municipality can reduce barriers while optimizing performance to provide the maximum value to residents, businesses and other customers. Operational efficiency results in the Municipality being more productive, efficient and sustainable for the citizens.

Rationale

Demonstrating operational efficiency will ensure that the Municipality continuously learns of operational transformation opportunities, threats and challenges. This will enable business models to identify costs and continuous improvement opportunities and manage resource constraints by understanding capacity and utilization. It will ensure that the Municipality attains a holistic and interconnected network and as a driver of innovation and implements technologies to transform and enhance the reach and impact of its action.

In keeping with its commitment to ensuring financial transparency, the Municipality has published annual budget and financial statements. In addition, the Municipality has invested in tools to support staff and municipal operations, including MESH (Asset and Work Management) program, a work order and asset management software designed to help governments evolve their operations. To support residents and businesses, online payments and building permits software have been implemented.

Outcome

The Municipality of South Bruce demonstrates superior service delivery and responsible financial management to ensure a balanced social, cultural, economic, and environmental approach.

Alignment with the 2014-2019 Corporate Strategic Plan

- Create a strong corporate environment that supports retention and succession planning for municipal staff.
- Secure the fiscal capacity necessary to develop and maintain infrastructure improvements that address bridge replacements, road resurfacing, and drainage concerns.

Objectives

- Invest in processes and tools for efficient and effective service delivery.
- Promote a corporate culture that empowers and supports municipal staff.
- Ensure longer-term fiscal sustainability of the municipality.



#	Objectives and Actions	Lead/Partner	Timing		
			S	M	L
F3	Invest in processes and innovative tools for efficient and effective service delivery				
F3.1	Task senior management across all departments to develop Departmental Report Cards to track progress, ensure that business plans are aligned and reflect strategic plan priorities.	South Bruce			
F3.2	Undertake a corporate service delivery review to ensure effective service delivery and improve efficiencies.	South Bruce			
F3.3	Investigate the feasibility of online technology tools and/or market intelligence platforms to ensure service delivery effectiveness.	South Bruce			
F3.4	Continue to advance accessibility practices such as reviewing and updating the Accessibility Plan every year and ensure that documents and applications are AODA compliant and available on the municipal website ³ .	South Bruce			
F3.5	Investigate the applicability of hiring a grant writer to access programs and complete funding applications.	South Bruce			
F4	Promote a corporate culture that empowers and supports municipal staff				
F4.1	Explore opportunities to improve staff's capacity through professional development support to take on more management and leadership roles.	South Bruce			
F4.2	Develop and implement a comprehensive Succession and Retention Strategy for staff.	South Bruce			
F4.3	Ensure an open and collaborative work environment that recognizes staff achievements and ensures they feel supported in their roles.	South Bruce			
F4.4	Incorporate and promote inclusivity in the workplace and broader community through training programs, networking and workshops.	South Bruce/ Bruce County			
F5	Ensure the longer-term fiscal sustainability of the municipality				
F5.1	Ensure that the necessary human and capital resources are allocated in the annual budget to ensure effective service delivery.	South Bruce			
F5.2	Effectively integrate the recommendations of the AMP with financial planning and long-term budgeting to address infrastructure needs.	South Bruce			
F5.3	Engage with senior levels of government to identify partnerships that will result in financial support and funding opportunities for local infrastructure projects.	South Bruce/Bruce County			
F5.4	Investigate the applicability of the NWMO Project funding to finance new projects and services.	South Bruce/NWMO			

³ Publish the Strategy on Municipal website to ensure that citizens are awareness of strategies in place.



Strategic Goal #1: Progressive and Growing Economy

A focus on creating a progressive and growing economy ensures that the priorities of local businesses and related stakeholders are addressed. It enables a development environment that encourages investment, economic growth and innovation. It also ensures that the economy is supported by a talented and robust labour force available for year-round, stable employment.

Rationale

Supporting new and existing businesses is important to the overall growth of the community. While the Municipality, in partnership with Bruce County, has developed targeted initiatives to support local businesses, research for this strategy points to business owners/managers having limited knowledge of the type of available services and how to access those services. Furthermore, they identify difficulties in attracting and retaining workers. The Municipality lacks sufficient shovel-ready employment lands to allow for growth and investment. As per *Plan the Bruce: Good Growth* interim report, the municipality only has 6 net hectares of employment land, 2% of Bruce County's inventory.

Work-at-home opportunities will significantly drive south Bruce's future employment growth. This includes diversified on-farm uses and service sector employment, including knowledge-based occupations. Information and communications technology will be a critical enabler to drive this growth. Industrial employment within utilities, small/medium-scale manufacturing, construction, trade and transportation are also expected to grow.

Given these opportunities, the Municipality should develop a clear understanding of where and when growth will occur and be sustainable and competitive. The strategic objectives and action plan of the South Bruce Economic Development Strategy provide critical direction for the municipality to ensure it continues to be a progressive and growing economy. This includes a focus on building the foundation, agricultural innovation and village revitalization.

Outcomes

South Bruce is a progressive and growing community and offers a favourable environment that supports a strong business ecosystem, investment and economic growth.

Alignment with the 2014-2019 Corporate Strategic Plan

- Create a strong corporate climate that supports local business growth and sustainability.

Objectives

- Foster a favourable business environment that supports existing businesses, creates local employment opportunities and attracts new business investment.



#	Objectives and Actions	Lead/Partner	Timing		
			S	M	L
S1	Foster a favourable business environment that supports existing businesses and attracts new investment				
S1.1	Conduct representative annual business satisfaction surveys to be continually aware of business needs.	South Bruce			
S1.2	Commission an internal review of the planning and approvals process to ensure favourable development process.	South Bruce			
S1.3	Continue to engage with Bruce County to ensure South Bruce's priorities are represented in the County's Official Plan update and associated projects.	South Bruce/ Bruce County			
S1.4	Investigate the applicability of a business coordinator position as part of Bruce County's business visitation efforts in coordination with a municipal resource.	South Bruce/ Bruce County			
S1.5	Regularly engage with local partners in workforce development to ensure a stable supply of skilled and semi-skilled workers ⁴ .	South Bruce/ Bruce County			
S1.6	Continue support for the village revitalization through grants to community groups and citizens.	South Bruce/ Bruce County			
S1.7	Support the preparation of shovel-ready employment/industrial lands to ensure long-term competitiveness.	South Bruce/Bruce County			

⁴ Adapt the Bruce County Workforce Development & Attraction Strategy.



Strategic Goal #2: Healthy and Vibrant Communities

Healthy and vibrant communities allow residents to have an excellent quality of life. They include the amenities, recreational and cultural opportunities that contribute to economic, social and mental well-being. Addressing infrastructure challenges ensures that communities can retain residents and attract a diverse array of new residents and ensure long-term vitality.

Rationale

Despite its many strengths, South Bruce faces challenges, including infrastructure gaps, namely, transit, housing, broadband and insufficient care/retirement options for an aging demographic. Gaps in main street revitalization was also identified as a challenge. The 2016 South Bruce Asset Management Plan (AMP) identified that more than 30% of assets, with a valuation of \$60 million, are in poor to very poor condition, while 47% are in good to very good condition. This could affect the ability of the community to meet the needs of current residents and attract people to live and work in South Bruce permanently.

People are increasingly seeking opportunities to connect with nature and experience arts and culture in new and exciting ways. The Municipality and its partners should make purposeful place-based investments that create a vibrant, inclusive, prosperous and unique community.

Investing in infrastructure requires an in-depth understanding of the current fiscal conditions and long-term planning budgeting. Furthermore, creating healthy and vibrant communities is based on the principle that residents determine their preferred vision for the future and are co-creators in the decisions that impact their well-being. Thus, the foundational goals of Open Government and Operational Efficiency are important to achieve this goal. In addition, this goal is connected to the strategic goal of Progressive and Growing Economy.

Outcomes

South Bruce is a community that invests in its people and supports physical and mental well-being by encouraging positive lifestyles, preserving natural beauty, and helping people pursue their passions.

Alignment with the 2014-2019 Corporate Strategic Plan

- Secure the fiscal capacity necessary to develop and maintain infrastructure improvements that address bridge replacements, road resurfacing, and drainage concerns.
- Support existing and new opportunities to attract new residents and retain our young adults and senior populations.

Objectives

- Celebrate and promote the municipality's strengths to attract investors and residents.
- Maintain and enhance infrastructure to meet existing and future resident and business needs.



#	Objectives and Actions	Lead/Partner	Timing		
			S	M	L
S2	Celebrate and promote the municipality's strengths to attract investors and residents				
S2.1	Develop consistent, clear messaging and positive reinforcement of community strengths and assets as attractors for residents, investors, businesses, and tourism.	South Bruce			
S2.2	Collaborate with immigration/newcomer agencies and stakeholders to strengthen resident attraction in South Bruce ⁵ .	South Bruce/GBLIP			
S2.3	Develop a Parks, Recreation & Culture Master Plan to guide Council, staff and community stakeholders on leisure service delivery in South Bruce.	South Bruce/NWMO			
S2.4	Negotiate opportunities for partnership and collaboration with local and area developers interested in residential development.	South Bruce/Developers			
S3	Maintain and enhance infrastructure to meet existing and future resident and business needs.				
S3.1	Position a multi-disciplinary Steering Committee of staff, Council, residents, businesses and stakeholders to inform the establishment of an assisted living/long-term care facility for seniors.	South Bruce/Bruce County; developers			
S3.2	Building on the Bruce County Long Term Housing Strategy, work with Bruce County to investigate the applicability of and meeting housing objectives to attract and retain residents.	Bruce County/South Bruce			
S3.3	Investigate the applicability of enhancing water and wastewater servicing to meet industrial needs.	South Bruce/ Bruce County			
S3.4	Continue to advocate for broadband and reliable cell networks across the municipality including the rural hamlets and villages. (e.g. SWIFT ⁶).	South Bruce/Bruce County			
S3.5	Update the 2016 AMP and use it develop infrastructure plans and to secure funding to meet infrastructure goals. (e.g. Investing in Canada Plan ⁷).	South Bruce			
S3.6	Advocate for the provision of reliable public-transit to connect the rural areas with the urban cores ⁸ .	Bruce County/South Bruce			
S3.7	Foster creativity through an arts/culture community hub that may include performing arts space, a makerspace for artisans, environmental education programming, and enhanced library services. A feasibility study should consider existing facilities ⁹ .	South Bruce/CLC			

⁵ Develop experiences and packages to showcase South Bruce to newcomers, potential residents and support businesses recruiting talent to the community.

⁶ SWIFT Broadband, swiftruralbroadband.ca

⁷ Investing in Canada Plan, infrastructure.gc.ca/plan/about-invest-a-propos-eng.html

⁸ Track progress of the Bruce County Master Transportation Plan Study.

⁹ See www.artsbuildontario.ca/building/creative-hubs/ for further rationale/examples.



Strategic Goal #3: Environmental Stewardship

Environmental stewardship refers to the responsible use and protection of the natural environment through conservation and sustainable practices.

Rationale

South Bruce is a unique and diverse municipality. It offers significant community strengths, including rolling hills, scenic roadways, trails and parks, rich agricultural lands, hamlets and main streets and cultural, heritage and recreational amenities. The Municipality faces both urban and rural growth pressures. Growth is projected for its urban centres as families search for affordable housing located in proximity to local amenities and employment markets. An important consideration for the municipality is managing this growth and conserving its natural resources and agricultural land. Thus, implementing sound stewardship programs is a priority for the community. Given the proximity of Bruce Power and clean energy-based investments and initiatives such as Kinetricks and the Municipal Innovation Council (MIC), the municipality is well-positioned to build energy efficiency and sustainability principles.

Outcomes

South Bruce is a healthy, vibrant, and sustainable community with empowered citizens, conserved natural resources, energy-efficient and sustainable.

Alignment with the 2014-2019 Corporate Strategic Plan

N/a

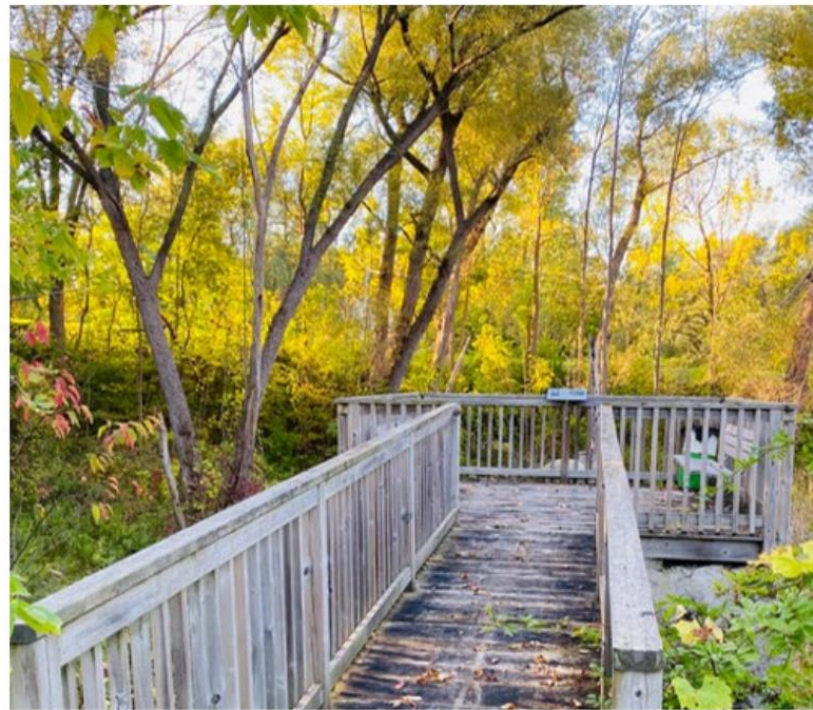
Objectives

- Promote and incorporate environmentally sustainable practices throughout the community.



#	Objectives and Actions	Lead/Partner	Timing		
			S	M	L
S4	Promote and incorporate environmentally sustainable practices throughout the community				
S4.1	Establish an environmental committee to pursue stewardship goals and care for their land (e.g. Stewardship Grey Bruce).	South Bruce/local groups			
S4.2	Investigate and promote Best Management Practices (BMPs) on agricultural operations that will enhance farm production and protect natural resources.	South Bruce			
S4.3	Implement community programs that encourage residents to care for their land and natural habitats (e.g. Good Neighbours Program).	South Bruce/local groups			
S4.4	Develop and implement an environmental plan consistent with the Ontario government's goals for environmental conservation, waste diversion/reduction and protecting our air, land and water.	South Bruce			
S4.5	Determine the Municipality's carbon footprint and establish goals for GHG reduction through daily practices and within major strategies such as the updated AMP.	South Bruce/ Green Municipal Fund			
S4.6	Investigate energy efficiency upgrades across municipal buildings and infrastructure to reduce environmental impact and uncover cost savings over the long term.	South Bruce			
S4.7	Expand greenspace by creating new parks or engaging trusts to secure environmentally sensitive habitats.	South Bruce/local groups			





Municipality of South Bruce - Corporate Strategy & Local Economic Development Strategy Update

Technical Report – Research and Analysis

June 2021



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About this Report

This *Technical – Research & Analysis Report* serves as the background report to the Corporate and Local Economic Development Strategies Updates. It details the results of *Phase 2 - Where are we now? Market Analysis & In-Community Engagement* and includes the following sections:

- **Document Review** – an overview of themes that emerged from a review of strategies, reports and planning documents to inform the corporate strategy and approach to economic development in the municipality.
- **Municipal Assets & Services** – a high-level overview of municipal services, focussed on the Asset Management Plan to support the infrastructure priorities for the municipality.
- **Economic Profile** – overview of the current demographic, labour force, and industry composition in South Bruce relative to Bruce County.



1. Document Review

The document review provides an overview of the key themes that emerged from a review of strategies, reports and planning documents to inform the corporate strategy and local economic development strategy updates. A review of Bruce County’s economic development and planning efforts was also completed to gain an understanding of the County’s role and areas of economic development collaboration and efforts.

A full list of documents reviewed is listed below:

- Municipality of South Bruce Economic Development Strategy (2014-2019)
- Municipality of South Bruce Corporate Strategic Plan (2014–2019)
- Municipality of South Bruce 2021 Budget Presentation
- The 2016 Asset Management Plan for the Municipality of South Bruce
- Community Improvement Plan. Municipality of South Bruce (Mildmay and Teeswater)
- Nuclear Waste Management Organization Site Selection Process 2020
- The Official Plan for the Formosa, Mildmay and Teeswater Settlement Area. The Urban Communities of the Municipality of South Bruce. 2005
- “Find Yourself in Bruce County” Bruce County Economic Development Strategic Plan (2017-2021)
- Bruce County Corporate Strategic Plan (2013 – 2023)
- Bruce County Official Plan
- Bruce County Workforce Development and Attraction Strategy (2021 - 2025).

1.1 Current Policy & Economic Development Framework

1.1.1 Regional Context

The “Find Yourself in Bruce County” Economic Development Strategic Plan 2017-2021 is the foundation for key initiatives currently underway in Bruce County with the overarching goal to “stimulate and reward innovation and economic development.” The plan was developed in consultation with member municipalities and defined a macro economic development approach, whereby the County would provide the regional framework, support member municipalities and act in a leadership capacity. The plan identified two strategic priority areas, namely, **Business Development** (business support, workforce development and business marketing/promotion) and **Sector Development** (tourism attraction and product development, nuclear/energy support and agriculture enhancements)

Key County-based economic development programs that deliver on these strategic priorities include:

- Business to Bruce – Supports local entrepreneurs through resources, grants, data and tools to build sustainable and prosperous new business ventures and expand existing ones.
- Spruce the Bruce – Community development, downtown revitalization and stakeholder coordination.



- Explore the Bruce – Marketing and promotion of Bruce County to potential new residents, business owners, and visitors.
- Bruce Innovates – Research into the potential of producing clean hydrogen from off-peak nuclear and renewable energy.
- Economic Task Force and Business Recovery – Comprised of economic development professionals, business owners, local stakeholders, and municipal staff with a mandate to support local businesses and guide recovery efforts.¹

Other key policies and initiatives that are of relevance to South Bruce include Bruce County Corporate Strategic Plan (2013-2023) and Bruce County Official Plan. Strategies in the Bruce County Corporate Strategic Plan that are of relevance to South Bruce include improved communication and promoting a ‘unified voice’ for the County. Bruce County is currently updating its Official Plan as a roadmap for local economic growth and development for the upcoming 25 years. The Plan is designed around 8 projects or guiding principles and includes agriculture, business, communities, connecting, good growth, heritage, homes and natural legacy.

1.1.2 Local Context

Municipality of South Bruce Corporate Strategic Plan, 2014 – 2019

The Corporate Strategic Plan’s envisioned South Bruce as a growing, dynamic, agriculturally rooted community that provides accessible and affordable amenities for residents and businesses, creating an environment supportive of growth, vibrant downtowns that foster small business, and a unique, year-round destination experience. The goals of the plan were to:

- Create a strong corporate climate that supports local business growth and sustainability.
- Create and promote a culture that practices clear communication, inclusiveness, transparency and accountability.
- Secure the fiscal capacity necessary to develop and maintain infrastructure improvements that address bridge replacements, road resurfacing, and drainage concerns.
- Create a strong corporate environment that supports retention and succession planning for municipal staff.
- Support existing and new opportunities to attract new residents and retain our young adults and senior populations.

While significant progress has been obtained with undertaking a comprehensive asset management plan in 2016, progress should continue with other elements of the corporate plan. These include continued fostering of a favourable corporate climate for business growth, clear communications, infrastructure improvements, community capacity and residential growth.

Municipality of South Bruce Economic Development Strategy, 2014 – 2019

The Municipality of South Bruce undertook its first Economic Development Strategy in 2014 to lay the foundations for future growth and establish the necessary directions and actions to achieve success. The

¹ Bruce County, Media Release “[Bruce County Launches Economic Task Force, Expands Supports to Local Businesses](#)”, March 27 2020



strategy identified the most feasible and suitable opportunities to stimulate increased growth and development in the municipality of South Bruce. Eight priority recommendations focused on creating the foundational elements for economic development, stimulating downtown revitalization, local food experiences and tractor culture, marketing the South Bruce Business Park, value-added agriculture and food processing, residential development and the NWMO project. The Strategy also identified target sectors for the municipality, including agriculture, food and beverage manufacturing, tourism and hospitality, aggregate sector (e.g., cement and concrete product manufacturing) and wood product manufacturing.

A review of the strategy and progress to date identified gaps and opportunities for focus and advancement. This includes a more targeted focus on industrial development, investment attraction, business growth, workforce development, community capacity and continued stronger collaboration with the County.

1.2 Population, Housing and Employment Growth Forecasts

The Plan the Bruce: Good Growth interim report, released as part of Bruce County's Official Plan review, provides some key highlights that are of relevance to South Bruce as it moves forward in its economic development and growth agenda. Key insights from this report are detailed below.

Population and Housing Forecasts

- Population growth is expected to occur due to outward growth pressure from the Golden Greater Horseshoe (GGH) and will be concentrated in Bruce County's urban centres.
- As the local and regional economies grow, it will drive net migration and improve the County's attractiveness to empty nesters and seniors
- As the population grows, it will, in turn, create demand for new housing across the County
- Housing demand is anticipated to remain strong, fueled by low mortgage interest rates, outward growth pressure from the GGH and employment opportunities associated with the Bruce Power refurbishment
- Housing will continue to shift towards Primary and Secondary Urban Communities as new families are attracted to the County in search of affordably priced, ground-oriented housing located within proximity to local urban amenities (i.e., schools, retail, personal service uses) and surrounding employment markets
- By 2046, the County's population is forecast to increase by 17,740 people, from 68,260 people in 2016 to 86,000 in 2046. The housing base is forecast to increase to 36,900 households from 28,230 in 2016.
- The Municipality of South Bruce will account for 7.8% of Bruce County's population, growing from 5,790 people in 2016 to 6,700 people in 2046.
- The Municipality of South Bruce will account for 7% of Bruce County's housing, with households increasing from 2,210 in 2016 to 2,600 in 2046.
- The Town of Saugeen Shores is expected to accommodate the largest share of housing growth over the 2016 to 2046 forecast period, with 41% of County-wide new housing development.



Figure 1: Population and Housing Projections for Bruce County, 2016-2046

Bruce County	Population					Growth 2016-2021		Growth 2016-2046	
	2016	2021	2026	2031	2046	Net	%	Net	%
Population	68,260	73,500	76,700	79,500	86,000	5,240	8%	17,740	26%
Housing	28,230	30,600	32,200	33,400	36,900	2,370	8%	8,670	31%

Source: Plan the Bruce: Good Growth, Interim Report, March 2021

Figure 2: Population and Housing Projections for South Bruce, 2016-2046

South Bruce	Population					Growth 2016-2021		Growth 2016-2046	
	2016	2021	2026	2031	2046	Net	%	Net	%
Population	5,790	6,000	6,100	6,300	6,700	210	4%	910	16%
Housing	2,210	2,300	2,400	2,400	2,600	90	4%	390	18%

Source: Plan the Bruce: Good Growth, Interim Report, March 2021

Employment Forecasts

- Employment opportunities in the County are anticipated to be largely driven by local employment opportunities associated with the Bruce Power refurbishment project as well as opportunities within the County's export-based employment sectors.
- The majority of this employment will be concentrated in Kincardine, driven by the Bruce Power refurbishment
- 31% of County-wide employment growth will be in industrial employment. Sectors that see growth include utilities, small/medium-scale manufacturing, construction, wholesale trade and transportation and warehousing.
- 16% of County-wide employment growth will be work at home. This will include diversified on-farm uses, service-sector employment, including knowledge-based occupations further enabled by improved telecommunications technology.
- South Bruce will account for 5.6% of Bruce County's employment by 2046, from 1,740 in 2016 to 2,300 jobs in 2046
- Of the 2,300 jobs; the majority will be work at home employment (32%), followed by industrial (18%), commercial/population-related (16%) and primary (11%)
- South Bruce's urban areas are expected to accommodate 75% of employment growth by 2046, with the rural area accounting for the remaining 25%

Figure 3: Employment Projections for Bruce County, 2016-2046

Bruce County	Population					Growth 2016-2021		Growth 2016-2046	
	2016	2021	2026	2031	2046	Net	%	Net	%
Employment	29,790	34,800	37,000	38,300	40,600	5,010	17%	10,810	36%

Source: Plan the Bruce: Good Growth, Interim Report, March 2021



Figure 4: Employment Projections for South Bruce, 2016-2046

South Bruce	Population					Growth 2016-2021		Growth 2016-2046	
	2016	2021	2026	2031	2046	Net	%	Net	%
Employment	1,740	1,900	2,000	2,100	2,300	160	9%	560	32%

Source: Plan the Bruce: Good Growth, Interim Report, March 2021

Vacant developable vacant industrial land supply is a concern as the municipality only has 6 net hectares of land, 2% of Bruce County’s 259 net hectares. Also, development should consider the role of Community Improvement Plans (CIPs) to facilitate and encourage economic activity. Overall, the report recommends that Bruce County clearly understand where and when growth will occur and develop a long-term vision that is sustainable and competitive. Twenty specific policy themes were presented that relate to both residential and non-residential growth policies, which should be incorporated within the Official Plan.

1.3 Document Review Themes and Emerging Findings

The review of economic development programs, efforts and initiatives at both the County and Municipal levels have resulted in the following key findings/observations. The following observations are important, as they highlight themes that are strongly represented in the local municipal framework and areas to ensure effective alignment with current and future local priorities and the broader County efforts.

1.3.1 Sector Development

Agriculture is a key focus area for the Municipality, with opportunities in agriculture and value-added food processing sectors. Opportunities associated with agriculture are documented in South Bruce’s Economic Development Strategy (2014-2019) and Bruce County’s 2017-2021 strategic plan. Opportunities exist to foster partnerships with regional education and government partners, including the University of Guelph and OMAFRA, to realise sector growth. Through the Business to Bruce program, the County is also working on clustering around agri-food processing and value-added production, as well as the development of a rural agricultural plan.

The Municipality was among the 22 municipalities and Indigenous communities that expressed an interest in hosting the Deep Geological Repository (DGR) facility and is now one of two final siting areas (along with the Township of Ignace) under consideration. The Municipality of South Bruce is currently undertaking several studies related to the project and the long-term management of used nuclear fuel. As identified in South Bruce’s Economic Development Strategy and Plan the Bruce: Good Growth interim report, opportunities exist for the municipality to capitalize on the anticipated growth of the nuclear sector and economic spin-offs, particularly with the Bruce Power refurbishment and Nuclear Innovation Institute.

1.3.2 Employment Lands and Investment Attraction

Capitalizing on sector growth will require consideration from the municipality to foster employment areas, including medium and heavy industrial lands, business parks and rural industrial lands. As identified in the Plan the Bruce: Good Growth, Interim Report, South Bruce has only 6 net hectares of vacant developable vacant industrial land supply, which translates to 2% of Bruce County’s 259 net



hectares. Development accommodated on Employment Areas generates relatively strong economic multipliers and high-quality employment opportunities, which can improve local socio-economic conditions². The Plan the Bruce Agriculture Interim Report further identifies the need for community input to designate Prime Agricultural Areas and Potential Prime Agricultural Areas, flexible Provincial policy and guidelines to broaden permitted industrial and commercial uses on farms and Urban-Agriculture Edge Planning principles.

The Business to Bruce’s innovative “matching-making tool” connects prospective entrepreneurs with a community that fits their business needs and lifestyle and with a peer and local entrepreneur to guide them through the process. South Bruce can proactively market community assets and strengths through this program to attract prospective investors and entrepreneurs. The program is being streamlined and refocused to include business attraction efforts and can be leveraged for growth and investment in the community.

1.3.3 Support for SMEs, Business Retention and Expansion

South Bruce is home to a large number of small and medium enterprises in target sectors, including agri-food processing, manufacturing and professional services. Bruce County’s Business to Bruce is a key opportunity area for South Bruce to continue to leverage to support local entrepreneurs through resources, grants, data and tools. The program is currently being reviewed to ensure that business support services provide continued value to local stakeholders.

The Bruce County Economic Task Force and the “Support the Bruce: Business Sustainability Fund (2020-2021)” aimed at stabilizing local businesses and guiding local economic recovery efforts are also key opportunities for the community.

1.3.4 Workforce Development

Workforce development efforts that build on Bruce County’s efforts are critical to ensure growth and development in the community. Overcoming local labour shortages has been an ongoing concern for South Bruce. Factors such as an ageing population, youth outmigration, and historical troubles with resident attraction have meant that local firms have struggled to hire quality talent.

Bruce County, in recognizing that economic success relies on successfully securing a talented local labour pool, developed the Workforce Development and Attraction Strategy 2021 – 2025. Four focus areas are identified, including continuous data collection, attraction, retention and skills building. Notable actions identified in the strategy include the development of a Local Immigration Partnership (LIP) with Grey County, marketing campaigns to attract new immigrants, improving newcomer support programs and a renewed focus on education and training was emphasized. The strategy also emphasized the importance of regional partnerships (e.g., Four County Labour Market Planning Board) to the long-term success of the strategy.

1.3.5 Community Development

South Bruce is experiencing high vacancy rates on their main downtown streets and has identified the need to grow downtown shopping and food options alongside revitalization efforts. While some Community Improvement Plan (CIP) programs have been initiated, broader support from Bruce County

² Plan the Bruce: Good Growth, Interim Report, March 2021



(e.g., the financial incentives offered through Support the Bruce Sustainability Fund) and updated policies to enable changes to CIPs will be very useful. The Plan the Bruce: Good Growth, Interim Report, identifies the need to rethink the role of Community Improvement Plans (CIPs) to facilitate and encourage economic activity.

Recent population growth has further highlighted the need to improve housing stock in South Bruce. A clear message is that attainable housing is required for people of all income levels, and additional housing capacity is required to meet the needs of workers moving to South Bruce. Regional collaboration with Bruce County is key to support South Bruce in advancing this priority area.

Improving access to reliable high-speed internet was deemed critical to support residential and business growth and was noted across all reports. Progress is being made with the Southwestern Integrated Fibre Technology (SWIFT), with funding to expand broadband services to more than 5,200 households and businesses across Bruce County. In April 2021, the provincial and federal government announced their commitment to creating more economic and educational opportunities in rural, remote, and underserved areas of Bruce and Grey Counties through improved, modern broadband networks. More than 1,200 homes and businesses are expected to benefit from this new program with an investment of up to \$1.8 million³.

The County is projected for commercial growth in nuclear power generation, greenhouse agriculture and tourism. This requires an effective response to the needs of the region's transportation system. In addition, the growing and aging rural populations increase the demand for public transportation and active transportation. Bruce County's Master Transportation Plan Study, currently underway, will analyze the status and future needs of the County's Land Transportation Systems (road network, public transit, specialized transit, taxi/ride share and active transportation).

