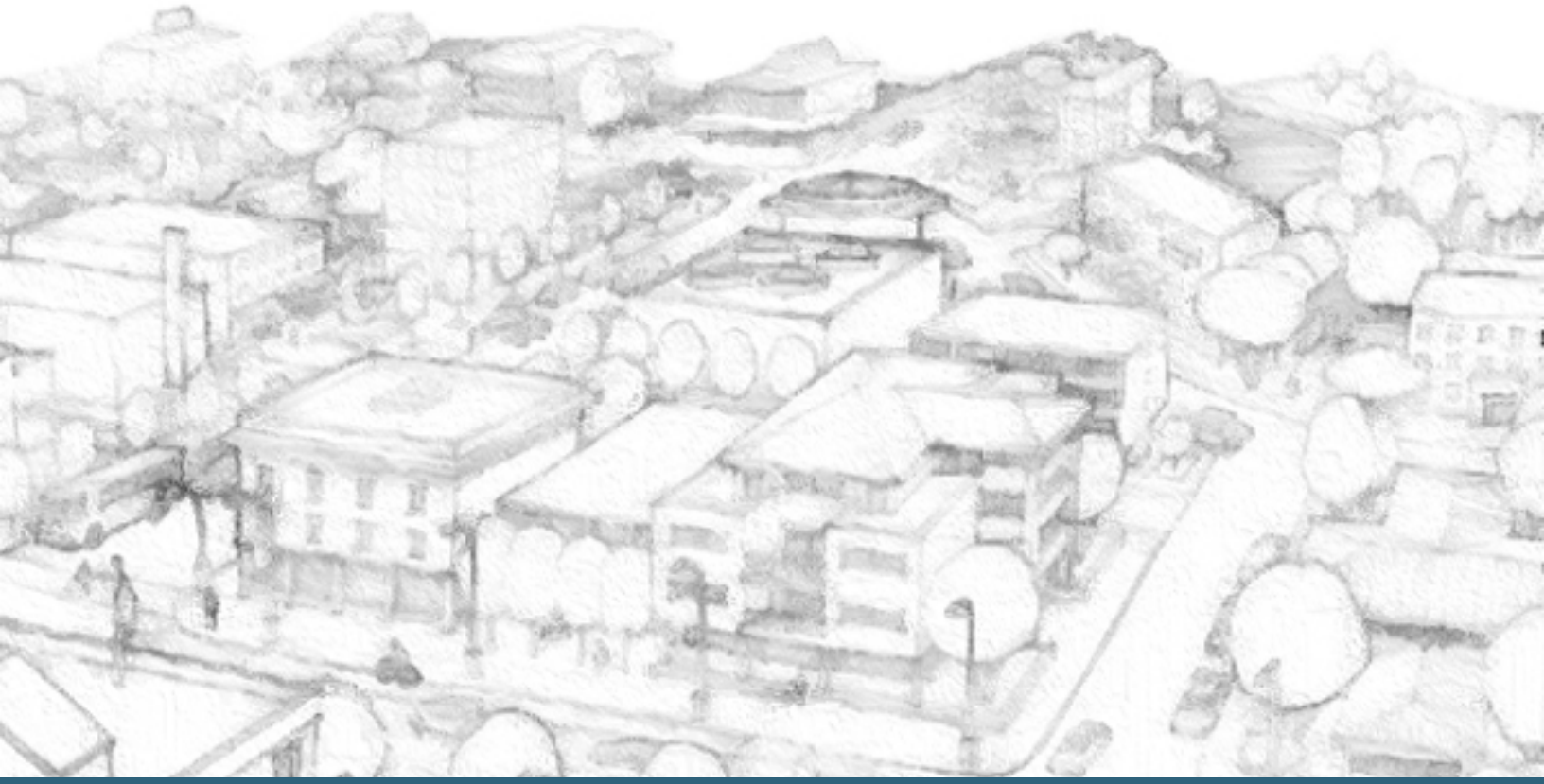
OURWINNIPEG REVIEW

PHASE 1 REPORT TO THE COMMUNITY

03/14/2018



Winnipeg

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ACKNOWLEDGEMENT





Winnipeg is located within Treaty Number 1 Territory, the traditional lands of the Anishinabe (Ojibway), Ininew (Cree), Oji-Cree, Dene, and Dakota, and is the Birthplace of the Métis Nation and the Heart of the Métis Nation Homeland. Whether as a community of the original inhabitants of this land or inhabitants of this land by birth or adoption, Winnipeggers all share the goal to make our city a better place to live based on mutual respect, equal opportunity, and hope. The review of the City's *OurWinnipeg* development plan acknowledges the City's commitment to establishing and maintaining mutually respectful relationships with First Nations, Métis, and Inuit governments, organizations and individuals.

