

Township of Perth South



Part II: Key Findings Report – Background Analysis and Community Engagement
FINAL

August 21st, 2012



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1 Introduction – Building the Plan

1.1.1 Purpose

The County of Perth has, and will continue to face, slow population growth, a changing agricultural base and a changing general economy. With a shifting and fast paced provincial and global economy, the need for a Corporate Strategic Plan that is focused on the emerging opportunities and challenges for the community is increasingly important. This is even more relevant given the County's proximity to several identified urban growth centres, under the *Places to Grow* Plan.

The purpose of the Corporate Strategic Plan is two-fold. Firstly, it is to clearly define a common vision for the community that will define the success of the County of Perth and its member municipalities. Equally important, the Plan is intended to provide Councils and staff with a framework or roadmap for decision making. The Plan seeks to prioritize the key programs, services and initiatives based on the needs, values and aspirations of community members and the service delivery realities of the County and its member municipalities. A detailed action plan will provide direction for the County over the next 5 years and a set of performance measurements will assist the County in the implementation and evaluation of activities and ensure that the vision and mission are accomplished.

1.1.2 Approach

A crucial first step in the development of the Plan has been the preparation of a **Key Findings Report**. The approach employed in the completion of this phase of the Plan involved a number of methods. A review of existing policy documents related to a broad range of issues in the County and its member municipalities was completed. This review provided insight into the assets, opportunities and challenges in the community. In addition, a cornerstone to developing the Corporate Strategic Plan is an understanding of the community in terms of its assets – business base, labour force, quality of life indicators – as well as its local and community networks and quality of place elements. This was achieved through an assessment of the regional economy in the form of a demographic profile and competitiveness analysis. This assessment highlighted the key patterns of change in the County compared with the Province of Ontario.

Community engagement is an important aspect of the preparation of any strategic document. During this process, a number of engagement channels were utilized to gain broad-based input from County and local municipal staff and Council, community residents, businesses and key stakeholders. A survey was distributed through the community using a traditional (paper) and a web-enabled format. In addition, interviews were conducted with County and local municipal Council and staff to gain an understanding of their vision for the community and key areas of service delivery. Other stakeholders (resident, business and community) were also interviewed throughout this process to gain additional insight. Five community focus groups, one for each municipality and one for the county, also allowed community members to share their ideas and identify the key priorities and actions for the plan that would be critical to achieving the desired community vision. This process of community engagement was facilitated through the development of local networks in the community and through the use of social media.



2 Current Policy Framework

A comprehensive review of available background plans and policies provide a strong understanding of the current programming and socio-economic activities in Perth County and its municipalities. This assessment will also inform a review of the strengths, weaknesses, opportunities and threats related to the County and communities ability to retain, expand and attract new residents and business investment. Understanding the current policy environment in Perth County is vital to establishing a base of knowledge on which to build the Corporate Strategic Plan.

2.1 Township of Perth South

2.1.1 SWOT Analysis (2009)

The SWOT Analysis, undertaken by the Township of Perth South in 2009, addresses the various strengths, weaknesses, opportunities, and threats by topic; culture, economic development, environmental issues and sustainability, and social.

The analysis identified a number of trends that were common throughout the topics:

- The Township has a strong social, cultural and transportation infrastructure.
- There exists a strong sense of community and civic pride.
- The Township has a shrinking population, with youth retention issues and limited career opportunities being the major causes of the lack of growth.
- Potential for increased tourism, improved events and recreational infrastructure
- Lack of political influence at the county and higher levels
- Development issues, such as highway expansions and limited development due to zoning by-laws, etc., threatening the community.
- Lots of economic opportunities in agriculture, raw materials and manufacturing, especially in local processing and value-added businesses, green industries, and organic/local produce production.
- The highway corridor is a major business asset, but its expansion threatens prime agricultural land as well as local wildlife
- The Township has rich agricultural land and strong management practices; however, the agricultural land is overprotected and it stifles development.

The Corporate Strategic Plans for Perth County and partner municipalities can work to prioritize the opportunities and address the threats and weaknesses identified in Perth South's SWOT analysis.



2.1.2 Focus Group Discussions (2009)

The Township of South Perth conducted focus group sessions to gather citizen input regarding the township's strategic direction.

Participants were asked questions surrounding a number of topics, including economical, environmental, and social. Citizens identified a number of strategies, including:

- Allowing for more freedom with agriculture designated land, such as additional or secondary businesses and the potential to sever surplus farm houses.
- Promote the Township as a great place to live and do business.
- Separate from the County or find a way for the township to be more independent.
- Encourage agricultural producers to undertake value-added processes or practices, stay on trend with agriculture, improve the distribution for local food by creating a regional hub or market and work to attract food processors.
- The township should promote alternative energy sources, educating the community and developing public/private partnerships.
- The township should develop a viable composting program, a hazardous waste disposal system, and work to increase the proportion of recycled items.
- Develop a long-term vision for forest coverage in the Township, work to educate the public about the importance of trees and their needs, and make subsidies for new tree planting.
- Provide youth programming and spaces around the arts, sports, and other recreation activities.
- Encourage local service groups to collaborate to create a rural event or festival to engage the community and attract visitors.
- Invest in the settlement areas and hamlets, with more servicing and more industrial land development in the township to create employment.

The township addressed a number of these suggestions in the focus group discussion piece, noting that the ability to sever properties is a County position but that the township is pursuing the issue at the Ontario Municipal Board (2010). The township has explored the potential for servicing, but at this time, it remains too costly per resident to be a feasible option. Secondary farm businesses have now been allowed by the County under certain conditions. A tree planting rebate of 25% of the tree cost was implemented in 2009; composters and digesters are also offered at a discount rate.

The Corporate Strategic Plans for Perth County and partner municipalities can work to ensure their work considers and prioritizes the strategies and problems outlined by Perth South's citizens in the 2009 Focus Group Discussions.



2.1.3 Visioning Session (2009)

The visioning session held by the Township of Perth South on March 19, 2009, asked participants to consider what their township will look like in 5 years. Participants were asked to respond to three questions, which are outlined below with the most popular responses.

Economically, in 5 years the Township of Perth South will;

- Grow and develop in rural industrial and rural residential, and investigate and remove roadblocks to growth.
- Reduce red tape which prevents development.
- Continue to set the pace in agricultural industry.

Environmentally, in 5 years the Township of Perth South will;

- Get into green energy.
- Have a more convenient household hazardous waste collection.
- Increase tree coverage on less productive land to prevent erosion.

Culturally, in 5 years the Township of Perth South will;

- Keep more young people in the community.
- Have more agricultural and community development, while also emphasizing sustainability.
- Be amalgamated.

The visioning session participants echoed many of the same issues as the previous sessions, notably the need to grow the community by retaining youth or attracting newcomers, the desire to balance the township's agricultural heritage and new residential and industry development, and the interest in green energy, increased tree coverage and better waste collection options. The Corporate Strategic Plans for Perth County and partner municipalities can work to prioritize the vision developed by the Township of Perth South.

2.2 Existing Policy Framework Matrix

From the review of these documents, it is worth noting that many of these reports have included actions/recommendations for the County with varying associated timelines, each of which point to a particular ordering of priorities. This section highlights the recommendations that were marked "high priority" or "short term", to be completed within a 1-3 year timeline in each document. The purpose of highlighting the high priority recommendations is to provide a starting point for the County for its response to community needs and a discussion of future budget and resource provisions.



FIGURE 2.1: DOCUMENT REVIEW - HIGH PRIORITY RECOMMENDATIONS

Plan/Policy Recommendation	Priority Level
Township of Perth South: Community Strategic Plan (2009)	
<ul style="list-style-type: none"> ■ Promote the Township as a place to live and do business. ■ Explore County governance/political structure options. ■ Promote alternative energy sources by educating the community and encouraging investment. ■ Develop a viable composting program and hazardous waste disposal system. ■ Develop a long term vision for tree coverage in the Township and educate people about the importance of trees. ■ Promote youth programming and spaces around the arts, sports and other recreation activities. ■ Encourage local service groups to collaborate to create a rural event or festival to engage the community and attract visitors. ■ Allow more freedom with agriculture designated land, such as additional or secondary businesses and the potential to sever surplus farm houses. ■ Encourage agricultural producers to undertake value-added processes or practices. 	0-2 Years
<ul style="list-style-type: none"> ■ Establish a regional hub for agricultural products (market, hub, distributor). ■ Invest in servicing for the settlements areas and hamlets. ■ Develop more industrial land. 	2-5 years

In reviewing this table, it is evident that there are a significant number of similar recommendations and actions brought forward by the various municipalities and the County, echoing the same issues. Many of the recommendations across the County are intended to be acted on in the short term. However, given the immense number of high priority recommendations and the current level of staffing in the County to act on these recommendations, greater consideration to short, medium and long term priorities should be considered.

On the whole, the County would benefit from a better understanding of the short, medium and long term priorities of each department, and of the member municipalities particularly where they share responsibility with the implementation of these plans.



3 Community Assets

There are a number of facilities, programs and services offered by the community organizations, the County, and the member municipalities that play a critical role in the everyday lives of residents. These community assets contribute to making Perth County an attractive and healthy place to live and work. This section aims to identify some of the key County/municipality-owned, County/municipality-maintained and non-municipal owned facilities, programs, services, businesses and community organizations that are considered assets in the community. This list is not intended to be exhaustive, but to provide insight into the key strengths of the community. In reviewing community assets, the Municipality and County websites, their respective service guides, any print marketing material and brochures were used.

FIGURE 3.1: COMMUNITY ASSET INVENTORY, 2011

Community Asset Description	County or Municipally Owned	Non-municipal ownership
<ul style="list-style-type: none"> ■ Perth South – Blanshard Recreation 		✓
<ul style="list-style-type: none"> ■ Perth South – Kirkton-Woodham Park ■ Perth South – Kirkton-Woodham Pool ■ Perth South – Kirkton-Woodham Community Centre ■ Perth South – Downie Recreation Program and Community Centre 	✓	



4 Our Current State

4.1 Community Profile

This section examines the following Perth County characteristics in comparison to each of the local municipalities and the Province of Ontario

- Population growth
- Age structure
- Family Income
- Educational Attainment.

This profile includes Statistics Canada data from 2001, 2006 and updated 2009 demographic data which was used as part of the County of Perth Economic Development Strategy and Action Plan 2010-2014 and Labour Market Analysis projects.

4.1.1 Population Growth

The County of Perth's 2011 population was 37,571, which was a small increase from the 2006 population. The municipality that is driving much of the population increase is North Perth (3.1%). It is estimated that the population in the County will increase to 41,214 by 2021, an increase of 9.7% over the 10-year time period at an average annual rate of increase at 1.0%. In comparison, Perth County's population is growing at a higher rate than St. Marys (0.6%), but at a lower rate than Stratford (1.2%).

FIGURE 4.1: COMPARATIVE POPULATION GROWTH, 2006-2021

Municipality	2006	2011	2006 - 2011 % Change
West Perth	8,839	8,919	0.9%
Perth East	11,986	12,028	0.4%
North Perth	12,254	12,631	3.1%
Perth South	4,132	3,993	-3.4%
Perth County	37,211	37,571	1.0%
St. Marys	6,617	6,655	0.6%
Stratford	30,516	30,886	1.2%

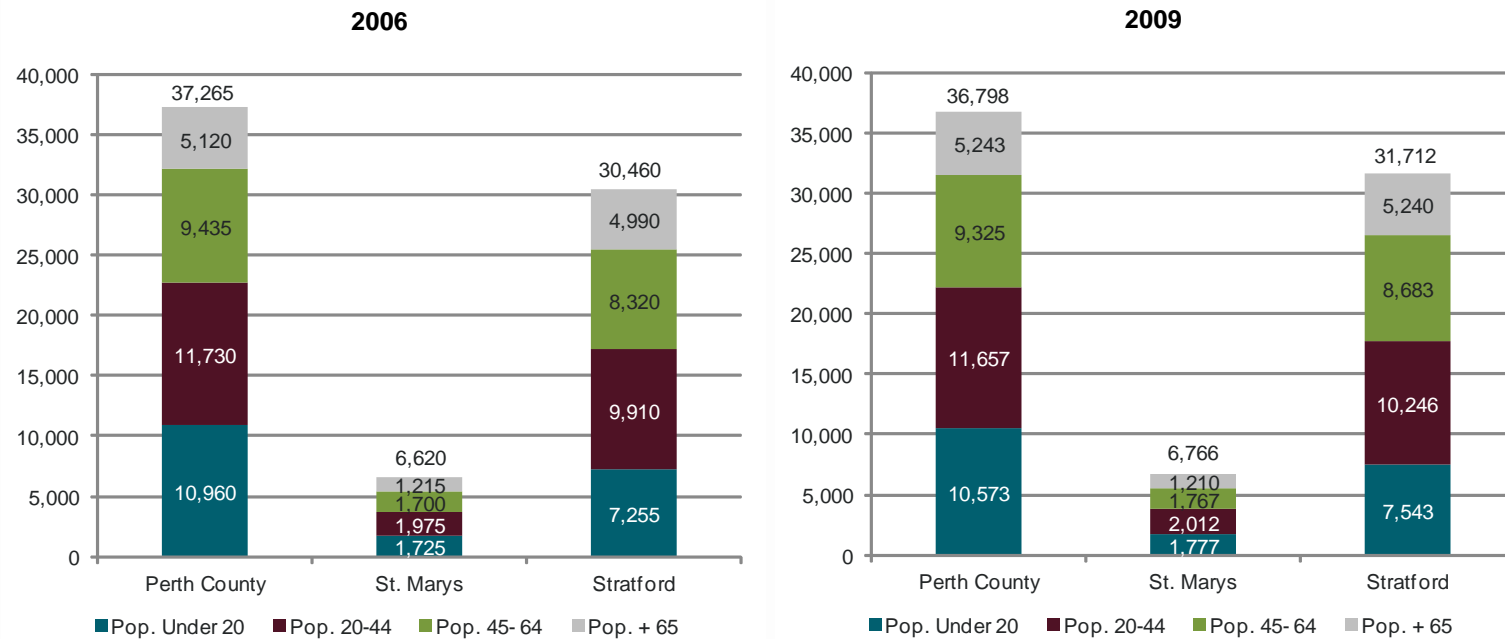
Source: Statistics Canada, Census, 2006, 2011 and Perth County Official Plan, 2008.



4.1.2 Age Structure

The age structure for the County of Perth has shifted slightly from 2006 to 2009. The largest segment of the population is the 20-44 years of age (11,657 in 2009) followed by the population under the age of 20 years of age (10,573 in 2009)). The only proportion of the population that has grown is the population over the age of 65 (5,243 in 2009 from 5,120 in 2006). Comparatively, age groups in St. Marys and Stratford have increased in population.

FIGURE 4.2: AGE STRUCTURE, 2006 & 2009



Source: Statistics Canada, Census 2006 and Perth County, Town of St. Marys and City of Stratford Labour Market Analysis, 2010 using data from Manifold Data Mining Inc.