1.3.6 Community Capacity and Continued Collaboration

The County provides the regional framework for economic development and, in a leadership capacity, collaborates on implementation strategies for regional activities such as broadband, regional transportation and other 'beyond our borders' initiatives. For South Bruce, a key consideration is to ensure that necessary resources are in place both from a corporate and economic development perspective. Dedicated staff support and resources can ensure that economic development priorities are met, collaborations with external stakeholders and project partners are maintained, and goals and objectives are aligned.

Regional collaboration is being sought in the context of the Deep Geological Repository (DGR) Site Selection Process. This project has great significance for the people of South Bruce and for the region overall. Bruce County's Human Services Integration Strategy and the Integrated Regional Transportation Strategy are also key opportunity areas for South Bruce as it address community priorities⁴.

1.3.7 Common Themes Matrix

The common themes matrix below provides a high-level overview of the themes that emerged from

³ Government of Ontario, [Expanding Broadband Connectivity in Grey and Bruce Counties](#), April 2021

⁴ <https://brucecounty.on.ca/news/2021-jan-26/bruce-county-promotes-partnerships-and-advancement-roma-conference>



each document.

Figure 5: Common Themes Matrix

Common Themes	Corporate Strategic Plans for South Bruce (2014-19) and Bruce County (2013-23)	Economic Development Strategies for South Bruce (2014-19) and Bruce County (2017-21)	Official Plans for South Bruce (2005) and Bruce County (2010)	Nuclear Waste Management Organization Site Selection Process (2020)	Asset Management Plan for South Bruce (2016)	2021 Budget Presentation for South Bruce (2021)	Community Improvement Plan for South Bruce (2020)	Workforce Development & Attraction Strategy for Bruce County (2021-25)
Sector Development	✓	✓✓	✓				✓✓	✓✓
Employment Lands & Investment Attraction		✓✓	✓✓					
Support for SMEs, Business Retention and Expansion	✓✓	✓✓	✓✓				✓✓	
Workforce Development	✓	✓✓		✓✓				✓✓
Community Development	✓✓			✓✓	✓✓	✓✓		
Community Capacity & Continued Collaboration	✓✓			✓	✓✓	✓		

A review of relevant initiatives and strategies reveals themes that are important to keep in mind when updating the economic development strategic plan. Figure 1 is a common threads matrix. A single checkmark (✓) indicates the document has some content relating to the theme, but it is not a primary focus. Two checkmarks (✓✓) indicate there is a primary focus on the theme.



2. Municipal Services Review

Municipalities deliver many of the services that are critical to their residents, and these services rely on well-planned and well-maintained infrastructure. Population change, aging assets and the impacts of a changing climate are putting increased pressure on the ability of many municipalities to ensure the long-term sustainability of their infrastructure. While many municipalities have asset management plans, significant differences exist between the completeness, detail, methodology and assumptions municipalities use to develop their current plans. Ontario requires any municipality seeking provincial capital funding to prepare a detailed asset management plan and show how its proposed project fits within its plan. In December 2017, Ontario introduced an asset management regulation that requires that all municipalities have a comprehensive asset management plan in place by July 1, 2024.

South Bruce’s Asset Management Plan (AMP) was adopted by Council in 2015 and provided a 10-year financial plan and strategy for the municipality’s assets. This section summarizes key municipal services provided by South Bruce, the extent of these services and recommendations from current AMP, along with key insights from community leaders stakeholder consultation conducted in May 2021. This list is not intended to be exhaustive but to provide insight into the current state of municipal services in South Bruce.

AMP’s age-based data indicates a minimal backlog and relatively minor short-term needs of \$601,000 between 2016-2025. However, long-term needs will be substantial. As major assets reach the end of their useful life, replacement needs will rise sharply to \$9.3 million between 2026-2030. Construction costs to upgrade the arena will account for \$8.9 million.

Fire, Roads & Bridges, Trees & Streetlights, Water, Wastewater & Storm Water, Cemeteries, Recycling & Solid Waste and Libraries, Swimming Pools, Recreational Facilities will be briefly discussed below.

Figure 6: Description of Municipal Services provided by South Bruce

Municipal Services	Description of service provided	Results of 2015 AMP	Stakeholder Observations
Fire	The South Bruce Fire Department is responsible for providing fire protection and emergency response services to the residents of South Bruce. Department operations include structure firefighting, rescue operations, medical and accident response, as well as Public Education and Fire Prevention activities. South Bruce Fire service operates out of two stations (Mildmay and Teeswater) with approximately 50 volunteer firefighters. Fire services are the second-largest tax-supported municipal service in South Bruce.	As per the current AMP, the Teeswater Fire Station requires major upgrades or replacement in the near future with costs of approximately \$1 million. The municipality’s annual requirements for its buildings total \$386,000. At this funding level, the municipality would be allocating sufficient funds on an annual basis to meet replacement needs as they arise without the need for deferring projects and accruing annual infrastructure deficits.	Stakeholders confirmed that the state of FIRE services in South Bruce is excellent but would like to see more municipal funding go to this service as opposed to relying on community fundraising.



Municipal Services	Description of service provided	Results of 2015 AMP	Stakeholder Observations
Roads & Bridges	<p>The roads and bridges budget represents over 59% of the total budget for the municipality. Based on the 2019/20 estimates and updated replacement cost values from the municipality, the infrastructure deficit for the roads department is \$7.76M. Roads and bridges are the largest tax-supported municipal service in South Bruce.</p>	<p>Road asset health grade is D which means significant deterioration is evident and service is at risk. Moreover, from a funding perspective, South Bruce is at F, which means significant underfunding of short-term, medium-term, and long-term infrastructure requirements based on existing funds allocation. Asset replacements will be deferred indefinitely. The municipality may have to divest some of its assets (e.g., bridge closures, arena closures), and levels of service will be reduced significantly.</p> <p>For bridges, the situation is slightly better. Bridges' health grade is C which means that deterioration is evident, but the asset continues to fill its function. Preventative maintenance is beneficial at this stage. The funding rating is at D, which means that South Bruce is not well prepared to fund its replacement needs in the short, medium or long term. Asset replacements will be deferred, and levels of service may be reduced.</p>	<p>Stakeholders confirmed that the state of road and bridge services in South Bruce is adequate, but some repairs should not be postponed any longer. Stakeholders were particularly impressed with South Bruce's snow removal service.</p>
Trees & Streetlights	<p>The South Bruce Tree committee oversees and maintains a healthy tree population in the rural and urban areas of the Municipality with the assistance of South Bruce's Public Works Department. The streetlight costs are partially funded through taxes and partially funded through a flat rate user charge applied to properties located within</p>	<p>AMP does not contain any information about the physical and financial health of these services.</p>	<p>Stakeholders confirmed that the state of trees and streetlight services in South Bruce is excellent.</p>



Municipal Services	Description of service provided	Results of 2015 AMP	Stakeholder Observations
	<p>the urban areas of Mildmay, Teeswater, Formosa, Belmore, and Carlsruhe. Trees and Streetlights represent a small percent of the total annual operating budget of about \$25,000.</p>		
<p>Water, Wastewater and Storm Water</p>	<p>South Bruce provides water and sewer systems and source water protection services which are fully funded through local improvement charges and user fees.</p> <p>These services are contracted to a third-party company responsible for the maintenance and operations of the systems. Base rates for the users have increased by 3%, which are in line with the recommendations in the 2016 Water and Sanitary Financial Plan to work toward full life-cycle financing of the water and sewer infrastructure.</p> <p>Storm water management is funded through taxation.</p>	<p>Water, wastewater and storm water form three separate categories when it comes to physical and financial grading in the current AMP.</p> <p>Water's health grade is C, and funding grade is D meaning that deterioration is evident, but the asset continues to full its function. Preventative maintenance is beneficial at this stage. The municipality is not well prepared to fund its replacement needs in the short, medium or long term. Asset replacements will be deferred, and levels of service may be reduced.</p> <p>Wastewater's health grade is B, and funding grade is F meaning that the asset is no longer new but is fulfilling its function. Preventative maintenance is beneficial at this stage. The municipality is significantly underfunding its short-term, medium-term, and long-term infrastructure requirements based on existing funds allocation. Asset replacements will be deferred indefinitely. The municipality may have to divest some of its assets (e.g., bridge closures, arena closures), and levels of service will be reduced</p>	<p>Stakeholders confirmed that the state of water and storm water services in South Bruce is meeting their needs but generally have limited knowledge about current conditions of this type of infrastructure in South Bruce.</p>



Municipal Services	Description of service provided	Results of 2015 AMP	Stakeholder Observations
		<p>significantly.</p> <p>Storm Water’s health grade is C, and funding grade is F meaning that deterioration is evident, but the asset continues to full its function. Preventative maintenance is beneficial at this stage. The municipality is significantly underfunding its short-term, medium-term, and long-term infrastructure requirements based on existing funds allocation. Asset replacements will be deferred indefinitely. The municipality may have to divest some of its assets (e.g., bridge closures, arena closures), and levels of service will be reduced significantly.</p>	
<p>Recycling and Solid Waste (Landfill)</p>	<p>Recycling and solid waste services for South Bruce include the maintenance and operations of the municipal landfill sites, garbage collection & recycling services which are fully funded through landfill and recycling fees and charges and garbage collection fees.</p> <p>Both services are fully funded through local improvement charges and user fees.</p>	<p>AMP does not contain any information about the physical and financial health of these types of services.</p>	<p>Stakeholders confirmed that the state of recycling and solid waste services in South Bruce is excellent.</p>
<p>Cemeteries</p>	<p>This service area includes operations and maintenance of cemeteries, mortuary and cenotaphs. The Culross and Teeswater Cemetery Board operations are overseen by a volunteer committee with operations 100% funded through fees and charges, investment interest and community donations. Cenotaph & Mortuary Budget is used to maintain the cenotaphs and</p>	<p>AMP does not contain any information about the physical and financial health of cemeteries in South Bruce.</p>	<p>Stakeholders confirmed that the state of cemetery services in South Bruce is excellent.</p>



Municipal Services	Description of service provided	Results of 2015 AMP	Stakeholder Observations
	<p>Mildmay mortuary building. Abandoned cemeteries in South Bruce are maintained on an as-needed basis.</p>		
<p>Libraries, Swimming Pools and Recreational Facilities</p>	<p>Libraries are fully funded through rental fees paid by the County of Bruce. The Municipality provides caretaking and maintenance activities at the Libraries.</p> <p>Taxes and rental fees help fund the operations and maintenance of municipal parks, ball diamonds and soccer fields. There are agreements with local service clubs to provide for the maintenance and upkeep of some of the municipal playgrounds and parks in South Bruce.</p> <p>Recreation Programs are largely funded through user charges and include gymnastics, seniors' activities, pickleball, the Mildmay Wellness centre and fitness program, and other initiatives that are provided from time to time.</p> <p>South Bruce's budget funds the outdoor pool programs and activities in Mildmay and Teeswater. Summer staff oversee the Learn to Swim program and outdoor pool activities all summer long.</p> <p>There are a number of facilities in South Bruce that are available for a variety of recreational, community and cultural events and programs for the ratepayers and residents of South Bruce. The cost to maintain these facilities is funded through user fees and charges, community donations and taxation. The 2021 tax dollars needed for these facilities is around \$350,000.</p>	<p>As per current AMP, facilities received F and D grading for their health grade and funding grade, meaning that assets are beyond expected life and have deteriorated to the point that they may no longer be fit to fulfill their function. Moreover, the municipality is not well prepared to fund its replacement needs in the short-, medium- or long term. Asset replacements will be deferred, and levels of service may be reduced. The annual funding deficit is estimated at \$350,000.</p>	<p>Stakeholders confirmed that the state of recreation facilities in South Bruce is excellent.</p>



3. Economic Profile

3.1 Demographic Trends

3.1.1 Current and Forecast Population

As of 2020, South Bruce was home to 5,862 residents: representing 8% of Bruce County’s population. While South Bruce saw a decrease in population of 1% between 2011 and 2016, the municipality saw population growth of 4% between 2016 and 2020. Despite this increase in growth, the population increase as a percentage of the population is less than Bruce County and the province.

Figure 7: Population change, 2011-2020

Year	South Bruce	Bruce County	Ontario
2011	5,685	66,102	12,851,821
2016	5,639	68,147	13,448,494
2020	5,862	73,056	14,635,100
% Change 2011-2016	-1%	3%	5%
% Change 2016-2020	4%	7%	9%

Source: Manifold Data Mining 2020 | Statistics Canada, 2016 Census | Statistics Canada, NHS 2011

Manifold Data Mining estimates an average annual population growth rate for South Bruce of 2% from 2020 to 2025, resulting in approximately 90 new residents by 2025. It is forecasted to be followed by a 1% growth between 2025-2030, resulting in approximately 78 new residents between these years. Overall, South Bruce is projected to experience growth at a slower rate than Bruce County and the province over the next 10 years.

Figure 8: Population projections, 2020-2030

Period	South Bruce	Bruce County	Ontario
2020	5,862	73,056	14,635,100
2025	5,952	76,412	15,490,100
2030	6,030	79,572	16,339,400
% Change 2020-2025	2%	5%	6%
% Change 2025-2030	1%	4%	5%

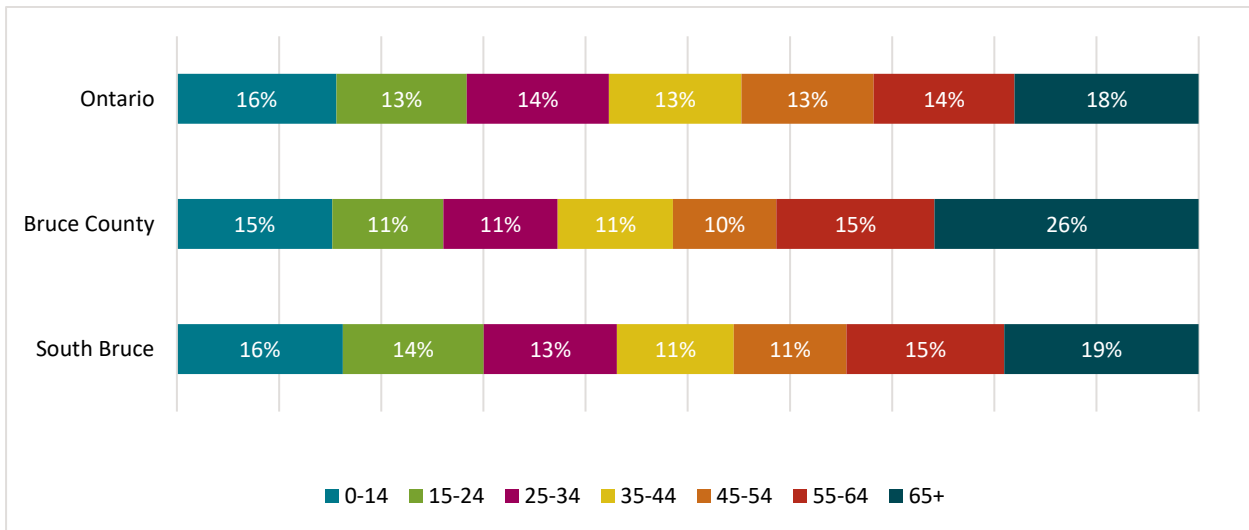
Source: Manifold Data Mining 2020

3.1.2 Population Growth by Broad Age Groups

The following figure shows the population of South Bruce by broad age groups compared to the Province. In 2020, South Bruce recorded the largest share of retirees (young seniors + elderly) at 19%, 1% higher than the provincial average, but 7% lower than Bruce County for the same cohort. South Bruce also recorded a high proportion of late-career and early retirement group (55 to 64 years) at 15% than the province (14%). Approximately 24% of the municipality’s population is between 25 to 44 years old (young + mid-working prime), while youth and young adults make up 30% of the population. These estimates are comparable to the provincial rates.



Figure 9: Share of the population by age group, 2020



Source: Manifold Data Mining 2020

3.1.3 Dwelling and Affordability

As shown in the figure below, South Bruce showed a median dwelling value of \$349,240 in 2020, approximately \$119,069 lower than the province at \$468,309.

Median dwelling values in South Bruce saw an increase of \$108,874 (45%) from 2015 to 2020. While the dwelling values are increasing, South Bruce is still affordable when compared to Bruce County.

This is important as it highlights the relative affordability of dwellings within the municipality, which is an important factor in the attraction of graduates, young families and professionals and growing business and investment.

Figure 10: Median value of dwellings, 2016-2020

Median Value of Dwellings	South Bruce	Bruce County	Ontario
2015	\$240,366	\$274,563	\$400,496
2020	\$ 349,240	\$353,728	\$468,309
Net Change	\$108,874	\$79,165	\$67,813
% Change	45%	29%	17%

Source: Manifold Data Mining 2020 | Statistics Canada, 2016 Census

South Bruce is comprised of approximately 2,340 occupied dwellings. As shown in the figure below **Error! Reference source not found.**, the municipality’s existing housing stock is predominately comprised of single-detached dwelling (i.e., low-density units) at 88% or 2,064 dwellings, and apartments, building with fewer than five storeys at 7.4%. Opportunities exist for South Bruce to diversify housing stock as a resident attraction strategy to attract and support a younger cohort, newcomers, single households and seniors to live, work and or retire in the community.



Figure 11: Type of Dwellings, South Bruce 2020

Type of Dwelling	South Bruce	Bruce County	Ontario
Single-detached house	2,064	26,200	3,065,790
Apartment, building with five or more storeys	-	5	982,431
Movable dwelling	26	263	16,580
Semi-detached house	23	690	317,224
Apartment, detached duplex	25	339	190,960
Row house	39	1,316	512,596
Apartment, building with fewer than five storeys	152	2,382	569,570
Other single-attached house	11	175	11,355

Source: Manifold Data Mining 2020

3.1.4 Household Income

As shown in the figure below, South Bruce showed a median household income of \$90,077 in 2020, approximately \$18,170 lower than the province at \$108,247. Median household incomes have been increasing, witnessing a 7% increase rate (\$4,384) from 2016 to 2020. This increase was lower than the growth experienced at the county and provincial levels.

Figure 12: Household Income, 2016-2020

Year	South Bruce	Bruce County	Ontario
Median household income 2015	\$84,282	\$91,366	\$97,856
Median household income 2020	\$90,077	\$105,368	\$108,247
Net change	5,795	14,002	10,391
% Change	7%	15%	11%

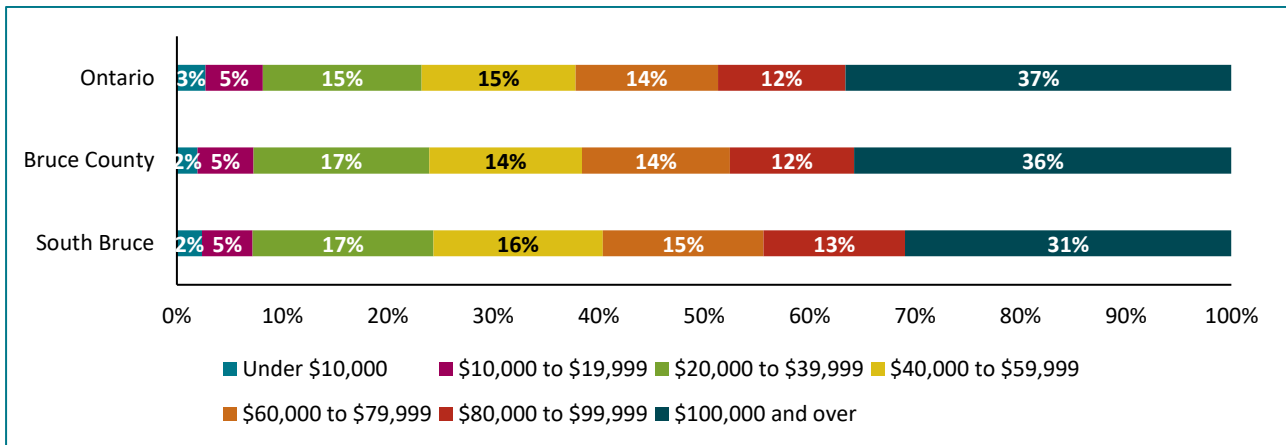
Source: Manifold Data Mining 2020 | Statistics Canada, 2016 Census

Household income groups show that South Bruce has a lower percentage of high-income earners over \$100,000 of 31%, compared to the province at 37%. Other large household income brackets are the \$20,000 to \$39,999 bracket, representing 17% of total income groups, and the \$20,000 to \$39,999 bracket, representing 16% of total household incomes. At the regional level, Bruce County displays a higher share of incomes of \$100,000 and over and slightly lower than the province.

Higher levels of income traditionally translate into more disposable income. When people and households have more money to save or spend, this can increase local goods and services consumption and boost consumer buying power.



Figure 13: Share of households by income group, 2020



Source: Manifold Data Mining 2020

3.1.5 Immigration

In 2020, approximately 190 people (3.2%) of the population in South Bruce were immigrants compared to the Province at 9,991,100 (68.3%). South Bruce has a lower immigrant attraction rate, possibly due to the nature of immigrants preferring larger metropolitan areas to settle. This poses a long-term labour force challenge for the municipality when attracting both skilled and unskilled labour. On the other hand, although immigrants don't directly reside in the community, the County is still seeing an influx, representing opportunities to attract these immigrants.

Figure 14: Immigrant population and period of arrival, 2020⁵

Period of Immigration	South Bruce	Bruce County	Ontario
Total - Immigrant status and period of immigration for the population in private households - 25% sample data	5,862	73,056	14,635,100
Non-immigrants	5,672	66,645	9,991,100
Immigrants to 2000	190	4,522	2,386,247
Immigrants 2001 to 2010	-	920	949,933
Immigrants 2011 to 2016	-	396	485,490
2017 and later	-	447	559,996
Non-permanent residents	-	125	262,310

Source: Manifold Data Mining 2020

⁵ Data after 2000 is suppressed due to limited immigration numbers.



3.1.6 Visible Minority

As of 2020, the visible minority population in South Bruce reached 71 people (1.2% of the population). The municipality shows a lower proportion of visible minority⁶ compared to the Province at 29.5% of the population. The majority of the municipality's population is of European descent. The largest visible minority present within South Bruce was Korean (31) followed by South Asian (20) and Filipino (17).

Figure 15: Visible minorities, 2020

Visible Minority	South Bruce	Bruce County	Ontario
Total visible minority population	71	2,134	4,313,090
Korean	31	439	532,435
South Asian	20	316	829,143
Filipino	17	195	340,917
Chinese	15	726	1,294,970
Multiple visible minorities	4	27	58,867
Black	3	375	696,692
Japanese	3	28	65,358
Visible minority; n.i.e.	3	67	79,194
Latin American	1	89	215,945
Arab	1	68	233,697
Southeast Asian	1	31	147,591
Total visible minority population	71	2,134	4,313,090

Source: Manifold Data Mining 2020

3.2 Educational Attainment

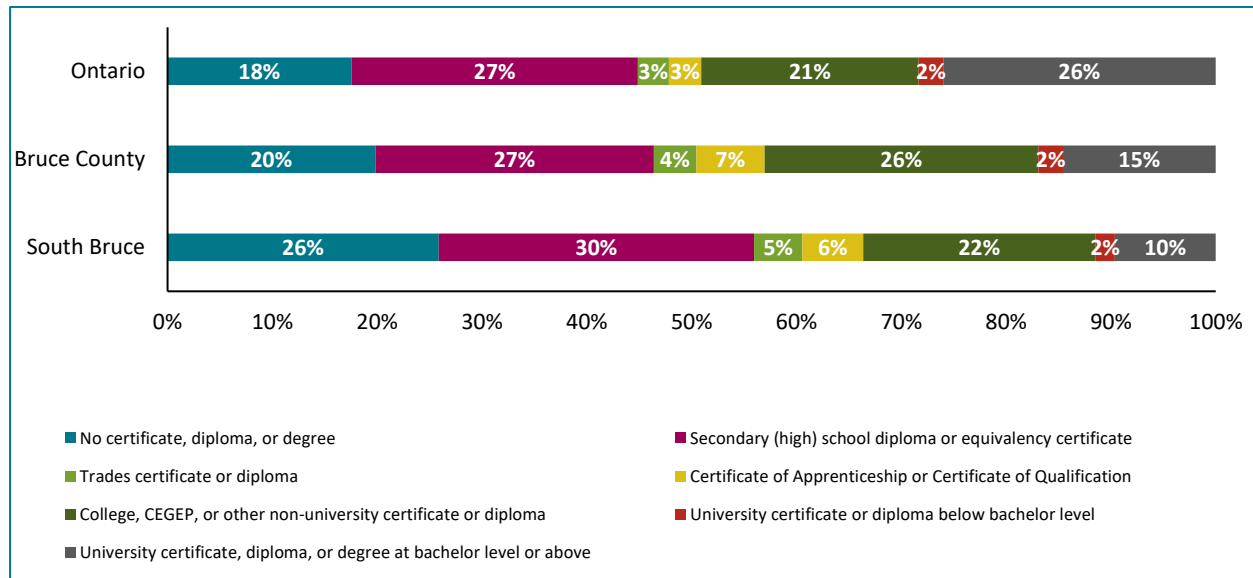
3.2.1 Educational Attainment

In 2020, 26% of the municipality's population aged 15 years and over had no certificate, diploma or degree compared to the province at 18%. 30% of South Bruce's population had a secondary (high) school diploma or equivalency certificate, while 22% had college, CEGEP or non-university diplomas. Only 10% of people in the municipality have a university certificate, diploma or degree at a bachelor level or above, compared to 26% of people in the province.

⁶ The visible minority refers to whether a person belongs to a visible minority group as defined by the Employment Equity Act. Visible minorities are defined as "persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour."



Figure 16: Educational attainment, 2020



Source: Manifold Data Mining 2020

3.2.2 Major Fields of Study

The following figure shows the major fields of study for the municipality’s population aged 15 years and older with a postsecondary certificate, diploma, or degree. Similar to provincial trends, the majority of the municipality’s population have an education related to architecture, engineering, and related technologies (602 people or 12%), followed by health and related fields (319 people or 6%) and business, management and public administration (270 people or 5%).

Figure 17: Major field of study, 2020

Field of Study	South Bruce	% of Total	Bruce County	% of Total	Ontario	% of Total
No post-secondary certificate, diploma, or degree	2,720	55%	28,379	46%	5,493,220	44%
Education	138	3%	2,405	4%	400,431	3%
Visual and performing arts and communications technologies	85	2%	965	2%	287,330	2%
Humanities	44	1%	1,349	2%	410,955	3%
Social and behavioural sciences and law	197	4%	2,742	4%	902,128	7%
Business, management, and public administration	270	5%	4,995	8%	1,425,010	12%
Physical and life sciences and technologies	43	0.90%	1,213	2%	298,926	2%
Mathematics, computer, and information sciences	88	2%	721	1%	339,050	3%
Architecture, engineering, and related technologies	602	12%	9,703	16%	1,301,790	11%



Agriculture, natural resources, and conservation	186	4%	1,210	2%	139,353	1%
Health and related fields	319	6%	5,406	9%	961,796	8%
Personal, protective and transportation services	217	4%	2,824	5%	387,742	3%
Other fields of study	-	0%	32	0.1%	2,425	0.02%

Source: Manifold Data Mining 2020

3.3 Labour Force Status & Mobility Trends

The labour force status details the participation rates and unemployment trends, the labour force by industry and occupation, labour force concentration and commuting patterns for South Bruce.

3.3.1 Labour Force Size

According to the standard definition employed by Statistics Canada, the employed are persons having a job or business, whereas the unemployed are without work, are available for work, and are actively seeking work. Together the unemployed and the employed constitute the labour force⁷. Between 2016 and 2020, the municipalities labour force grew by 7%, adding 237 people. South Bruce experienced a lower labour force growth compared Bruce County at 11% and the province at 12%.

Figure 18: Labour force size, 2016-2020

Labour Force Size	South Bruce	Bruce County	Ontario
In the labour force 2020	3,522	37,424	8,017,580
In the labour force 2016	3,285	33,635	7,141,675
Net Change	237	3,789	875,905
% Change	7%	11%	12%

Source: Manifold Data Mining 2020 | Statistics Canada, 2016 Census

3.3.2 Participation and Unemployment Rates

According to the Bank of Canada, population ageing is the key factor behind the decline in Canada's participation rates⁸. Therefore, it is expected that as the population ages and replacement rates remain below the optimal rate⁹, participation rates will continue to drop. The following figure shows that participation rates in the Stratford-Bruce Peninsula have been fluctuated and remain lower than those in the Province and Canada since July 2020. The economic region of Stratford – Bruce Peninsula¹⁰ has a

⁷ Statistics Canada. Retrieved on January 7, 2019, from < <https://www150.statcan.gc.ca/n1/pub/81-004-x/def/4153361-eng.htm>>

⁸ Bank of Canada/Banque du Canada, Labour Force Participation: A Comparison of the United States and Canada 2017.

⁹ <https://novascotia.ca/finance/statistics/news.asp?id=13796>

¹⁰ Stratford – Bruce Peninsula covers the following communities - https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page_Hierarchy-Hierarchie.cfm?Lang=E&Tab=1&Geo1=ER&Code1=3580&Geo2=PR&Code2=35&SearchText=ontario&SearchType=Begins&SearchPR=01&B1=All&TABID=1&type=0

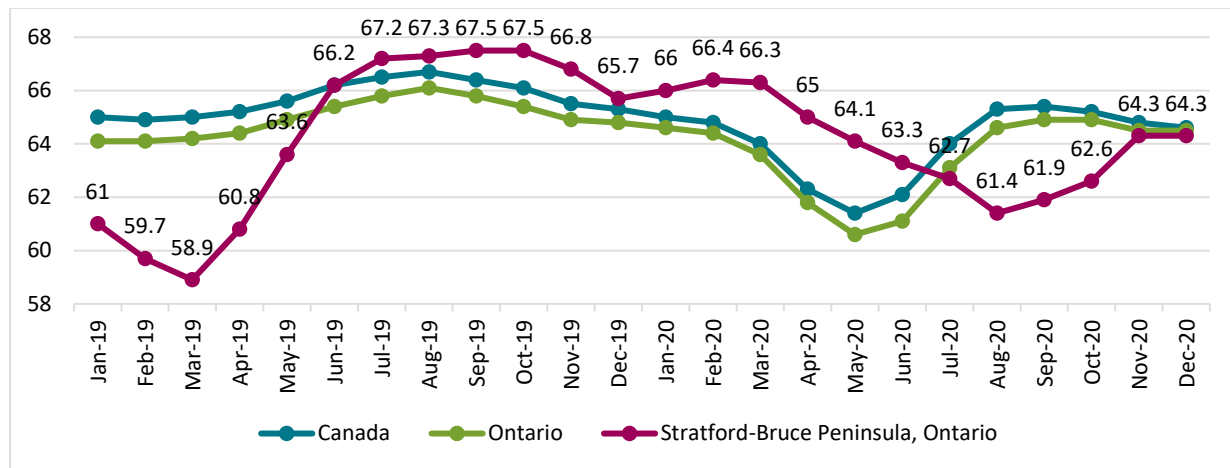


population of around 298,070.