The project team would like to acknowledge the efforts of all those who participated in the work conducted in this phase and supported the development of this report: members of the community who participated in public engagement activities, members of the Citizen Advisory Committee for their insight and advice, and members of the public service who contributed to and reviewed the content of this report.

THE *OURWINNIPEG* REVIEW PROCESS - INTRODUCTION

PURPOSE OF THIS REPORT

This report marks the end of the first phase of the *OurWinnipeg* review, and reports on the work done to date. It summarizes issues facing our community as determined through our research and community consultation. It also provides a brief overview of what these observations mean for Phase 2, the next steps of the review process.

WHAT IS *OURWINNIPEG?*

OurWinnipeg is the City of Winnipeg's 25-year development plan. This plan is required by the Province of Manitoba's *City of Winnipeg Charter.* The Charter requires that any public work, undertaking or development (such as the Financial Management Plan, departmental strategic plans, and by-laws) must be consistent with the City's development plan; therefore, *OurWinnipeg* is intended to guide everything the City does. It provides a vision and policies that influence the delivery of City services, how we get around in the city, and decisions about how the city grows.

OurWinnipeg was adopted by Council in 2011, along with four supporting direction strategies. One of the supporting strategies, *Complete Communities*, was adopted as a by-law and contains more specific policies related to sustainable land uses and development. The other direction strategies are *Sustainable Transportation*, *Sustainable Water and Waste*, and *A Sustainable Winnipeg*.

WHY ARE WE REVIEWING *OURWINNIPEG*?

The *City of Winnipeg Charter* requires that a review of the City's development plan be initiated within five years after it was adopted (this review was initiated in late 2016). Regardless of this requirement, it is important to ensure that the plan still aligns with the vision and needs of our growing and changing population.

The City's goal is to update Winnipeg's development plan (and potentially other plans) to include a renewed vision for Winnipeg, as well as policies that support Winnipeggers' physical, social, environmental and economic priorities. The updated plan will also include ideas about how to implement the plan, and measures to tell us if we are reaching our goals.

HOW ARE WE REVIEWING *OURWINNIPEG*?

The *OurWinnipeg* review is being conducted in three phases and is expected to take approximately 18 months to complete.