4.1.3 Household Income

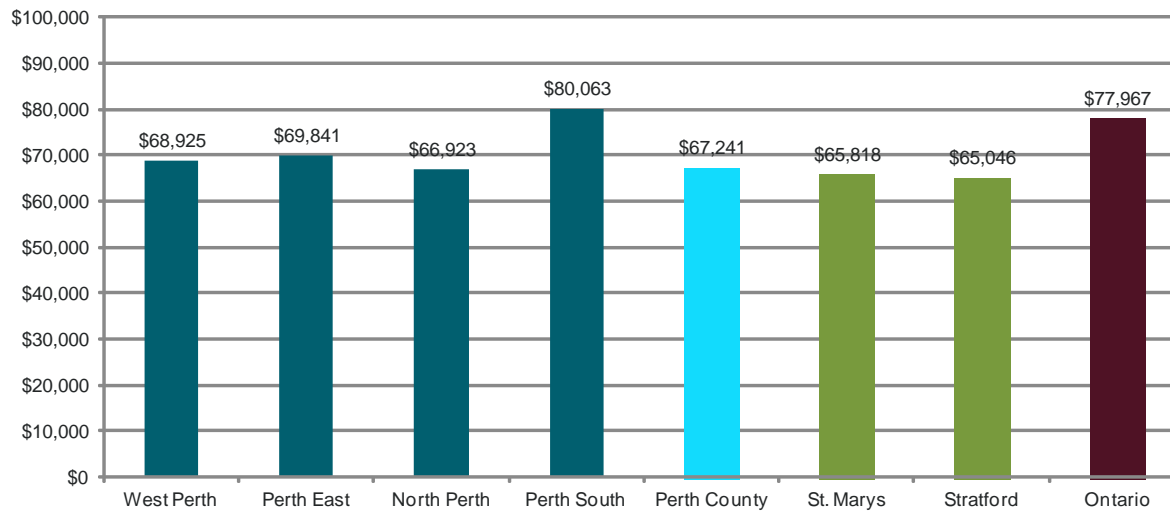
Average income rates provide important information about the wealth generated or retained by the local population. High income rates suggest a high level of disposable income, which in turn could mean that there is a large affluent population. The following figure identifies the 2005 household income rate for Perth County's local municipalities. The municipality with the highest average household income was



the Township of Perth South at \$80,063. This was the only municipality with a higher index (103) than the Province of Ontario. The remaining three municipalities had an average household income considerably lower (10% or more) than the Province of Ontario. St. Marys and Stratford has lower average household incomes of \$65,818 and \$65,046 respectively. Assuming a modest 1.5% annual increase in household income in these municipalities since 2005, the average household incomes in Perth County could climb to a range from \$73,177 in North Perth to \$87,544 in Perth South by 2011.

FIGURE 4.3: HOUSEHOLD INCOME, 2005

	West Perth	Perth East	North Perth	Perth South	Perth County	St. Marys	Stratford	Ontario
Average household income / year	\$68,925	\$69,841	\$66,923	\$80,063	\$67,241	\$65,818	\$65,046	\$77,967
Indexed to Ontario	88	90	86	103	86	84	83	100



Source: Statistics Canada, Census 2006.

4.1.4 Education

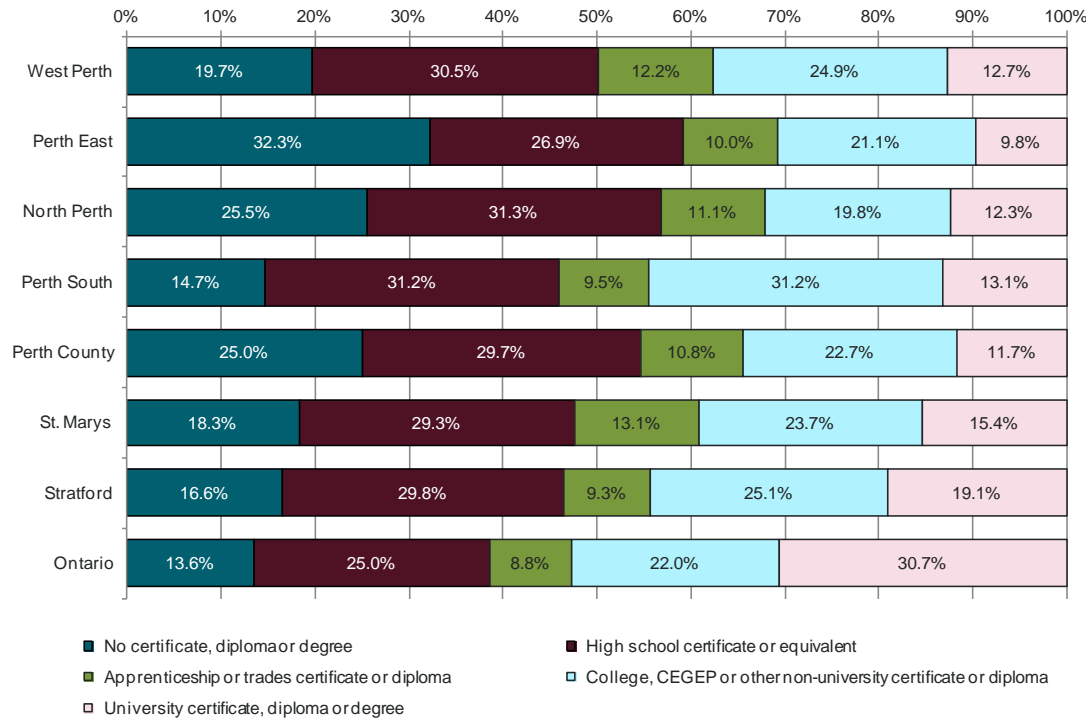
The *County of Perth, Town of St. Marys and City of Stratford Labour Market Analysis* states that the level of educational attainment in a municipality can be used as a general indicator of the capacity for innovation in a local population. Further, educational attainment is often seen as a contributor factor to the quality of the `human capital` of a municipality or the accumulation of skills and talents which manifests itself in the educated and skilled workforce.



In 2006, less than half (45.3%) of the County's population 25 to 64 years of age had attained some form of post-secondary education, which was lower than St. Marys (52.2%) and Stratford (53.6%) and significantly lower than the Province of Ontario (61.6%). The population base in Perth County was more inclined to attain college education (22.7%) than university education (11.7%), which may reflect the historic importance of the region's agriculture and manufacturing sectors. The regional working age population base that had attained an apprenticeship (10.8%) was also larger in comparison to the Province of Ontario (8.8%).

The region benefits from being located within 75 kilometres from at least one of the following postsecondary institutions: Conestoga College (Kitchener main campus); Fanshawe College (London main campus); the University of Waterloo (Waterloo and Stratford); Wilfrid Laurier University (Waterloo); and Western University (London). The proximity to these schools helps make post-secondary education more accessible for the population and enables the attraction of a workforce with higher education attainment levels.

FIGURE 4.4: EDUCATIONAL ATTAINMENT PROFILE, 2006



Source: Statistics Canada, Census 2006.



4.1.5 Summary of Demographic Profile

The County has experienced a slow population increase over the previous five years. Slow population growth is expected to continue through to 2021. Based on population estimates, the proportion of Perth County's population that is expected to grow is among those 65 years and older. Residents in Perth South tend to be more affluent on average than the other Perth County municipalities, which suggest a higher level of disposable income among residents in this part of the County.

Finally, the Perth County working age population is more inclined to have a college diploma or an apprenticeship or trade certificate. The proximity to several colleges and universities in the broader region facilitates an environment for the local population to access education and attract skilled workers.

4.2 Competitive Analysis

This section of the report examines the resident labour force and employment by industry, occupational classifications and commuting flows for the local municipalities. Then, recognizing the priority areas identified in the Perth County economic development strategy, which are "Lone Eagles", Value Added Agriculture, Green and Technology Based Manufacturing, Arts, Culture and Tourism, and Main Street Commercial, particular attention is given to the local municipality's capacity for developing these priority sectors.

4.2.1 Labour Force Flow Pattern

While the size and growth of the local labour force is an asset to the community, consideration must be given to the degree to which a community sees an outflow or inflow of its labour force. The degree of outflow may represent an opportunity to capture or retain employment in the community. It is also an indication of the strength of the community in generating local employment opportunities.

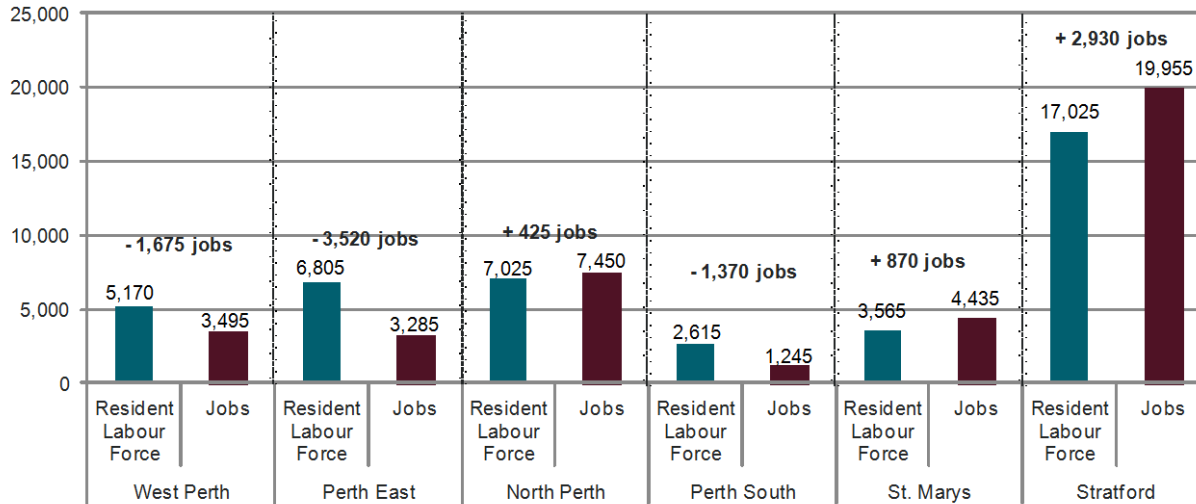
In 2006, there was a significant outflow of the resident labour force in three of the four local municipalities. As indicated on the following figure, the municipality with the highest level of net exporting of labour (i.e. jobs in the community less the resident labour force) is the Township of Perth East (-3,520 jobs) followed by the Municipality of West Perth (-1,675 jobs). There is also sizable outflow in the Township of Perth South (-1,370 jobs). The Municipality of North Perth was the only community that had more jobs than the resident labour force, which was largely driven by its manufacturing industry. This net importing of labour to fill jobs in the manufacturing industry may have changed since the closure of Campbell's Soup Company in Listowel and the loss of approximately 500 jobs at this facility. In 2010, the food processing plant reopened under new owners - Erie Meat Products. These owners intend on creating 500 new jobs within four years.¹

¹ The Toronto Star, <http://www.thestar.com/news/ontario/article/778750--listowel-to-get-wiener-plant>, Friday, March 12th, 2010.



The Town of St. Marys and the City of Stratford are both net importers of labour of 870 jobs and 2,930 jobs respectively, which indicates that they serve as regional employment centres.

FIGURE 4.5: LABOUR FLOW ANALYSIS, LABOUR FORCE 15 YEARS AND OVER, PERTH COUNTY LOCAL MUNICIPALITIES, 2006



Source: Statistics Canada, Census 2006.

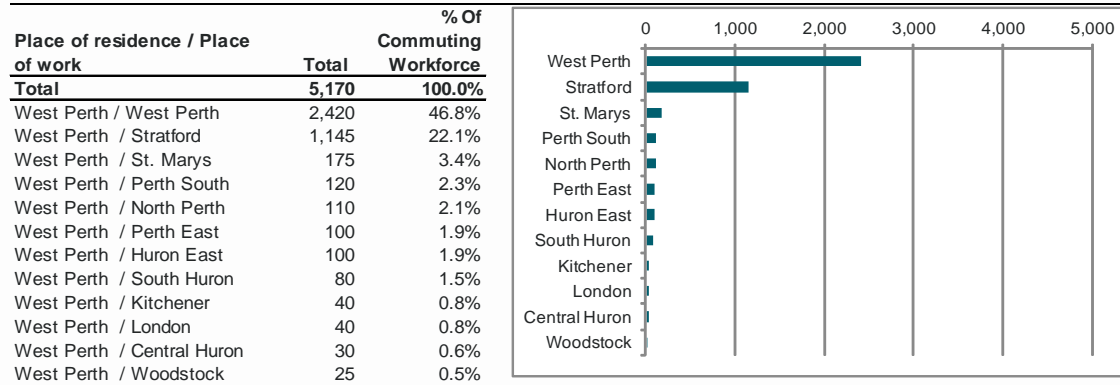
4.2.2 Commuting Flows by Place of Work

Having considered the range of employment that is exported, or leaving, Perth County communities daily, a further consideration is where the resident labour force is travelling for employment. The table that follows illustrates the place of work data by census subdivision for the employed labour force 15 years and older by usual place of work. Commuting flows results indicate that much of the resident labour force is employed in jobs in the local and regional economy. In West Perth, nearly half (46.8%) of the resident labour force are employed within the municipality and a further 22.1% are employed in jobs in Stratford. In Perth East, over one-third (35.4%) of the resident labour force are employed in local jobs and nearly one-quarter (23.1%) are employed in jobs in nearby Stratford. The remaining resident labour force (41.5%) is employed in communities across southwestern Ontario (e.g. Kitchener, Waterloo, other rural communities).

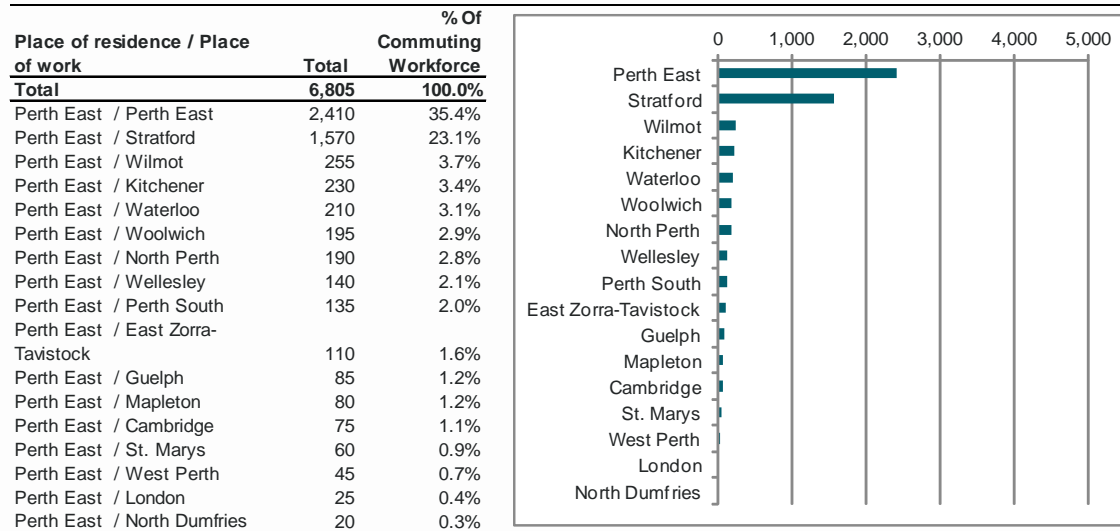


FIGURES 4.6 AND 4.7: COMMUTING FLOWS, PERTH COUNTY MUNICIPALITIES AS A PLACE OF RESIDENCE, 2006

Municipality of West Perth



Township of Perth East



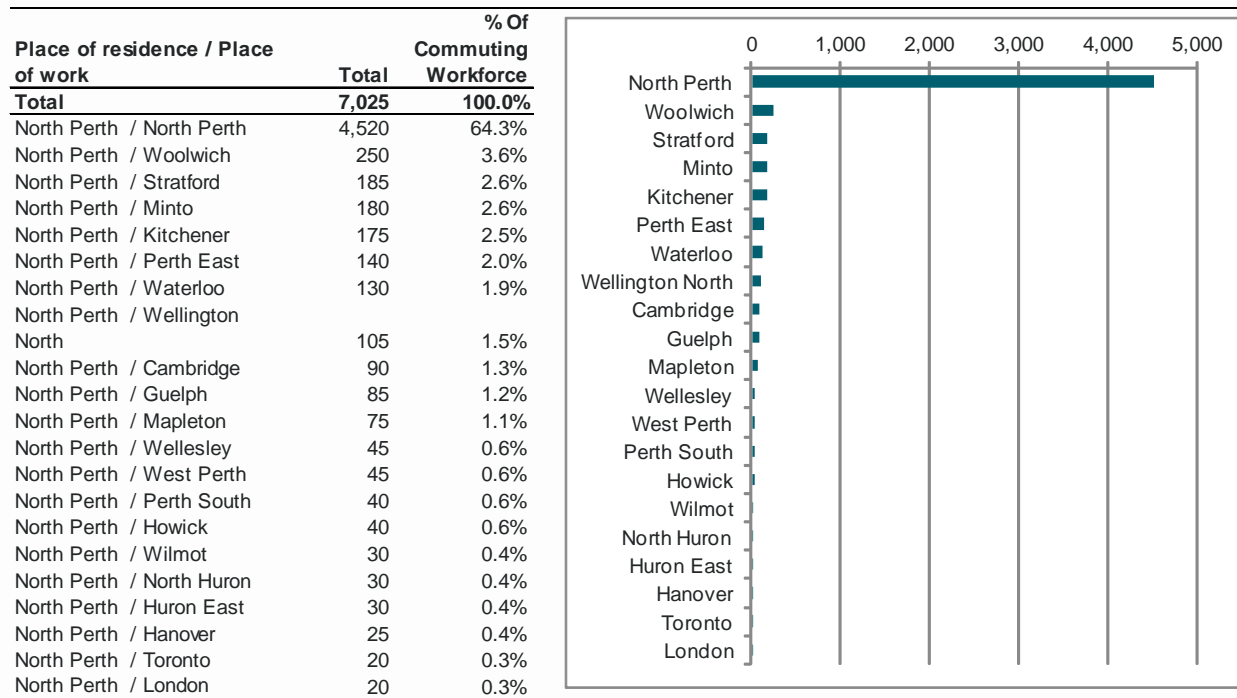


Note: Statistics Canada suppresses commuting data when the commuting flow is below 20 people. Census subdivisions that receive fewer than 20 residents from local municipalities are not included. Source: Statistics Canada, 2006