When developing the analysis month over month, a decline in the participation rate starting in March 2020 coincides with the beginning of the COVID-19 pandemic. By December 2020, the participation rate in the Stratford-Bruce Peninsula was 64.3%, which was 1.4% lower than the participation rate recorded in December 2019 and 2% lower than the participation rate recorded in March 2020.

As per Manifold Data Mining, South Bruce showed participation rates of 71.73% in December 2020.

Figure 19: Participation rates (%), Stratford-Bruce Peninsula, January 2019 to December 2020



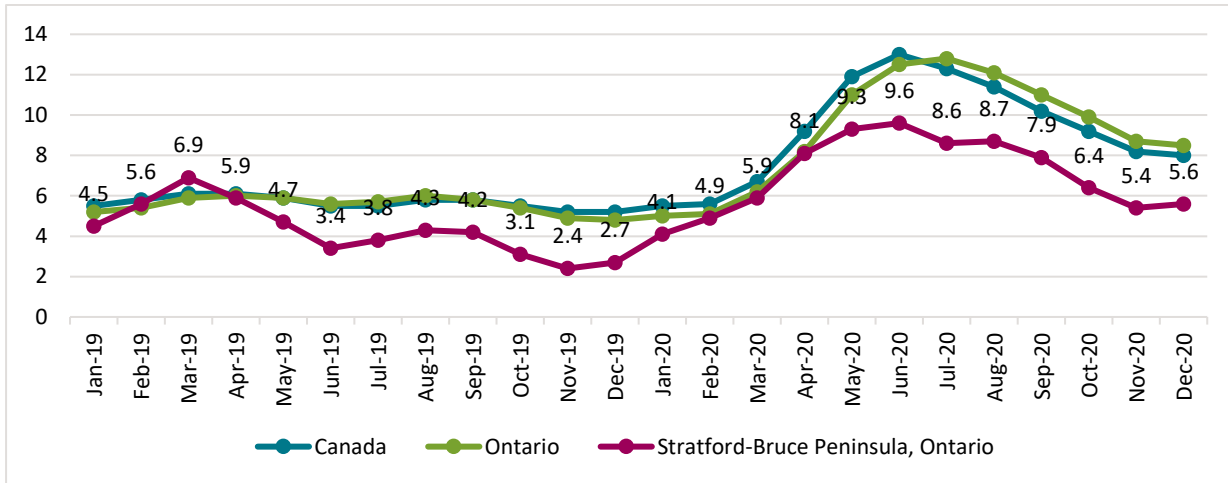
Source: Statistics Canada. Table 14-10-0293-01 Labour force characteristics by economic region, three-month moving average, unadjusted for seasonality

The unemployment rate trendline also provides evidence related to the impact of the COVID-19 pandemic in Canada, Ontario and the Stratford-Bruce Peninsula. By July 2020, the unemployment rate had reached almost 10%. However, unemployment rates dropped in the subsequent months. By December 2020, the Stratford-Bruce Peninsula was experiencing a lower unemployment rate of 6%, although this is still much higher than the 3% unemployment rate seen in December 2019.

As per Manifold Data Mining, South Bruce showed unemployment rates of 4.44% in December 2020.



Figure 20: Unemployment rates, Stratford-Bruce Peninsula, Ontario, January 2019 – December 2020



Source: Statistics Canada. Table 14-10-0293-01 Labour force characteristics by economic region, three-month moving average, unadjusted for seasonality

3.3.3 Labour Force by Industry

Labour force by industry is ‘place of residence’ data, meaning the labour force information of South Bruce’s residents. This includes residents employed or unemployed, both within and outside the municipality.

In 2020, South Bruce accounted for a labour force of 3,494 people by industry. The following figure **Error! Reference source not found.** shows the percentage of the labour force by industry in South Bruce and comparative rates in Ontario. South Bruce is centred in the following industry sectors:

- Manufacturing (15% of the total labour force)
- Agriculture, forestry, fishing, and hunting (15% of the total labour force)
- Construction (12% of the total labour force)
- Health care and social assistance (10% of the total labour force)
- Retail trade (8% of the total labour force)

Manufacturing, Health care and social assistance and Retail trade are also prominent sectors in the province.

Figure 21: Labour Force by Industry (%), South Bruce & Province, 2020

Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2012	South Bruce	% of total	Bruce County	% of total	Ontario	% of total
All industries	3,494	100%	36,890	100%	7,676,670	100%
11 Agriculture, forestry, fishing, and hunting	523	15%	2,890	8%	119,492	2%
21 Mining, quarrying, and oil and gas extraction	56	2%	458	1%	40,381	0.5%



Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2012	South Bruce	% of total	Bruce County	% of total	Ontario	% of total
22 Utilities	125	4%	5,088	14%	69,413	1%
23 Construction	432	12%	3,423	9%	504,846	7%
31-33 Manufacturing	531	15%	2,471	7%	748,098	10%
41 Wholesale trade	166	5%	1,021	3%	314,393	4%
44-45 Retail trade	283	8%	4,087	11%	859,617	11%
48-49 Transportation and warehousing	118	3%	1,048	3%	351,685	5%
51 Information and cultural industries	37	1%	436	1%	185,017	2%
52 Finance and insurance	65	2%	795	2%	456,356	6%
53 Real estate and rental and leasing	33	1%	580	2%	185,300	2%
54 Professional, scientific, and technical services	125	4%	1,495	4%	655,822	9%
55 Management of companies and enterprises	-	0%	22	0%	17,527	0.2%
56 Administrative & support, waste mgmt. & remediation	84	2%	969	3%	355,919	5%
61 Educational services	162	5%	2,100	6%	609,797	8%
62 Health care and social assistance	345	10%	4,033	11%	831,093	11%
71 Arts, entertainment, and recreation	-	0%	674	2%	156,890	2%
72 Accommodation and food services	130	4%	2,128	6%	427,519	6%
81 Other services (except public administration)	156	4%	1,646	4%	315,647	4%
91 Public administration	125	4%	1,527	4%	471,862	6%

Source: Manifold Data Mining 2020

As shown in the following figure, the labour force in South Bruce grew by 7.2% from 2016 to 2020, an increase of 234 people from 2016 to reach a labour force of 3,494. From 2019 to 2020, the total labour force grew by 123 people; while some industries saw growth, A few sectors saw their labour force decline.

Industries that showed labour force growth included educational services (+32), manufacturing (+ 31), wholesale trade (+26), health care and social assistance (+25) and public administration (+25).

Industries that showed a decline in the labour force included accommodation and food services (-20) and Arts, entertainment, and recreation (-10). The decline in the labour force could be attributed to the impact of COVID-19.

Figure 22: Labour force change by industry sector, South Bruce 2016 & 2020

Total labour force population aged 15+ years - North American Industry Classification System (NAICS) 2012	Labour force		Labour Force Change 2016-2020	
	2016	2020	2016-2020 Net Change	2016-2020 % Change
Total	3,260	3,494	234	7.2%
11 Agriculture, forestry, fishing, and hunting	500	523	23	4.6%
21 Mining, quarrying, and oil and gas extraction	40	56	16	40.0%
22 Utilities	115	125	10	8.7%
23 Construction	420	432	12	2.9%



31-33 Manufacturing	500	531	31	6.2%
41 Wholesale trade	140	166	26	18.6%
44-45 Retail trade	275	283	8	2.9%
48-49 Transportation and warehousing	110	118	8	7.3%
51 Information and cultural industries	25	37	12	48.0%
52 Finance and insurance	65	65	0	0.0%
53 Real estate and rental and leasing	20	33	13	65.0%
54 Professional, scientific, and technical services	105	125	20	19.0%
55 Management of companies and enterprises	0	0	0	N/A
56 Administrative & support, waste mgmt. & remediation svc	70	84	14	20.0%
61 Educational services	130	162	32	24.6%
62 Health care and social assistance	320	345	25	7.8%
71 Arts, entertainment, and recreation	10	0	-10	-100.0%
72 Accommodation and food services	150	130	-20	-13.3%
81 Other services (except public administration)	165	156	-9	-5.5%
91 Public administration	100	125	25	25.0%

Source: Manifold Data Mining 2020 | Statistics Canada, 2016 Census

3.3.4 Labour Force by Occupation

As indicated in the following figure, the (resident) labour force by occupations shows that trades, transport and equipment operators and related occupations, accounting for 23% or 803 of total occupations. This number is well below the 13% seen in the Province. Sales and service occupations rank second highest in South Bruce at 16% (560 occupations), followed by Management occupations at 16% (544 occupations).

Figure 23: Labour Force by Occupation (%), South Bruce & Province, 2020

Total labour force population aged 15 years and over by Occupation - (NOC)	South Bruce	% of total	Ontario	% of total
All occupations	3,494	100%	7,676,670	100%
0 Management occupations	544	16%	908,132	12%
1 Business, finance, and administration occupations	402	12%	1,292,980	17%
2 Natural and applied sciences and related occupations	128	4%	619,835	8%
3 Health occupations	214	6%	516,874	7%
4 Occupations in education, law and social, community and government services	266	8%	988,070	13%
5 Occupations in art, culture, recreation, and sport	65	2%	230,066	3%
6 Sales and service occupations	560	16%	1,634,480	21%
7 Trades, transport and equipment operators and related occupations	803	23%	981,908	13%
8 Natural resources, agriculture, and related production occupations	243	7%	128,703	2%
9 Occupations in manufacturing and utilities	270	8%	375,629	5%

Source: Manifold Data Mining 2020



As shown in the following figure, from 2016 to 2020, the occupational categories that experienced the largest net growth in South Bruce included Management occupations (+64), Occupations in education, law and social, community & government (+41) and Business, finance, and administration occupations (+32)

Figure 24: Labour force change by occupations, South Bruce, 2016 & 2020

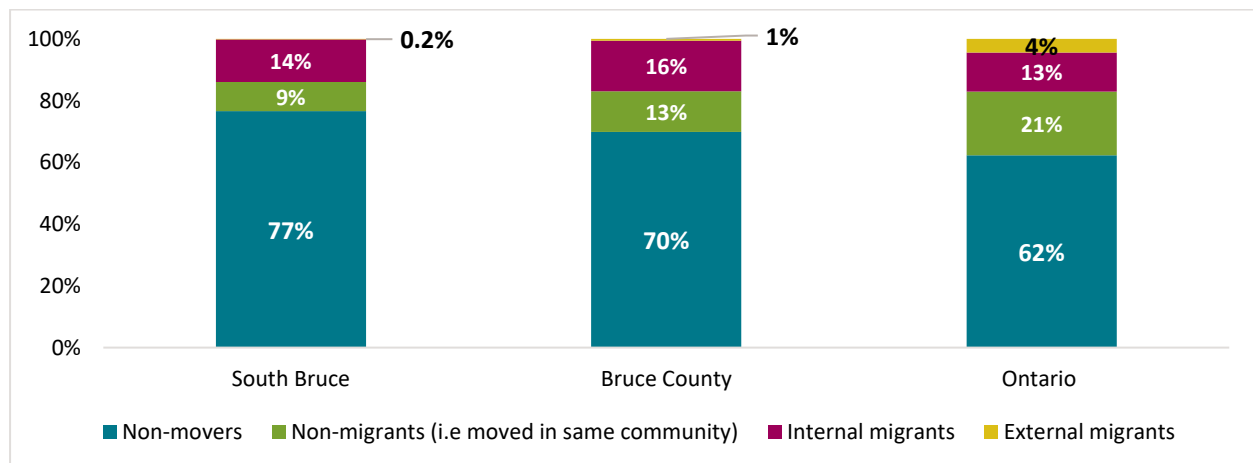
Total labour force population aged 15 years and over by Occupation - (NOC)	Occupation		Occupation Net Change	% Change
	2016	2020	2016-2020	2016-2020
All occupations	3260	3,494	234	7%
0 Management occupations	480	544	64	13%
1 Business, finance, and administration occupations	370	402	32	9%
2 Natural and applied sciences and related occupations	105	128	23	22%
3 Health occupations	185	214	29	16%
4 Occupations in education, law and social, community & government	225	266	41	18%
5 Occupations in art, culture, recreation, and sport	40	65	25	63%
6 Sales and service occupations	565	560	-5	-1%
7 Trades, transport and equipment operators and related occupations	775	803	28	4%
8 Natural resources, agriculture, and related production occupations	250	243	-7	-3%
9 Occupations in manufacturing and utilities	265	270	5	2%

Source: Manifold Data Mining 2020 | Statistics Canada, 2016 Census

3.3.5 Mobility

The movement of people within a community or to the community from somewhere else constitutes mobility. Statistics Canada tracks this in two ways, by asking if a household has moved within the past year and asking if a household has moved within the past five years. The following figure focuses on households that moved in the last five years. As of 2020, most people in South Bruce and the province Ontario stayed where they were five years earlier or moved somewhere in the same geography. In 2020 South Bruce had the lowest share of external and internal migrants among comparators.

Figure 25: Mobility status 5-years ago (adjusted to current year), 2020



Source: Manifold Data Mining 2020



3.3.6 Commuting Patterns

While the labour force by industry data provides information on the type of industry where the municipalities population is employed, it does not indicate if the labour force is employed in industries within the community or commutes to other places to work. The commuting patterns are important in this regard as it indicates where the municipalities labour force live and work. It should be noted that the data presented below is 2016 and shouldn't be directly compared to the labour force or employment numbers in 2020. The data should be studied for broader commuting pattern trends.

As shown in the following figure, approximately 560 residents worked in the South Bruce, while 1,615 of its resident's commute outside the municipality to work in other communities. South Bruce attracts approximately 415 workers to work in the community. The data shows that South Bruce loses approximately 1,200 workers. This indicates the size of the resident employed labour force is larger than the number of jobs available in the sector in the municipality. Therefore, it indicates that people are commuting out of the municipality to work in this sector, or the municipality is "exporting" labour.

Considering the industry sectors, South Bruce saw the highest export of workers in the following sectors:

- Manufacturing
- Health care and social assistance
- Construction
- Retail trade
- Utilities

This indicates that the municipality may not have provided the level of opportunities for its resident labour force. While not directly employed in the community, these patterns confirm and support the notion that skilled workers choose to live in South Bruce regardless of where they may work.

Figure 26: Net Export (-)/Net Import (+) of Labour by Industry Sectors, South Bruce, 2016

Labour force population aged 15+ years by industry subsectors (NAICS)	Residents working In South Bruce	AVR resident 'working outside' South Bruce (A)	Non-residents 'working in' South Bruce (B)	B-A = Net Import (+)/Net Export (-)
Total	560	1,615	415	-1,200
11 Agriculture, forestry, fishing and hunting	65	60	90	30
21 Mining, quarrying, and oil and gas extraction	25	10	10	0
22 Utilities	0	100	0	-100
23 Construction	45	135	25	-110
31-33 Manufacturing	100	330	60	-270
41 Wholesale trade	35	85	50	-35
44-45 Retail trade	110	135	35	-100
48-49 Transportation and warehousing	10	85	0	-85
51 Information and cultural industries	0	10	10	0
52 Finance and insurance	15	30	10	-20
53 Real estate and rental and leasing	0	10	0	-10
54 Professional, scientific and technical services	15	35	0	-35
55 Management of companies and enterprises	0	0	0	0



Labour force population aged 15+ years by industry subsectors (NAICS)	Residents working In South Bruce	AVR resident 'working outside' South Bruce (A)	Non-residents 'working in' South Bruce (B)	B-A = Net Import (+)/Net Export (-)
56 Administrative and support, waste management and remediation services	20	30	10	-20
61 Educational services	30	65	35	-30
62 Health care and social assistance	10	270	0	-270
71 Arts, entertainment and recreation	0	10	0	-10
72 Accommodation and food services	25	105	10	-95
81 Other services (except public administration)	30	60	50	-10
91 Public administration	25	50	20	-30

Source: Statistics Canada, 2016 Census.

As shown in the following figure, the majority of South Bruce Workers (430) commute to Brockton. Other communities that attract South Bruce residents include Hanover, Kincardine, North Huron and Minto.

Figure 27: Place of Work for South Bruce Residents (Who Work Outside South Bruce), 2016

Communities	Total	% of total
Brockton	430	27%
Hanover	215	13%
Kincardine	205	13%
North Huron	175	11%
Minto	130	8%
Other communities (23 communities)	460	28%
Total	1,615	100%

Source: Statistics Canada, 2016 Census

As shown in the following figure, the municipality attracts most of its incoming workers from Brockton. Approximately 155 residents commute to South Bruce to work from Brockton. Other communities that South Bruce attracts workers from include West Grey, Morris-Turnberry, Hanover and North Huron.

Figure 28: Place of Residence for Workers who Commute to the South Bruce to work, 2016

Communities	Total	% of total
Brockton	155	37%
West Grey	85	20%
Morris-Turnberry	45	11%
Hanover	40	10%
North Huron	30	7%
Other communities (9 communities)	60	14%
Total	415	100%

Source: Statistics Canada, 2016 Census

3.4 Business Environment and Structure

A business characteristics assessment was completed to understand the number and type of businesses



in South Bruce using the Canadian Business Counts. Specifically, businesses in the municipality were profiled by total employee number, size of business establishments by employees and businesses by industry.

3.4.1 Key Business Characteristics

As of December 2020, approximately 519 businesses by industry were registered in South Bruce. The following figure shows the total businesses in the community, the majority of which were businesses without employees (i.e.) sole-proprietorships; approximately 411 businesses fall under this category. 60 businesses employ between 1 to 4 employees, while 38 businesses employed between 5 to 19 employees. The municipality is also home to medium and large business establishments as well, with approximately 10 businesses employing at least 20 employees. The following figure also shows the highest proportion of business establishments by industry in 2020.

These include businesses without employees and businesses with employees.

- Agriculture, forestry, fishing, and hunting – 241 businesses (46% of total businesses)
- Construction – 52 businesses (10% of total businesses)
- Real estate and rental and leasing – 47 businesses (9% of total businesses)
- Other services (except public administration) – 36 businesses (7% of total businesses)

Industry sectors with the highest number of businesses without employees include the following:

- Agriculture, forestry, fishing, and hunting – 216 businesses (42% of total businesses)
- Real estate and rental and leasing – 42 businesses (8% of total businesses)
- Other services (except public administration) – 28 businesses (5% of total businesses)
- Construction – 22 businesses (4% of total businesses)

The top industry sectors with employees in 2020 were:

- Construction – 30 businesses (6% of total businesses)
- Agriculture, forestry, fishing and hunting – 25 businesses (5% of total businesses)
- Retail Trade – 12 businesses (2% of total businesses)
- Other services (except public administration) – 8 businesses (1.5% of total businesses)

Figure 29: Business Counts, South Bruce, December 2020

Industry (2 Digit NAICS)	Total	Without employees	Total, with employees	1-4	5-9	10-19	20-49	50-99	100+
Total	519	411	108	60	26	12	8	1	1
Unclassified	24	22	2	1	1	0	0	0	0
Sub-total, classified	495	389	106	59	25	12	8	1	1
Agriculture, forestry, fishing and hunting	241	216	25	17	4	2	1	0	1
Mining and oil and gas extraction	1	1	0	0	0	0	0	0	0
Utilities	6	6	0	0	0	0	0	0	0
Construction	52	22	30	19	8	2	1	0	0
Manufacturing	10	7	3	1	1	0	1	0	0
Wholesale trade	12	7	5	1	1	2	1	0	0



Retail trade	25	13	12	2	6	4	0	0	0
Transportation and warehousing	11	8	3	1	1	1	0	0	0
Information and cultural industries	3	2	1	1	0	0	0	0	0
Finance and insurance	12	11	1	1	0	0	0	0	0
Real estate and rental and leasing	47	42	5	3	1	0	1	0	0
Professional, scientific and technical services	13	8	5	4	0	0	1	0	0
Management of companies and enterprises	1	1	0	0	0	0	0	0	0
Administrative and support, waste management and remediation services	5	2	3	2	1	0	0	0	0
Educational services	1	0	1	0	1	0	0	0	0
Health care and social assistance	10	10	0	0	0	0	0	0	0
Arts, entertainment and recreation	3	3	0	0	0	0	0	0	0
Accommodation and food services	5	2	3	0	0	1	1	1	0
Other services (except public administration)	36	28	8	7	1	0	0	0	0
Public administration	1	0	1	0	0	0	1	0	0

Source: Statistics Canada, Canadian Business Counts, December 2020

3.4.2 Business Concentration

In terms of business concentration, South Bruce shows a high concentration in agriculture, forestry, fishing and hunting, which has 241 businesses in South Bruce. While mining, quarrying, oil and gas extraction, utilities and public administration also show high LQ's relative to the province, it's important to note they only have 1-6 businesses in the community. The previous economic development strategy chose agriculture, Manufacturing, tourism and hospitality and aggregate as target sectors. These are broken down in more detail in the next section

Figure 30: Concentration of businesses (location quotients), South Bruce, December 2020

Industry (2 Digit NAICS)	Total Business LQ	Without Employees LQ	With Employees LQ
11 - Agriculture, forestry, fishing and hunting	15.60	15.16	12.60
21 - Mining, quarrying, and oil and gas extraction	1.77	2.78	0.00
22 - Utilities	6.26	6.71	0.00
23 - Construction	1.14	0.66	2.66
31-33 - Manufacturing	0.85	1.19	0.66
41 - Wholesale trade	0.94	1.05	1.05
44-45 - Retail trade	0.83	0.85	1.05
48-49 - Transportation and warehousing	0.32	0.29	0.42
51 - Information and cultural industries	0.42	0.38	0.59
52 - Finance and insurance	0.41	0.41	0.26
53 - Real estate and rental and leasing	0.48	0.41	1.07
54 - Professional, scientific and technical services	0.20	0.16	0.34
55 - Management of companies and enterprises	0.20	0.21	0.00
56 - Administrative and support, waste management and remediation services	0.27	0.14	0.65
61 - Educational services	0.18	0.00	0.75
62 - Health care and social assistance	0.30	0.48	0.00
71 - Arts, entertainment and recreation	0.37	0.44	0.00
72 - Accommodation and food services	0.35	0.39	0.44



Industry (2 Digit NAICS)	Total Business LQ	Without Employees LQ	With Employees LQ
81 - Other services (except public administration)	1.17	1.39	0.89
91 - Public administration	2.21	0.00	3.48

Source: Statistics Canada, Canadian Business Counts, December 2020

South Bruce's industries were benchmarked against the province at the 3-digit industry sub-sectors to determine the business concentration. The top-20 sub-sectors by the number of businesses in the municipality were benchmarked against the province at the 3-digit level to determine the unique sectors for South Bruce and the sectors that lag with respect to the province. Key insights are described below:

- Animal production and aquaculture is the largest industry subsector, with 132 businesses representing 25% of total businesses for the municipality. This subsector also has a very high concentration of businesses relative to the province, with an LQ of 22.18.
- Crop production, Real estate and Specialty trade contractors are also important subsectors, each accounting for between 7% to 18% of the municipality's total businesses. Crop production and real estate also have high LQ's of 12.23 and 1.30, respectively
- Repair and maintenance and support activities for agriculture and forestry with 18 and 14 businesses, respectively, also show opportunities for growth. They form important support sectors to target sectors, including manufacturing and agriculture.

Figure 31: Total number of businesses and concentration (3-digit NAICS), South Bruce, December 2020

Industry Sub-sectors	South Bruce Total Businesses (Top 20)	South Bruce LQ
Animal production and aquaculture	132	22.18
Crop production	94	12.23
Real estate	45	0.47
Specialty trade contractors	35	1.30
Repair and maintenance	18	2.09
Support activities for agriculture and forestry	14	12.23
Construction of buildings	14	0.94
Professional, scientific and technical services	13	0.20
Securities, commodity contracts, and other financial investment and related activities	10	0.49
Religious, grant-making, civic, and professional and similar organizations	10	0.94
Food and beverage stores	8	1.75
Personal and laundry services	8	0.79
Truck transportation	7	0.38
Utilities	6	6.26
Social assistance	6	1.20
Machinery, equipment and supplies merchant wholesalers	5	1.74
Administrative and support services	5	0.27
Miscellaneous merchant wholesalers	4	2.06
Clothing and clothing accessories stores	4	1.12
Ambulatory health care services	4	0.15

Source: Statistics Canada, Canadian Business Counts, December 2020



4. South Bruce Target Sectors

This section of the report focuses on the key target sectors for the Municipality of South Bruce, its economic forecasts and the impact of broad market trends on sector development and growth. The 2014-2019 Municipality of South Bruce Economic Development Strategy identified key sectors for South Bruce, including Agriculture, Food and Beverage Manufacturing, Tourism and Hospitality, Aggregate and Wood Product Manufacturing. These sectors were identified to be economic drivers for South Bruce with the potential for further development.

As per EMSI Analyst, 2017 input-output data, the top export industries for South Bruce include agriculture, manufacturing and construction (Figure 32). Agriculture accounts for 33% of total South Bruce exports with approximately \$53 million. Further, agriculture accounts for 21% of all of Bruce County's agriculture exports at \$253 million. Manufacturing continues to be a key export industry for the municipality with \$34 million, followed by construction at \$31 million.

Utilities are the top export industry for Bruce County, accounting for 65% of all exports. However, the utilities sector is not a significant exporter for South Bruce currently, with only 1% of all exports. This sector may require continued monitoring given the growth of the nuclear sector, the Bruce Power refurbishment and the Deep Geological Repository (DGR) project.

Figure 32: Exports by Industry NAICS, South Bruce and Bruce County, 2017 input-output data

Industry (NAICS)	Bruce County		South Bruce	
	\$	% of total	\$	% of total
Agriculture, forestry, fishing and hunting	\$252,842,826	5%	\$52,816,881	33%
Manufacturing	\$393,665,900	7%	\$34,888,790	22%
Construction	\$242,808,615	4%	\$31,471,624	20%
Wholesale trade	\$54,780,357	1%	\$7,821,320	5%
Public administration	\$220,380,904	4%	\$6,597,304	4%
Mining, quarrying, and oil and gas extraction	\$44,979,219	1%	\$4,976,134	3%
Retail trade	\$51,658,787	1%	\$4,320,427	3%
Educational services	\$89,162,325	2%	\$3,448,304	2%
Other services (except public administration)	\$36,593,332	1%	\$2,933,415	2%
Professional, scientific and technical services	\$45,237,691	1%	\$2,274,645	1%
Health care and social assistance	\$175,573,814	3%	\$2,053,310	1%
Admin & support, waste mgmt. & remediation	\$28,360,425	1%	\$1,447,060	0.9%
Transportation and warehousing	\$41,859,114	1%	\$1,385,290	0.9%
Finance and insurance	\$26,821,079	0.5%	\$1,374,065	0.9%
Utilities	\$3,526,751,932	65%	\$1,262,864	0.8%
Information and cultural industries	\$41,213,691	1%	\$689,884	0.4%
Real estate and rental and leasing	\$22,648,002	0.4%	\$630,192	0.4%
Accommodation and food services	\$95,341,874	2%	\$626,661	0.4%
Arts, entertainment and recreation	\$11,285,342	0.2%	\$55,986	0.03%
Total Exports	\$5,401,965,230	100%	\$161,074,156	100%



Source: EMSI Analyst, 2021

Comparing the business counts and the location quotients, the sectors that are concentrated in South Bruce and serve as key drivers include:

- Agriculture, forestry, fishing and hunting – 241 businesses (49% of total) with LQ of 15.6
- Construction - 52 businesses (11% of total) with LQ of 1.14
- Other services (except public administration) - 36 businesses (7% of total) with LQ of 1.17
- Retail trade - 25 businesses (5% of total) with LQ of 0.83
- Wholesale trade - 12 businesses (2% of total) with LQ of 0.94
- Manufacturing – 10 businesses (2% of total) with LQ of 0.85

Other services include those establishments, not classified to any other sector, primarily engaged in repair and maintenance, personal and laundry services and religious, grant-making, civic, and professional and similar organizations. These services are important as they provide critical supply chain opportunities to industries, including manufacturing and support community development in the form of personal care services, civic and advocacy groups.

Figure 33: Business Counts by Industry and Location Quotients, South Bruce, 2020

Industry (2 Digit NAICS)	Total businesses	% of total	LQ
Sub-total, classified	495	100%	1.00
Agriculture, forestry, fishing and hunting	241	49%	15.6
Construction	52	11%	1.14
Real estate and rental and leasing	47	9%	0.48
Other services (except public administration)	36	7%	1.17
Retail trade	25	5%	0.83
Professional, scientific and technical services	13	3%	0.2
Wholesale trade	12	2%	0.94
Finance and insurance	12	2%	0.41
Transportation and warehousing	11	2%	0.32
Manufacturing	10	2%	0.85
Health care and social assistance	10	2%	0.3
Utilities	6	1%	6.26
Admin & support, waste mgmt. & remediation	5	1%	0.27
Accommodation and food services	5	1%	0.35
Information and cultural industries	3	1%	0.42
Arts, entertainment and recreation	3	1%	0.37
Mining and oil and gas extraction	1	0.2%	1.77
Management of companies and enterprises	1	0.2%	0.2
Educational services	1	0.2%	0.18
Public administration	1	0.2%	2.21

Source: Canadian Business Counts, December 2020



In addition to the above, community consultations identified key sectors for the town to include agriculture, both primary and value-added, manufacturing and technology-based development, tourism based on local assets and agriculture and cleantech. Thus, the following sectors are identified as key target sectors for South Bruce:

- Agri-business
 - Primary Agriculture
 - Value-added agriculture
- Manufacturing
- Tourism and Support Services

These target sectors also align with Bruce County's key sectors and thus provide opportunities for increased collaboration and coordination of efforts.

While construction, retail trade, wholesale trade and other services are areas of strength for South Bruce, these are sectors that should be effectively managed rather than actively targeted. The growth of the retail trade sector, for example, is essential to realize growth in tourism and agri-tourism and rural and Main Street revitalization. Construction will continue to be a mainstay for South Bruce, given the growth that is associated with the nuclear sector. For South Bruce and Bruce County, industrial employment growth is anticipated to be concentrated in sectors related to utilities, small/medium-scale manufacturing, construction, wholesale trade and transportation and warehousing. Employment growth associated with the Bruce Power refurbishment project is largely captured within this employment category¹¹.