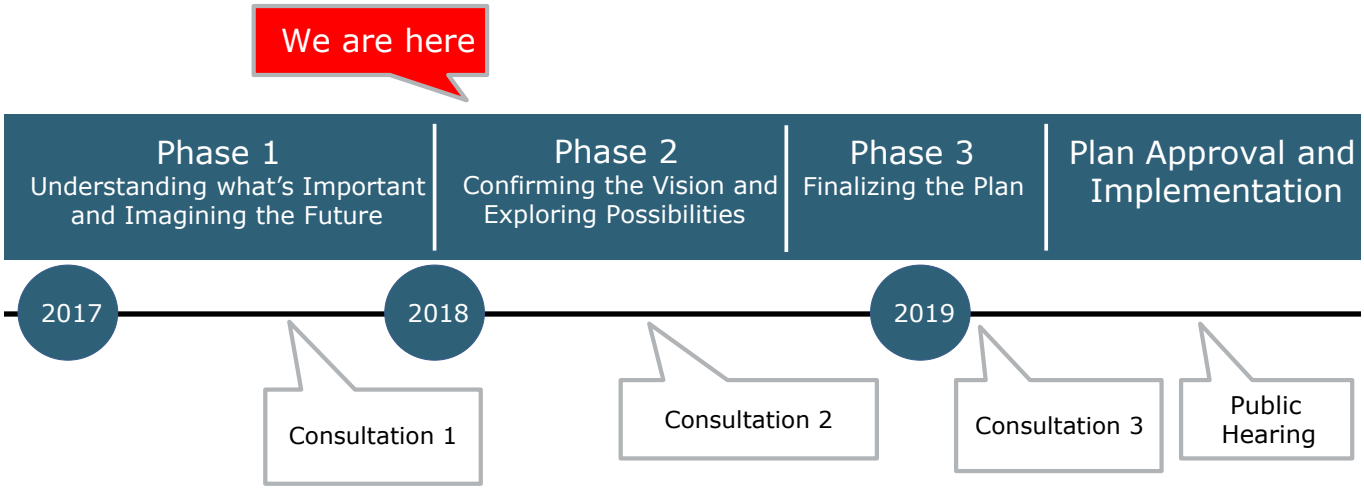


Figure 1: Project Timeline

Phase 1: Understanding What's Important and Imagining the Future
Phase 1 activities focused on listening to community members, and understanding how the City can help increase the quality of life for Winnipeggers, both today and in the future. This involved talking to people to gain an understanding of community perspectives, values and priorities; analyzing statistical data; initiating background studies; and identifying community trends. Phase 1 culminated with this *Phase 1 Report to the Community*, which provides a summary of what we learned from background research and what we heard from Phase 1 public engagement.

Phase 2: Confirming the Vision and Exploring the Possibilities
Phase 2 will take what we learned in Phase 1 and use it to confirm a community vision for Winnipeg's future physical, social, environmental and economic development. Existing *OurWinnipeg* policy will be compared with what we heard in Phase 1, to determine which policies are still relevant to that vision, and which ones could be changed to better address the current and future needs of Winnipeggers. This phase will also involve input from community members.

Phase 3: Finalizing the Plan
Much of Phase 3 will be spent reflecting on and recording what was learned in Phases 1 and 2. The aim is to update the *OurWinnipeg* planning package to better reflect community vision, needs, and priorities as Winnipeg grows and changes. The draft plan will be shared with the community to let us know if we got it right.

Following Phase 3, revisions may be made to the draft plan before the new plan is advanced to Council for adoption.