The Municipality of North Perth has a strong live-work balance, where nearly two-thirds (64.3%) of the resident labour force were employed in jobs within their municipality. The remaining one-third are employed in jobs in nearby rural communities, but as far as Kitchener, Guelph, Toronto and London. Residents of Perth South also have a strong live-work balance since many were employed in the cities of Stratford (28.1%) and St. Marys (19.7%), within their own community (23.7%) or nearby rural communities.

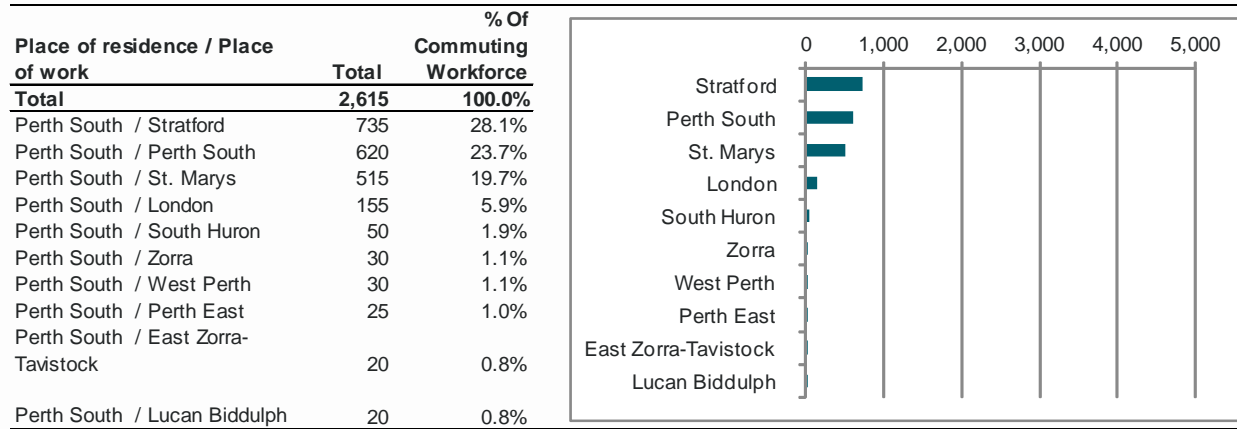
FIGURES 4.8 AND 4.9: COMMUTING FLOWS, PERTH COUNTY MUNICIPALITIES AS A PLACE OF RESIDENCE, 2006 (CONTINUED)

Municipality of North Perth





Township of Perth South



Note: Statistics Canada suppresses commuting data when the commuting flow is below 20 people. Census subdivisions that receive fewer than 20 residents from local municipalities are not included.

Source: Statistics Canada, 2006

4.2.3 Labour Force by Occupation

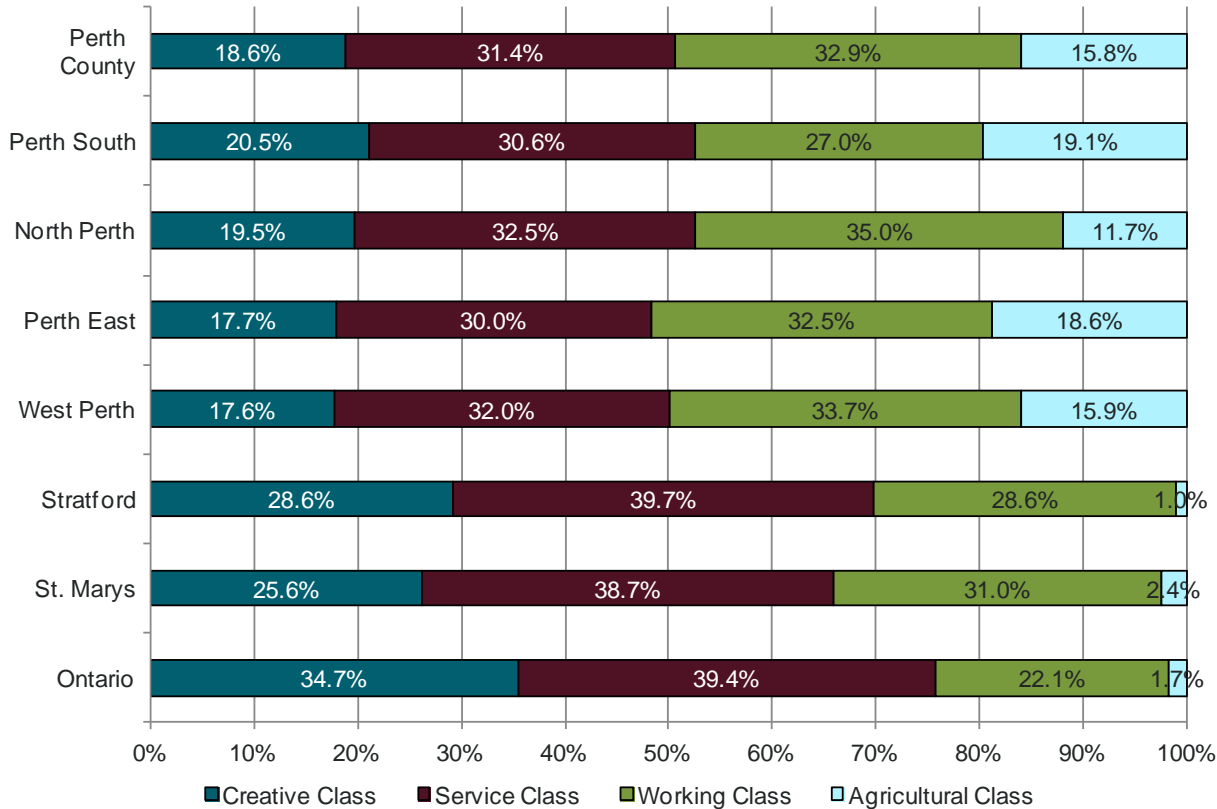
The *County of Perth, Town of St. Marys and City of Stratford Labour Market Analysis Study* examined the labour force by occupations as it relates to creative class industries versus service-based, working and agricultural class industries. This section explores labour force by occupation for these industries. The methodology is outlined in the labour market analysis report and reapplied to the local municipalities.

The following figure shows the percentage of workers in each occupation class for Perth County, the local municipalities and the Province of Ontario. In terms of creative occupations, Perth County (18.6%) and each of the member municipalities (ranging from 17.6% to 20.5%) trail Stratford (28.6%), St. Marys (25.6%) and the Province of Ontario (34.7%). There are much higher percentages among Perth County municipalities for the working class which range from 27.0% (Perth South) to 35.0% (North Perth) compared to the Province (22.1%) and the agricultural class which range from 11.7% (North Perth) to 19.1% (Perth South) compared to St. Marys, Stratford and the Province. These results are due to the county's heavy concentrations in trades, processing and primary industry occupations. The Martin Prosperity



Institute's research indicates that creative occupations are generally higher paying. The County and member municipalities are at a risk of falling behind the rest of the province with respect to income levels, wealth generation and innovation.

FIGURE 4.10: OCCUPATION CLASS, 2006



Source: Statistics Canada, Census of Population, 2006 using the University of Toronto's Martin Prosperity Institute classification.

The following figure highlights the creative occupations in more detail by member municipality. People engaged in creative occupations total approximately 4,020. The communities with larger numbers of creative occupations are North Perth (1,205 residents) and Perth East (1,370 residents). Creative occupations are relatively low across all classifications. Given the generally higher wages, specialized skills



and innovative capabilities of these individuals, the size and growth of this class of worker has substantial implications for the County and member municipalities' corporate strategies. The local decision makers will need to retain and grow a population base to sustain the municipality. The County's assets that could attract and retain these workers could include proximity to performing arts amenities in Stratford and proximity to post-secondary institutions. Comparatively, Stratford has more creative class occupations than all of the Perth County municipalities at 4,865.

FIGURE 4.11: CREATIVE CLASS OCCUPATIONS, 2006

Creative Occupations	West Perth	Perth East	North Perth	Perth South	Perth County	St. Marys	Stratford
All Creative Occupations	910	1,205	1,370	535	4,020	915	4,865
A0 Senior management occupations	60	50	50	35	195	25	110
A1 Specialist managers	85	90	120	25	320	90	415
A2 Managers in retail trade, food and accommodation services	130	175	190	70	565	80	565
A3 Other managers, n.e.c.	75	105	190	75	445	100	405
B0 Professional occupations in business and finance	20	90	95	35	240	60	295
B1 Finance and insurance administration occupations	75	105	115	30	325	75	215
C0 Professional occupations in natural and applied sciences	45	100	35	25	205	35	305
C1 Technical occupations related to natural and applied sciences	70	85	100	15	270	85	390
D0 Professional occupations in health	15	20	30	30	95	40	160
D1 Nurse supervisors and registered nurses	70	90	115	65	340	80	255
D2 Technical and related occupations in health	70	55	85	55	265	10	125
E0 Judges, law yers, psychologists, social w orkers, ministers of religion, and policy and program officers	40	55	45	10	150	65	260
E1 Teachers and professors	85	120	130	15	350	80	695
F0 Professional occupations in art and culture	10	25	25	35	95	45	300
F1 Technical occupations in art, culture, recreation and sport	60	40	45	15	160	45	370

Source: Statistics Canada, Census of Population, 2006 using the University of Toronto's Martin Prosperity Institute classification.

In 2006, the resident labour force engaged in service based occupations accounted to approximately 6,780 people. Again, much of the resident labour is located in Perth East (2,045) and North Perth (2,280). These types of occupations typically offer lower paying salaries and wages. Nearly one-half (48.3%) of these occupations are clerical (1,675) or sales and service (1,600). The total number of people engaged in Perth County's service class is very close in size to Stratford's total number of 6,765.



FIGURE 4.12: SERVICE-BASED CLASS OCCUPATIONS, 2006

Service Occupations	West Perth	Perth East	North Perth	Perth South	Perth County	St. Marys	Stratford
All Service Occupations	1,655	2,045	2,280	800	6,780	1,380	6,765
B2 Secretaries	65	130	100	45	340	35	295
B3 Administrative and regulatory occupations	80	80	85	50	295	90	195
B4 Clerical supervisors	10	10	25	0	45	30	80
B5 Clerical occupations	500	445	555	175	1,675	360	1,510
D3 Assisting occupations in support of health services	100	110	95	10	315	50	345
G0 Sales and service supervisors	10	55	50	25	140	30	210
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, w wholesales and grain buyers	70	120	110	85	385	65	240
G2 Retail salespersons and sales clerks	170	195	270	140	775	145	835
G3 Cashiers	45	35	55	40	175	45	280
G4 Chefs and cooks	25	50	95	10	180	45	415
G5 Occupations in food and beverage service	45	95	80	10	230	40	300
G6 Occupations in protective services	30	45	25	15	115	50	165
G7 Occupations in travel and accommodation, including attendants in recreation and sport	10	40	25	15	90	15	70
G8 Child care and home support workers	95	155	130	40	420	60	250
G9 Sales and service occupations, n.e.c.	400	480	580	140	1,600	320	1,575

Source: Statistics Canada, Census of Population, 2006 using the University of Toronto's Martin Prosperity Institute classification. Note: Sales and service occupations, n.e.c. includes hairstylists, funeral directors, cleaners, butchers, food service attendants, service station attendants, dry cleaning occupations, etc.

Residents in the working class labour force represent the largest type of labour in the County with 7,120 people occupying these types of jobs. North Perth and Perth East continue to have the largest residential labour force base with 2,460 and 2,215 people respectively. The largest occupational groups were transportation equipment operators (1,120), machine operators in manufacturing (955), labourers in processing, manufacturing and utilities (740) and assemblers in manufacturing (725). The large size of this occupational group suggests a high level of importance of this type of work to the local economy.

Stratford's working class of 4,865 people is comparatively smaller than Perth County's at 7,120 people. The larger working class occupations are assemblers in manufacturing (1,090 people) and machine operators in manufacturing (825 people). These results are a reflection of the city's manufacturing industry.



FIGURE 4.13: WORKING CLASS OCCUPATIONS, 2006

Working Class Occupations	West Perth	Perth East	North Perth	Perth South	Perth County	St. Marys	Stratford
All Working Class Occupations	1,740	2,215	2,460	705	7,120	1,105	4,865
H0 Contractors and supervisors in trades and transportation	40	50	30	30	150	35	130
H1 Construction trades	180	205	175	65	625	30	255
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	60	105	70	20	255	30	210
H3 Machinists, metal forming, shaping and erecting occupations	110	180	175	55	520	45	290
H4 Mechanics	130	250	225	55	660	155	390
H5 Other trades, n.e.c.	25	60	35	40	160	25	140
H6 Heavy equipment and crane operators, including drillers	10	60	75	20	165	20	55
H7 Transportation equipment operators and related workers, excluding labourers	300	350	395	75	1,120	160	440
H8 Trades helpers, construction and transportation labourers and related occupations	200	290	160	50	700	95	390
I2 Primary production labourers	45	75	90	30	240	15	90
J0 Supervisors in manufacturing	35	10	50	10	105	40	170
J1 Machine operators in manufacturing	265	240	370	80	955	170	825
J2 Assemblers in manufacturing	125	205	340	55	725	100	1,090
J3 Labourers in processing, manufacturing and utilities	215	135	270	120	740	185	390

Source: Statistics Canada, Census of Population, 2006 using the University of Toronto's Martin Prosperity Institute classification.