The key target sectors for South Bruce are detailed below.

4.1 Primary & Value-added Agriculture (Agri-business)

4.1.1 Primary Agriculture (Census of Agriculture)

The census of agriculture examines South Bruce's farming operations using data from the 2016 Agricultural Census of Canada. This section studies insight into key regional and provincial trends and their relation to trends in South Bruce. The next section on Agri-business focusses on the entire agriculture value chain, including primary and value-added processing, among other sub-sectors.

The agriculture industry is an integral part of the Canadian economy. In 2015, the sector employed 280,315 people and accounted for 2.2% of Canada's total imports and 4.6% of total exports. Canada remains one of the world-leading exporters of agriculture products as total farm sales reached \$69.4 billion in 2015¹². The Canadian agricultural sector is evolving; growth in the sector is driven primarily by competition and aided by technology. The use of technology and equipment has allowed farms to be more efficient, with increased precision and automation. Also, the size of farming operations had increased, is largely run by young operators and is more capital intensive¹³.

¹¹ Plan The Bruce: Good Growth – Interim Report, 2021.

¹² <https://www150.statcan.gc.ca/n1/daily-quotidien/170510/dq170510a-eng.htm>

¹³ <https://www150.statcan.gc.ca/n1/en/pub/95-640-x/2016001/article/14811-eng.pdf?st=IPJCSb4H>



The character of agriculture and agri-food operations differs by province¹⁴. While the primary sector plays a more important role in the Prairies, food processing is an important sector in Ontario¹⁵.

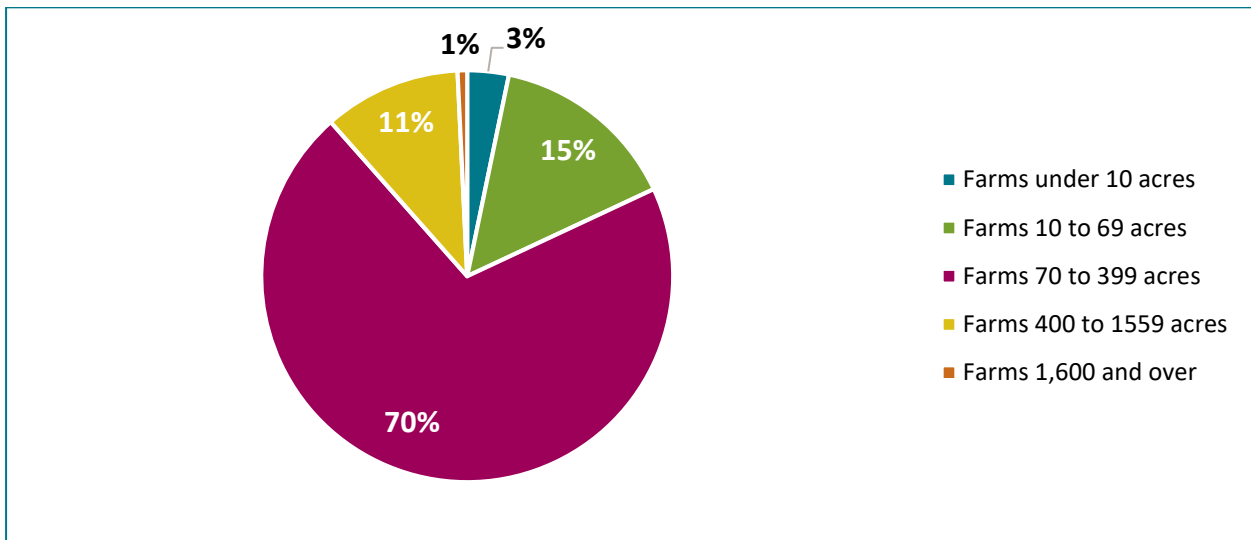
Number of Agricultural Operations

In 2016, there were a total of 399 farms in the municipality. South Bruce accounted for 21% of all farms in Bruce County. The number of farms in South Bruce decreased by 4%, from 416 in 2011 to 399 farms in 2016. This reflects the broader provincial and national trend, as farm numbers decreased across Canada and Ontario by 6% and 5%, respectively. The decline of farms can generally be attributed to the increase in automation, sophistication and the size of agricultural operations¹⁶.

Size of Agricultural Operations

The following figure shows only 3% of farms in South Bruce were under 10 acres. The majority were mid-size farms, as 15% were from 10 to 69 acres, and 70% were from 70 to 399 acres. Approximately 11% of farms were between 400 to 1559 acres, and around 1% were 1,600 acres and over.

Figure 34: South Bruce: Farms classified by total farm area, 2016



Source: Statistics Canada. Table 32-10-0404-01 Farms classified by total farm area.

Agricultural Operations by Type

The following figure shows the classification of farms in South Bruce by farm type in 2016. The majority of were cattle ranching (153 farms – 38% of total farms) and Oilseed and grain farming (130 farms – 33% of total farms). South Bruce has a larger proportion of its farms in Cattle ranching compared to Bruce County and the province. South Bruce's strength in agriculture can aid in the development of value-added agri-businesses and respond to food insecurity challenges. Opportunities exist to support food security, reduce food waste and promote local agricultural products through continued online and in-store buy local marketing campaigns.

¹⁴ <https://www150.statcan.gc.ca/n1/pub/95-640-x/2011001/p1/p1-01-eng.htm>

¹⁵ http://www5.agr.gc.ca/resources/prod/doc/cb/apf/pdf/bg_con_overvu_e.pdf

¹⁶ <https://www150.statcan.gc.ca/n1/daily-quotidien/181127/dq181127b-eng.htm>.



Figure 35: South Bruce: Farms classified by farm type, 2016

Farm Type	South Bruce		Bruce County		Ontario	
	Number	%	Number	%	Number	%
Total number of farms	399		1,928		49,600	
Cattle ranching and farming	153	38%	701	36%	10,225	21%
Oilseed and grain farming	130	33%	599	31%	16,876	34%
Beef cattle ranching and farming, including feedlots	95	24%	562	29%	6,786	14%
Other grain farming	67	17%	262	14%	5,109	10%
Dairy cattle and milk production	58	15%	139	7%	3,439	7%
Other crop farming	41	10%	229	12%	7,187	14%
Other animal production	30	8%	197	10%	5,902	12%
Soybean farming	27	7%	168	9%	5,821	12%
Hay farming	27	7%	143	7%	4,681	9%
Corn farming	22	6%	84	4%	4,265	9%
Poultry and egg production	16	4%	49	3%	1,816	4%
Animal combination farming	16	4%	105	5%	1930	4%
Wheat farming	13	3%	76	4%	1528	3%
All other miscellaneous crop farming	13	3%	72	4%	1716	3%
Broiler and other meat-type chicken production	11	3%	26	1%	900	2%
Sheep and goat farming	11	3%	56	3%	1097	2%
Horse and other equine production	10	3%	70	4%	3112	6%
Hog and pig farming	9	2%	43	2%	1229	2%
Sheep farming	8	2%	39	2%	752	2%
Vegetable and melon farming	6	2%	24	1%	1,856	4%
Other vegetable (except potato) and melon farming	6	2%	23	1%	1709	3%
Chicken egg production	5	1%	17	1%	642	1%
Goat farming	3	1%	17	1%	345	1%
Apiculture	3	1%	13	1%	593	1%
Fruit and tree nut farming	2	1%	9	0.5%	1362	3%
Fur-bearing animal and rabbit production	1	0.3%	4	0.2%	86	0.2%
Dry pea and bean farming	1	0.3%	7	0.4%	124	0.3%
Greenhouse, nursery and floriculture production	1	0.3%	21	1%	2050	4%
Nursery and tree production	1	0.3%	15	1%	1092	2%
Maple syrup and products production	1	0.3%	11	1%	391	1%

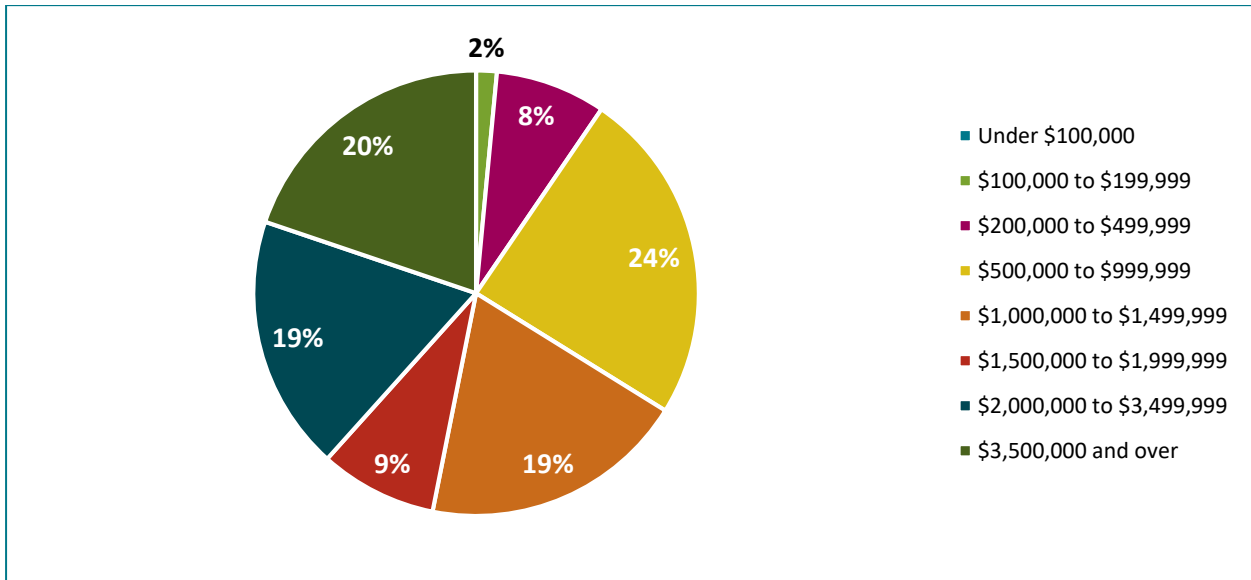
Source: Statistics Canada. Table 32-10-0403-01 Farms classified by farm type. Totals may not equal 100% due to rounding and the figure only including farm types existing in South Bruce.



Agricultural Operations Capital

Farm capital represents the value of either an owned or leased farm and includes the land, buildings, livestock and machinery. As shown in the following figure, most farms in South Bruce reported a farm capital between \$500,000 to \$999,99. Although there are also a notable proportion of farms reporting farm capital over \$3,500,000, no farms report capital of under \$100,000. This follows the trend that as farms become larger, the value of land and buildings used by agricultural operations increases.

Figure 36: South Bruce: Farms classified by total farm capital, 2016



Source: Statistics Canada. Table 32-10-0435-01 Farms classified by total farm capital

Gross Farm Receipts

Gross farm receipts (before deducting expenses) include receipts from all agricultural products sold, program payments and custom work receipts. Gross farm receipts for farms in South Bruce grew by 20% from \$82,366,112 in 2011 to \$98,865,421 billion in 2016. There is a general growth in farm receipts ranging from \$50,000-99,999 and larger farms between \$500,000 and \$2,000,000 and more between 2011 and 2016.

Figure 37: Farm Receipts by Number of Farms Reporting

Farm Receipts by Number of Farms Reporting	2011	2016	Net Change	% Change
under \$10,000	49	41	-8	-16%
\$10,000 to \$24,999	73	44	-29	-40%
\$25,000 to \$49,999	57	68	11	19%
\$50,000 to \$99,999	66	69	3	5%
\$100,000 to \$249,999	81	73	-8	-10%
\$250,000 to \$499,999	52	46	-6	-12%
\$500,000 to \$999,999	19	36	17	89%
\$1,000,000 to \$1,999,999	16	15	-1	-6%



\$2,000,000 and over	3	7	4	133%
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Source: Statistics Canada. Table: 32-10-0436-01 (formerly CANSIM 004-0233)

Direct Consumer Sales

In the following two figures, the "number of farms reporting" does not equal the sum of the parts because farms reporting more than one category (or activity) are only counted once.

In 2015, 33 farms in South Bruce reported selling agriculture products directly to consumers. 32 or 97% of these farms reported selling unprocessed agricultural products, while 9% of them reported selling value-added products.

Figure 38: South Bruce: Types of Agricultural Products Farms Reported Selling Directly to Consumers (2015)

Direct Sales	Number of Farms with Direct Sales	% of Total
All farms reporting	33	100%
Unprocessed agricultural products sold	32	97%
Value-added products sold	3	9%

Source: Statistics Canada. 32-10-0447-01 (formerly CANSIM 004-0244)

In 2015, of the 33 farms in South Bruce that reported they sold agriculture products directly to consumers, 94% sold through farm gate sales, stands, kiosks, U-pick, while 18% used farmers' markets.

Figure 39 South Bruce: Where Farms that Reported Selling Directly to Consumers Sold Their Agricultural Products (2015)

Direct Sales	Number of Farms with Direct Sales	% of Total
All farms reporting	33	100%
Farmgate sales, stands, kiosks, U-pick	31	94%
Farmers' markets	6	18%
Community Supported Agriculture (CSA)	1	3%
Other methods	2	6%

Source: Statistics Canada. 32-10-0447-01 (formerly CANSIM 004-0244)

Technology Adoption and Use

The following figure shows the number of farms reporting technologies used on the operation in 2015. At this time, 700 farms in South Bruce reported using some form of technology. Of these farms, 245 (25% of total farms) reported using Computers/laptops for farm management. Approximately 146 farms used GPS technology, 146 farms used Smartphones/tablets for farm management, and 111 farms used GPS Technology.



Figure 40: South Bruce: Number of Farms Reporting Technologies Used on the Operation (2015)¹⁷

Technologies	Number of Farms Using Technology	% of Total
Total Farms reporting Technology Usage	700	100%
Computers/laptops for farm management	245	35%
Smartphones/tablets for farm management	146	21%
Automated steering (auto-steer)	68	10%
GPS technology	111	16%
GIS mapping (e.g., soil mapping)	52	7%
Greenhouse automation	0	0%
Robotic milking	5	1%
Automated environmental controls for animal housing	37	5%
Automated animal feeding	36	5%
Other technologies	0	0%

Source: Statistics Canada. 32-10-0446-01 (formerly CANSIM 004-0243)

4.1.2 Agricultural Value Chain

While the previous section focused on the census of agriculture which examines South Bruce’s farming operations using data from the 2016 Agricultural Census of Canada, this section focuses on the entire agriculture value chain, including primary and value-added processing, among other sub-sectors. This section focuses on historical, current and forecasted jobs and occupations as well as recent business const and historical supply chain insights.

The agricultural value chain includes the core actives and the value chain including farms, fishing and related, beverage manufacturing, value-added food & related manufacturing (meatpacking, dairy products and seafood products), wholesale agriculture, science and engineering related to the agriculture sector (crop science, seed testing laboratories and R&D) and support services (agri-finance and agricultural product sterilization service).

The data presented here is from EMSI Analyst and shows the number of jobs in the community.

Figure 41: Agriculture Value Chain Definition NAICS

NAICS	Description
1111	Oilseed and grain farming
1112	Vegetable and melon farming
1113	Fruit and tree nut farming
1114	Greenhouse, nursery and floriculture production
1119	Other crop farming
1121	Cattle ranching and farming
1122	Hog and pig farming
1123	Poultry and egg production
1124	Sheep and goat farming

¹⁷ Different respondent interpretations of what constitutes use of technology for farm management may have led to underreporting of computer and smartphone use



NAICS	Description
1129	Other animal production
1125	Aquaculture
1141	Fishing
3121	Beverage manufacturing
3111	Animal food manufacturing
3112	Grain and oilseed milling
3113	Sugar and confectionery product manufacturing
3114	Fruit and vegetable preserving and specialty food manufacturing
3115	Dairy product manufacturing
3116	Meat product manufacturing
3117	Seafood product preparation and packaging
3118	Bakeries and tortilla manufacturing
3119	Other food Manufacturing
3122	Tobacco manufacturing
3123	Cannabis product manufacturing
4111	Farm product merchant wholesalers
4131	Food merchant wholesalers
4132	Beverage merchant wholesalers
4133	Cigarette and tobacco product merchant wholesalers
4134	Cannabis merchant wholesalers
4171	Farm, lawn and garden machinery and equipment merchant wholesalers
4183	Agricultural supplies merchant wholesalers
541330	Engineering services
541380	Testing laboratories
541690	Other scientific and technical consulting services
541710	Research and development in the physical, engineering and life sciences
1151	Support activities for crop production
1152	Support activities for animal production
3253	Pesticide, fertilizer and other agricultural chemical manufacturing
3331	Agricultural, construction and mining machinery manufacturing

Jobs

In 2020, South Bruce accounted for 669 agri-business. South Bruce has the highest proportion of its total employment in the agri-business sector compared to the county and province, making up 40% of total employment. This is comparable to 11% in Bruce County and 6% in Ontario.

Figure 42: South Bruce and Comparators: Sector Jobs as a Factor of Total Employment

	Agri Business Job 2020	Total Jobs 2020 (Total)	Agri Business as a % of total
South Bruce	669	1,659	40%
Bruce County	3,486	31,976	11%
Ontario	482,361	7,959,660	6%

Source: EMSI Analyst, Adapted by MDB Insight

The following figure shows jobs in 2016, 2020 and forecast to 2025 in South Bruce, Bruce County, and the Province. Between 2016 to 2020, South Bruce saw an increase of six jobs or 0.9%, which was lower than Bruce County and Ontario. Between 2020 and 2025, there's a small drop expected in South Bruce and the County, while the province is expected to gain jobs. Overall, from 2016 to 2025, South Bruce is



expected to have a marginal dip of 0.8% of jobs while Bruce County and Ontario are expected to see the growth of 8.3% and 9.7%, respectively.

Figure 43: South Bruce, Bruce County and Ontario: Job, Trend Line (2016 to 2025)

	2016	2020	2025	% Change 2016 to 2020	% Change 2020 to 2025	% Change 2016 to 2025
South Bruce	663	669	658	0.9%	-1.6%	-0.8%
Bruce County	3,200	3,486	3,464	8.9%	-0.6%	8.3%
Ontario	452,087	482,361	495,863	6.7%	2.8%	9.7%

Source: EMSI Analyst, Adapted by MDB Insight

In 2020, farms made up the largest proportion of agri business jobs with 500 jobs. This was followed by beverage manufacturing and agriculture suppliers merchant wholesalers with 39 and 30 jobs, respectively.

Farms and meat products manufacturing saw growth of 14% and 11%, respectively, between 2016 and 2020. Growth for these sectors is expected to continue into 2025 at a lower rate, with Farms increasing by two jobs or 0.4% and meat product manufacturing increasing by one job or 5%. Agricultural supplies merchant wholesalers are also expected to increase by two jobs or 7% between 2020 and 2025. On the other hand, beverage manufacturing and dairy product manufacturing saw a drop in jobs between 2016 and 2020 and this trend is expected to continue through to 2025.

Figure 44: South Bruce: Job Growth by Sub-Sector, 2016 to 2020 & 2020 to 2025

Sub Sector	Jobs			Job Change			
	2016	2020	2025	2016-2020		2020-2025	
				Net	%	Net	%
Farms	438	500	502	62	14%	2	0.4%
Beverage manufacturing	54	39	35	-15	-28%	-4	-10%
Agricultural supplies merchant wholesalers	39	30	32	-9	-23%	2	7%
Dairy product manufacturing	38	21	14	-17	-45%	-7	-33%
Meat product manufacturing	19	21	22	2	11%	1	5%

Source: EMSI Analyst, Adapted by MDB Insight

In 2020 managers in agriculture were the top occupations in South Bruce's agri-business sector, making up 62% of occupations. Despite seeing a drop of 6% between 2020 and 2025, managers in agriculture are expected to continue making up a large proportion of agribusiness occupations (61%). General farm workers also make up a large proportion of occupations in 2020 and expected in 2025, making up 26% and 29% of occupations, respectively. Overall, agri-business occupations are expected to drop by 6% from 2020 to 2025.



Figure 45: Top Occupations in Agri-Business – 2020 and projected to 2025

Occupations	2020	% of total	2025	% of total	Occupation Change 2020-2025	
					Net	%
Managers in agriculture	278	62%	260	61%	-18	-6%
General farm workers	116	26%	121	29%	5	4%
Transport truck drivers	18	4%	17	4%	-1	-6%
Process control and machine operators, food and beverage processing	16	4%	14	3%	-2	-13%
Sales and account representatives - wholesale trade (non-technical)	12	3%	11	3%	-1	-8%
Accounting technicians and bookkeepers	10	2%	<10	N/A	N/A	N/A
Approx. Total ¹⁸	450	100%	423	100%	-27	-6%

Source: EMSI Analyst, Adapted by MDB Insight

Businesses Counts

The following figure shows agribusinesses in South Bruce, the county and province as a factor of total businesses in each comparator. Compared to the county and province, South Bruce has the highest number of agri-businesses as a proportion of total businesses in the community, with agribusinesses making up 36% of all businesses. This is comparable to 20% in Bruce County and 4% in Ontario.

Figure 46: Agribusiness Businesses as a factor of total business

	Businesses 2020 (Agribusiness)	Businesses 2020 (Total)	Agribusiness as a % of Total Businesses
South Bruce	186	519	36%
Bruce County	1,412	6,979	20%
Ontario	65,230	1,600,591	4%

Source: Statistics Canada, Canadian Business Counts, December 2020 – Adapted by MDB Insight

South Bruce had 186 agribusinesses in 2020. Out of the 186 businesses, 157 were sole-proprietors, and 29 businesses had employees. Cattle ranching and farming, other crop farming and other animal production farming make up the largest proportion of total businesses with 98, 25 and 20 businesses, respectively.

Figure 47: Top Agri-Business Business Counts Dec 2020

NAICS	Sub Sector	Total	Without Employees	With Employees
	Total	186	157	29
1121	Cattle ranching and farming	98	87	11
1119	Other crop farming	25	23	2
1129	Other animal production	20	17	3

¹⁸ There are 123 Occupations with less than 10 employed. Due to insufficient data these are not captured in the totals



NAICS	Sub Sector	Total	Without Employees	With Employees
1151	Support activities for crop production	8	8	0
1123	Poultry and egg production	6	2	4
1122	Hog and pig farming	4	4	0
1124	Sheep and goat farming	4	4	0
4171	Farm, lawn and garden machinery and equipment merchant wholesalers	4	2	2
4183	Agricultural supplies merchant wholesalers	4	3	1
1152	Support activities for animal production	4	2	2

Source: Statistics Canada, Canadian Business Counts, December 2020

Supply Chain Analysis

The Supply Chain analysis can be used to find leakage in the economy where money is leaving the region that might otherwise be captured. It can also be used as an exploratory tool for deciding what businesses might be a good fit for the community.

In 2017, \$33,877,795 was made in purchases from the agri-business sector. \$17,675,469 or 52% were in-region purchases and \$16,202,325 or 48% were from imported purchases (indicating money leaving the region). Farms account for \$17,130,711 of total purchases, and 91% of these purchases were made in South Bruce. It's also noteworthy that dairy product manufacturing and meat product manufacturing have 99.1 and 98.5% of purchases within South Bruce

On the other hand, pesticide, fertilizer and other agricultural chemical manufacturing and animal food manufacturing have the second and third largest dollar value of purchases after farm, and 100% of these purchases are imported from outside the community.

Figure 48: South Bruce: In Region/Imported Purchases - 2017

Sub Sector	Total Purchases	In-region Purchases		Imported Purchases	
		\$	%	\$	%
Farms	\$17,130,711	\$15,519,756	90.6%	\$1,610,955	9.4%
Pesticide, fertilizer and other agricultural chemical manufacturing	\$4,691,381	\$0	0%	\$4,691,381	100%
Animal food manufacturing	\$3,512,899	\$0	0%	\$3,512,899	100%
Electric power generation, transmission and distribution	\$1,906,400	\$79,708	4.2%	\$1,826,692	95.8%
Petroleum and coal product manufacturing	\$1,841,500	\$0	0%	\$1,841,500	100%
Dairy product manufacturing	\$1,099,150	\$1,089,074	99.1%	\$10,076	0.9%
Meat product manufacturing	\$965,899	\$951,297	98.5%	\$14,602	1.5%
General freight trucking	\$948,217	\$35,635	3.8%	\$912,582	96.2%
Plastic product manufacturing	\$927,722	\$0	0%	\$927,722	100%
Grain and oilseed milling	\$853,915	\$0	0%	\$853,915	100%
Total	\$33,877,795	\$17,675,469	52%	\$16,202,325	48%

Source: EMSI Analyst, Adapted by MDB Insight



4.2 Manufacturing

The following section focuses on the entire manufacturing sector, including food and beverage manufacturing, wood product manufacturing and aggregate, among other manufacturing sub-sectors present in South Bruce. The analysis of local manufacturing includes historical, current and forecasted jobs and occupations as well as recent business counts and historical supply chain insights. The data presented here is from EMSI Analyst and shows the number of jobs in the community.

Jobs

In 2020, South Bruce accounted for 171 jobs. South Bruce has the highest proportion of its total employment in the manufacturing sector when compared to the county and province, making up 10% of total employment. This is comparable to 4% in Bruce County and 9% in Ontario.

Figure 49: South Bruce and Comparators: Sector Jobs as a Factor of Total Employment

	Manufacturing Job 2020	Total Jobs 2020 (Total)	Manufacturing as a % of total
South Bruce	171	1,659	10%
Bruce County	1,472	31,976	5%
Ontario	718,981	7,959,660	9%

Source: EMSI Analyst, Adapted by MDB Insight

The following figure shows jobs in 2016, 2020 and forecast to 2025 in South Bruce, Bruce County, and the Province. Between 2016 to 2020, South Bruce saw a decrease of 55 jobs or -24%, while there was minor growth in Bruce County and Ontario. Between 2020 and 2025, the downward trend of jobs in South Bruce is expected to lessen with an expected decrease of 25 jobs or -15%, while Bruce County and Ontario are expected to see minor growth during this period, albeit lower the period between 2016 and 2020.

Despite the decline in the number of manufacturers, manufacturing continues to represent an economic opportunity for the municipality, with \$34 million in exports.

Figure 50: South Bruce, Bruce County and Ontario: Job, Trend Line (2016 to 2025)

	2016	2020	2025	% Change 2016 to 2020	% Change 2020 to 2025	% Change 2016 to 2025
South Bruce	226	171	146	-24.3%	-14.6%	-35.4%
Bruce County	1,437	1,472	1,500	2.4%	1.9%	4.4%
Ontario	692,867	718,981	731,341	3.8%	1.7%	5.6%

Source: EMSI Analyst, Adapted by MDB Insight

Food manufacturing makes up the largest proportion of manufacturing jobs with 44 jobs and is followed by beverage and tobacco product manufacturing and wood product manufacturing with 42 and 33 jobs, respectively.

The following figure shows job growth in sub-sectors with the highest number of jobs in 2020. The figure investigated job growth in South Bruce between 2016 and 2020 and forecasted to 2025. Wood products



manufacturing and furniture and related product manufacturing saw growth from less than ten jobs to 33 and 19 jobs respectively between 2016 and 2020. Growth in furniture and related products manufacturing is expected to continue into 2025, with the expected addition of 5 jobs. Other sectors saw a drop in jobs between 2016 and 2020, but this downward trend is expected to lessen moving into 2025.

Figure 51: South Bruce: Job Growth by Sub-Sector, 2016 to 2020 & 2020 to 2025

Sub Sector	Jobs			Job Change			
	2016	2020	2025	2016-2020		2020-2025	
				Net	%	Net	%
Food manufacturing	63	44	37	-19	-30%	-7	-16%
Beverage and tobacco product manufacturing	54	42	39	-12	-22%	-3	-7%
Wood product manufacturing	<10	33	25	N/A	N/A	-8	-24%
Machinery manufacturing	25	19	17	-6	-24%	-2	-11%
Furniture and related product manufacturing	<10	19	24	N/A	N/A	5	26%

Source: EMSI Analyst, Adapted by MDB Insight

In 2020, process control and machine operators, food and beverage processing was the top occupation in South Bruce’s manufacturing sector, making up 54% of occupations. Despite expecting a drop of 13% between 2020 and 2025, Process control and machine operators, food and beverage processing occupations are expected to continue making up a large proportion of manufacturing occupations (62%). Janitors, caretakers and building superintendents made up the other 46% of occupations in 2020 and are expected to make up 38% of occupations in 2025.

Figure 52: Top Occupations in Manufacturing – 2020 and projected to 2025

Occupations	2020	% of total	2025	% of total	Occupation Change 2020-2025	
					Net	%
Process control and machine operators, food and beverage processing	15	54%	13	62%	-2	-13%
Janitors, caretakers and building superintendents	13	46%	8	38%	-5	-38%
Approx. Total	28	100%	21	100%	-7	-25%

Source: EMSI Analyst, Adapted by MDB Insight

Businesses Counts

The following figure shows manufacturing businesses in South Bruce, the county and province as a factor of total businesses in each comparator. South Bruce has a similar proportion of manufacturing businesses compared to Bruce County at 1.7% of total businesses, which is slightly lower than the province at 2%.



Figure 53: Manufacturing Businesses as a factor of total business

	Businesses 2020 (Manufacturing)	Businesses 2020 (Total)	Manufacturing as a % of total businesses
South Bruce	9	519	1.7%
Bruce County	121	6,979	1.7%
Ontario	33,514	1,600,591	2.1%

Source: Statistics Canada, Canadian Business Counts, December 2020 – Adapted by MDB Insight

South Bruce had nine manufacturing businesses in 2020. Out of the nine businesses, seven were sole-proprietors, and two businesses had employees. Leather and allied product manufacturing and Primary metal manufacturing make up the largest proportion of total businesses with three businesses each.

Figure 54: Manufacturing Business Counts Dec 2020

Sub Sector	Total	Without Employees	With Employees
Total	9	7	2
Leather and allied product manufacturing	3	2	1
Primary metal manufacturing	3	3	0
Transportation equipment manufacturing	2	2	0
Food manufacturing	1	0	1

Source: Statistics Canada, Canadian Business Counts, December 2020

Supply Chain Analysis

The Supply Chain analysis can be used to find leakage in the economy where money is leaving the region that might otherwise be captured. It can also be used as an exploratory tool for deciding what businesses might be a good fit for the community.

In 2017, \$12,642,584 was made in purchases from the manufacturing sector. \$8,425,488 or 67% were in-region purchases and \$4,217,096 or 33% were from imported purchases (indicating money leaving the region)

Farms account for \$7,578,377 of total purchases, and 79% of these purchases were made in South Bruce. It's also noteworthy that dairy product manufacturing and meat product manufacturing have the second and third largest amount of purchases, and 100% and 99% of purchases are made within South Bruce, respectively.