WHAT WE LEARNED

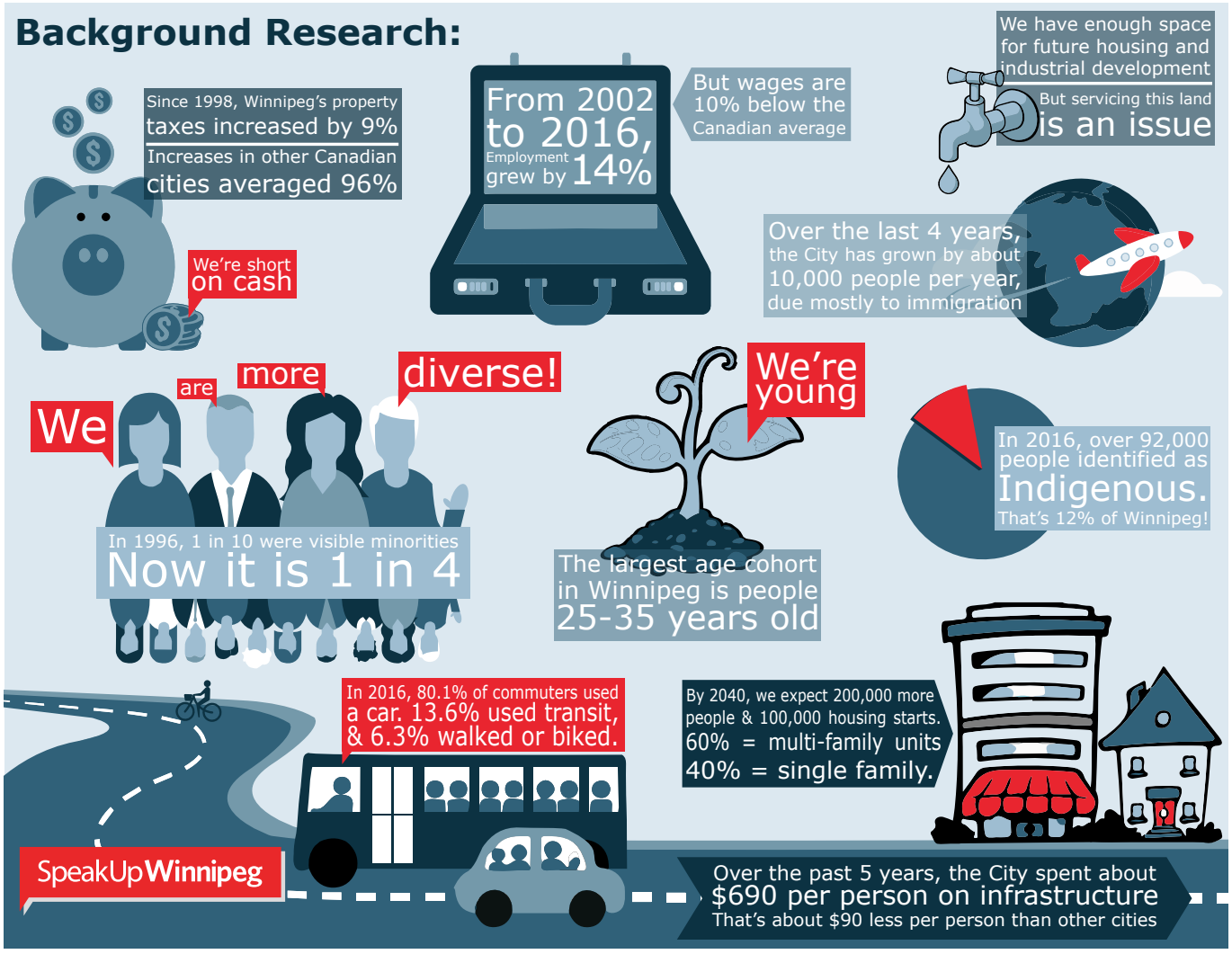


Figure 2: What We Learned: Background Research

The review of *OurWinnipeg* began by gathering information to understand how the community is growing and changing. This involved compiling information about the community's current and projected demographic and economic condition to identify community characteristics, and ultimately understand requirements associated with accommodating the needs of all community members.

Within this phase of the review, we have reviewed existing data that is available through such sources as Statistics Canada, the City of Winnipeg *Community Trends and Performance Report* and development permit data. We have also undertaken background research in areas where information was dated or where gaps existed. This included detailed study of our employment, commercial and residential lands to better understand future needs. The Conference Board of Canada was also commissioned to complete a long term *Population, Housing and Economic Forecast*.

The infographic on (page 6) provides an overview of the key findings, statistics and trends from the background research. A more detailed description of this information can be found in **Appendix A**.