There is a sizable base of the resident labour force engaged in agricultural occupations at 3,410 people. The community with the largest base is Perth East at 1,265 people. Both West Perth and North Perth have a similar number of residents engaged in agricultural occupations. However, the number of people employed in agricultural class occupations has trended downward in the County and Province. Both St. Marys and Stratford have fewer people engaged in this type of development at 85 and 170 respectively.

FIGURE 4.14: AGRICULTURAL CLASS OCCUPATIONS, 2006

Agricultural Occupations	West Perth	Perth East	North Perth	Perth South	Perth County	St. Marys	Stratford
All Agricultural Occupations	820	1,265	825	500	3,410	85	170
I0 Occupations unique to agriculture, excluding labourers	820	1,255	825	500	3,400	85	160
I1 Occupations unique to forestry operations, mining, oil and gas extraction and fishing, excluding labourers	0	10	0	0	10	0	10

Source: Statistics Canada, Census of Population, 2006 using the University of Toronto's Martin Prosperity Institute classification



4.2.4 Regional Location Quotients

A location quotient (LQ) analysis was used in the *Perth, St. Marys and Stratford Economic Development Strategy and Action Plan* to determine the level and degree of industry specialization. LQs are a commonly used tool in local/regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. For the purpose of the Perth County and local municipality strategic planning exercise, LQs were calculated relative to the province of Ontario.

To analyze the results displayed in the tables below, a location quotient greater than 1.0 for a given sector indicates a local concentration of economic activity as compared to the overarching region (in this case Ontario) and may be an indication of competitive advantage with respect to the attraction of that industry sector. Location quotients equal to 1.0 for a given sector suggest that the study area has the same concentration of economic activity as the overarching region. Finally, a location quotient of less than 1.0 suggests that the community does not have a strong competitive advantage in that sector.

In theory, an industrial or business concentration that is greater than the overarching regional average may also represent the export base of the participating municipality (both in terms of products or services). Businesses that make up this export base may have chosen to locate in the community due to certain local or regional competitive advantages. These competitive advantages can be used to attract additional investment, in the same or complementary industries.

The industry concentration in the member municipalities relative to Ontario are provided in the following table. The very high LQ in each of the member municipalities is a clear indication of the strength and importance of this industry in the County. Two other industries that were consistently in the high range (in excess of 1.25, but lower than 2.00) were manufacturing and construction. Two industries that are driving the high labour force concentrations are food processing and rubber product manufacturing.

There is labour force concentration in Perth South for arts, entertainment and recreation. This is driven by the proximity to the Stratford Shakespeare Festival.



FIGURE 4.15: PERTH COUNTY MEMBER MUNICIPALITIES LABOUR FORCE LOCATION QUOTIENTS, 2006

LQ Classification	West Perth	Perth East	North Perth	Perth South	St. Marys	Stratford
Very High	Agriculture (10.40)	Agriculture (11.68)	Agriculture (7.49)	Agriculture (11.84)		Arts, entertainment and recreation (2.08)
High	Manufacturing (1.50) Construction (1.34)	Construction (1.65)	Manufacturing (1.77) Mining (1.49)	Arts, entertainment and recreation (1.51)	Wholesale trade (1.98) Agriculture (1.73) Manufacturing (1.71) Other services (1.33) Health care and social assistance (1.27)	Manufacturing (1.74) Accommodation and feed services (1.40)
Average	Transportation & warehousing (1.17) Other services (1.07) Wholesale trade (1.05)	Manufacturing (1.20) Wholesale trade (1.19) Transportation & warehousing (1.15)	Construction (1.24) Transportation & warehousing (1.18) Wholesale trade (1.16) Accommodation and food services (1.06)	Construction (1.22) Manufacturing (1.16) Health care and social assistance (1.16) Wholesale trade (1.12)	Arts, entertainment and recreation (1.17)	Health care and social assistance (1.08) Retail trade (1.07)

Source: Statistics Canada, REDDI, 2006.

The following figure provides further regional economic analysis for the performance of the member municipalities' employment base. Agriculture is a dominant employment industry. Despite declining employment growth in this industry in Perth County and Ontario, any further municipal strategic planning efforts need to include consultation with and a defined role for the agriculture and farming community. Similar to the resident labour force, the employment base had high location quotients in manufacturing (e.g. West Perth and North Perth) and construction (e.g. West Perth, Perth East and Perth South). Food processing and rubber products manufacturing are the clear drivers of the high manufacturing employment LQs.



FIGURE 4.16: PERTH COUNTY MEMBER MUNICIPALITIES EMPLOYMENT LOCATION QUOTIENTS, 2006

LQ Classification	West Perth	Perth East	North Perth	Perth South	St. Marys	Stratford
Very High	Agriculture (13.70)	Agriculture (19.30)	Agriculture (8.24)	Agriculture (21.57)	Wholesale trade (2.43) Agriculture (2.41) Manufacturing (2.40)	Arts, entertainment and recreation (2.03)
High	Manufacturing (1.60) Construction (1.41)	Construction (3.06) Wholesale trade (1.34) Other services (1.32)	Manufacturing (2.01) Mining (1.91)	Construction (4.33) Transportation & warehousing (2.88)		Manufacturing (1.97) Health care and social assistance (1.26)
Average	Wholesale trade (1.14) Transportation & warehousing (1.13) Other services (1.05)		Wholesale trade (1.24) Other services (1.01)	Educational services (1.21)	Other services (1.05)	Accommodation and food services (1.23) Retail trade (1.02)

Source: Statistics Canada, REDDI, 2006.

4.2.5 Perth County's Economic Target Sectors

The *Perth, St. Marys and Stratford Economic Development Strategy and Action Plan* describes the thought process for facilitating economic development and the initiatives that must increase the total wealth within a community. The report describes the two main ways to do generate additional wealth; which are:

1. Export development – initiatives that bring new money into the community and
2. Import substitution – initiatives that keep money in the community.



The recommended directions for economic growth in Perth County are:

- “Lone Eagles”
- Value Added Agriculture
- Green and Technology Based Manufacturing
- Arts, Culture and Tourism and
- Main Street Commercial Development.

This section of the report will further explore these target sectors in the member municipalities, which can potentially shape the municipalities in the years to come.

4.2.5.1 “Lone Eagles”

Lone Eagles in the County’s Strategy and Action Plan are described as knowledge workers with highly transportable skills, such as writers, analysts, artists, accountants, trades people, sales professionals and other advisors. A full description is provided in the report. There are many benefits to a strong Lone Eagle presence in the community, which include:

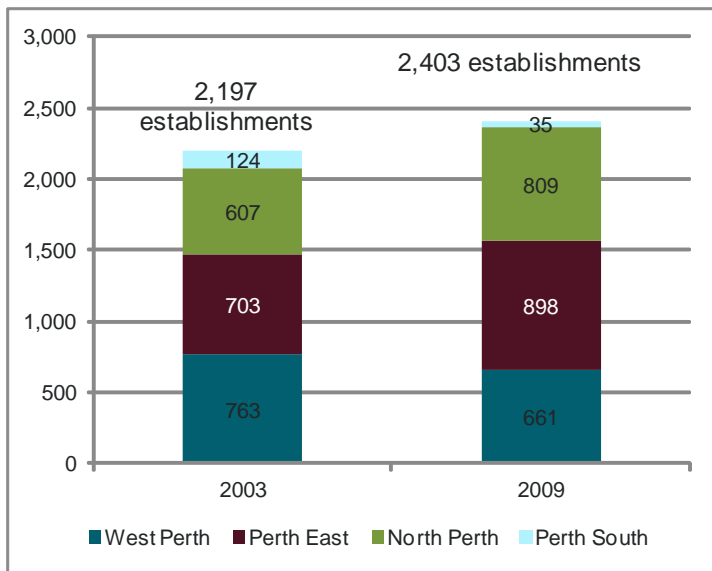
- A minimal dependence on local infrastructure
- They can potentially grow into five, 10 or 15 person operations
- Spouses and/or children of the Lone Eagles can add to the local labour force and
- Business leaders attract other business leaders and serve as ambassadors for new investment.

The following figure depicts the business establishments that are classified as having no employees (the best available approximation for Lone Eagles) by local municipality. The establishments in the ‘no employees’ category include the self-employed and cottage industries (i.e. those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). Overall, there was strong growth in the number of establishments with no employees. A total of 206 (+9.4% growth) new business establishments were added to the County’s economy over the six year time period. A larger driver of business growth was from the agriculture community.



FIGURE 4.17: EMPLOYEE BUSINESS GROWTH FOR PERTH COUNTY MEMBER MUNICIPALITIES, 2003 TO 2009

Municipality	2003	2009
West Perth	763	661
Perth East	703	898
North Perth	607	809
Perth South	124	35
Perth County	2,197	2,403
	2003-2009 Difference	206
	% Growth	9.4%



Comparators	2003	2009
St. Marys	498	512
Stratford	1,048	1,162
	2003-2009 Difference	128
	% Growth	8.3%

Source: Statistics Canada, Canadian Business Patterns, 2003 & 2009.

Note: Users are cautioned that business establishment locations can fluctuate considerably from one period to the next a local municipal subdivision level since Statistics Canada changes these local boundaries when business location recording.

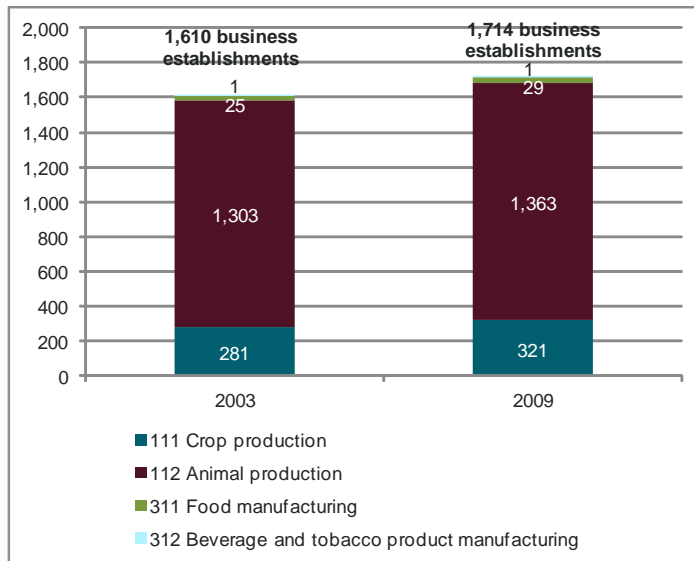


4.2.5.2 Value Added Agriculture

The value added agriculture sector included large farm operators, mid-sized and small farm operators and food processing companies. Large farm operators were defined in the County's *Economic Development Strategy and Action Plan* as having several hundred head of animals or acres of crops and contracts with intermediaries or with large processing facilities. Mid-sized and small farm operators provide more value added agricultural products. The speciality food sector is serving a growing consumer market and there is a growing number of entrepreneurial firms serving unique specialty markets. Perth County communities benefit from the area's proximity to a large population base in the Greater Golden Horseshoe and the growing immigrant communities. As the following figure illustrates, the value-added agriculture sector is dominated by businesses in animal production (i.e. cattle, dairy, hog and chicken farming) and to a lesser extent crop production (i.e. oilseed and grain farming). There was an increase in food manufacturing establishments from 25 in 2003 to 29 in 2009. These food manufacturing establishments were primarily animal food and dairy product processors.

The County's Economic Development Strategy references opportunities to embark on value-added operations such as the production of specialty foods, pork processing markets and bio-materials or renewable energy markets.

FIGURE 4.18: VALUE ADDED AGRICULTURE FOR PERTH COUNTY, 2003 TO 2009

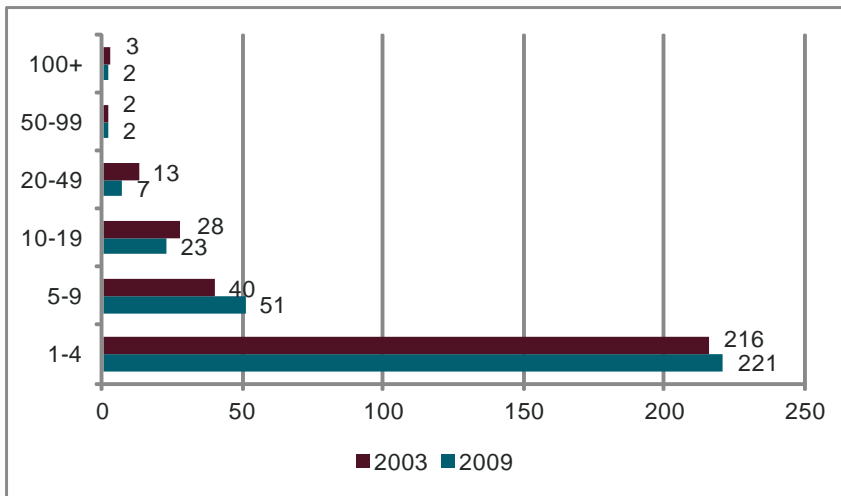


Source: Statistics Canada, Canadian Business Patterns, 2003 & 2009.



In terms of the size of value added agriculture businesses, many are small with 1-4 or 5-9 employees. The following figure illustrates the importance of small business in the industry's vitality. In fact, these small businesses were the only ones to have increased in the number of establishments from 2003 to 2009.

FIGURE 4.19: VALUE ADDED AGRICULTURE, PERTH COUNTY, EMPLOYEE SIZE, 2003 TO 2009



Source: Statistics Canada, Canadian Business Patterns, 2003 & 2009.

4.2.5.3 Green and Technology Based Manufacturing

The green and technology based manufacturing sector covers a range of activities including electricity generation, waste and sewage treatment, fabricated metal product manufacturing and transportation equipment manufacturing. The following figure illustrates Perth County's sector composition. In 2003, there were 82 businesses in this sector. By 2009, this sector grew by 85 businesses (+3). This indicates that the sector has experienced stagnating growth. Industries that have grown by the largest numbers include machinery (+5) and fabricated metal product (+4) manufacturing. Business trends in this sector in St. Marys and Stratford are very similar to Perth County and also show stagnating growth.



FIGURE 4.20: GREEN AND TECHNOLOGY BASED MANUFACTURING, PERTH COUNTY, 2003 AND 2009

Industry (NAICS)	Perth County			St. Marys			Stratford		
	2003	2009	Increase/ Decrease	2003	2009	Increase/ Decrease	2003	2009	Increase/ Decrease
221 Utilities	5	4	-1	1	1	0	2	4	2
323 Printing and related support activities	2	2	0	3	2	-1	8	8	0
325 Chemical manufacturing	3	1	-2	1	2	1	3	5	2
326 Plastics and rubber products manufacturing	4	6	2	2	1	-1	8	5	-3
327 Non-metallic mineral product manufacturing	7	4	-3	1	2	1	7	7	0
331 Primary metal manufacturing	2	0	-2	0	0	0	1	0	-1
332 Fabricated metal product manufacturing	18	22	4	5	7	2	25	26	1
333 Machinery manufacturing	14	19	5	5	4	-1	12	11	-1
334 Computer and electronic product manufacturing	1	1	0	0	0	0	1	2	1
335 Electrical equipment, appliance and component manufacturing	0	1	1	1	0	-1	3	2	-1
336 Transportation equipment manufacturing	5	2	-3	2	3	1	11	9	-2
337 Furniture and related product manufacturing	14	14	0	4	6	2	7	7	0
339 Miscellaneous manufacturing	7	9	2	4	2	-2	10	10	0
Total	82	85	3	29	33	4	98	97	-1

Source: Statistics Canada, Canadian Business Patterns, 2003 & 2009.