On the other hand, Plastic product manufacturing, converted paper product manufacturing, Iron and steel mills and ferro-alloy manufacturing, General freight trucking, Boiler, tank and shipping container manufacturing and Grain and oilseed milling are among the top 10 manufacturing purchases, but 94-100% of the purchases are imported.



Figure 55: South Bruce: In Region/Imported Purchases - 2017

Sub Sector	Total Purchases	In-region Purchases		Imported Purchases	
		\$	%	\$	&
Farms	\$7,578,377	\$5,969,986	79%	\$1,608,390	21%
Dairy product manufacturing	\$1,079,872	\$1,077,584	100%	\$2,288	0.2%
Meat product manufacturing	\$960,188	\$950,161	99%	\$10,027	1%
Plastic product manufacturing	\$588,659	\$0	0%	\$588,659	100%
Converted paper product manufacturing	\$562,248	\$0	0%	\$562,248	100%
Cement and concrete product manufacturing	\$413,244	\$405,947	98%	\$7,297	2%
Iron and steel mills and ferro-alloy manufacturing	\$389,842	\$0	0%	\$389,842	100%
General freight trucking	\$385,989	\$21,809	6%	\$364,180	94%
Boiler, tank and shipping container manufacturing	\$368,740	\$0	0%	\$368,740	100%
Grain and oilseed milling	\$315,424	\$0	0%	\$315,424	100%

Source: EMSI Analyst, Adapted by MDB Insight

4.3 Tourism and Support Services

A key sector opportunity for South Bruce is a focus on tourism based on local assets and services that support the sector. The sector includes arts, entertainment and recreation assets, accommodation and food and beverage services. Retail and transportation, travel services and other services are also included, given they are important to support services for the sector to grow.

Based on the NAICS definition, the tourism sector in South Bruce is highly concentrated in support services, including retail trade, restaurants and personal services. South Bruce has local arts, entertainment and recreation assets, including the South Bruce Barn Quilt Tour¹⁹ and Tractor tour²⁰ that can serve as key drivers of the tourism sector. It's also noteworthy that the town hall serves as a multi-purpose facility for the community and is used as a performance and event venue. In addition, the prominence of the agricultural sector and agri-business provide opportunities for agri-tourism growth. It's also noteworthy that in addition to the direct benefits that the sector provides for growth, it accounts for added benefits such as infrastructure growth and neighbourhood revitalization and aids the growth of quality of life supports such as arts and cultural institutions.

The following section focuses on the entire tourism sector in South Bruce. The analysis of local tourism includes jobs by tourism sub-sectors, occupations and business counts. The data for the tourism sector is presented as an overview as the data does not fully capture the entire spectrum of the sector and the local assets, places, traditions, cultures and festivals that form a part of South Bruce's tourism appeal.

Jobs

In 2020, South Bruce accounted for 330 related tourism jobs. The proportion of tourism-related jobs in South Bruce similar to jobs in Bruce County, which sits at 21% and the province, which sits at 25%.

¹⁹ <https://www.visitsouthbruce.ca/arts.html>

²⁰ https://www.visitsouthbruce.ca/uploads/1/2/7/7/127745555/tractor_tour_brochure_2021_revised.pdf



Figure 56: South Bruce and Comparators: Sector Jobs as a Factor of Total Employment

	Tourism Job 2020	Total Jobs 2020 (Total)	Tourism as a % of total
South Bruce	330	1,659	20%
Bruce County	6,629	31,976	21%
Ontario	2,016,668	7,959,660	25%

Source: EMSI Analyst, Adapted by MDB Insight

Businesses Counts

The following figure shows tourism businesses in South Bruce, the county and province as a factor of total businesses in each comparator. When compared to the county and province, South Bruce has the highest amount of tourism businesses as a proportion of total businesses in the community, with tourism businesses making up 11% of all businesses. This is comparable to 5% in Bruce County and 7% in Ontario.

Figure 57: Tourism Businesses as a factor of total business

	Businesses 2020 (Tourism)	Businesses 2020 (Total)	Tourism Businesses as a % of Total Businesses
South Bruce	56	519	11%
Bruce County	370	6,979	5%
Ontario	117,119	1,600,591	7%

Source: Statistics Canada, Canadian Business Counts, December 2020 – Adapted by MDB Insight



5. Next Steps

Building on the document review, economic baseline analysis and target sector insights, the key economic drivers for South Bruce will be developed. The assessment will also consider the broader market trends to ensure that these opportunities are effectively leveraged to realize growth and development. The key economic drivers are informed by local, regional, provincial and national trends. The results and insights of this report will be combined with the consultation insights to inform the Strengths, Opportunities, Aspirations, Risks and Results (SOARR) analysis. The SOARR is a strategic planning model that serves as the pivot between what has been learned and what needs to happen going forward to address economic development priorities for South Bruce.

The high-level economic drivers and SOARR assessment will be presented at the Selections of Future Directions presentation. Based on client input, the economic drivers will be further refined and, along with the SOARR assessment, will form part of the Economic Development Strategy for South Bruce.



Municipality of South Bruce - Corporate Strategy & Local Economic Development Strategy Update

Consultation Insights

June 2021



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About this Report

Consultation Insights serves as the background report to the Corporate and Local Economic Development Strategies Updates. It details the results of the *Phase 2 - Where are we now? Market Analysis & In-Community Engagement* and includes the results of the stakeholder engagement undertaken as part of the strategy updates.



1. Introduction

Community consultations were an important aspect of the strategy development for both the Corporate Strategy update and the Local Economic Development Strategy update. Community Engagement began in early April 2021 to June 2021 and included the following sessions to date:

Figure 1: Stakeholder Engagement Process, Corporate and LED Strategy Update

Engagement Activity	Target Audience	Scope
Advanced Reconnaissance Interviews (11)	Mayor, CAO/Clerk, County representative, local businesses and community champions	Corporate Strategy update and Local Economic Development Strategy update
Workshop with Council (1)	Municipal Council	Corporate Strategy update and Local Economic Development Strategy update
Staff Session (1)	Senior Management Team	Corporate Strategy update and Local Economic Development Strategy update
Internal Staff Survey (15 responses)	Municipality of South Bruce Staff	Corporate Strategy update
Business/Community Survey (75 responses)	Local businesses and residents	Local Economic Development Strategy update
Workshop with Support Agencies & Service Groups (1)	Local organizations, service clubs and community champions	Corporate Strategy update
Workshop with Businesses (1)	Local businesses and support organizations	Local Economic Development Strategy update
Group Discussion with Municipality and County (1)	County Economic Development Staff	Local Economic Development Strategy update

The summary results of the engagement processes are detailed below.



2. Advanced Reconnaissance Interview Summary

South Bruce Top Strengths

Sense of Community Backed by a Supportive Environment

- Residents feel it's a beautiful place for people to live; the people make up the backbone of the community
- The community works together — residents promote supporting local and home-based businesses
- Many local organizations are focused on giving back to the community

Economic Diversification and Business Resilience

- Diverse employment – for a rural area, South Bruce has several different industries, including agriculture, energy, retail and manufacturing etc. Good momentum in all sectors – demand for land and trades for building and equipment
- The business community is resilient and able to pivot if needed. For example, when manufacturing was on the decline, the community took advantage of opportunities in the energy sector
- The agricultural community hasn't changed much in 50 years – stable and has the potential to create wealth in the community
- Nuclear has been a strength for over 40 years
- Aggregate industry – lots of resources here, value-added

Growth Potential

- There is a willingness from officials and municipal staff to help grow local business
- Migration and retention of younger people and spousal employment growth happening. Bruce nuclear jobs and young families are coming here to live because of rural quality of life. Commute for work to Toyota and Honda. Some commute to Toronto, Kitchener, or Guelph.
- There is a migration of baby boomers from the county to rural areas for retirement years.
- Teeswater was built was through immigration. Need more people to come in. Unemployment rate is one of the lowest in the province
- Sewer system between Formosa and Teeswater has been a great positive
- GayLea investment

Greatest Opportunities for South Bruce Over the Next Five Years

Opportunities to Capitalize on Energy Sector

- DGR – Important to understand if it's a good fit during the next couple of years
- Energy opportunities outside NWMO and nuclear – Take advantage of the increasing demand for energy. Bruce Nuclear is a major employer for the area for 18-19 years. Offering jobs with good



wages. This is a great opportunity for the local population given a broad range of trades is needed here. Also generates many inquiries for industrial land – Opportunity to focus on industrial land development - Capital Asset Plan is important

- Opportunity for supply chain growth in the sector. construction and day-to-day operations – Opportunity for Teeswater to start conversations for growth opportunities with Mike Grenchuk, CEO
- Growth of Kinectrics – they are considering putting in a medical isotope’s development in the region (irradiate isotopes using the nuclear reactor)
- Nuclear Innovation Institute - opportunities to create jobs with the Carbon Footprint project and for the municipality to operate more efficiently
- Algonquin College is talking about a setting up in what will be the nuclear hub of Canada. They have a certified radiation technologist program at their campus in Pembroke. It used to be a nine-month course and now is a two-year course.

Other Sector Growth Opportunities

- Real Estate Demand - Lots of growth opportunity given housing availability is hard to come by – Properties come up for sale, and they are gone in a week. Remote work resulting in urban people moving to South Bruce
- Aggregate Industry - Particularly value-added concrete products (E.g., precast concrete, instead of just shipping the gravel, bring the inputs here – Supported by the fact that the GTA is getting closer as its growth expands north. Suburbs of Kitchener and Orangeville are close as well.
- Agriculture Industry - a significant contributor to the economy and will continue to be as long as South Bruce stays innovative and avoids capitalization maturity (Ex. Marijuana plant – 7 acres outside Kincardine employs 300 people). Seeing increased investments in processing and primary production
- Health Industry - Medical support – there is a potential for a new medical centre in Teeswater. Opportunity to offer a drop-in emergency centre, dialysis or chemo treatments.
- Trades need labourers; will be hard to find part-time ag workers (once retail/restaurant go back to work with Covid)

Considerations That May Stand in the Way of Advancing Opportunities

Division in the Community

- The current division in the community related to a DGR Project will need to be addressed in the long-term whether a project is approved or not. Community concern, fear and lack of information dissemination needs to be addressed
- The signs that say “No to nuclear” are a significant deterrent to investors. Although the city has explained that they are not against nuclear, just the DGR, the signs can lead investors to think otherwise
- Businesses feel shunned by others if they are too vocal about their appreciation of a DGR Project like NWMO
- Community needs a say; economically speaking don’t want to be held hostage for 10 years.



- Consumer perception – Why would they put it into Teeswater?

Gaps in Servicing Capacity

- The vision of the council to put in sewer in Teeswater a few years ago was a good idea
- Natural gas supply – South Bruce has a problem with the laundering facility because Enbridge said they couldn't supply the plant; Teeswater is at the end of the trunk line. Its capacity is fully utilized. As a result, they are trucking in compressed natural gas. Enbridge has now said it will cost \$40 million to improve the trunk line from Stratford for Teeswater users, which is a concern
- Sewer capacity – Looking at how to improve capacity
- Water capacity – Drilled a well which is working for now, but future businesses will likely demand water service.
- Hydro – Put in their own line to get three-phase power
- Grant/Loan Funding – Got money from the Fed and Prov government to help with construction. Nothing concrete from the county yet

Infrastructure/Amenities Gaps

- Connectivity – issues related to broadband and cell connectivity
- Roads and bridges are concerns
- Access to electric and natural gas
- Lack of housing options
- Gaps in education options/institutions

Municipal Staff Capacity

- In some cases, staff are wearing too many hats. e.g., just one CBO who also does planning and by-law enforcement; treasury has three people, and if two leave together, there is a big void
 - Potential action could be to have a formal organizational review

Partnerships That Could be Leveraged to Advance Opportunities

- Opportunity to get more programs with the county related to promotion and delivery of service.
- Collaborate more with Hanover hospital and share practices.
- CEO of the hospital in Walkerton is also a CEO in other hospitals and is bringing these four hospitals together (Walkerton, Durham, etc.). The Shared Services concept started a few years ago in rural health care.
- Business Association – they are good leaders; municipal staff attend their meetings, and support letters go back and forth
- Local businesses such as Kinectrics may invest more as a result of closer partnership
- Partner with farms and talk about development space for housing. Can also look into partnerships with other municipalities to make land available from old commercial or farmland

South Bruce Economic Development Progress and Future Priorities



Business Support Through Grants, Programming and Services

- Considerable work done to become a resource for businesses. Still more to do, but the relationships are stronger than ever before
- Better Communications – Bang the Table, Facebook, Instagram, newspapers
- Very responsive to Covid-19 - Helping businesses jump on board virtual tools, website development and social media tools
- The municipality offers business grants
- Spruce the Bruce - Downtown community groups worked to take advantage of the program

Encouraging development

- Sale of the industrial land and movement related to housing
- Infrastructure over the last ten years
- Appetite for being positively engaged with economic development
 - Gaylea did a major expansion in Teeswater. They went to full production with more local jobs. Kinectrics also developed a new building.

Focus on Infrastructure

- Having redeveloped their CIP – adding interior development for downtown businesses, run-down, progressive steps
- Broadband – Technology requirements in prominent sectors like agriculture are increasing faster than broadband developments.
- Services
 - Mildmay and Teeswater are at the end of the natural gas lines
 - Teeswater has only one well, but there is no storage for a backup in case the well goes down. Although Mildmay has a water tower

Increase Staff Resources and Support for Businesses

- Solve a potential disconnect between municipal staff and local businesses. For example, the municipality offers grants, but they involve a lot of time in front of a computer. Since not all local businesses are behind a computer during the day, finding time to fill these out can be a challenge. (Ex. Barbers)
 - Ex. The municipality could hire a summer student who supports businesses with grant applications
- The municipality should reach out by phone with businesses to check in and see if there is something they could off or help with (Ex. grant application support)

Capacity building of Municipality for Bigger Projects

- Businesses are willing to expand if given the right environment
- We need to have industrial land available, so there is more industry



- Need planning and work with the county to get planning documents up to speed and encourage people who own zoned land to open up the land for both commercial and residential development
- The municipality needs to secure some land here (ex. warehousing).
- Bring in more community amenities like grocery stores
- Zoning and development - Focus on how business enterprise coming to the area can be accommodated on the regulatory side
- Infrastructure – power is dependable, but the focus should be on bridges and roads that require upgrades

How NWMO fits into the municipality's priorities

Need for Resources and Infrastructure if NWMO is moved forward

- Opportunities are being hindered by the limbo that the municipality is in because of NWMO
- Focus on making sure the right people are negotiating with NWMO, so the municipality gets the best deal for the area – There are concerns that despite a shoestring budget, the municipality can hire someone with the right skill set for these negotiations
- If a deal is secured, South Bruce needs to be aggressive with infrastructure

Community Support for NWMO and DGR

- The community needs to be educated on the NWMO project and brought up to speed on its potential benefits to the community
 - NWMO is a gigantic catalyst for growth. Bring in tax dollars and great community benefit – shared benefit for the entire area - ex. 2,000 to 3,000 jobs (directly and indirectly) + need property developments and Main Street spending)
 - Neighbouring counties will benefit from this project
 - Potential for Centre of Excellence and Administrative Building to be in South Bruce
 - The project will draw from 50-70 km, and, for the first time, South Bruce will be an importer of labour
- There is a rural site in South Bruce for this project. 1500 acres, and landowners agreed to sell. Nuclear waste is sitting in Darlington and Pickering, so something needs to be done with this waste. Great faith in Canadian Nuclear Safety Commission, and they are very thorough. Deep geological repositories are the only way to go to get more growth in the community

What Stakeholders Value Most About Their Relationship with the Municipality?

- Council and staff are good at making time and work back and forth with businesses – although this has been happening less recently.
- Council and administration are over-half-glass-full thinkers
- Councillors are very approachable people and easy to work with - Easy to have a casual and informal relationship



- Forward-thinking people who want to make this community better

Ways to Develop That Relationship Further

- Some feel like it's getting harder to obtain quality time with staff because of their limited capacity
- The community needs to be looking down the road five years, envisioning for the future, rather than reacting to current issues
- Elected officials need to attract and retain partners for businesses
- By working with a staff member who is an industry liaison with business experience.

Initiatives That Have the Most Impact on South Bruce From the Three Levels of Government and What Could Be Improved.

County:

- The county is doing a good job with their programs
- The county supports the Grey Bruce Health Unit well – They have been impactful throughout the county
- Focusing on public-private partnerships can help solve broadband and other infrastructure issues (roads, bridges)
- County roads need to be upgraded
- The county needs to be involved with purchasing new land and needs rezoning and also work with other municipalities to unlock land

Province:

- Worried about flip-flop between lockdowns and its impact on businesses
- The province funds hospitals. These funds are supposed to support the clinic, although they have to ask for donations from residents of municipalities to fund the most up-to-date equipment. Walkerton has a birthing unit, so everybody uses this unit for the most part. A new CT scanner also requires funding.
- School - New facility for schools – combine catholic and public schools
- Workforce skills training opportunities – have the right training for those that are here
- Regulatory policies come from the province – cut red tape

Federal Government:

- Canadian Nuclear Safety Commission from the feds has a positive impact
- Financial support for the community related to NWMO
- Entice Immigrants to want to settle in rural areas
- Climate change comes from the Feds. Carbon neutral economy. Potential opportunities with local clean energy initiatives.



The Most Dramatic Economic Transformation South Bruce Will Experience in the Next Decade or So

Agriculture

- They have always been an agriculture community.
- The 100-acre farmers cannot survive, so they are disappearing at a tremendous rate
 - they are renting to the corporations; in a decade or two, there are going to be only 30% of the farmers they have now (not including people who live on the farmhouse and rent their land).
 - With the corporate control of farms, South Bruce is no longer an agricultural community
 - There are concerns over multi-million dollar farm corporations paying minimum wage for farm labour.
 - The municipality may need to pivot some of its agriculture focus to other areas like commercial/industrial development

Changing Population

- For the first time in a while, South Bruce will have to prepare for an influx of new people coming into the community.
 - Major transformation here, it won't be the Anglo-Saxon settler culture. It will be new immigrants.
 - Potential worry about housing and maintaining a rural atmosphere – Also need to increase current residents' multicultural awareness

Potential Growing Pains

- Need more jobs to stimulate the potential influx of people coming (Ex. more healthcare workers in hospitals and clinics)
 - More stores on the main street and more social media marketing for main street businesses
 - Need to further develop a hub for banking and shopping
- Need to focus on new infrastructure and development to support the growth
 - More land available for commercial and industrial purposes or a new farm. For example, John Deere coming to South Bruce as a supplier to Bruce Nuclear.
- Need to build a foundation in innovation through development like an internal hub for nuclear innovation

How should local government plan to address these economic changes?

- Cultural sensitivity training and education - The community at the moment is not as welcoming to visible minorities as it could be and needs to be more welcoming cultural diversity (avoid the "We're here first." Mentality)
- Focus on economic recovery post-covid-19 (ex. Learn from Brockton E coli business recovery)
- Management trend towards corporate farms and support local workers

How might the NWMO help local government address the changes?



- There will be a huge demand for housing – emphasis on new infrastructure
- Dealing with the potential of the most significant project infrastructure in Ontario
- Yes, opportunity, education, guidance. The local government is willing to support
- Officials and staff are invested in supporting the growth
- Without NWMO, there is an infrastructure gap, particularly bridges, roads, chip/tar that should be asphalt

Physical Infrastructure or Services Needed to Meet the Needs of Residents And Businesses In South Bruce

- Roads, bridge, sanitation, arenas, medical centres – need to be in place to attract people
- Broadband Internet
- Commercial and industrial, and residential land. South Bruce needs more of it
- Social Services to help South Bruce be more welcoming to new community members and help foster a pro-multicultural environment
 - Cultural centres – what are the activities that are non-traditional Canadian activities, potential economic development, worship areas transformation
 - Mildmay or Formosa could have a mosque

2031 Vision for South Bruce

General Community Aspects

- A balanced economy
- Embrace a multicultural community
- A place that people talk about in a good way and want to experience.
- A vibrant community for families where residents are proud of where they live
- The community is in a healthy financial situation and has the infrastructure and staff resources that support the growth.
- Still have the small-town atmosphere because of Lions, Optimists, volunteer firefighters
- South Bruce focusing on hosting a sports tournament

Community Development

- New investment in downtown
- Business attraction
- Development of new housing
- Attractive communities

Sector Development

- South Bruce will continue to look like a rural community because the farms will be farms for decades to come, and Mildmay and Teeswater will still be towns and not cities



- Agriculture and its supply chain will be well-supported.
- The underlying economic/social fabric of the community has been changing and will continue to change. The farms are corporate farms, and the people who live in the farmhouses aren't farmers but renters of land to corporations. This trend will only accelerate. Farming jobs will drop. The community has to adjust to a new future and include new forms of investment, including the nuclear industry.
- The economy is diversified - Non-ag businesses held this community together when agriculture was down.

NWMO

- More high-level nuclear waste will be produced in the next four decades, and we need a place to store this waste safely.
 - The geological repository is being built, given the danger posed by the transportation of nuclear waste to other locations.
- Will transform the community if a deal is made. refurbishments Bruce Power – initiatives that bring people into the community and making it easy to attract professional and support services people because big businesses are coming in
 - Without NWMO: general growth, residential, younger families, not impressive or aggressive, status-quo
- Ongoing social divide will persist over time. There will be resentment in the community especially if there is no referendum. There's a sense that people are pretending to listen.



3. Workshop with Council Summary

On April 29th, MDB Insight team hosted a consultation session with South Bruce Council members. The results of the session are summarized below.

Using Mentimeter, rate the Goals from ‘highly relevant’ (1) to ‘least relevant’ (5).



Is the goal OK as it is, or does it need to be reworded / updated?

- Get more industrial property in our municipality – need direction on how - There are businesses that would come here if serviceable industrial land is available.
- Local business / attract new residents – if you concentrate on those, it is easier to do the other goals, all fall in line with each other.
- Need a strong push for main street revitalization.

What must be the Top Corporate priorities for our Municipality over the next five years?

- Better quality internet – business impacts, need for rural broadband for student education.
- Recreation facilities – satisfactory. Lack of long-term care / nursing home, some retirement communities.
 - Aging fire department, facilities and equipment.
- Promoting land development – all sectors, need to stay competitive with other communities, need residential development.
- Source of funds for land acquisition – impact on levy, possible borrowing.
- Investigate making land available for employment development in both larger villages including Teeswater and Mildmay.
- Fiscal position / perception of municipality is very important.



- Business cases, taxpayer appetite, increase tax base, infrastructure upgrades, Teeswater co. jobs, spin-offs.
- How to attract businesses to the community, partnerships with County, balance of taxation/attractiveness.
- NWMO – substantial incomes possible, workforce concerns among agriculture.

Has the environment we are operating in changed since 2014? Are there things we need to consider or do differently to respond to changes?

- Overall cost of development and red tape has increased, can deter development. This is one of the top concerns.
- Previous Mission statement – “enhance main streets” – should be worth the energy and dollars although several councillors were not convinced.
 - Need more opportunities in downtowns but not sure how to pursue.
 - Should continue to support “Shop local”, that money finds its way back into the community – education gap in terms of importance of local taxpaying businesses (who are also asked for sponsorship \$).
- More housing investment – Ripley project - hot property market.
 - How to attract housing developers? Municipal plan to assist, work with developer? Advertise for investors?

Beyond NWMO, what must be the big priorities for South Bruce over the next 5 years with regards to economic development?

- Agri-business community – large corporations tend to dominate – how do we support the small/growth businesses (e.g., elevator feed)? How do we attract these types of businesses?
- The supply chain is well developed/investment for the feed companies – what is our role in that? Circular? – support the local economy?
- Transitions/new opportunities in Agri-business? – how do we attract abattoir to the municipality?
- Schools as economic drivers – under risk currently.
- SMEs – connectivity (internet suppliers/stronger communication), regional efforts? -, private efforts are in place; fiber comes through Teeswater. Attract private companies/could lead to competition – South Bruce is involved in SWIFT initiative.
- Natural gas – Teeswater and Mildmay are both facing constraints, can’t support large businesses/more development.

Who are your partners and collaborators? How do we make these relationships work better?

- Local community investment – hotel, truck shop (P. Thompson). Companies – Teeswater Concrete, Ag investments, co-op systems, gravel, septic system, housing developments.
- County – communication/discussions; zoning and development goals; feedback loop.
- Need to address red tape/development constraints – review of bylaws – are they favorable?



- Projects are dragging on; deters development.
- Acknowledge local businesses; good news stories; public recognition e.g.: Medical clinic – service clubs & committees (responsible for development in the community). \$70,000 playground. redevelopment.
- State of the community groups? – COVID impact.

Looking forward to 2031, what is your economic vision for South Bruce?

- Status of the NWMO – will have a huge impact – will it be good or bad?
- Out-migration decline; local impact, job created, businesses, supply chain (B2B) – Vision to create more jobs in South Bruce – Similar to Council’s priorities in 2014; need to continue this type of thinking.
- Vibrant Main Streets and industrial parks.

Additional thoughts/Summary of Accomplishments so far

- Ontario funding is not in place anymore – implications of that.
- Municipality can borrow money – we are not operating in an environment without money, how do we effectively use these funds - put it to creating job, homes – need to determine the best place for these funds.



4. Staff Session

On May 3 and May 10, MDB Insight team met with South Bruce's staff to obtain input to inform the development of Corporate Strategy and Economic Development Strategy.

What have been the Municipality's main accomplishments? What partners/organizations have helped you?

- Great working relationships – staff/community business input was a draw to work here.
- Municipality – leadership, staff are invested, Council support is high, community spirit/support, spirit of volunteerism.
- How was the culture developed? – organic vs. targeted change – CAO has taken charge/leadership/invested in Org. & staff. Built great environment over time – Council over the years – listening; good relationship; implemented market review; employees valued.
- Tools – Bang the table; website revamp – communications clear; dedicated staff; improved last year. 2014 identified; 2020 implemented.
- Supporting local industry – sustaining growth; Gay Lee: largest employer. Kinectrics (land/building; 2 facilities in community).
- Federal & Provincial support.
- Continued water & wastewater services.
- Level of service provided is high for community of this size – funding/grants; commitment from senior staff. NWMO projects (upgrades). Municipal infrastructure improvements over the years, capital (roads), facilities (e.g.: Town Hall, fire services (200-350k), Mildmay Arena renovations) – will enable meeting the needs of future residents. We have the infrastructure to meet the needs/maintaining the infra (million \$ paving roads, bridges, needs study ongoing, EA wastewater treatment, Council buy-in is essential). Town Hall is a meeting place now (community space). Recreational spaces - good proportion for the community.
- 10-year capital plan for infrastructure – future Plan for staff – current state and future needs.
- Asset Management Plan; SWIFT; Doctor's office (community planning to build new medical center in the next year).
- Bruce County – Grants; projects for COVID, Spruce the Bruce; CFDCs – our role is to make businesses aware; digital downtown, business to Bruce; Social media (website; online payments of recreational programs, Community surveys; youth programs (NWMO CLC; grants; care packages – with the idea of retaining; NEXTGen events (educational & rec); youth working group).
- Residential growth in community – building permits.
- Increase in population in youth and young families – moving into community (earlier declining trend).

Top priorities for South Bruce over the next five years

- Industrial/residential land development



- Favourable development environment
- Source of funds for land acquisition
- Business attraction & sector development (e.g.: value-added agriculture and food processing)
- Broadband and Internet
- Main street revitalization
- Ensure long-term fiscal sustainability
- Income/spillover benefits of NWMO
- Focus on Infrastructure/services (e.g., facilities for seniors, emergency, natural gas)

What are your top priorities for South Bruce over the next five years?

- Data from NWMO and data in terms of DGR's economic impact on the community. Will be good to know the ROI.
- We need a favorable environment for development – Water Tower; business needs (e.g.: water pressure), infrastructure for land development needs to be in place.
- Asset management? – plan will be developed; financial sustainability to sustain what we have and what we need is still not clear – \$11 million needed versus \$2 million we have – define long-term vision. Compared to other municipalities, the \$ we have invested is high.
- Economic development plan for the future – with/w/o the NWMO.
- Outdoor activities – splash pad, trails, Rec MP (as part of the NWMO project work).
- Employee communications – internal dept. internet. Central system (CB) to connect between depts. Fire (internal dept. is well developed) but municipal information could be built, keep us informed.
- Residential development – will support all the other activities. There is a need for R&D and need to leverage the opportunity.
- Tax base/assessment – ideal mix? Farmland is a high % of tax base but cant tax more than 25%. Haven't had talks about what the ideal base could be.
- Residential versus farmland - Are the values comparable? housing rates are applied.
- Developer perspectives – improve/make better the relationships and support for developers.
- Providing the staffing/resources – need additional resources in some dept. we also need to define the new opportunities/services that could support EcDev. Admin could require new staff. Small municipalities – the roles and responsibilities are a mix and many. EcDev – takes many forms and other duties. Also depends on what is EcDev – we are focussed on business retention. Resources are needed for investment attraction.
- Service creep – staff/equipment. COVID also play a role. Adding services means more staff and more funding. We lack the equipment (e.g.: trucks) we need to perform the services we provide.
- Main Streets – up to standard, fill empty storefronts, maintain and improve, shop local.
- Empty homes – what could be done? Infill opportunities? – don't believe there are many even in Teeswater and Mildmay.



- Create the environment for attracting people & investment.
- Industrial – water services.
- Residential – Quality of Level services.
- Support staff.

How will the services you provide change over the next 5 years? What needs to happen for you to adapt?

- Public Works – Master Servicing Plan (underway). Key to making sure we have proper infras. GIS – we have the mapping requirements. Equipment – we are ok. Environmental considerations – EA underway for Wastewater Treatment Plant. Landfill – projects are on the go – no challenges so far.
- Developer relationships (e.g., regional development boards – support for developers).
- Expansion of the Teeswater wastewater plant.
- Fire – asset management/industry standards need to be updated. Current fire services can support residential expansion. Council decisions can impact service provisions as staffing is limited. Staffing is a good mix. The issue is training volunteers (working on fixing this). Experience is very positive. Good for the next 10-15 years.
- Investment high – online training tools. Need to see the full use of the tools.
- Staffing Demographic – Finance (2 of 3 retiring within the next 5 years). Workload is high now; expansion will result in more. Asset management – need more help. Tax base vs. staffing – annual cost that needs to be considered.
- Any tools? – looking at a budgeting system to support new staff. New programs – MESH (Asset and Work Management Program), state tracker, online payments & building permits – make sure the public know this. Council software – live view of Council meetings.
- Teeswater – Not bad here but need it all-round – industrial and residential.
- Funding is stable for new programs/services – in five years, may change and impacts need to be considered.
- Partners/collaboration with County & other municipalities – IT dept. at County – better support this. Shared services, we are always open. By-law enforcement.
- Service delivery review underway through MIC.
- County also took a review.

How will the services you provide change over the next 5 years? What needs to happen for you to adapt?

- Communications – Fire/ could look at collaboration. Cohesive Training (regional training center). Need to understand the importance and value of joint service delivery.
- We need support in so many services areas – e.g.: building dept. should a County wide service be an opportunity. Asset management is another area.
- Clear procedures and responsibilities – agreements are well-defined.



- New tools in place; annual fees – is it an option for the County to purchase and the Municipalities use the tool on a service fee basis. IT at the County level is one example of this.
- Joint tendering on bigger public works projects. small projects should be kept local.

How does the NWMO fit into the municipality's priorities?

- Residential, improve assets, industrial and commercial cores – all these Council priorities (forms 80%+) are met through the project.
- Council still open and learning – verifying any challenges – studies being done – won't support until they fully understand – by doing this, they have made learning about the project a priority.
- Current budgets have nothing to do with NWMO – will support Council but for the near future, it is not a consideration. If voted to go forward, we will look at it.
- What will be the impact of the funding, if removed? – its grant funding (origin doesn't matter). Been part of our asset management.
- Lack of funding could result in fiscal challenges – time, tax. Need to expand residential tax base, we cannot support services otherwise. We will have to triple tax base to maintain services at the top standard. Without NWMO, will continue to be cash strapped.
- Space/services/facilities to accommodate the growth – we need to be ready.
- Key – work with developers, industrial focus.
- Look into development charges – no development charges currently. County is looking into them currently. Good opportunity to motivate developers to come and invest.



5. Staff Survey Results

The top three (3) strengths or assets that provide the greatest potential for South Bruce to create a more prosperous and sustainable future.

- South Bruce being a nuclear centre of excellence: great opportunities with possible DGR, one of two communities selected for used fuel project as well as possibility of partnering with/being home to facilities in the nuclear sector (e.g. Kinectrics). Proximity to Bruce Power is another strength.
- Desirable place to live / great community, friendly people and good location
- Lands available for development

Other mentions include affordable housing, more businesses like Gay Lea, vibrant downtowns and growing businesses. Facilities and services including recreation facilities, senior residential facilities, schools, family farm/residences were mentioned. Infrastructure improvements focussed on roads, water and wastewater were also mentioned.

The top three (3) challenges facing South Bruce

- Aging Population and lack of labour force
- Lack of development lands for residential, industrial & commercial to attract future industry
- Lack of downtown businesses, vacant store fronts on main street especially in Teeswater and Formosa

Other mentions include community divisions over DGR, lack of a "destination" feel, inadequate broadband, high taxes, aging infrastructure/deteriorating roads, gaps in government funding. There is a lack of good paying jobs (outside of Bruce Power). Also, the agriculture sector is seen a labour force decline, due to the impact of automation. Gaps in housing, lack of residential development and gaps in targeted resident attraction are other challenges

Is the current community vision still relevant and reflective of the community's current and future desired state?

Response	Number of Responses	Out of Total, %
Yes	9	64%
No	4	29%
Don't Know	1	7%
Total	14	100%



What do you like or dislike about the current vision for South Bruce?

Likes

- Staying true to our small-town roots but open to some growth and supporting local business
- Agriculturally rooted
- Supports growth
- Positive and forward looking
- Affordable amenities

Dislikes

- Downtowns that are not dynamic or vibrant, losing our SMEs and many store vacancies
- How to become year round destination
- Not dynamic
- It sometimes feels like the environment does not support growth
- More focus on youth

What is your vision for the future? By 2031, my South Bruce will be...

- A place with vibrant downtowns, local services of all types so people do not have to leave town, the population would increase by 20% , the DGR would be approved and there would be secondary education opportunities available , we would also be the start of Bruce County destinations - trails and Roads all start here
- Vibrant with new subdivisions, commercial and industrial growing, providing accessible and affordable amenities for residents and businesses, creating an environment supportive of growth, vibrant downtowns that foster small business, year-round destination experience
- Buzzing with anticipation of a new major project in the community.
- New developments with commercial subdivisions
- A place to retire with lots of activities for seniors with biking and walking trails and options for senior housing and care facilities.
- Small town friendly, with thriving small businesses filling the towns where young and old are proud of our community with great recreational facilities for health and wellbeing of residents.
- To see South Bruce grow and attract youth to live in the community. Provide for future generations.
- Growing in a controlled steady manner with manufacturing jobs, store fronts filled in each community, empty homes and buildings occupied or demolished. Happy and safe.
- More jobs for our youth, so they can buy homes and stay local
- More commercial growth to see small and mid-sized businesses in the community
- Able to sustain itself; villages have full stores and all basic amenities. Sufficient jobs to retain young families. Managed growth; not excessive. A town with suppliers/jobs linked to ag, small business and nuclear industry while still retaining small town culture/character.



- Growing and Dynamic
- No empty spaces for the downtown core, affordable housing, more local education and jobs for our youth

The following are the Strategic Goals of the 2014 – 2019 Corporate Strategic Plan. In your opinion, are the Strategic Goals still relevant and reflective of the community’s current and future desired state? For each goal, indicate if it is highly relevant, somewhat relevant, neither relevant nor irrelevant, somewhat irrelevant, or highly irrelevant.

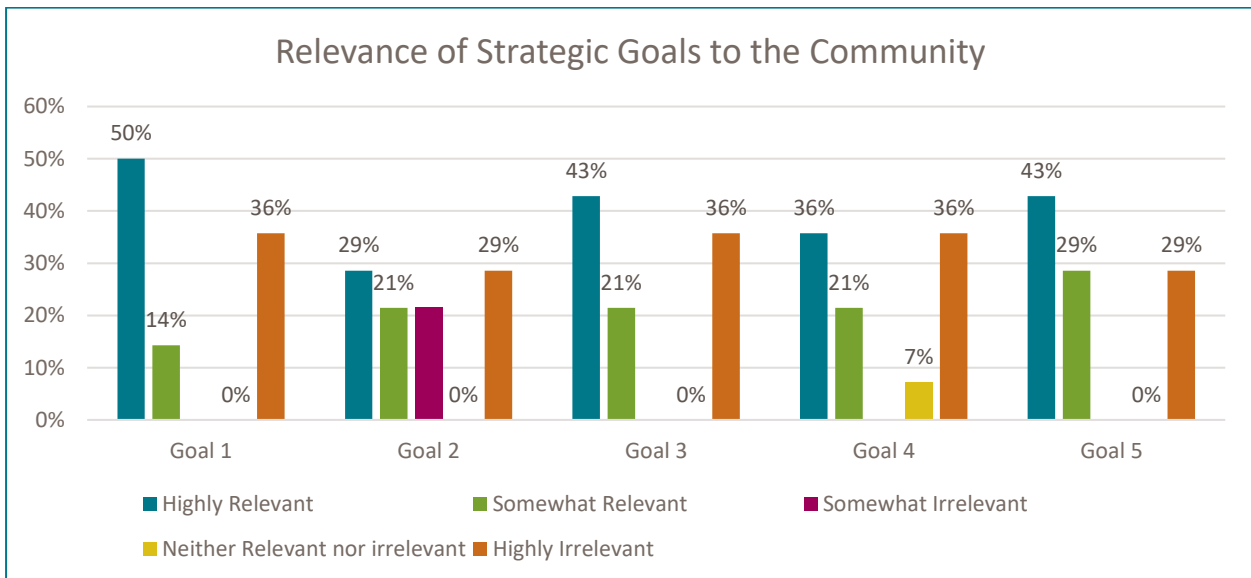
Goal #1: Create a strong corporate climate that supports local business growth and sustainability

Goal #2: Create and promote a culture that practices clear communication, inclusiveness, transparency, and accountability

Goal #3: Secure the fiscal capacity necessary to develop and maintain infrastructure improvements that address bridge replacements, road resurfacing, and drainage concerns

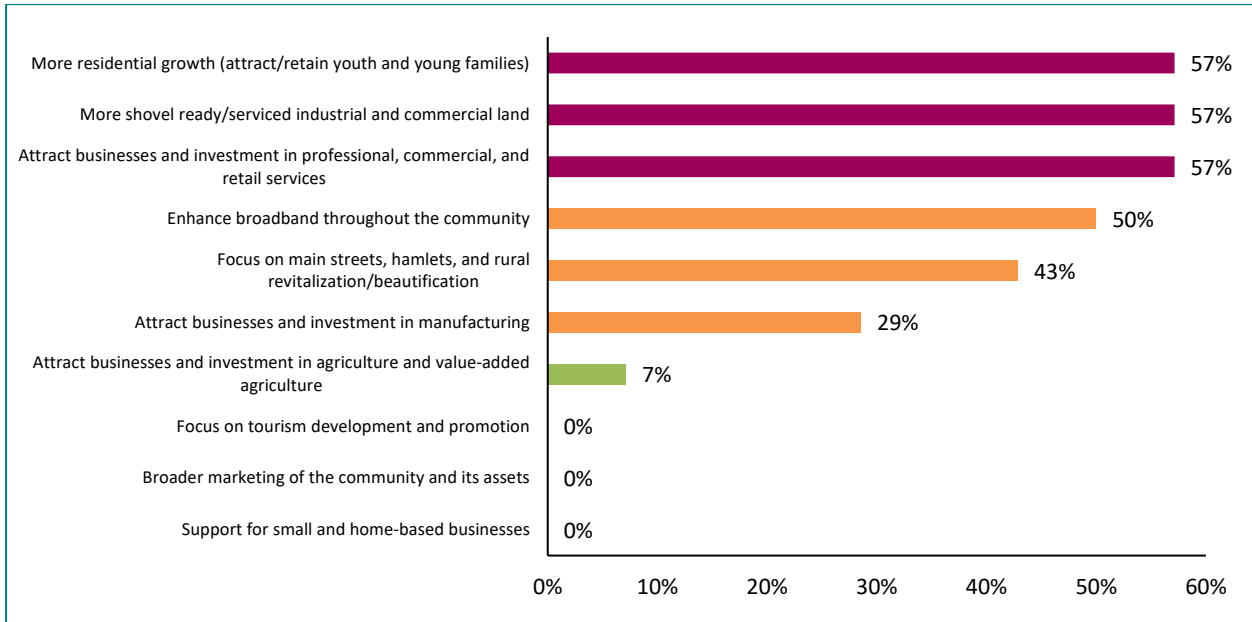
Goal #4: Create a strong corporate environment that supports retention and succession planning for municipal staff

Goal #5: Support existing and new opportunities to attract new residents and retain our young adults and senior populations

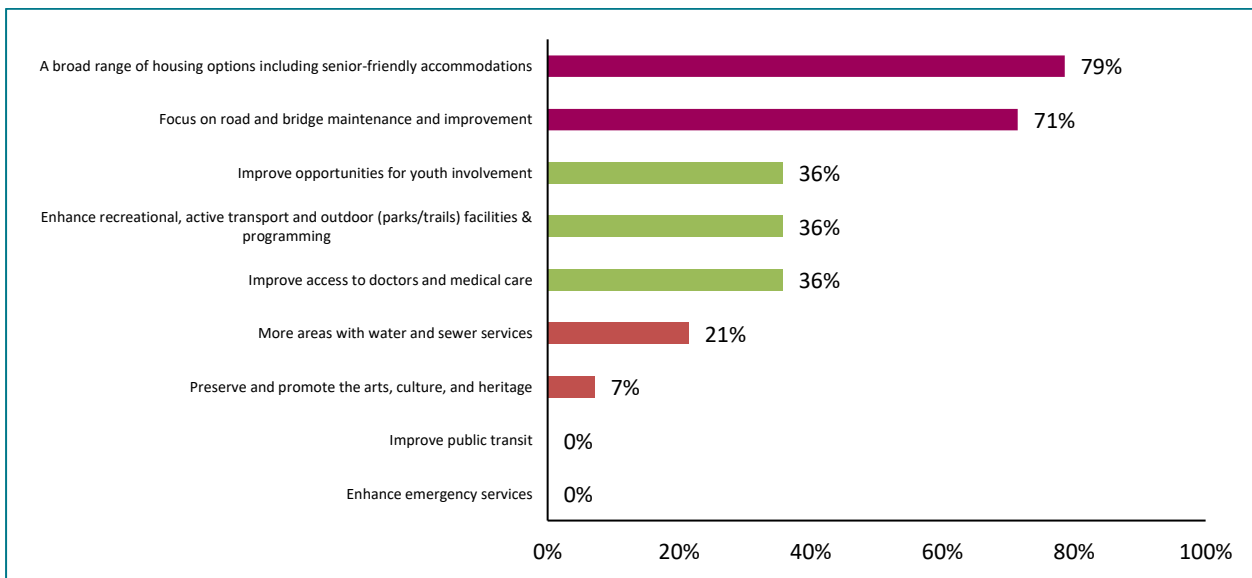




From a local business growth and sustainability perspective, what are your top three (3) priorities for the Municipality of South Bruce over the next 5 years? (n=14)

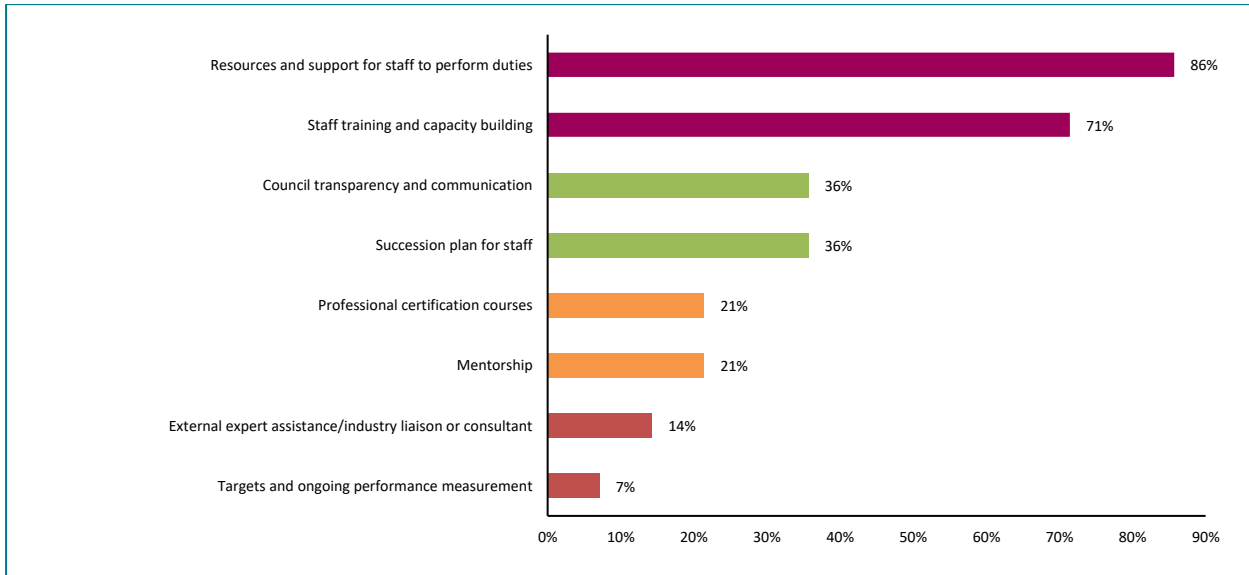


From an infrastructure and community growth and services perspective, what are your top three (3) priorities for the Municipality of South Bruce over the next 5 years? (n=14)





From a corporate environment and staff resourcing and capacity perspective, what are your top three (3) priorities for the Municipality of South Bruce over the next 5 years? (n=14)



What are the programs and services that the Municipality delivers best [open-ended]?

- All Services are delivered beyond what should be expected for a small population, all services from Roads Maintenance, PW, Parks & Rec, Fire, Customer support are all excellent
- Affordable taxes, good roads, recreation
- Snow removal
- Recreation programs for kids and fitness programs
- Fire response
- Water and wastewater services
- Recreation and communication to support businesses
- Parks and rec staff work hard, under funded and under equipped to deliver services against the odds

Are there ways to improve or modernize service delivery? If so, please offer suggestions. [open-ended]

- Better broadband, better use of technology to conduct reports and such electronically
- Continue to invest in infrastructure through asset management. Never be afraid of change
- More employees, more time to perform great work. We struggle to keep good staff because they get overwhelmed having to wear too many hats
- Ensure staff have equipment and tools to do their jobs to the best of their ability
- Union gas
- Use digital options (online payment, digital property files) more while maintaining traditional service delivery that is still important to specific demographics
- Continue to be transparent



- Try more cost sharing initiatives with other municipalities, and/or the County to keep costs affordable for services such as by-law enforcement, building inspection, fire chief, IT
- Continue to streamline processes wherever possible. We have been actively doing this
- Fund parks and rec better and don't consistently tell them to cut their spending (looking at you council). With more funds they can obtain the equipment needed to do their job to the fullest, instead of spending 1/3 of their time scrounging for it

Please provide us with any additional ideas or thoughts that you would like to share [open-ended].

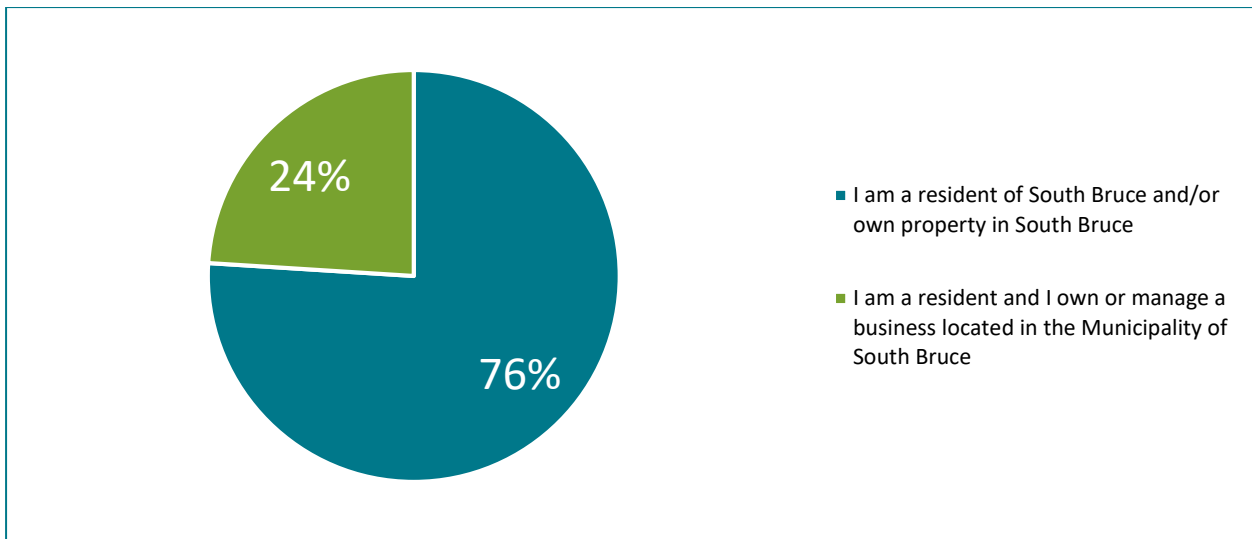
- I think at some point the residents should be made aware of the potential positive impacts of the DGR from schooling/education to the financial impact it will have on them
- South Bruce has to focus on bringing in alternate employment to agriculture such as Kinectrics
- Our municipality needs to grow to support the current levels of service. Without growth, hard decisions need to be made with regard to all services to ensure replacement of assets are must haves, not nice to have
- Get more government funding back like years ago
- More/improved outdoor recreational facilities to get people of all ages active and outside such as tennis courts, pickle ball courts areas for road hockey. Promote walking trails
- Keep moving forward



6. Business/Community Survey Results

Respondent Profile

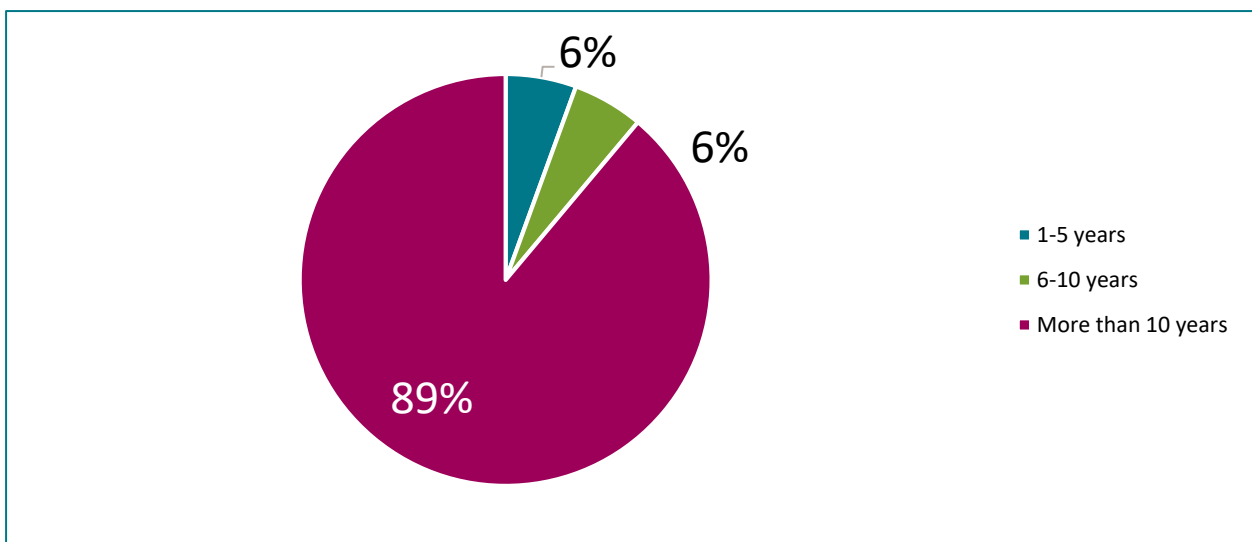
Out of the 75 respondents, 18 were residents who own or manage a business located in the Municipality of South Bruce. These 18 individuals made up the sample size for business-specific questions. No respondents resided outside the municipality. The resident questions below include responses from all 75 survey respondents.



Business Specific Questions

How many years, as the current owner/operator, have you been operating this business location in South Bruce? (n = 18)

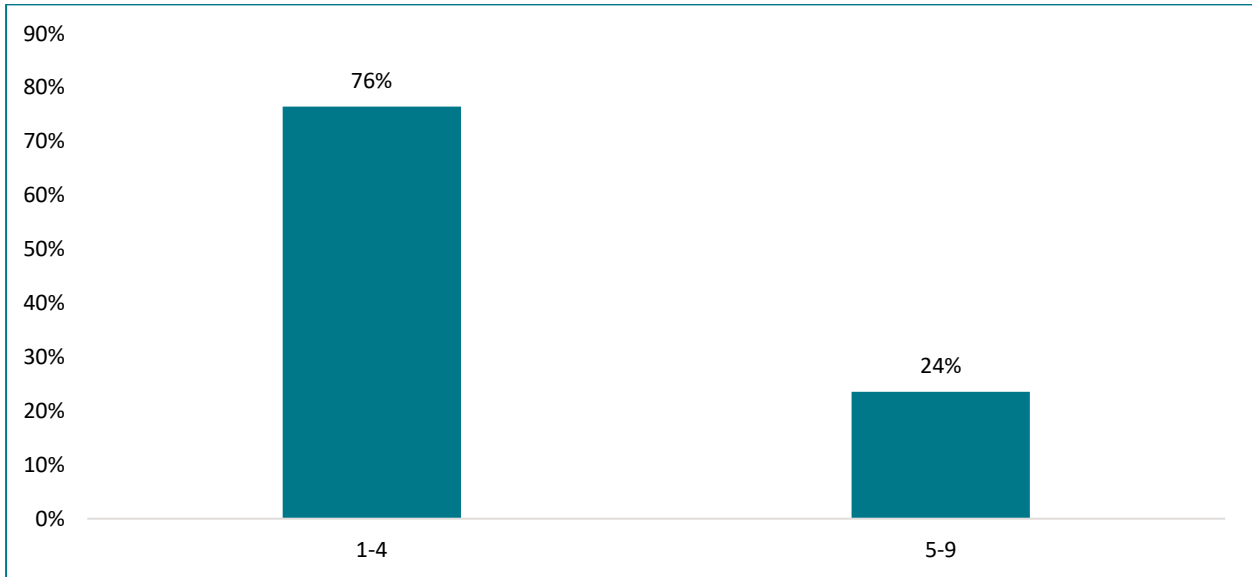
89% of business owners have been operating for over ten years.





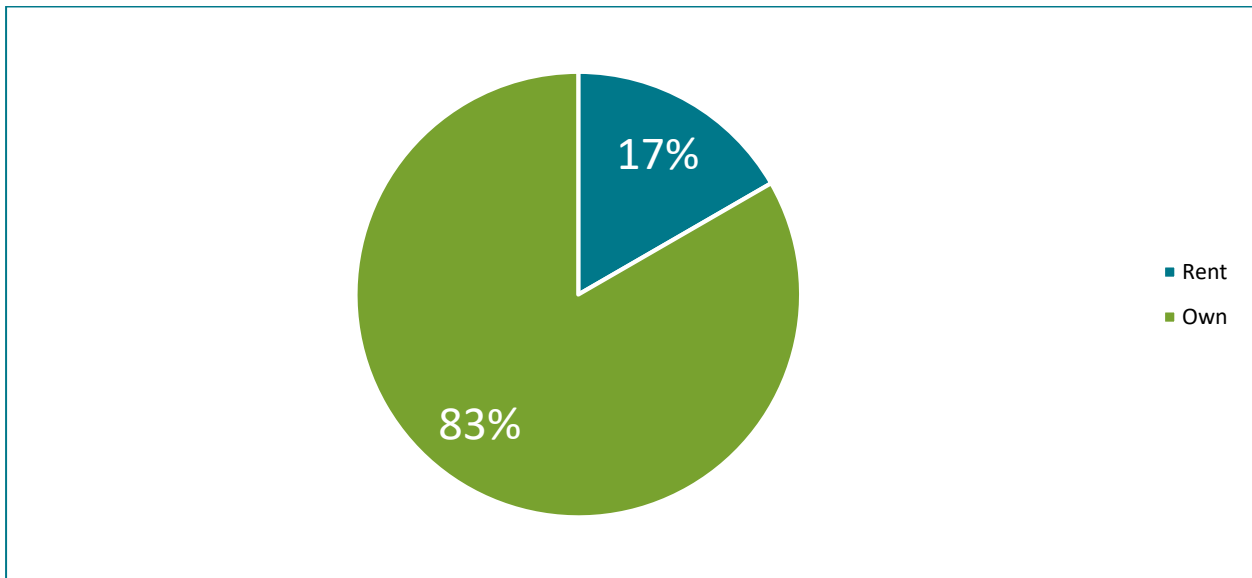
Including yourself, how many full-time employees currently work at this location? (N = 17)

Most respondents were small businesses with less than nine full-time employees.



Do you currently rent or own your business property? (N = 18)

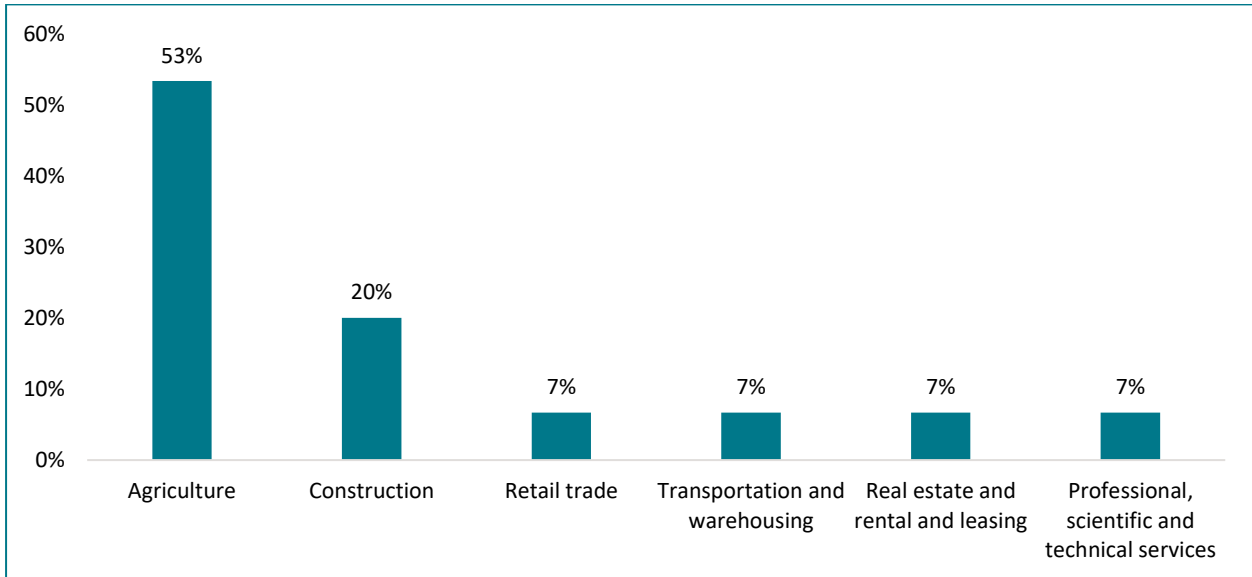
83% of businesses own their business property





What type of business do you operate? (N = 17)

A large proportion of respondents operate agriculture (53%) and construction businesses (20%)

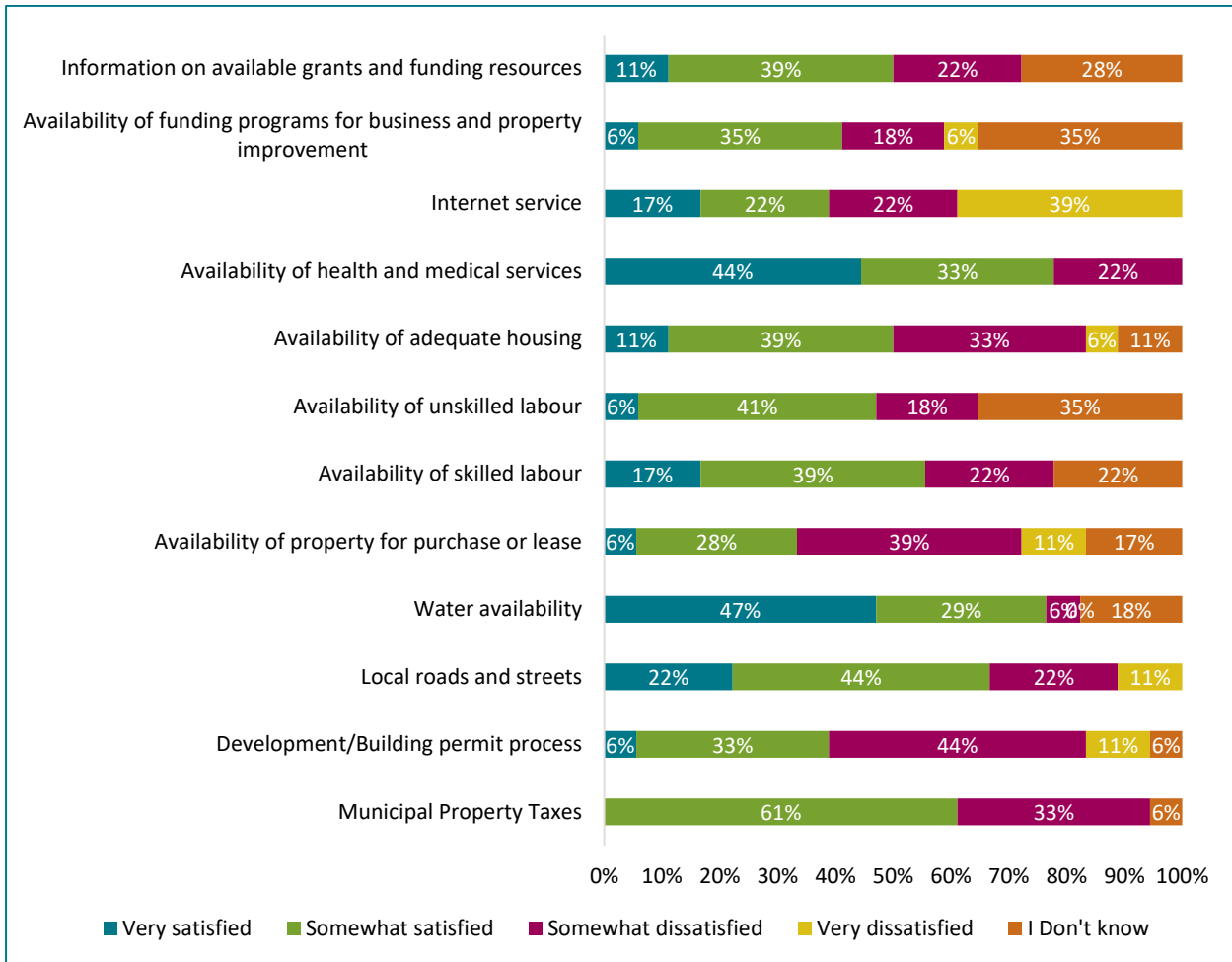




Business Satisfaction

How satisfied are you with each of the following factors of doing business in South Bruce? (N = 18¹)

A large proportion of participants are very satisfied or somewhat satisfied with available information on grants, health and medical services, availability of skilled labour, water availability and local roads and streets.