Of the 85 businesses in this sector, nearly half (41 or 48.2%) of them are located in Perth East. Thirty of these businesses are located in North Perth and the remainder (14) are located in West Perth. The numbers of businesses in manufacturing are relatively small in comparison to larger communities or cities such as Cambridge, Kitchener or London. The County's Economic Development Strategy states key components for a successful manufacturing sector. They are:

- Strong technology associations to promote and foster networks that generate entrepreneurship and company alliances
- Presence of original equipment manufacturers (OEMs) and small to mid-tier companies including related activities in research, design, manufacturing, product testing, sales and operations
- Transportation (air, sea and highway) and telecommunications infrastructure for the supply chain
- Demonstrated ability to attract private and public dollars for research and spawn new companies, including funding from government contracts and grants to provide dollars for jobs, manufacturing, R&D and facilities and
- Post-secondary academic institutions with established communication channels to industry for the development of curricula and training programs to upgrade workforce skills.



The County Strategy also explores the growth of the alternative energy manufacturing sector and Ontario's *Green Energy Act*. This Act is intended to help make the Province a North American destination for investment in wind power, solar PV, biofuel and fuel cell technologies.

4.2.5.4 Arts, Culture and Tourism

The arts, culture and tourism sector is largely comprised of the following industries.

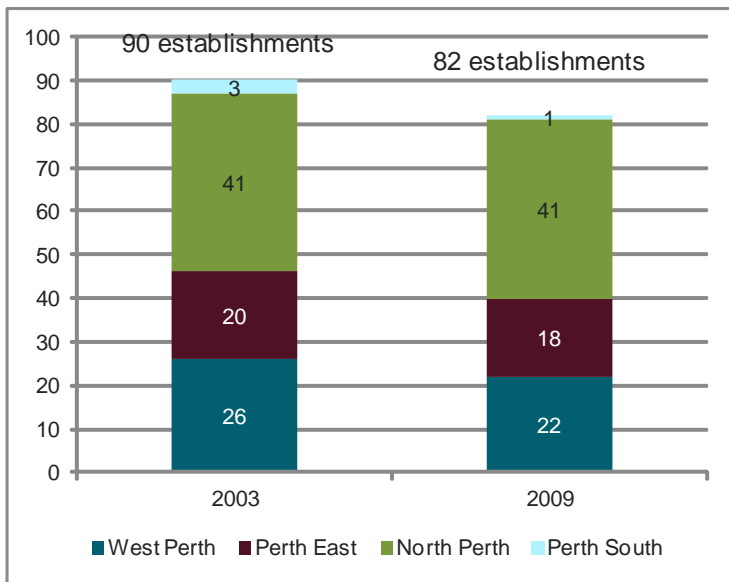
- Publishing industries
- Motion picture and sound recording industries
- Performing arts, spectator sports and related industries
- Heritage institutions
- Amusement, gambling and recreation industries
- Accommodation services and
- Food services and drinking places.

The following figure identifies the number of business establishments in Perth County by specific industry. In 2003, there were 90 businesses in this sector and over one-half (48) of the businesses were in the food services industry. There were also 15 businesses in the performing arts, spectator sports industry and 13 businesses in accommodation services industry. By 2009, the number of businesses in this sector declined to 82 (-8.9%). The only industry to report a strong increase was the amusement, gambling and recreation industry with an additional 11 businesses. St. Marys and Stratford's arts, culture and tourism sector has largely remained unchanged in terms of the net number of new businesses operating from 2003 to 2009. The County's strategy recommends the need to add tourism product offerings and a better sector integration with Stratford's Shakespearean Festival and larger arts, culture and tourism sector.



FIGURE 4.21: ARTS, CULTURE AND TOURISM SECTOR, PERTH COUNTY, 2003 AND 2009

Municipality	2003	2009
West Perth	26	22
Perth East	20	18
North Perth	41	41
Perth South	3	1
Perth County	90	82
	2003-2009 Difference	-8
	% Growth	-8.9%



Comparators	2003	2009
St. Marys	51	57
Stratford	287	284
	2003-2009 Difference	3
	% Growth	0.9%

Source: Statistics Canada, Canadian Business Patterns, 2003 & 2009.



4.2.5.5 Main Street Commercial Development

Perth County's Main Streets (e.g. Mitchell, Listowel, Milverton, etc.) represent the centres of commercial activity and the `heart` of each rural community. The quality of this community environment indicates the municipality or township's interest and investment in making the area an attractive place for private sector business investment. However, there are vacancies in the downtowns, which suggest a current over supply of retail and commercial space in the rural communities.

4.2.6 Summary of Competitive Analysis

The County's labour force analysis revealed that three of the four member municipalities are net exporters of labour. North Perth was the only municipality that drew more people into the community to fill local jobs. Many of the people who reside in Perth County are employed in local jobs in the Perth County or neighbouring communities such as Stratford and St. Marys. Other places where residents are employed include London, Kitchener and Waterloo. These findings indicate a relatively healthy live-work balance in the communities.

There is a large component of the labour force engaged in working class or serviced based class occupations. Creative occupations typically are higher paying, but the proportions of people engaged in these types of occupation across the member municipalities are much lower than the Province of Ontario. Agricultural class occupations are larger in comparison to the province of Ontario's average. These results indicate a risk of falling behind the rest of the province with respect to income levels, wealth generation and innovation.

Perth County has a clear industry concentration in agriculture as demonstrated by the very high LQs generated by municipality for both the resident labour force and jobs. LQs were also high for the manufacturing and construction industries.

The recommended directions for economic growth in Perth County are:

- **Lone Eagles** - This sector requires minimal dependence on local infrastructure and the size of their businesses can potentially grow into larger operations.
- **Value added agriculture** - There are opportunities to embark on producing specialty foods, pork processing and producing bio-materials for the renewable energy markets.
- **Green and technology based manufacturing** – Although this sector of the economy has experienced stagnating growth, there are business opportunities in alternative energy manufacturing products.
- **Arts, culture and tourism** – There is a continued need to add tourism product offerings and better integrate these offerings with Stratford's Shakespearean Festival and larger regional sector.
- **Main street commercial development** – These main streets represent the heart of each rural community and require municipal or township investment in making them attractive places for private sector business investment.



5 Community Engagement

5.1 Community Conversations

In all, four major themes have emerged from the community conversations:

1. Population Attraction and Retention
2. Partnerships And Collaboration in Service Delivery and Governance
3. Attract and Retain Local Businesses
4. Build on the Agricultural Heritage and Strengths

The statements collected as part of the community engagement process are personal opinions, and have not been verified for their factuality.

Theme 1: Population Attraction and Retention

The feedback from the community engagement suggested that the decline in population and the ageing demographic is one of the most significant ways in which the community is changing. Participants in all the community sessions indicated a desire to have a more stable population with:

- Growth across all age groups;
- Increased youth retention; and
- Increased immigrant attraction.

While the region's population is low year to year, respondents also pointed to a declining rural population and an increasing settlement rate in the County's urban centres. This trend seems to be largely caused by an ageing farming population and an increasing farm size. For some municipalities, such as Perth South, a lack of an urban centre has led to a population decline as the rural population moves to the nearby separated Town of St. Marys, while others, such as Perth North, have seen an increased population growth causing rising home prices in the Town of Listowel.

Youth engagement and retention was seen as a key piece to achieving this vision for the community, with a noted lack of current services geared towards youth, and a lack of post-secondary education opportunities in the community. The K-12 education institutions are seen as an asset that could be developed more to support students and engage them in their community.



Immigration was also mentioned repeatedly as an important tool for dealing with the County's slow growth, although most respondents felt that the community was not attractive at this time for immigrants. This was largely due to a lack of services and a perception that the community is not welcoming to new immigrants. Public education about immigration and better branding of the County as a welcoming community were mentioned as priorities in order to achieve this vision.

For all municipalities, housing was an issue, with concerns regarding the affordability and variety of available properties being seen as two major issues to attracting new residents. This was echoed in the community survey, where affordable housing was mentioned by several respondents as a priority in achieving their vision.

Theme 2: Partnerships and Collaboration in Service Delivery and Governance

The participants suggested that partnerships and collaboration between the County and the member municipalities needed to be strengthened. The sentiment was that in the next decade, there would be some sort of governance or service-delivery model change in each of the communities; either through amalgamation, increased partnerships, or harmonized policies. The sentiment in the community refers to the lack of harmony, especially in the area of planning; between the upper and lower tier of government. This will need to be improved.

This sentiment was echoed in the community survey responses (addressed in the following section), with respondents questioning the current governance structure, citing duplication and a lack of representation for certain communities, while others were unsure of the benefits of amalgamation or collaboration on service delivery. Stronger partnerships between the County and surrounding communities rated very important by respondents. Most respondents also saw the delivery of most major services, such as roads maintenance, medical services, planning and development, as a partnership between the County and the local municipality.

Theme 3: Attract and Retain Local Businesses

One of the most significant points of discussion was the need to support existing businesses and attract new businesses to the County. Most respondents felt that businesses were unaware of the opportunities in the region, and that a lack of serviced land was limiting certain kinds of business development.

When asked about the types of businesses that can be successful in the community, it was generally felt that there was a need to strategically look at businesses that fit in with the character of the County to try to attract or grow those types of businesses. Agricultural development, as well as agri-business and food processing opportunities were seen to be the largest opportunity. Tourism, specifically capitalizing on the large number of visitors to the Stratford area, was also seen as a key sector for potential development. Many residents expressed concern over the ageing professional service providers, such as lawyers, doctors and accountants in areas such as Listowel, and how to ensure that there are new professionals to take their place.

When the community was asked where business opportunities should be pursued, two different answers were given. A large number of community respondents suggested that business development activities should be concentrated in the downtowns and around the urban



centres such as Listowel, Milverton and Mitchell, in order to protect prime agricultural land. The agribusiness development and agricultural production was seen as having strong potential across the County.

Theme 4: Build on the County's Agricultural Heritage and Strengths

The County's agricultural land and rich agricultural heritage came up repeatedly in the discussions as something to be protected, valued, and capitalized on. The land base was deemed an asset and a major characteristic of the County, with farms that range from large scale livestock operations to small scale, niche markets serving the organic and local food demand. Farmers were consistently perceived as the County's largest group of entrepreneurs, characterized by participants as hard working and motivated. Agribusiness supply and service was mentioned as a key opportunity for growth.

Participants saw the agricultural sector in Perth County remaining and continuing to be a major driver of employment and economic prosperity for the community. However, they pointed to several issues related to planning, including the inability to sever farmhouses from farming properties as a problem in some municipalities. There appeared to be two views on planning regulations and agriculture, the first being that the regulations are too lax and allowing increased residential development on prime agricultural land should not be pursued; and the second that regulations are too strict, not allowing for severances or farms under a certain size, which hurts certain farm groups and populations, such as the Mennonite population in Perth East.

Participants in the community sessions outlined several ways in which the agricultural sector could be further supported. The sector is seen as having a high potential for innovation, and that the County should support this potential by marketing the region as an agricultural hub, developing local sales opportunities for local products, such as a hub or market, and connecting farmers to other levels of government who can assist them in securing export markets.

5.1.1 The Community's Vision and Priorities

During the community conversations participants provided input as to their vision for the County of Perth and its member municipalities over the next 10 years. The most frequently cited responses included the following:

- The promotion of our small town culture with urban amenities.
- Preservation of our rural and agricultural lifestyle.
- To have vibrant towns and main streets where people will come back to and people who live in the community don't have to travel outside to access the goods and services they need.
- A place where the population is engaged, growing, and vibrant.



- Access to a strong set of diverse services and employment.

When priorities for the next five years were discussed, the participants suggested the following five priorities:

1. Continue to improve collaboration in governance and service delivery
2. Develop population attraction and retention strategies and tools
3. Increase the amount of development ready land and support local businesses
4. Support our volunteers and not for profit groups
5. Make infrastructure improvements on local roads

The development of family activities, recreation and a desire for the County to differentiate itself from Stratford were also mentioned, but to a lesser degree.



5.2 Online Survey Results

5.2.1 Township of Perth South

The Perth County Community Engagement Survey was successful in gathering 359 survey responses. The survey was available online for residents to share their thoughts and help inform the consulting team of key community directions.

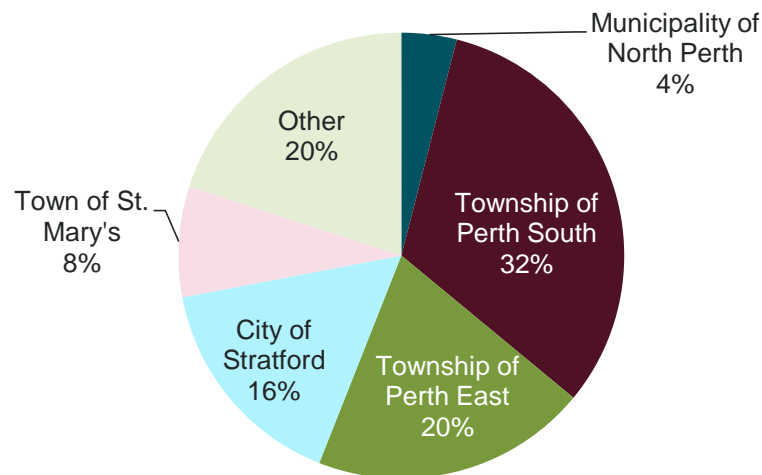
Within the survey, demographic traits, occupation, commuter data and ideas for the vision of the future of their community and the county as a whole were collected. This report focuses on the county level data and combines all of the survey responses into one report. The statements collected as part of the survey are personal opinions, and have not been verified for their factuality.

The survey found that Perth South residents are interested in attracting business and associated employment to increase their population. Agriculture is a way of life in Perth South and the preservation of a rural way of life and a sense of 'neighbourhood' is important. A policy environment that allows farmers to diversify their business to adapt to changing economic times is recommended by the survey respondents.

Resident Profile Section

Which community do you work in?

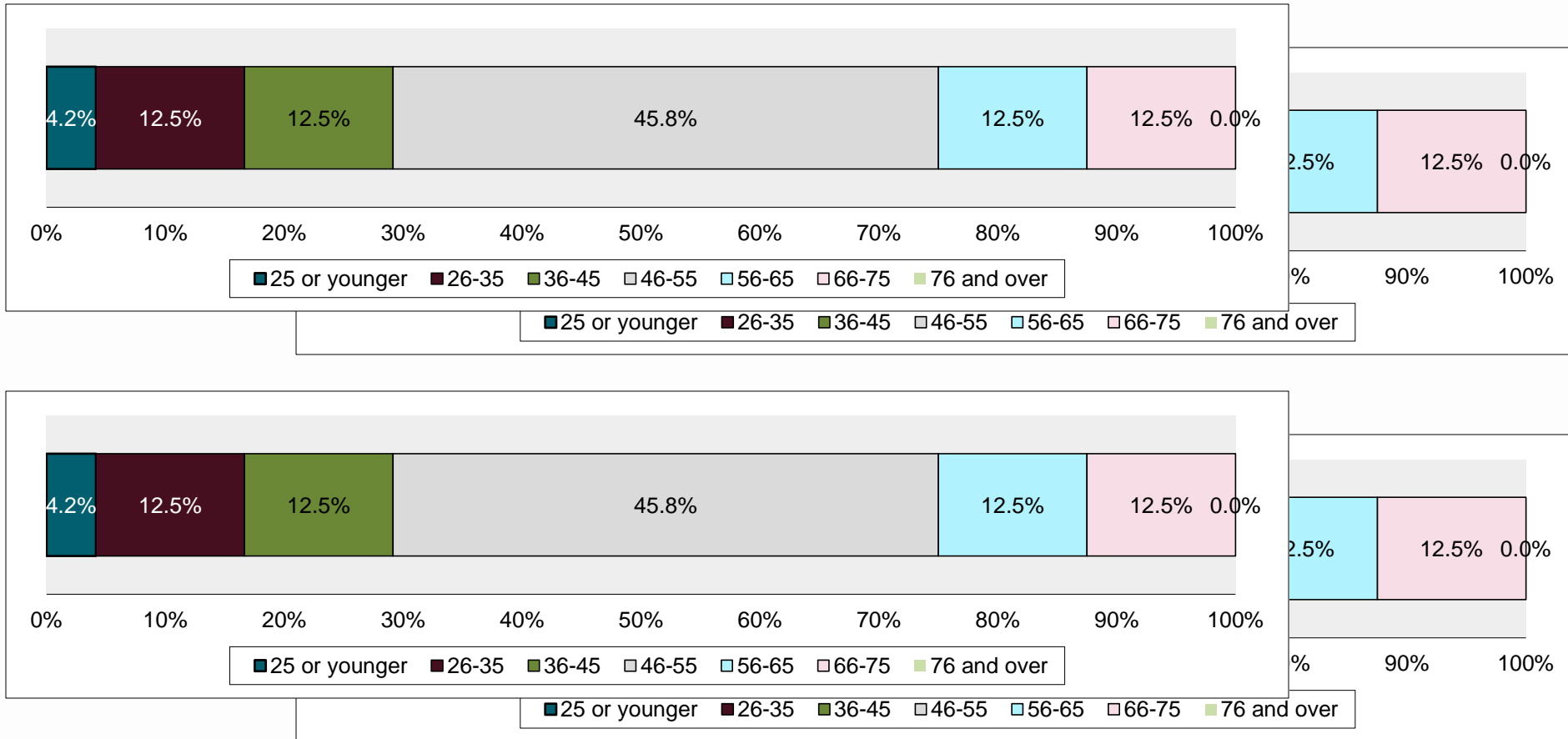
The majority of survey respondents do not work in Perth South. Only 32% of residents who took part in the survey work within the community.