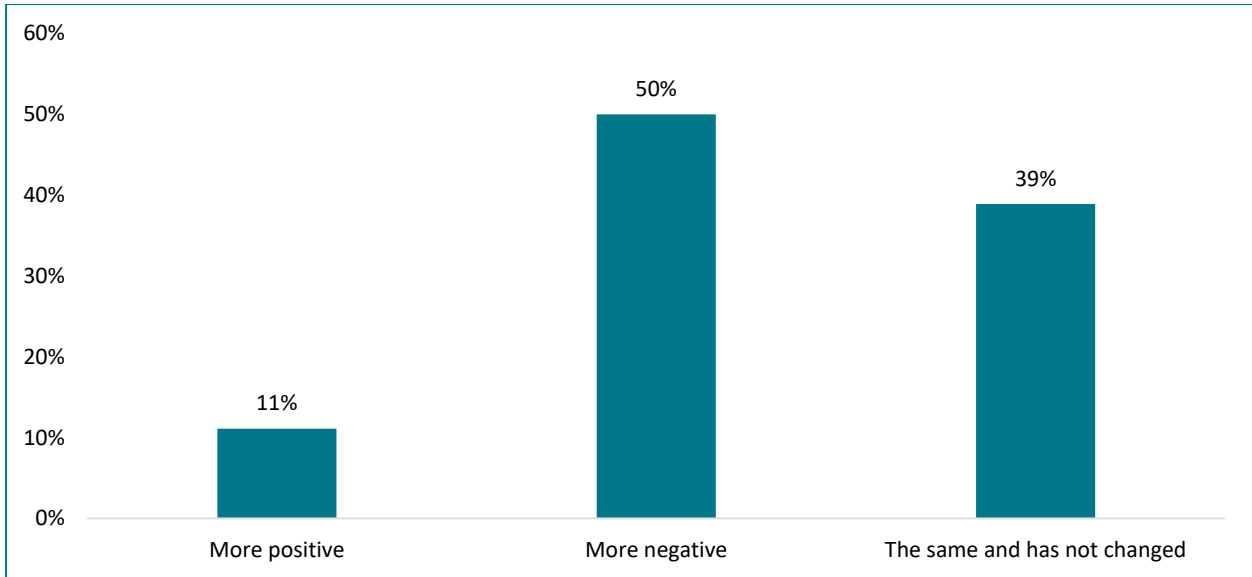
¹ Water availability, Availability of unskilled labour and Availability of funding programs for business and property improvement had 17 responses



Business Attitudes and Perceptions

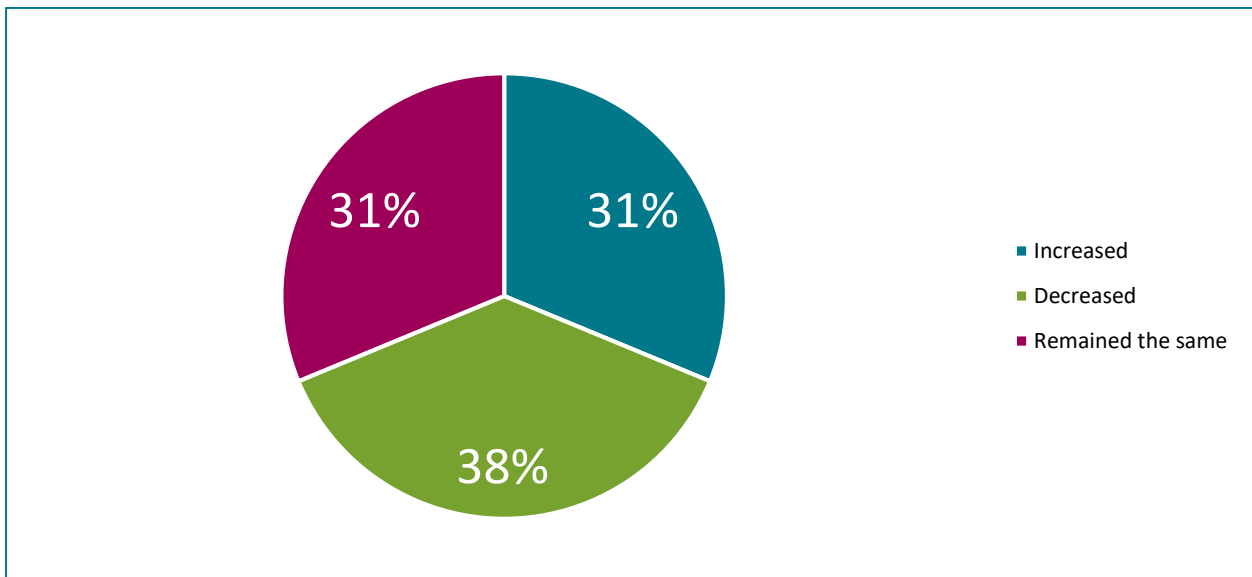
Over the past 12 months, would you say your attitude about doing business in South Bruce is more positive, more negative or has not changed? (N=18)

Over the last 12 months, half of the participants have a more negative attitude about doing business in South Bruce.



Compared to the last fiscal year, have the revenues at your business this fiscal increased, decreased or remained the same? (N = 16)

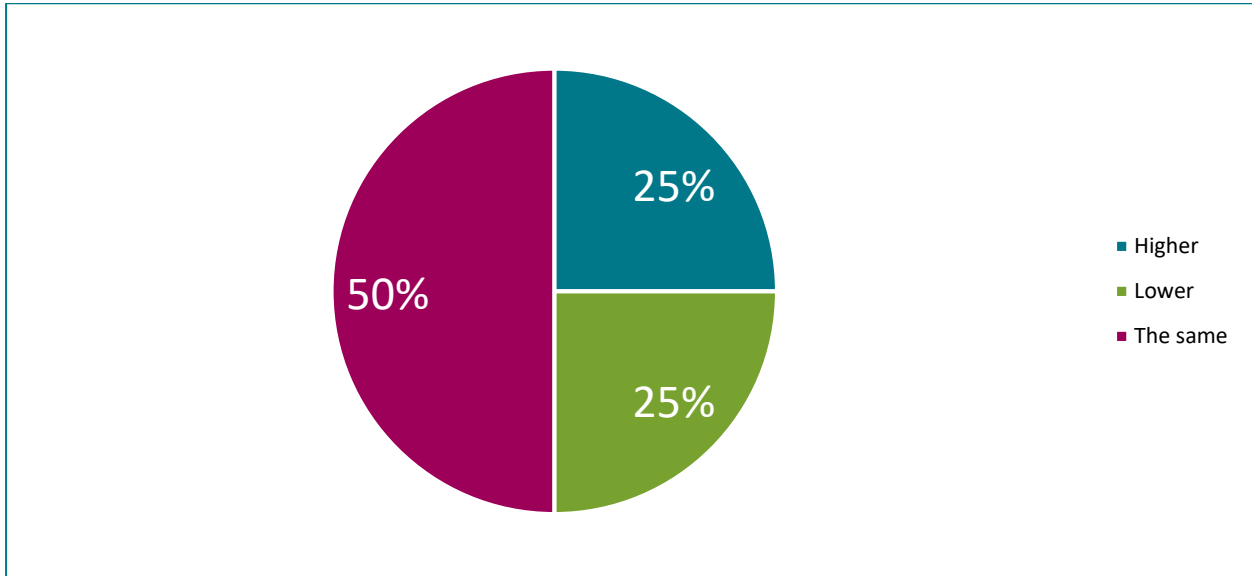
An equal proportion of businesses have seen an increase and decrease in revenue (31% each). While the largest proportion of businesses found their revenue stayed the same





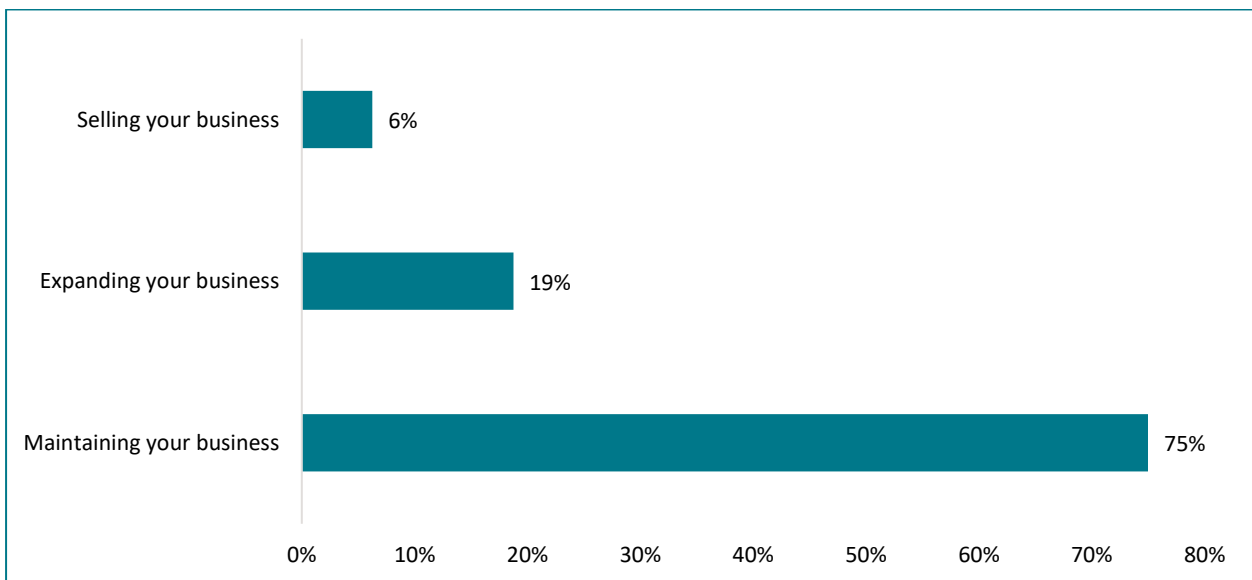
What are your expectations for the next fiscal year in total revenues compared to the last year? (N=16)

An equal proportion of businesses expect an increase and decrease in revenue (25% each). While half of responding businesses predict their revenue will stay the same



What are your plans for the next 24 months? (N=16)

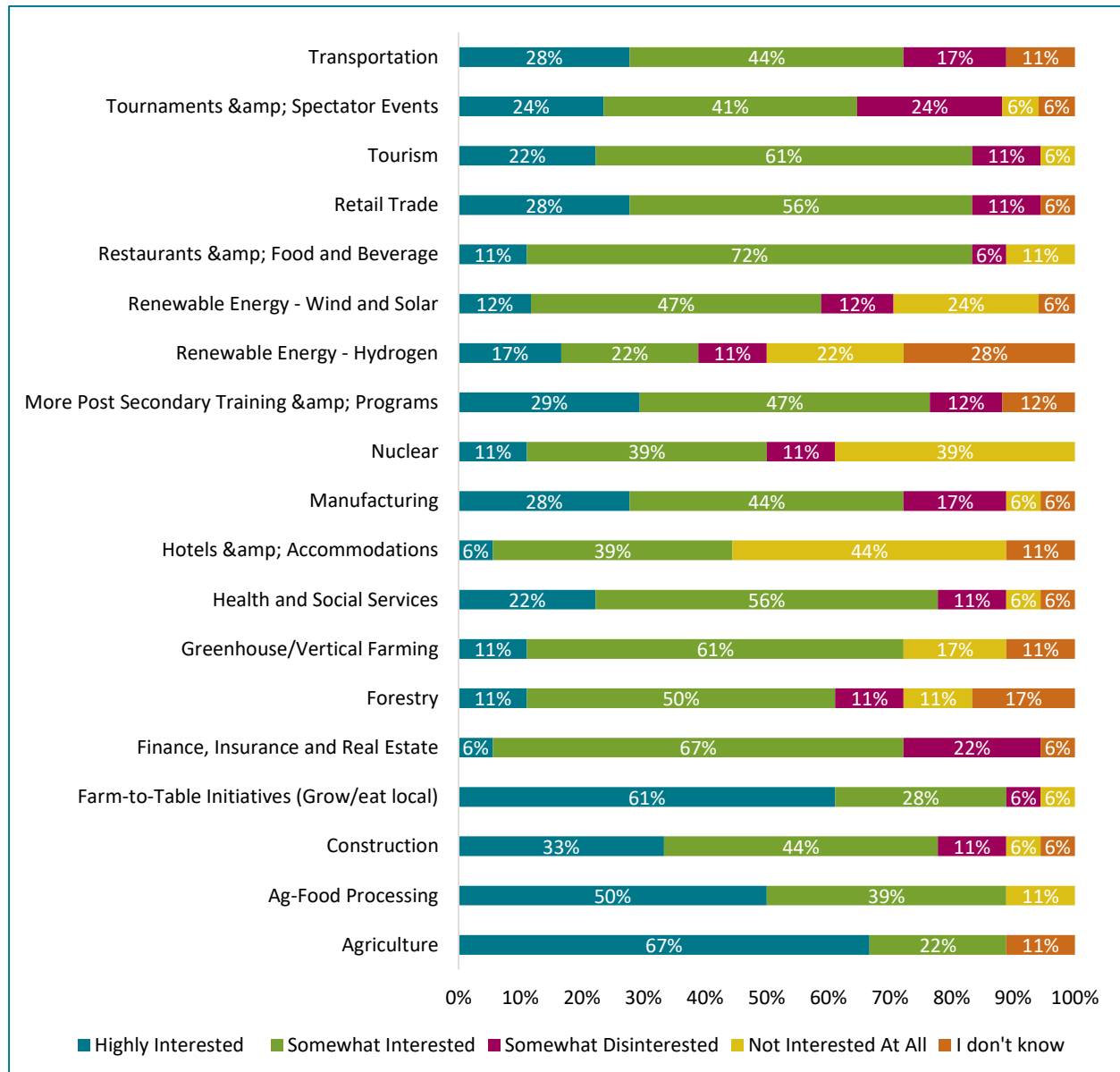
75% of businesses expect to keep and maintain their business over the next 24 months.





How interested are you in seeing more of the following industry sectors in South Bruce? (N=18²)

A large proportion of participants are highly interested in agriculture, agri-food processing and farm-to-table initiatives. A large proportion of participants are somewhat interested in Finance, Insurance and real estate, Forestry, greenhouse/vertical farming, health and social sciences, restaurants, food and beverage, retail trade and tourism.



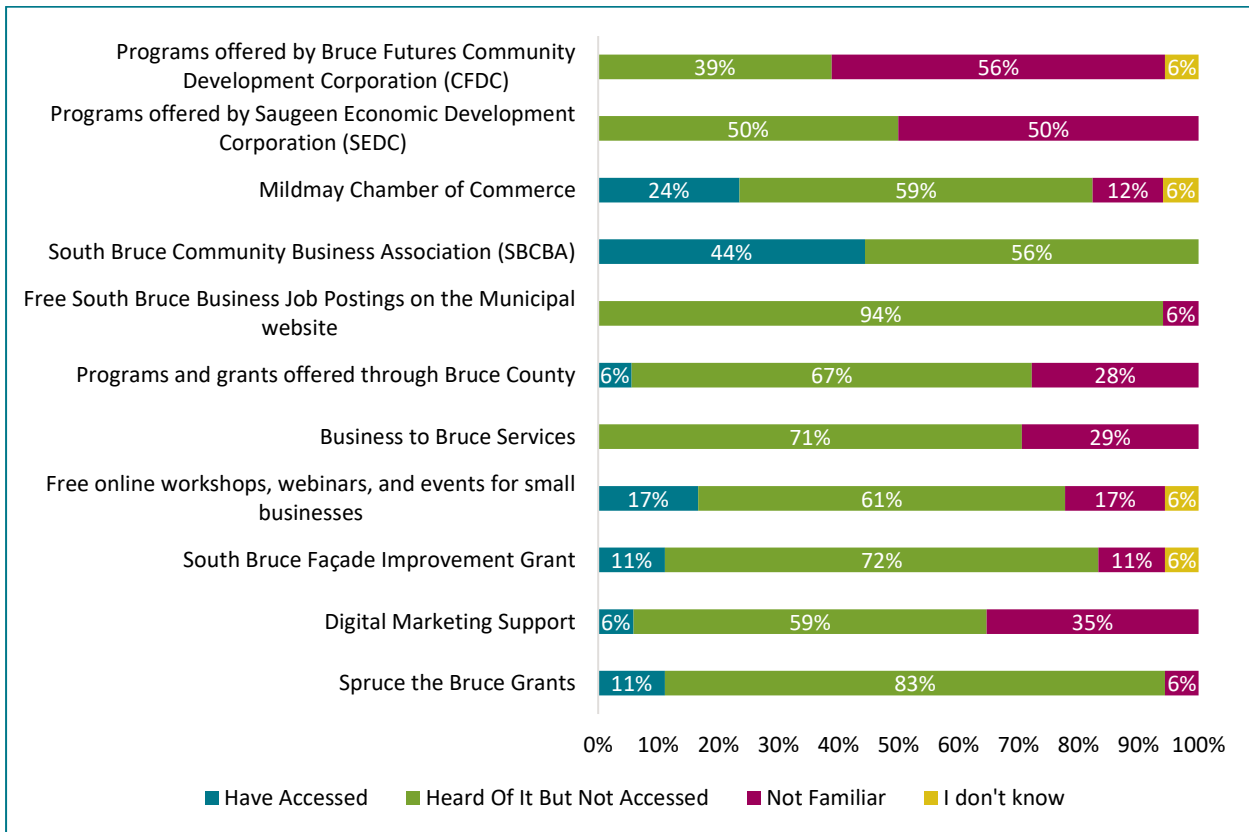
² More Post Secondary Training & Programs, Renewable Energy - Wind and Solar and Tournaments & Spectator Events had 17 responses each



Business Support

Has your business accessed any of the following business support programs? (N = 18³)

At least half of respondents have heard of the programs listed except for programs offered by Bruce Futures Community Development Corporation (39% had heard of it). A notable proportion of residents have accessed South Bruce Community Business Association and Mildmay Chamber of Commerce.

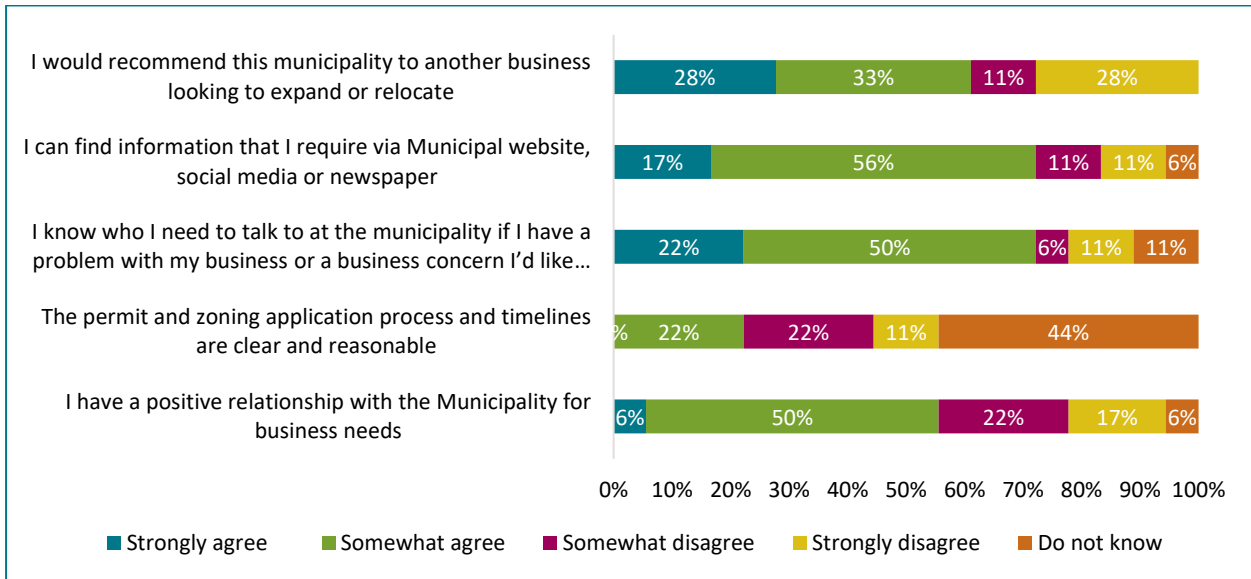


³ Digital Marketing Support, Business to Bruce Services, Free South Bruce Business Job Postings on the Municipal website and Mildmay Chamber of Commerce had 17 responses

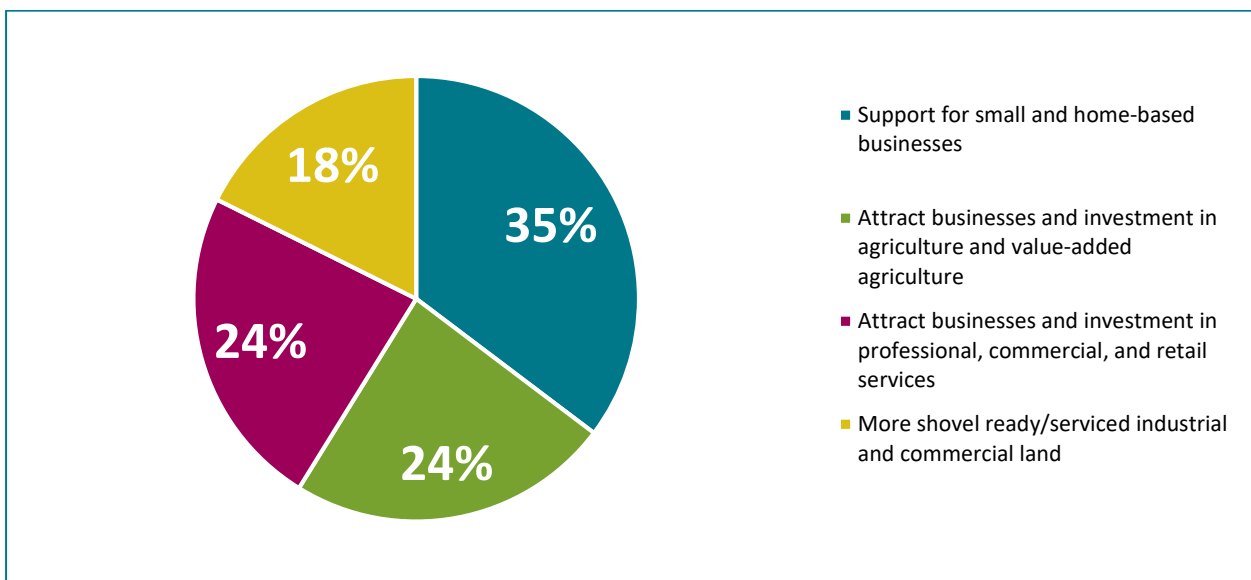


What is the level to which you agree with the following statements? (N=18)

Overall, the majority of respondents did not strongly agree or strongly disagree with any of the statements. At least half of the respondents somewhat agree with “I can find information that I require via Municipal website, social media or newspaper,” “I know who I need to talk to at the municipality if I have a problem with my business or a business concern I’d like to share” and “I have a positive relationship with the Municipality for business needs.”



From a local business growth and sustainability perspective, what are your top three (3) priorities for the Municipality of South Bruce over the next five years? (N = 18)

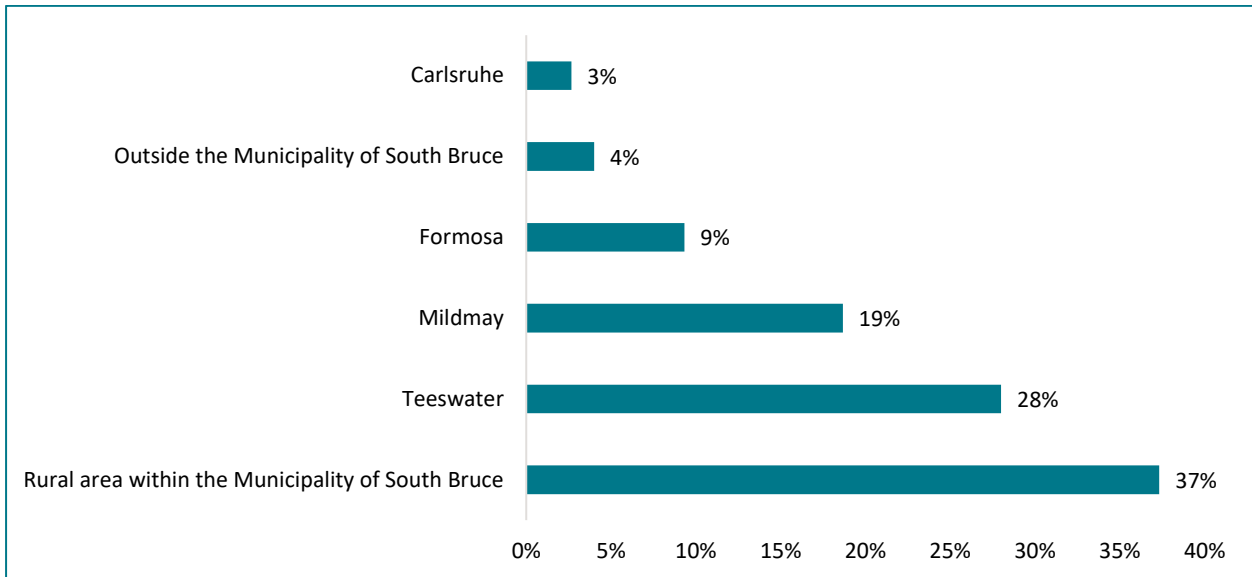




Resident Perspectives

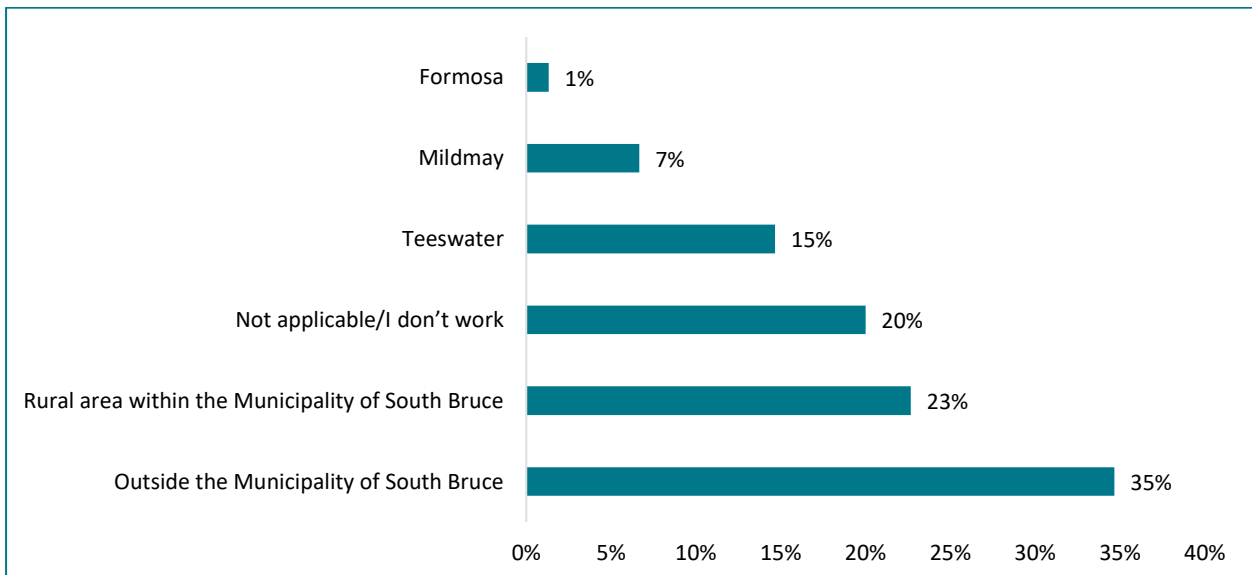
Where is your primary residence? (N = 75)

Most respondents were from Rural areas within the municipality of South Bruce, Teeswater or Mildmay. No respondents were from Deemerton or Belmore.



Where do you work? (N=75)

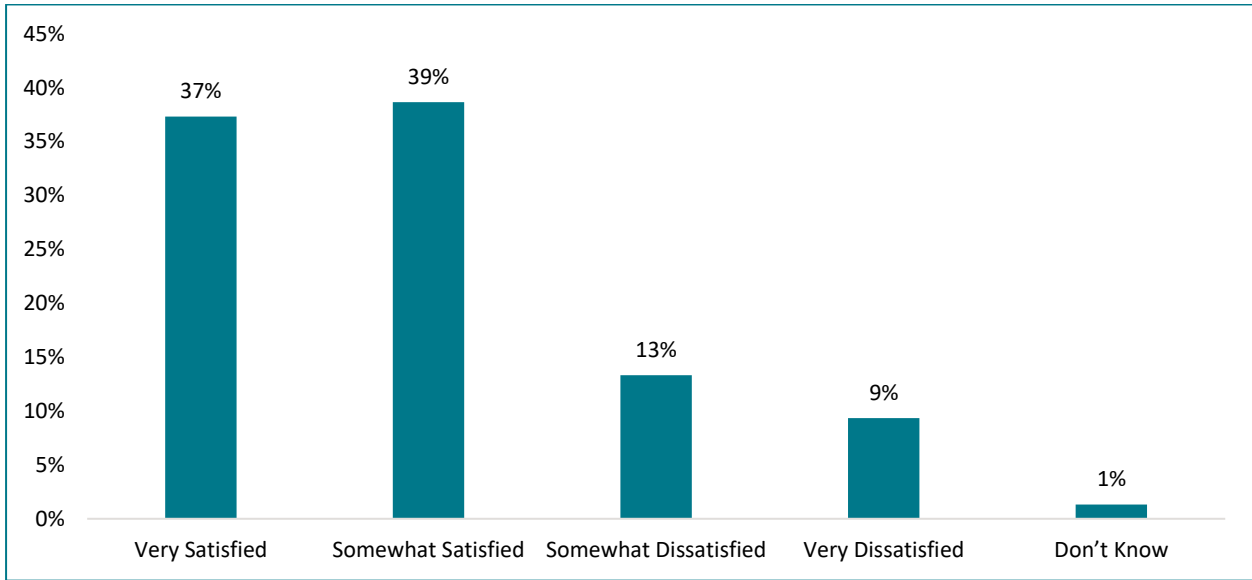
Most respondents work outside the municipality, rural areas within the municipality of South Bruce or don't work. No respondents worked in Carlsruhe, Deemerton, Belmore or were currently not looking for work.





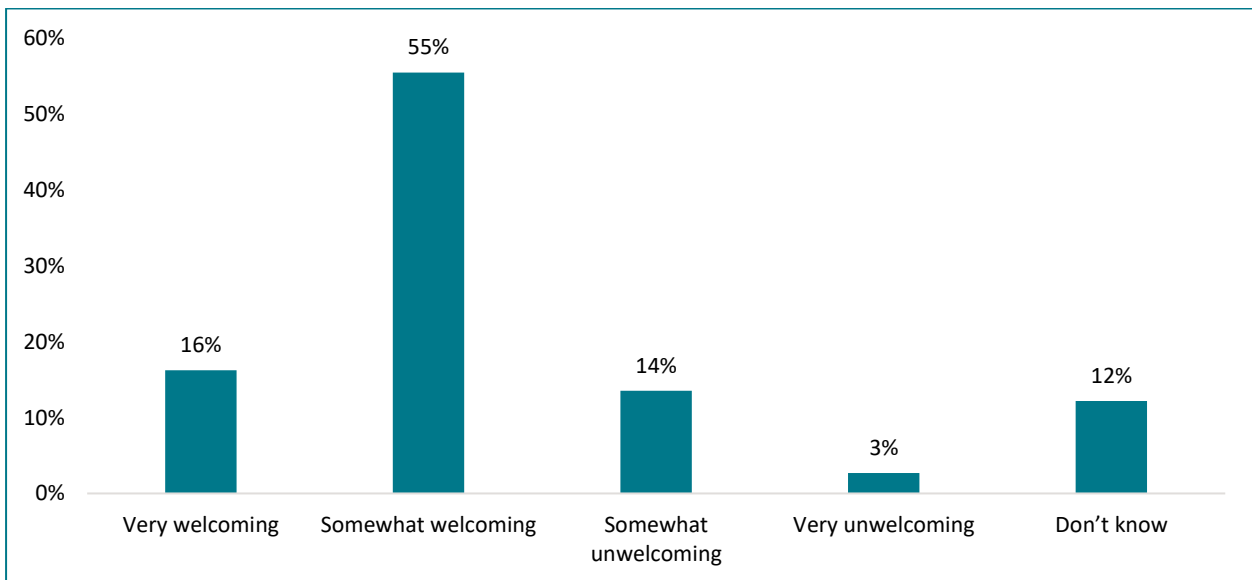
How do you generally feel about South Bruce as a place to live? (N =75)

Most respondents were very satisfied or somewhat satisfied with South Bruce as a place to live



How welcoming is South Bruce to newcomers? (N = 74)

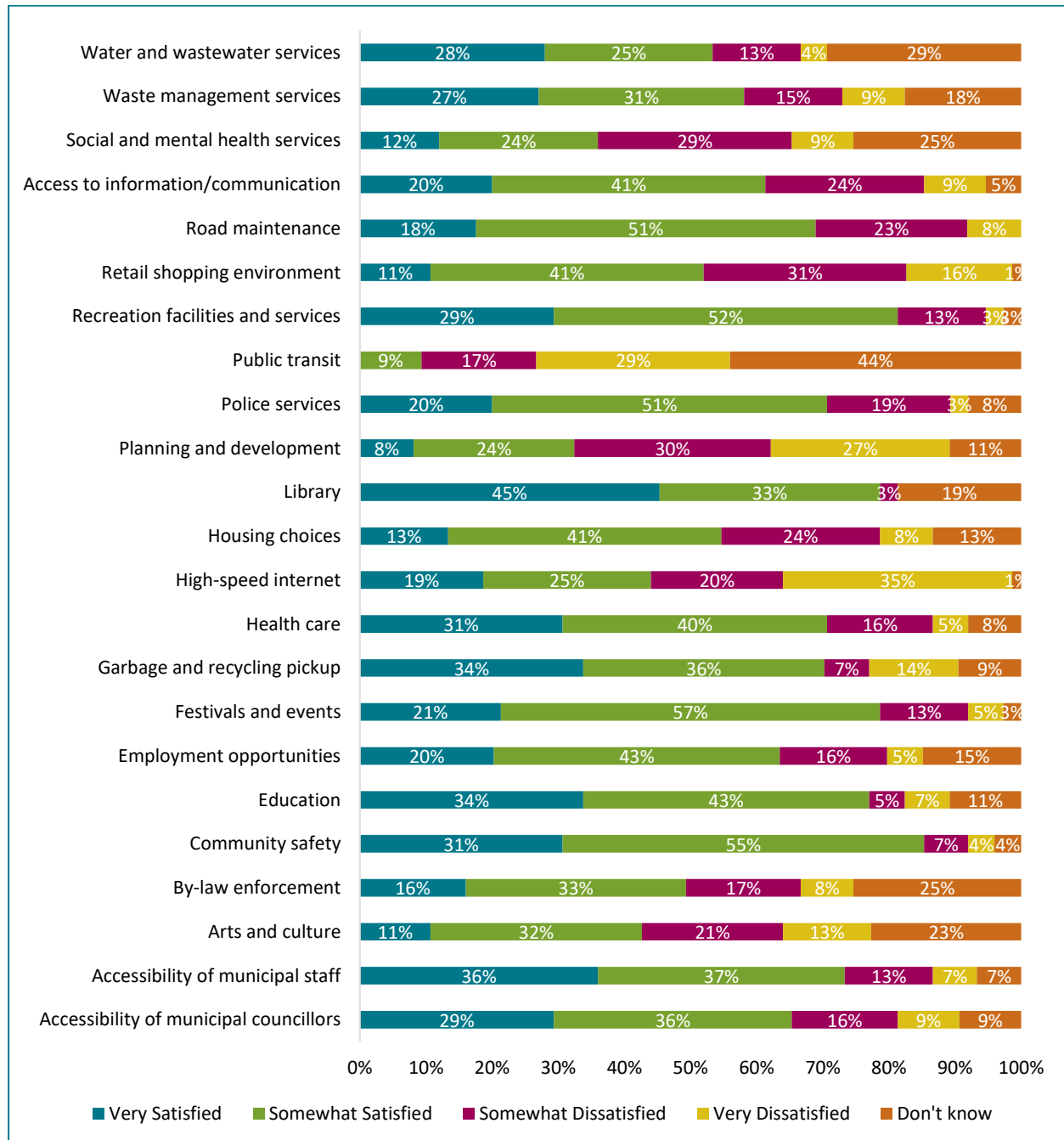
Over half of respondents feel South Bruce is somewhat welcoming to newcomers. It's noteworthy that 12% didn't know.





How satisfied you are with each of the following factors as they relate to South Bruce? (N = 75)

Over half of respondents are very satisfied or somewhat satisfied with many of the following factors related to South Bruce. Although, over half of respondents are somewhat dissatisfied, very dissatisfied or don't know about social and mental health services, public transit, planning and development, high-speed internet and arts and culture.





What are the three most appealing reasons for choosing to live in South Bruce?

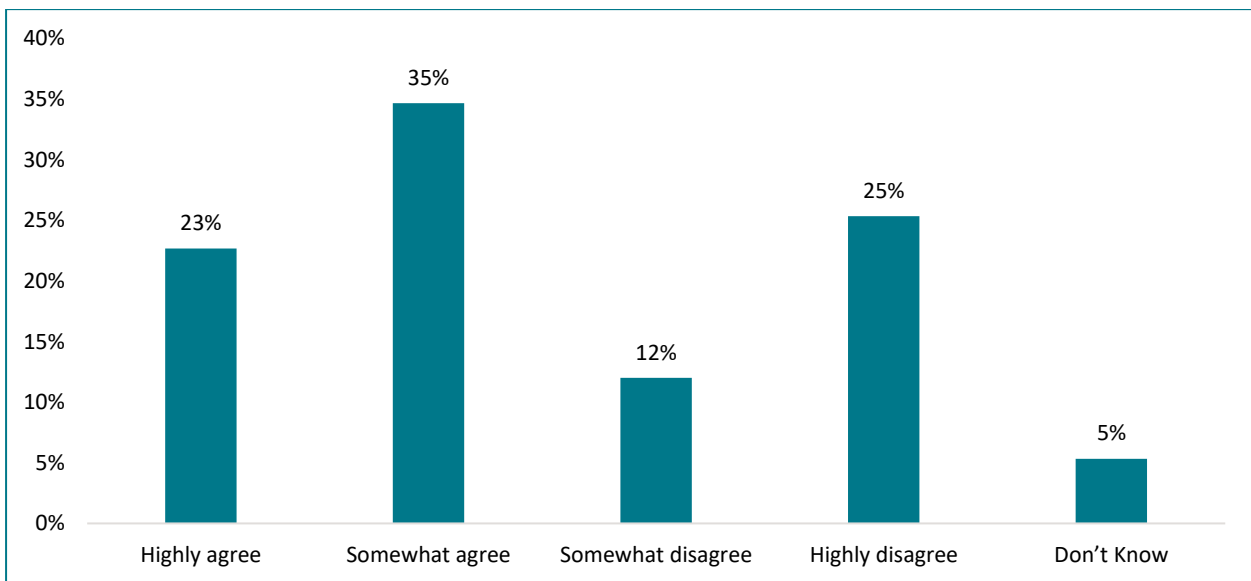
Most respondents mentioned unified, safe and welcoming community as their first appealing reasons for choosing to live in South Bruce. The fact that the community is affordable (Low Cost of Living), laidback and easy-going lifestyle and has access to nature also came up often under respondents top three most appealing reasons for choosing to live in South Bruce.

From an infrastructure and community growth and services perspective, what are your top three priorities for the Municipality of South Bruce over the next 5 years

Most respondents mentioned focusing on road and bridge maintenance and improvement as their first top priority, followed by Improve access to doctors and medical care. Improving public transit, a broad range of housing options including senior-friendly accommodations, enhance recreational, active transport and outdoor (parks/trails) facilities & programming and high speed internet (broadband) also came up often under respondents top three priorities.

Would you agree that the Municipality of South Bruce provides sufficient opportunities to voice your opinion on municipal matters? (N = 75)

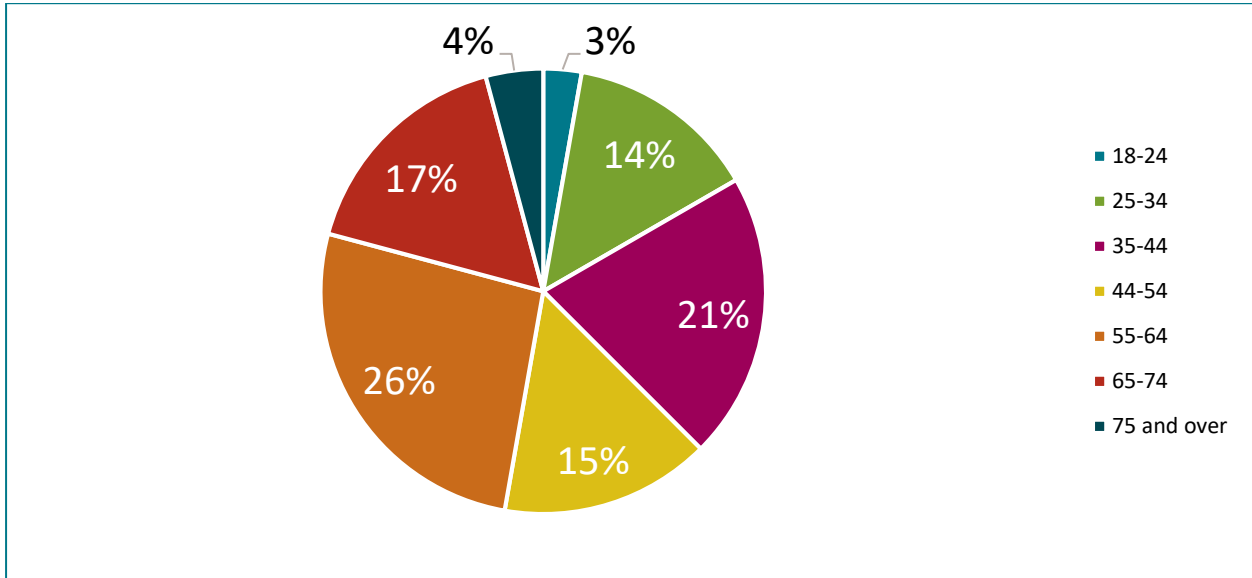
58% highly or somewhat agree that the Municipality of South Bruce provides sufficient opportunities to voice your opinion on municipal matters. It's noteworthy that 25% highly disagree with this statement.





Demographics

Select the range that reflects your age





7. Workshop with Support Agencies & Service Groups

On May 18, seven community stakeholders took part in the consultation with MDB Insight staff. These stakeholders included: Formosa Lions/Lioness Club, Saugeen Economic Development Corporation, Mildmay Rotary Club, Mildmay-Carrick Agricultural Society, South Bruce Tourism, OYAP (Ontario Youth Apprenticeship Program Coordinator) and Teeswater Kinsmen. These community stakeholders provided input for the following questions.

What are the current strengths or assets of South Bruce's economy?

- Strong community group: CWL, Lions, Churches, RCs, etc. Keep forging these relationships (e.g., new playgrounds, planting trees).
- Gay Lea in Teeswater and new partners of Bruce Power, agriculture sector, people in the community are resilient.
- South Bruce is up and coming. Teeswater and Formosa went backwards with retail. Christmas event was run by the community. In the process of getting new businesses as well like Kinectrics.
- In Formosa, community meetings are taking place by zoom. Fundraisers have been cancelled unfortunately with no money coming in.
- Hard to engage younger population into community events and overall social engagement is limited because of pandemic. Hard to host other fundraisers which is having impact on the community.
- Youth engagement is critical, but they are working on this.
- Business community in Mildmay works well and new infrastructure in Teeswater like water and sewers which led to landing Gay Lea expansion and Kinectrics.
- Great infrastructure is in place and great business climate.
- Revitalization: SMEs are coming back and more of downtown community. Great collaboration b/w businesses to work together.
- Location and close proximity to large urban centres and having a small-town climate. Healthcare is strong. Volunteerism is highly present in the community.
- Younger families are moving to the community and need extra services for aging population.
- Business vitality and good mix of sectors in the community.
- Great relationships with municipality and how communication works.
- Very welcoming community for new businesses. However, hard to recruit new members as a result of the pandemic.

Here's a list of some services that the Municipality provides. How would you rate the quality of these services?



- Community groups shared positive feedback about all municipal services mentioned below. However, in some cases, they had limited knowledge about these services.
- Fire services
- Local roads, sidewalks, bridges and snow removal: there were several comments made about the need to invest in bridges SOGR
- Garbage, recycling and landfill
- Cemetery, parks and recreation facilities and services
- Water, sewers and drains
- Economic development & Community Improvement Plan
- Building and by-law enforcement
- Trees and weed control: stakeholders had limited knowledge
- Animal services: stakeholders had limited knowledge

Are there services areas that the Municipality should be paying more attention to? Any opportunity to improve or develop municipal programs, to better meet the needs of the community?

- Seems like they are land-locked at this time. Teeswater doesn't have the same growth as other communities. Where can they set up a new block of land in Teeswater?
- There is a risk of not having this balance in Teeswater including residential development.
- Young families are coming to the community but not enough residential development.
- There is no willingness to sell some of the lots and South Bruce is held hostage to this limitation and can't build for the community.
- Youth: adding skate parks to keep youth engaged is critical.
- BR&E project is important for South Bruce.

What do you value most about your relationship with the Municipality of South Bruce? Are there ways you wish to develop that relationship further?

- Great relationship with the municipality and very approachable. Knows about various groups engaged in the community. This relationship has been strong, and they forge these relationships.
- Rhonda and the Council are very approachable and doing the best they can.
- For the fair, very good guidance including councillors and volunteers.
- Very good connection with Saugeen, South Bruce and five other municipalities. They deal with youth, advancing women, labour force diversification, entrepreneurship & immigration.
- However, COVID places some limitation in terms of developing relationships.
- Great support from staff for Christmas event and homecoming for next summer.

Top priorities for South Bruce over the next five years



- Need more industrial land. Promoting land development – all sectors, need to stay competitive with other communities, need residential development as well to ensure affordable housing.
- Need to ensure favorable development environment and reduce red tape.
- Value-added agriculture and food processing. Other types of agriculture and eco-tourism type of marketing should be done for the area. Direct partnerships around festival can also help promote the area.
- Better quality internet – business impacts, need for rural broadband for student education. Infrastructure and broadband improvements.
- Main street revitalization.
- Community amenities should be improved. Lack of long-term care / nursing home as there are retirement communities in South Bruce. Aging fire department, facilities and equipment.
- Source of funds for land acquisition – impact on levy, possible borrowing.
- Investigate making land available for employment development in both larger villages.
- Business cases, taxpayer appetite, increase tax base, infrastructure upgrades, Teeswater co. jobs, spin-offs.
- How to attract businesses to the community, partnerships with County, balance of taxation/attractiveness.
- NWMO – substantial incomes possible, workforce concerns among agriculture.
- Fiscal position / perception of municipality is very important.

What priorities or opportunities should be added to the list for South Bruce's economy in next 5 years?

- Making these priorities SMART.
- Childcare, before and after school care.
- Infrastructure and broadband improvements.
- Opportunities for students to do local apprenticeships and how to keep youth locally. Trade schools can also train locally.
- Partnerships with post-secondary education institutions should be explored. Fanshawe has presence in South Bruce. Georgian College is another PSE located in the community. Kinectrics, Gay Lea are hiring students. Emphasize local training opportunities and promote them to the community.
- How to sustain businesses that are already here on Main Street and attract new ones and Main Street revitalization.
- More industrial land.
- Affordable housing.
- More favourable development environment.
- Value-added agriculture and food processing.
- Community amenities and businesses.



Looking forward to 2031, what is your vision for South Bruce?

- DGR site can be looked after similar to European examples.
- DGR is unlikely to take away from their advancement due to due diligence.
- DGR is great for the community although community is very divided. However, if they get DGR, everyone will be watching them how they are handling this project.
- Worried about the division in the community because of DGR project.
- How to develop South Bruce into year-round destination experience, but need more restaurants, hotels in the area. They already have great events going but need to promote them even more (Christmas event, fairs, lavender farm which is unique). Opportunity to attract more international tourists to the area.



8. Workshop with Businesses

Reflection on Work to Date and Current Situation

South Bruce's Current Strengths

Quality of life in South Bruce is Attractive

- People are very genuine and want to build a strong community. They are an engaged and involved community with volunteerism and invested in community organizations
- People in the community – (people support local supports, events etc. (ex. local fair)
- Growing population
- Natural beauty and resources
- Lower cost of Living

Business Diversity and Untapped Potential

- Long history of agriculture strength – Dairy, Growing cash-crop area, diverse (ex. Cannabis farm)
- Multigeneration businesses (ex. farms, retail stores) – people are staying
- Agri-tourism opportunities
- Improved connectivity/internet speeds in the area over time will make South Bruce attractive to remote workers (location to KW and GTA)

Municipality's Main Accomplishments and Areas of Significant Progress

Building Effective Relationships

- Highly invested municipality, great working relationships
- Strong relationships with the business community

Business Support

- Business support through grants, programming and services
- Downtown businesses taking advantage of the “Spruce the Bruce” program
- The municipality has done a good job of providing services
- Commitment to learning about the DGR project

Satisfaction With Local Government's Support for Economic Growth and Development and Suggestions

What's Going Well

- The municipality shows support and a desire to grow – Good at aligning everyone's interest for the betterment of the community
- Some businesses feel South Bruce has made great strides our strengths to attract businesses/industry

Suggestions for Improved Satisfaction



- Could have better communication with the community
- Need to continue pushing more promotion for our community outside our community
- Improve diversity (including age - although it can be a difficult job for younger workers) in local government representation such as newcomers to Canada/visible minorities in the area – Better branding to be welcoming to all (need to check in with the community on this)
 - Vision of local government (what we want in the community) – hard to get a true feel for the community as a whole (differing opinions and focus areas)
- DGR focus is taking away from other possible opportunities – could focus on keeping a broader perspective when planning for the future
- Legacy issues – Hard to plan for the future

Opportunities for South Bruce

Sector Growth Opportunities

- Impact of the South Bruce DGR project
- Growth in agri-business, construction, logistics, nuclear and aggregate sectors
- Potential for tourism due to natural resources

Other Opportunities

- Stronger partnerships with County
- Resources and infrastructure to effectively respond to growth and development
- Residential development in the community
- Staffing to support growth and development

Priorities for South Bruce Over Next 5 years

Affordable Housing Development and Resident Attraction

- Developing more rental units, especially higher density residential (Apartments, duplexes etc.) to provide more diverse housing options. Difficulty in finding alternative housing options is potentially forcing people away from the community (Especially for young families and seniors)
- Public and private sectors work together on cutting red tape related to regulations on developing land
- Resident attraction efforts should target diverse demographics (affected by employment and types of housing availability)

Mainstreet Development and Rural Revitalization

- Figure out how to make investments in the main street sustainable
 - Ex. recently introduces fitness center and grocery store are struggling, setting a precedence for future investors consideration
- Increased opportunities for recreation fits with the need of families



- Ex. keeping arenas updated – foster top-of-the-line recreation opportunities for children, playgrounds, splash pads etc.
- Grocery Stores - lack of grocery store takes residents outside our municipality to shop
 - On the other hand, we need a population to support these types of businesses

More Industrial Land, Infrastructure and Broadband Improvements

- Need to Develop more industrial land by fostering a favourable development environment
- Rural infrastructure – roads (especially side roads), bridges (trouble getting modern agriculture machines over current bridges as they get larger)
- Broadband is affecting residents, businesses (emphasis on the effects on agriculture)
- Need to focus on increasing workforce availability by attracting both high skill and low skill workers
- Focus on developing the value-added agriculture and food processing sector

Risks Of Not Planning for The Future

Concerns related to Businesses and Residents Retainment

- If we don't plan to create opportunities for youth, there is a risk of losing youth for jobs outside the community
- Risks of not having the services (ex. public transportation) to continue to attract retirees
- Risk of not being attractive to businesses and residents and lacking the diversity and inclusion desired in the community
- Not staying on top of the services required by diverse residents
 - Ex. Lacking access to health/mental health etc.

Other Risks

- Not Investment ready – i.e. not having shovel-ready industrial land available when an investor inquires.
- Risk of not being ready to adapt for change (Ex. COVID and tech environment) – businesses need to be more resilient and adaptive
- Risk of deterioration of the communities' strengths

How Players Can Work Together, Focus on Priorities and Make These Opportunities a Reality

Bruce County

- Look at a broad range of projects and how a local project in South Bruce fits into the County's priorities

Community/Business Groups - Organizations Within the Community Can Work Together

- Focus on reflecting on the success of successful partnerships within the community to foster or motivate the creation of new partnerships



- Find common goals between organizations, broaden our horizons and see how they fit into community priorities
 - Sometimes groups don't work together and attempt similar projects – more could be done by working together
 - Examples of community/business Groups include the Chamber of Commerce, OFA, farmers association, board of education and health unit

What The Economy of South Bruce Looks Like in 10 Years

Sector and Main Street Development

- More industry is established in the next ten years, providing jobs, supporting the tax base, infrastructure, etc.
- South Bruce stays ahead of technological trends
- Increased tourism and the sector become a bigger part of the community
 - Ex. agritourism attracts cars from larger cities
- Agriculture production increases. Major production farms continue growing as technology advances
- A main street full of sustainable businesses
 - In the next ten years, we need to look for non-traditional ways to fill main street storefronts.

Resident Attraction and Placemaking

- More housing development and continue looking at development opportunities
 - Caution related to any consideration of developing on farmland. Community is only open to considering secondary quality farmland for residential development
- More diverse transportation offerings (including public transportation)
- See more people working remotely from bigger centers in South Bruce. These people are not “just living here” but are actively involved in the community and collaborating with the previous residents of the community. Help hang onto small-town feel
- The municipality population is made up of broader age groups and diverse incomes.
 - Ex. attract younger people and young families (In 10 years would like to see more kids in schools)
 - Having access to high-quality services (ex. private educational opportunities - attract higher-income workers)



9. Discussion with Municipality and County

Shovel Ready Industrial Lands/Site Selection

- County handles enquiries, more of a macro-approach with specific roles for the County that focuses on the regional aspect
- County's role is to help in land attraction and planning aspect of developing industrial lands.
- Municipality would like more of a support in increasing employment land
- The County is updating its Official Plan and encourages strong engagement with member municipalities. County interested and inviting member municipalities to let them know what their priorities are. County willing to talk to local Council about the Official Plan update and associated projects

Value-Added Agriculture & Food Processing

- Need to clearly define the role for South Bruce in this sector
- County can offer support by connecting to agri operators
- County is reviewing the sector as part of the Official Plan update. This will highlight the needs of the sector and the responses
- Opportunities exists in agritourism and agricultural retail
- Consideration should be placed in understanding the type of zoning for value-added agriculture and agri-tourism

Sector Focus

- Key sectors for the County are agriculture, tourism and energy. Depending on the sector, the support differs. For example, within agriculture, the focus is on entrepreneurship, growing into the future and agri-tourism BR+E with surrounding counties. Energy traditionally has one major employer; the focus is to keep the business here and grow the supply chain. County is focussed on the energy sector because of Bruce Power and Utilities plays an important mid-level opportunity in the community. The supply chain to energy and the clean-tech sector needs to be addressed.

Investment Attraction (Marketing/Promotion/Prospecting)

- Actively pursuing investment
- Bruce County markets broadly, outside of Bruce County.
- The County is currently reviewing their business attraction strategy (Business to Bruce)
- As part of the business attraction strategy, the County in an entrepreneurial function promotes member municipalities. Promotion efforts depend on what the needs of the enquiry and that helps shape which local municipality the County connects with.



Business Retention & Expansion (BR+E)/ Business to Bruce

- Economic Development efforts at the County initially started at the community level. Member municipalities indicated that they would benefit if the County has more of a regional focus. The Spruce the Bruce program is very different from what it is 5 years ago, the focus is on the macro

Community Capacity and Business Visitation

- South Bruce is lacking in terms of staffing resource
- The Economic Development Strategy may result in resourcing a position. The municipality recognizes it is a vacuum that needs to be filled
- Capacity needs to be built from within, Municipality to look in-house
- County's role is to provide the regional approach. The Business to Bruce program has 3 business coordinators that cover the area. They work on the ground and know the pulse of the community
- Business visitation efforts of the County should be coordinated with a municipal resource. The three business coordinators of the Business to Bruce program are focussed on the interior, lakeshore and peninsula. County is directed by Council and works with BIA, Chamber and local business community
- County is excited that South Bruce is interested in support from Bruce County. County doesn't want to duplicate services. Willing to work with the community to know needs.

Tourism Marketing/Product Development

- There is a market to capitalize on outdoor living with a focus on recreation such as trails and paddling
- Our calling card is 'visit the area' – positioning our brand to focus on live and build a businesses – fairly recent.

Resident Attraction/Newcomers/Remote Workers

- County is researching the target groups to attract – the people who want to live and open a businesses in the community. Once the target groups are identified, efforts will be focussed on attracting them
- marketing campaign – 'live here'
- Building the product is important, not jumping on the remote living

Infrastructure/Utilities

- South Bruce is at the end of two gas lines, there is an opportunity to expand services.
- The County has a role to play here. County is connecting with Enbridge and Encor

Entrepreneurship/Small Business Support/CIPs

- County pushed each community to do a CIP, working very much in local economic development, local urban areas, grow from within. Programs were focussed on areas that were prescribed, for example, façade improvement
- County has struggles in keeping the spruce the Bruce funding – they are working to answer the Question – is this relevant for the County to do anymore?



- Will have incentives beyond the downtown and help alleviate the problems. Maybe focus on industry, broader, align CIP with incentives, for e.g. Wellington, Grey County
- Efforts are underway to expand broadband access and take inventory of qualified broadband. The SWIFT project is a great initiative

Economic Recovery

- 1.75 million stimulus package, funds in loans and Spruce the Bruce. This is the current landscape; how do we grow the current economy?
- Municipal Innovation Council look at addressing downtown vacancies. Programs are in place so far and come up with a model that could work