How old are the participants?

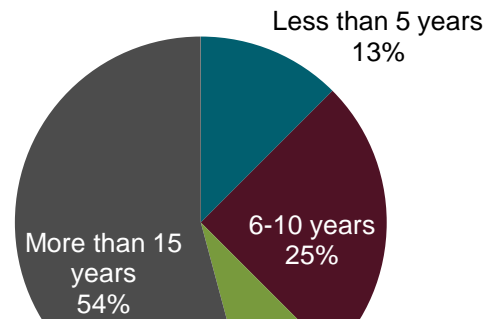
The age category with the highest representation in the survey results is between the ages of 46 and 55.





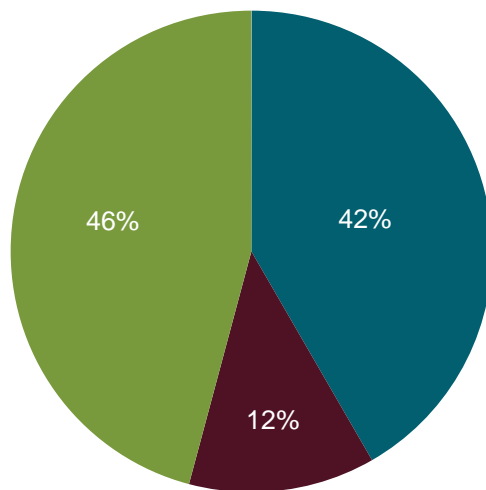
How long have you lived in your community?

More than half of those who completed the survey have lived in the community for more than 15 years. The percentage of Perth South survey respondents who have lived in the community for less than 10 years is 38%. This is 8% higher than the figure at the county level. Those who completed the survey are slightly newer to the community than in other areas.



Are you responding as a business owner?

Of the survey respondents within the Township, and the percentage of business owners who participated in the survey.



■ Yes I operate a business in the same community in which I live.

■ I operate a business in Perth County (excluding St. Marys and Stratford), but NOT in the same community in which I live.

■ I DO NOT operate any business.

Business ownership?

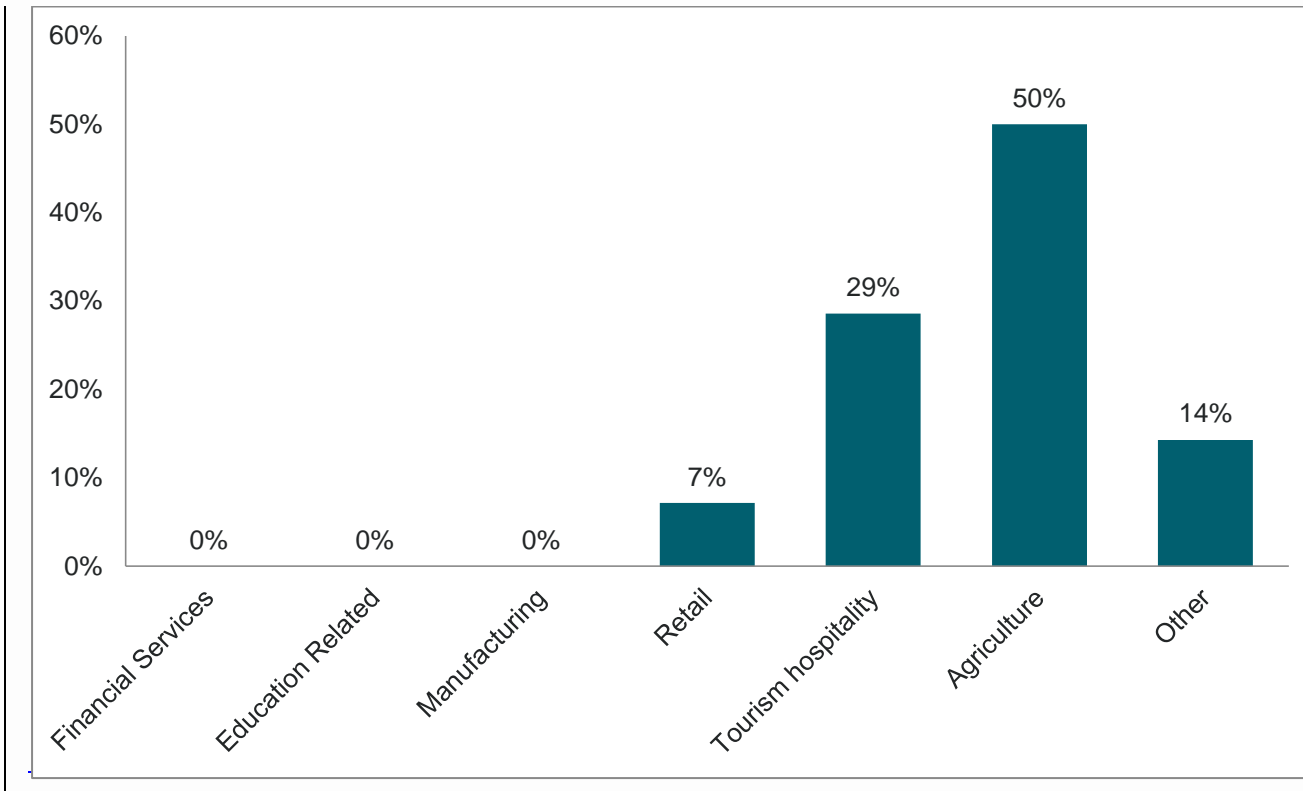
In Perth South, 42% own a business within the County. This is a higher percentage of business owners than in other areas.

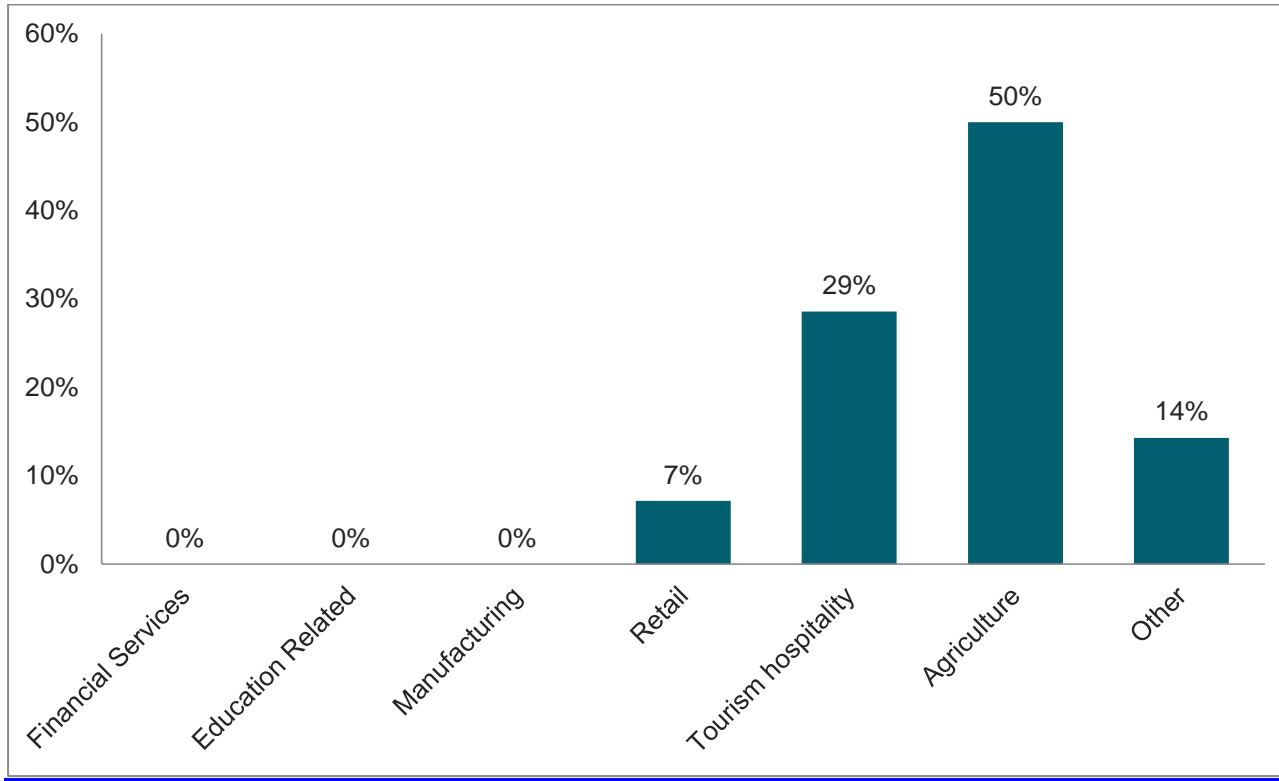


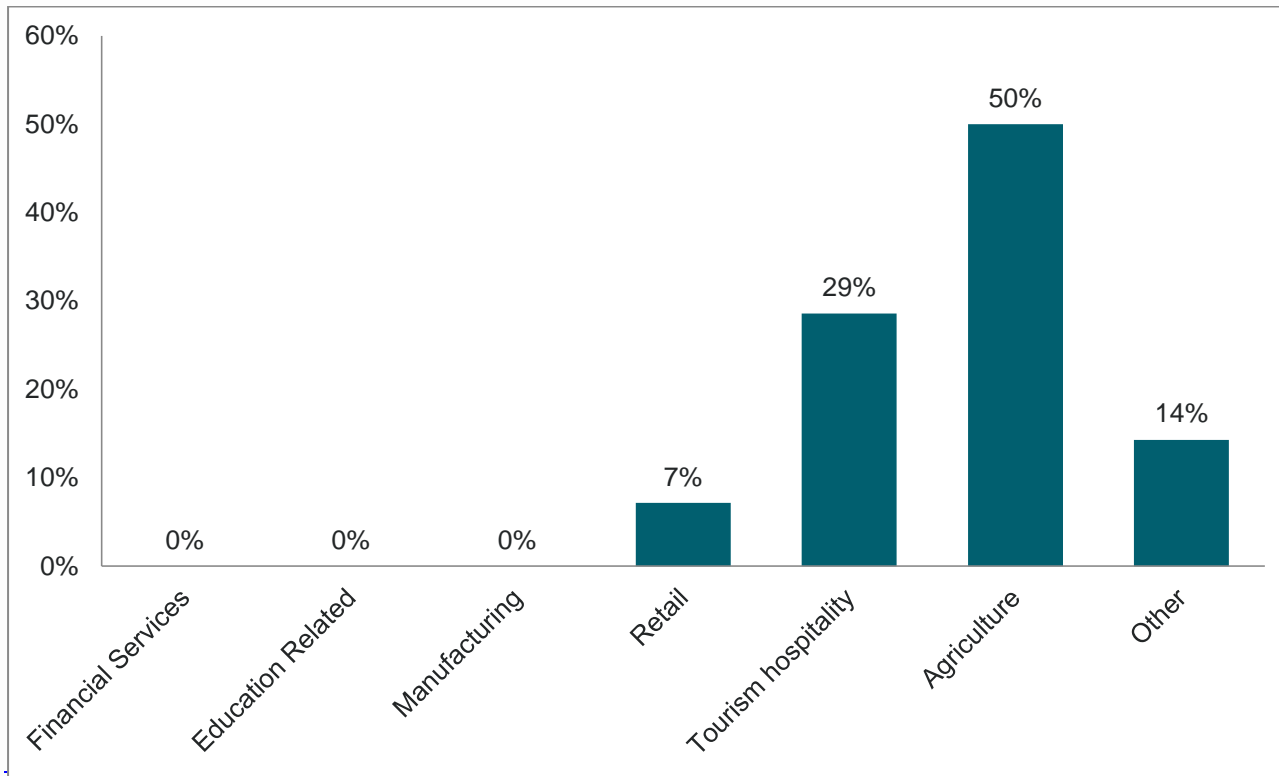


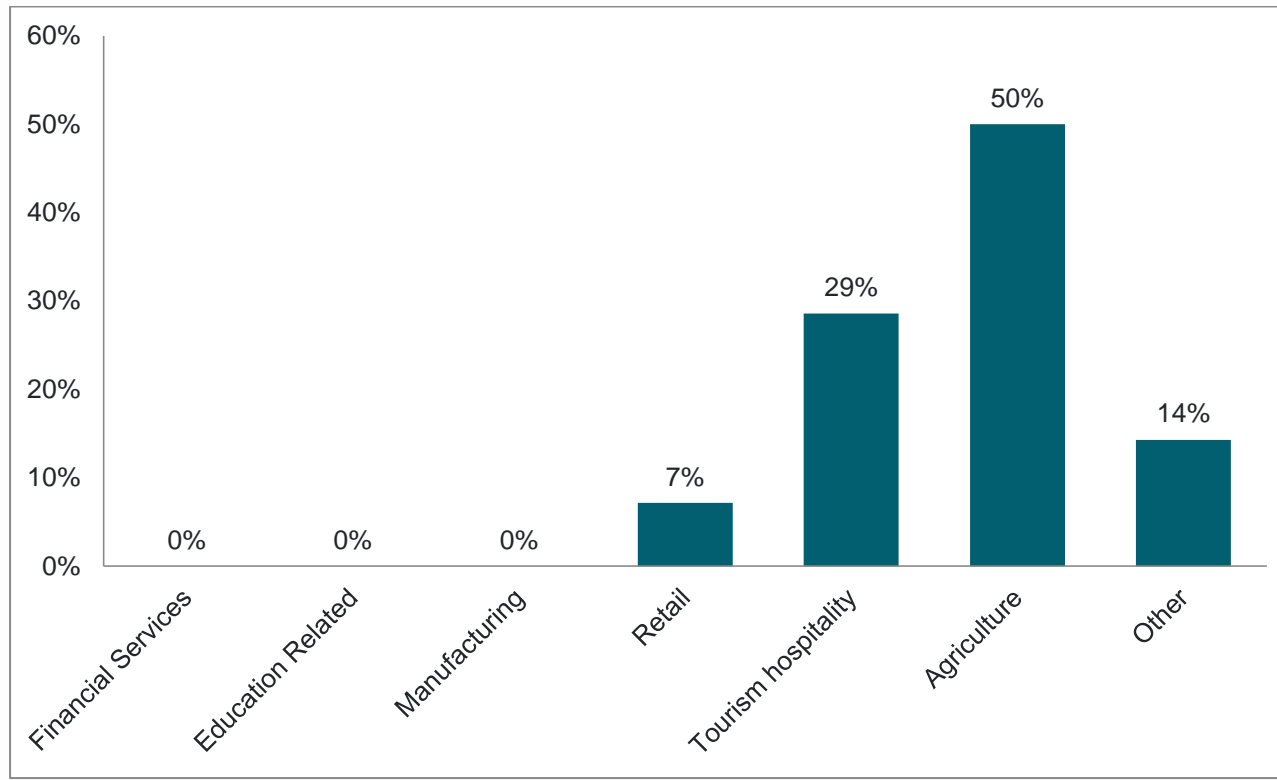
If applicable, what type of business do you own or operate?

The majority of business owners from Perth South who completed the survey own an agricultural business. This is a higher percentage than at the County level.









Local Community Questions

What makes your local community a unique place to live or work?

The survey responses mentioned the following themes when describing the unique qualities of the Township of Perth South:

- Perth South is a very rural area with a strong sense of community, family farms and beautiful rural areas.
- Perth South is very liveable, with basic services and amenities, yet close to the city and all that it has to offer.



- The people of Perth South, with farming values and yet diversity in the community, are what make it unique.

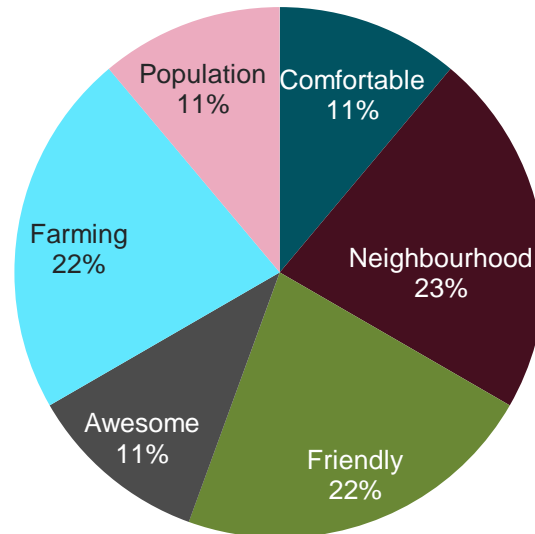
Use three words best describe your community?

The words that residents of the Township of Perth South use to describe their community are:

Neighbourhood

Friendly

Farming



What is your vision for your local community?

The residents of Perth South who responded to the survey shared their vision for the future of the community. Some of the themes in the comments are as follows:

- Increase the population of the community
- Increase communications with our neighbours and our Council
- Develop more home based businesses and the tourism businesses.



What are the top 3 priorities for your local community for achieving this vision?

In the part of the survey designed to discuss the top priorities for action, many of the community members' comments focused on the following points:

- **Citizen Engagement:** Address isolation, more opportunities for conversation with Council, ensure that the municipality has a fair voice at the County level
- **Economy:** Trails and tourism development, more strategic economic development initiatives
- **Land Use:** Farmhouse separation permitted, planning coordinated with the County, more park land development

What are the barriers to achieving these three priorities?

- **Budget Constraints:** The community is sensitive to the budget implication of the visions that they imagine. The cost of managing the community, the potential costs of projects, increasing costs of new developments, the potential expenses of marketing. All of these discussions need to take place in the context of the funds available.
- **Attitude:** The culture of the community can be a barrier to new developments because change creates friction. There are concerns that closed minded attitudes, fear and even the assumption that progress is always good can either stall development or potentially move the community in the wrong direction.
- **Municipal and County Governments:** The residents of Perth South who took part in the survey were concerned with the balance of power between municipalities and at the County level.

Community Service Priorities

The majority of survey responses strongly or somewhat agree with the statements that were put forward for a variety of community services, except for the current municipal structure, which was not supported. The highest number of “Strongly Agree” ratings is for business attraction, indicating a desire for more active programs in this area. Health care, natural and cultural heritage, and, internet services have the highest overall rankings, indicating strong support for these services.

Description of Services	Strongly disagree	Somewhat disagree	Somewhat agree	Strongly agree
My community needs additional recreational facilities, services and programs for its children and youth.	9%	27%	36%	27%



Residential development should be encouraged.	18%	27%	18%	36%
Business attraction and investment should be actively pursued in my community.	0%	9%	27%	64%
My community has adequate health care and emergency medical services.	0%	9%	45%	45%
My community has adequate high speed/high capacity Internet.	18%	9%	36%	36%
The natural and cultural heritage of my community needs to be protected, conserved and managed.	0%	27%	36%	36%
My community needs investment in physical infrastructure (water, roads, sewers) to manage expected community growth.	27%	9%	36%	27%
My community offers adequate value for municipal tax dollar spending.	20%	30%	50%	0%
Municipal structure (4 municipalities and 1 county) is adequate and effective.	22%	33%	22%	22%

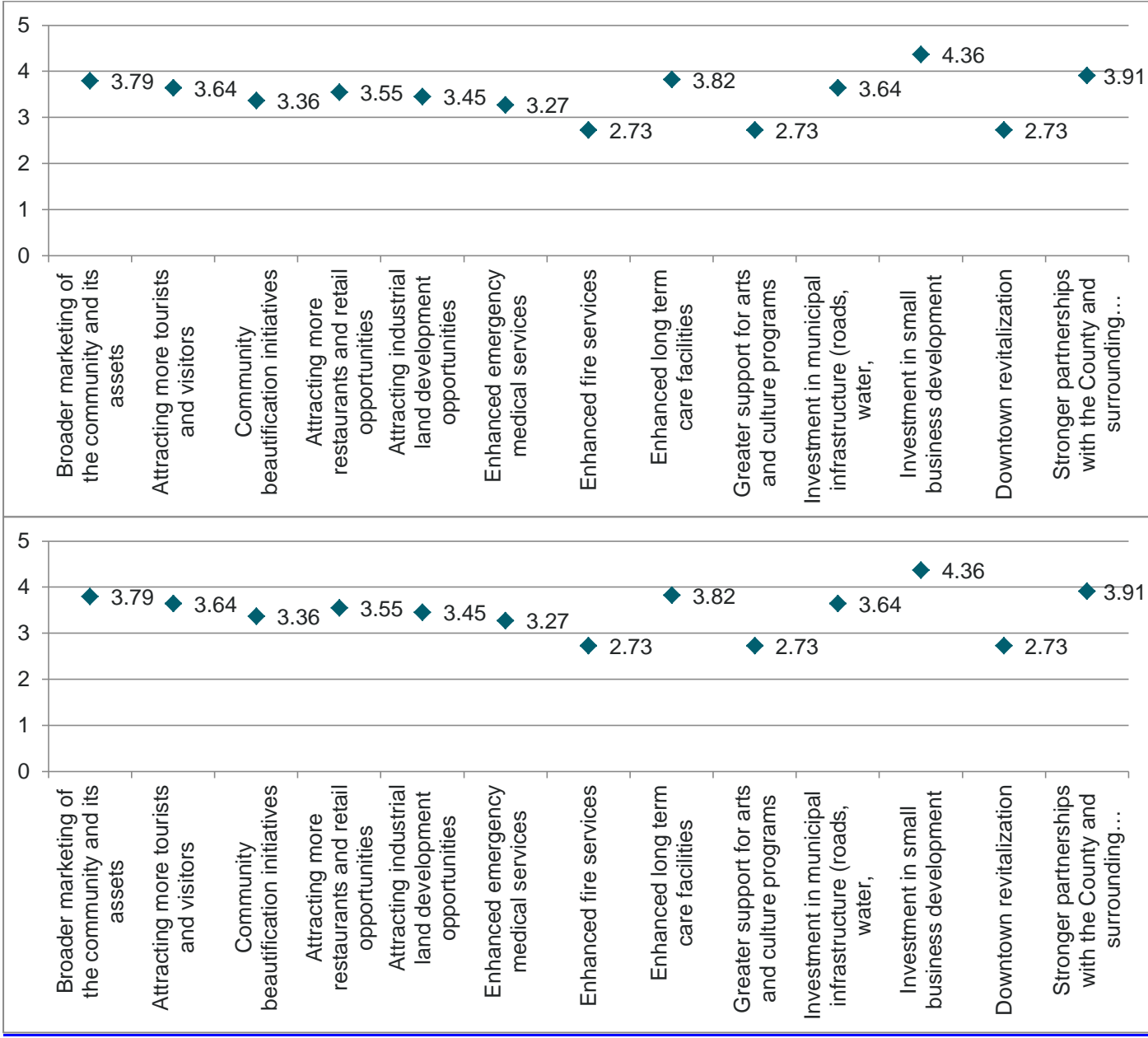
Comments on Service Ratings

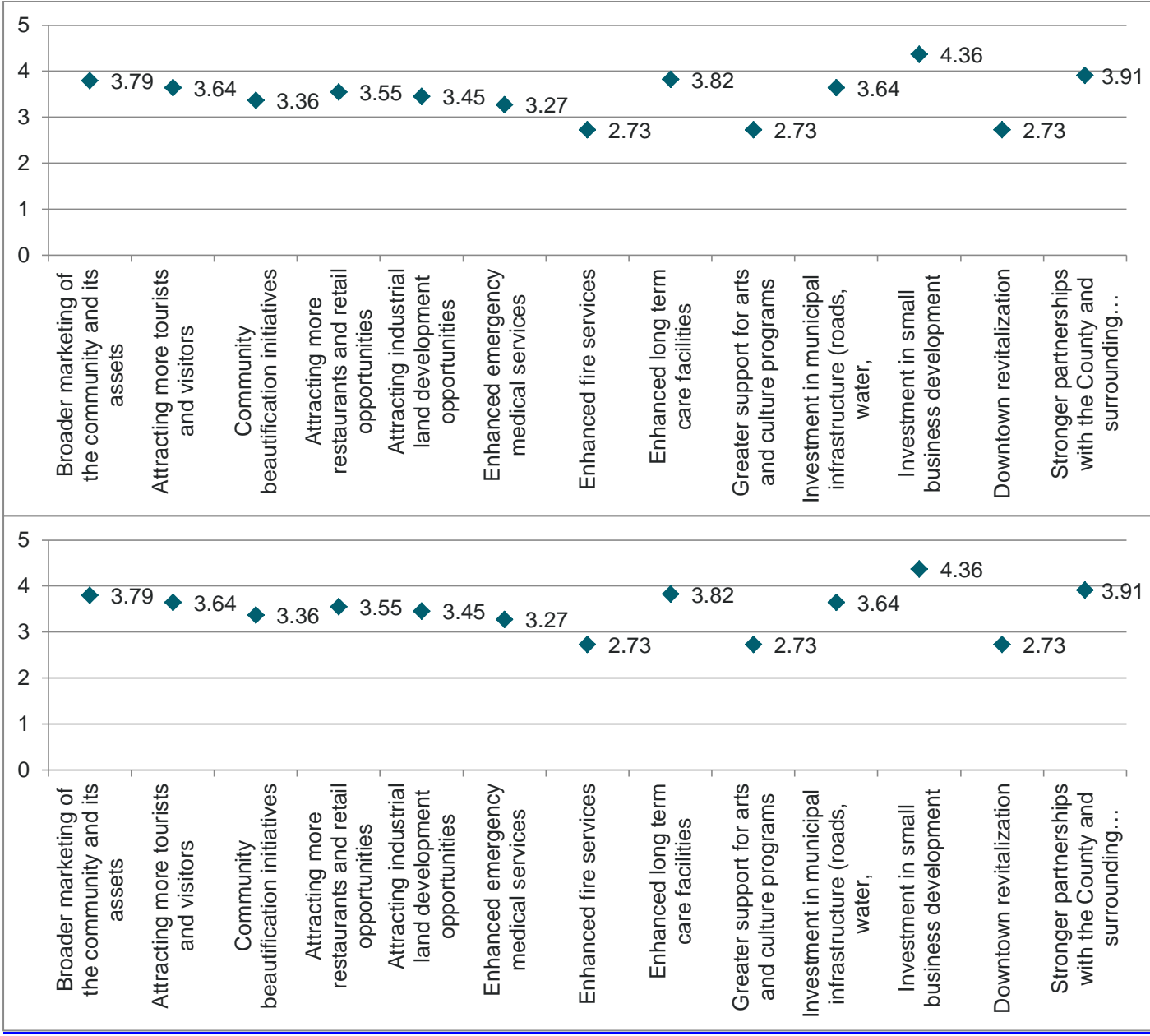
- **Recreation:** Suggestions include venues for youth to gather, more variety in recreation programs, biking lanes and trails development. Some comments state that what is currently in place meets the needs of a small community
- **Residential Developments:** The comments support new housing, but not at the expense of farmland.
- **Business Attraction:** The survey comments emphasize the need for less regulation for farmers to be successful in diversifying, and stress the need for industry and other unique businesses to increase the local economy and population.
- **Health Care:** Those surveyed are happy with current quality of care; expanded services and hours.
- **Internet:** Appreciation for good quality of service and cost. More rural areas may have some connectivity issues.
- **Natural and Cultural Heritage:** Support for conservation efforts is expressed, not just based in the towns but also rural areas.
- **Physical Infrastructure:** Comments suggest that maintenance of existing infrastructure, including roads is a priority over the construction of new infrastructure.
- **Value for Tax Dollars:** In rural areas the level of services (i.e. garbage pickup and plowing of roads) is not considered very high, and therefore the comments express that taxes are relatively high.
- **Municipal Structure:** The majority of comments support dissolving the municipal level of government because an additional level of administration is not seen as necessary.

The comments suggest that those who completed the survey support a regional government. The concern as to the debt of the larger towns is discussed as a barrier, but one that could be dealt with. More consistent management of bylaws and policies is seen as a potential advantage, as well as decision making focused on the needs of the whole region.



The top priority area based on the average ranking is investment in small business development, followed by the development of strong relationships within the County and surrounding area. The lowest priority areas are enhanced fire services, arts and cultural programs and downtown revitalization.







5.2.2 Needs, Values, Aspirations Matrix for Perth County and its municipalities

Engagement Activity	Needs	Values	Aspirations
Community Survey	<ul style="list-style-type: none"> ■ More flexibility with farmhouse severance ■ Protect, conserve and manage natural and cultural heritage ■ Invest in physical infrastructure to manage expected community growth ■ Pursue business attraction and investment ■ A community vision that is supported by the political will ■ Business attraction and support, as well as more industrial land 	<ul style="list-style-type: none"> ■ Location of the community for opportunities ■ Proximity to urban areas ■ Farmland in the community ■ Quiet, beautiful, peaceful rural atmosphere ■ Libraries, arts and culture, health care (ranked well) ■ Small town feeling ■ Community pride and civic engagement ■ Safe, friendly community 	<ul style="list-style-type: none"> ■ Diverse opportunities for housing ■ Diverse opportunities for long-term employment with good wages ■ Maintain the rural urban mix and the small town feeling ■ Maintain and keep our rural schools ■ Enhance the local retail offerings in the urban areas ■ Farmland will continue to produce local food that can continue to feed the community ■ Better access to broadband internet across the County



Engagement Activity	Needs	Values	Aspirations
Community Conversation Sessions	<ul style="list-style-type: none"> ■ More welcoming to new Canadians ■ Lack of long-term vision ■ More diverse employment opportunities ■ More development ready land and industrial areas for businesses ■ More government collaboration 	<ul style="list-style-type: none"> ■ Agricultural assets and heritage ■ Sports and recreation opportunities ■ Strong physical infrastructure for business and residents ■ Strong workforce ■ Small town feeling with urban amenities ■ Strong health care assets (hospitals) ■ Arts and culture 	<ul style="list-style-type: none"> ■ To be a desirable community for youth, young families and immigrants ■ More support for business retention and expansion ■ Be known for our lifestyle and offerings for residents and business ■ Collaborative government ■ Local opportunities for selling agricultural products



5.3 Staff Sessions

The following comments reflect the discussion held with Perth South staff in March 2012. While the key focus of this conversation was related to the municipality, it is important to recognize that staff also shared perspectives and opinions that related to neighbouring municipalities or the County at large.

When you reflect on the actions identified through previous strategic planning work (as per the document shared), what progress has been made?

- Agriculture - expansion of big farms has occurred
- Green energy – residents have done a lot, but not the municipality for financial reasons. There was a study on municipally owned properties having green energy and it is still pending a decision
- Hazardous waste removal – partnership with St Marys and Stratford will get done this year
- Trees – Trees Perth South has subsidized trees by 25% (as long as approved by Upper Thames CA)
- Why are severances so difficult while neighbours (St. Marys/Stratford) can annex land to create new subdivisions? Tried to work with the county to change it and were turned down and then turned down at OMB too and this is the main reason for population loss and there is confusion because it's already for existing homes, not a conversion. The current policy doesn't work with land leases because that won't allow mortgage financing. The Planning Act is so restrictive for rural housing development and we need a broader provincial policy is changed
- Youth – because there is little residential we'll lose our youth to other communities
- Amalgamation - no progress on its aims
- Red tape – industrial or commercial – Provincial Policy Statements are not allowing development

Economically, in 5 years the Township of Perth South will (1 meant not important, don't pursue and 5 meant extremely important, continue to pursue)

- Grow and develop in rural industrial and rural residential, and investigate and remove roadblocks to growth ... 5
- Reduce red tape which prevents development \wherever under the townships control ... 3
- Continue to set the pace in agricultural industry ... important but need to start talking about changing the tax and severance regime ... 5

Environmentally, in 5 years the Township of Perth South will....

- Get into green energy ... 4



- Have a more convenient household hazardous waste collection ... 5
- Increase tree coverage on less productive land to prevent erosion ... 4

Culturally, in 5 years the Township of Perth South will...

- Keep more young people in the community ... 5
- Have more agricultural and community development, while also emphasizing sustainability ... 4
- Be amalgamated ... 5

What are people saying about how things are going in our community? Are there new goals that we should establish?

- Citizens are overall fairly satisfied, if it doesn't affect them directly they don't make it an issue. However, people are not identifying themselves with Perth South; there is no cohesiveness with most still thinking of it as two municipalities.
- Ward system – consider eliminating to create more cohesiveness, smaller council
- Need more sustainability on revenue. In 2010 the largest source of revenue was from grants
- Schools – the declining population is a problem. Downie (one of two schools in Perth South) is only open because they take overflow from Stratford. The threat of expanding schools in Stratford could cause Downie to close.
- Hazardous Waste – didn't have any before, now partnership with St. Marys and Stratford
- Recreation – joint pool and centre in Kirkton. Residents use St. Marys and Stratford for most recreation, South Perth soccer programs are well used. The township is too small for an arena

From your perspective what are the areas we should be paying particular attention to? What's changing?

- Amalgamation. The municipality is not sustainable without an urban area or we have population increase. West Perth or St. Marys will be the partner and citizens prefer West Perth because St. Marys is carrying a huge debt load .
- Positive is that St. Marys has agreed to extend services for industrial park, there is a tough economic climate now but will result in future value. The tax base has been adjusted for that area so it doesn't impede development in St. Marys
- Pay attention to existing businesses so they stay ... for example:
 - Maple leaf chicken, is the company safe? It's on independent services which lessens costs but puts it at greater risk of tough rural business regulations
 - CBM - quarry, cement production ... factory is in St. Marys
 - Faucett Tractor ... 35-40 employees ... tractor wrecking yard



- Robica – fuel/water tank fabrication

If you had your wish list to go to Council with, what would be the top 3 priorities that you would include?

- Hard to achieve consensus
- Increased tree coverage, it looks more appealing.
- Reduce red tape for development wherever the municipality has some control. There is frustration for business applicants to be moved around to different organizations (e.g. Upper Thames, County)
- Industrial and rural residential growth. Need to do it SOMEHOW! Ideas such as increased tax bases and allowing little pieces of non-farmable land to be developed could work. Need an inventory of these properties
- MPAC (Municipal Property Assessment Corporation) needs to look at the assessment of the properties that are undervalued; the house portion of the farm should be looked at seriously (not part of the 25% agriculture tax reduction). Can they flag homes for MPAC
- Ward system must be removed. Amalgamation has got to happen
- OPP – going to County delivery will probably not change the cost
- Fire – they partner three different municipalities and seem content with this arrangement
- Agriculture growth – continue it, Sustainability just requires a balance of farm/residential/commercial;/industrial

Actions must be measurable and it's generally staff that is tasked with tracking the data and preparing a performance/outcomes report. How would you suggest we measure the outcomes for your three priorities?

- Very limited thoughts
- Mostly very practical ideas such as put 2 trees in for everyone you chop down

5.4 Council Sessions

Attached are meeting proceedings from strategic planning sessions held in Perth County from March 21-23, 2012. The purpose of these sessions was to share the highlights of stakeholder consultations, preliminary research and other input and then develop the key items in the strategic plans. The statements collected as part of the sessions are personal opinions, and have not been verified for their factuality.

Editor's Notes:

- a. The symbol // or ... indicates that two similar ideas have been merged together.
- b. This document contains the meeting proceedings and is not intended as a "Final Report"



5.4.1 Vision

This vision is the desired future state (such as more 5+ years) of the organization.

Draft Vision

1. **Governance structure.** Strong partnerships with neighbouring municipalities with possible regionalization.
Measures: reduced size and cost of governance... lower tax rates
2. **Youth retention has been successful** ... retained and increased the number of young people back to the community
Measures: Population census data... The local clubs have a younger average age
3. **Small businesses thriving** - a niche market for some local products, increased value added agricultural industry. There is rally around the on farm secondary businesses.
Measures: # new businesses registered... # employees by industry type.
4. **Agriculture** is still the core of the community with businesses built on that concept
Measures: sales of agricultural products, # acres, gross farm receipts (by Township)
5. **Efficient, well-coordinated municipal and county governance.**
Measures: stable tax base, infrastructure and reserves are in good shape
6. **Population** has started in increase

A voting process took place to finalize the Vision and the “make or break” elements of the vision.

- Voting results from this meeting
 - **Multiple selection (maximum choices = 7) (Allow bypass)**
 - **Number of ballot items: 19**
 - **Total number of voters (N): 6**

Number of Votes	Idea
6	1. Agriculture is still the core of the community with businesses built on that concept
5	2. Small businesses thriving ... more small businesses in the community ...allowed small business to grow in



Number of Votes	Idea
	rural areas
5	3. Strong partnerships with neighbouring municipalities with possible regionalization ...amalgamated township with a neighbouring municipality
4	4. Efficient, well-coordinated municipal and county governance. ...reduced size and cost of governance
4	5. Increased value added agriculture industry ... There is rally around the on farm secondary businesses.
4	6. Youth retention has been successful ... retained and increased the number of young people back to the community ... The local clubs have a younger average age.
3	7. Population has started in increase ...population has shown some growth ...Population decline has slowed
2	8. There is a strong youth presence in the school and recreation facilities.
2	9. A niche market for some local products
2	10. Infrastructure and reserves are in good shape
1	11. More diversified economy
1	12. More co-ordinated services with other partners
1	13. Taxes have stayed similar with similar services
1	14. Plan on how the municipality will control its own destiny
1	15. The physical health of our citizens is strong
0	16. Incorporated a town into township
0	17. There is cooperation between the county and lower tiers
0	18. Business mentorship is up and running successfully
0	19. Transit systems for seniors



Make or break elements (with measures)

1. Governance structure. Strong partnerships with neighbouring municipalities with possible regionalization, amalgamated township with a neighbouring municipality
 - a. Measures: reduced size and cost of governance and lower tax rates
2. Youth retention has been successful, retained and increased the number of young people back to the community
 - a. Measures: Population census data, the local clubs have a younger average age; there is a strong youth presence in the school and recreation facilities.
3. Small businesses thriving, there are more small businesses in the community and allowed small business to grow in rural areas in addition to a growing niche market for some local products
4. Increased value added agriculture industry ... There is rally around the on farm secondary businesses.
 - a. Measures: # new businesses registered... # employees by industry type.
5. Agriculture. agriculture is still the core of the community with businesses built on that concept
 - a. Measures: sales in agriculture products, # acres, gross farm receipts (by Township)
6. Efficient, well-coordinated municipal and county governance.
 - a. Measures: stable tax base, infrastructure and reserves are in good shape
7. Population has started in increase (population has shown some growth and decline has slowed)

5.4.2 Mission

A Mission describes the overall core purpose of the organization. To arrive at a consensus for the Mission statement for this session, the group voted on the most appropriate statements which accurately depicted the most important issues for the municipality.

- Voting results from this meeting
 - **Multiple selection (maximum choices = 2) (Allow bypass)**
 - **Number of ballot items: 6**
 - **Total number of voters (N): 6**



Number of Votes	Idea
5	1. The Township provides open and accountable government; effective and efficient core services with a look to the future to ensure stability
4	2. To provide effective, efficient governance that will foster prosperity and development in our rural areas.
2	3. To provide efficient/transparent services and quality of life to our community.
1	4. To provide reasonable services for reasonable cost to ratepayers.
0	5. Manage the assets of the of the ratepayers in a prudent manner and provide necessary services in a cost effective manner
0	6. Accountable value for money, meet customers' needs

After the voting was complete, the following mission statement was approved by the members of this session;

- **To provide open and accountable government, effective and efficient services, to ensure prosperity and development while maintaining quality of life.**

5.4.3 Guiding Principles

Guiding Principles are fundamental laws that will direct behaviour in everything that an organization does. Through this process, the following questions were answered;

- What are the fundamental principles that South Perth embodies?
- What are some of the key principles that you would like people to see the municipality standing for?

Similar to the process of determining the Mission statement, the members of this session were given the opportunity to vote on the principles that they believed to be the most appropriate to abide by in the process.

- Voting Results from this meeting
 - **Rank Order (Allow bypass) – Not Multiple Selection**



- Number of ballot items: 6
- Total number of voters (N): 6

Number of Votes	Idea
30	1. Integrity - ensuring all matters are dealt with honesty and respect ...core values and morals
26	2. Accountable - being fiscally responsible, making sure money is spent reasonably
25	3. Openness and transparency - giving the public as much information as possible within the confines of legislation. Open to questions and change
18	4. Responsive - providing good customer service and respond to requests as quickly as possible.
15	5. Respect for the environment: maintaining environmental responsibilities
12	6. Engaging our citizens - providing input into local governance

Number of Votes in Each Rating

	1	2	3	4	5	6	Mean	STD	n
1. Integrity	3	1	1	1	0	0	2.00	1.26	6
2. Accountable	1	2	2	0	1	0	2.67	1.37	6
3. Openness	2	0	1	3	0	0	2.83	1.47	6
4. Responsive	0	1	1	2	1	1	4.00	1.41	6
5. Respect f	0	1	1	0	2	2	4.50	1.64	6
6. Engaging	0	1	0	0	2	3	5.00	1.55	6



With the results of the voting tabulated and merged ideas considered, the following six principles were agreed upon.

Draft Principles with working definitions

1. **Integrity:** All matters are dealt with in an honest and respectful way (based on core values and morals)
2. **Accountable:** fiscally responsible and making sure money is spent reasonably
3. **Openness and transparency:** giving the public as much information as possible within the confines of legislation. Open to questions and change
4. **Responsive:** providing good customer service and respond to requests as quickly as possible.
5. **Respect for the environment:** maintaining environmental responsibilities
6. **Engaging our citizens:** providing input into local governance and open to broad feedback



5.4.4 Priorities

Based on the discussion there was a process of determining actionable priorities that the group felt were necessary to discuss. Considering the community input to date, the group member were asked what they saw as the key priorities that Council must address, including whether or not “quick wins” were important.

Similar to the process of determining the Mission statement and Guiding Principles, the members of this session were given the opportunity to vote on the principles that they believed to be the most appropriate to abide by in the process. In this instance, the outcome was not to choose a condensed list of priorities, but rather to rank the importance of each one by determining which ones were voted the most.

- Voting Results from this meeting
 - **Multiple Selection (maximum choices = 8) (Allow bypass)**
 - **Number of ballot items: 19**
 - **Total number of voters (N): 6**

Number of Votes	Idea
6	1. QUICK: business mentorship program ... set up list of experts - B2B
4	2. Reduce size of government (LT) ...remove ward system of election
4	3. Focus on business incubator - continue to develop plan - maybe involve neighbouring communities
4	4. Assist in residential development maybe purchase and industrial land
4	5. QUICK: reduce size of Council
3	6. Reorganize government within Perth county ...enter into discussions with St. Marys
3	7. To develop a strong business map tracking system
3	8. QUICK: create small business incentives - amnesty for small business registration
3	9. QUICK: Updated info and projections on population decline and tax base
3	10. QUICK: Longer term budgeting



Number of Votes	Idea
2	11. Change official plan to ensure growth ...Work with the county to ensure growth
2	12. Develop a youth retention strategy
2	13. QUICK: positive articles for the local media (mayors report, “what’s happening in Perth South” etc.)
1	14. Address legislation and regulations to allow business growth (e.g. secondary farm occupations - bylaws etc.)
1	15. Recreation & culture strategy: festivals, etc.
1	16. QUICK: group (townships and county) bulk/cooperative purchasing
1	17. QUICK: Develop a print media highlighting local business - have talked about a map highlighting local business ...Develop a business map and make it available to all residents
1	18. QUICK: communication strategy to better inform public
0	19. QUICK: talk to schools about youth opportunities - what are they looking for? -> what programs we might develop

5.4.5 Role of Municipal Government

The following is a list of items in which the group members of the session agreed upon, which state the roles and responsibilities of local government in relation to the chosen priorities.

Long term Priorities

- Reduce size of government (LT), remove ward system of election
 - Role of Township: LEAD
- Focus on business incubator - continue to develop plan - maybe involve neighbouring communities
 - Role of Township: LEAD, Partners: CFDC, OMAFRA, FedDev, Federal & Provincial Policies, SWEA . Start a small industry incubator to help with a business incubator establish small business incubator



- Assist in residential development maybe purchase and industrial land
 - Role of Township: Support the res dev and LEAD in industrial land. Assist in development of Sebringville property
- Reorganize government within Perth county ...enter into discussions with St. Marys
 - Role of Township: partner / LEAD? in convincing County
- Develop a strong business map tracking system
 - Role of Township: LEAD

Quick Wins

- QUICK: Business mentorship program, set up list of experts - B2B
 - Role of Township: FACILITATE with County support. Identify 6 business champions. Have a networking event? SB fair. What could be new linkages? Reverse trade show * Partners: County, CFDC
- QUICK: reduce size of Council
 - Role of Township: LEAD to get the process going
- QUICK: create small business incentives, amnesty for small business registration
 - Role of Township: LEAD
- QUICK: Updated info and projections on population decline and tax base
 - Role of Township: LEAD
- QUICK: Longer term budgeting
 - Role of Township: LEAD