WHAT WE HEARD

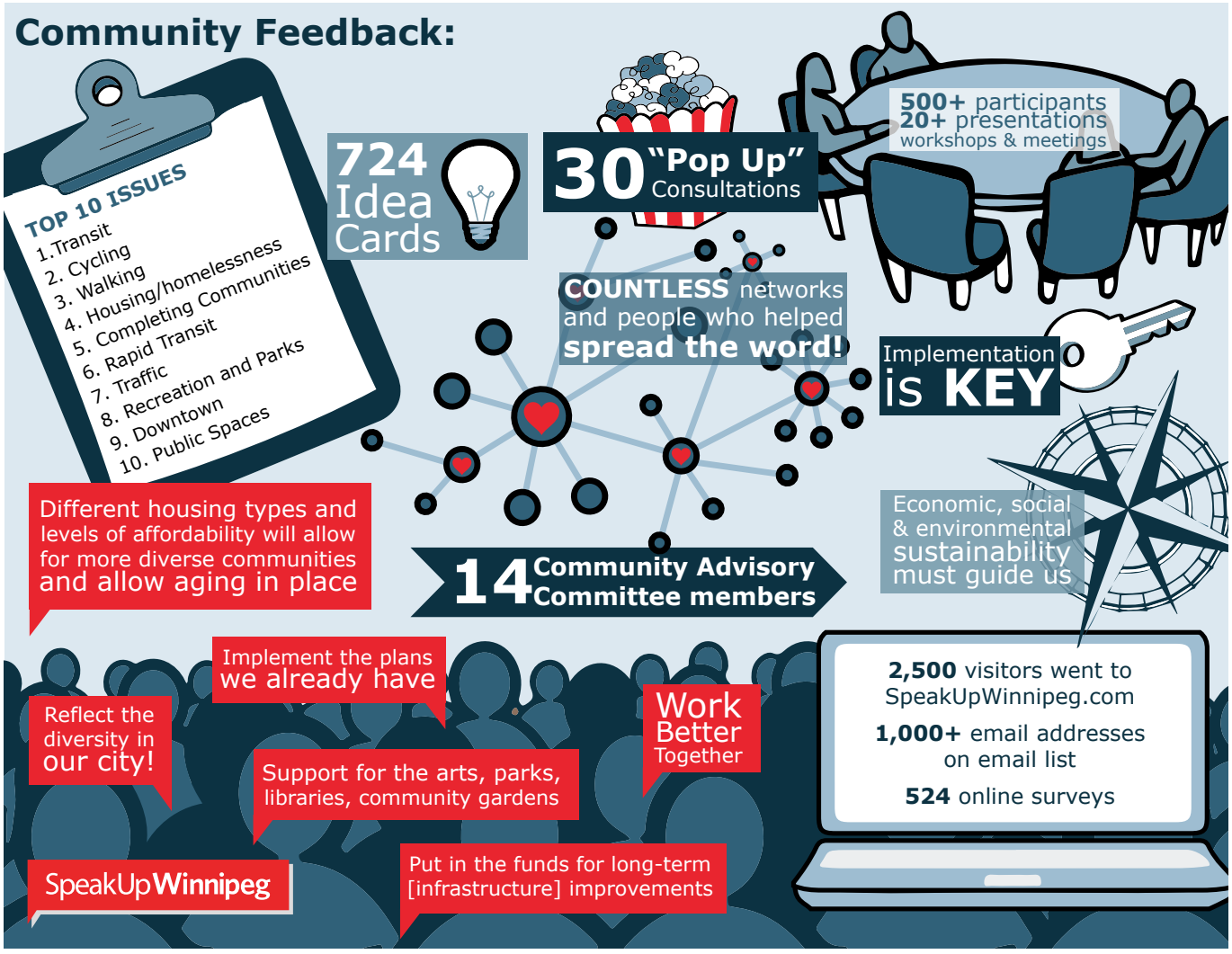


Figure 3: What We Heard: Community Feedback

WHY WE NEED TO HEAR FROM WINNIPEGGERS

OurWinnipeg policies are intended to positively impact the lives of all Winnipeggers, so it is important to hear from Winnipeggers in every phase of this review. We need to understand what is perceived as being important to achieving a high quality of life so that the revised policies presented to City Council at the end of this review reflect community values and priorities.

PUBLIC ENGAGEMENT ACTIVITIES

Public engagement activities have, and will continue to, aim to reach and involve as many Winnipeggers with as many backgrounds and experiences as possible through both in-person and online opportunities.

The *OurWinnipeg* review and participation opportunities were promoted through an official launch (September 7, 2017), which was followed by media coverage and a radio interview. The project website was promoted at all in-person engagement events, through members of the Community Advisory Committee, through the City's Twitter and Facebook accounts, as well as through the SpeakUpWinnipeg email list, which sends updates to over 1,000 email addresses and the City's electronic Public Engagement newsletter with over 5,000 email addresses.

The project website (SpeakUpWinnipeg.com) has been and will continue to serve as the information hub throughout the review, providing blogs and information about the review process, *OurWinnipeg* documents and reports, and public engagement opportunities. Content is provided in both English and French. Having this online presence increases opportunities for participation, providing those who may not have time or desire to attend in-person engagement events with another option to participate.

As we know that there are many Winnipeggers who may not have access to the internet or a computer, in-person engagement provides opportunity for equitable access and is a more personal way of connecting.

In-person engagement has involved (and will involve) presentations, meetings, workshops, group discussions, and "pop up consultations", where we attended community events where people are already gathering, as a way of making participation as easy as possible.

speakupwinnipeg.com

In Phase 1, we used a consistent set of questions in all engagement activities to gain insight into what is important to Winnipeggers:

- What is your vision for Winnipeg's future?
- To achieve that vision, what does the City need to start doing, stop doing, keep doing, or do differently?

We asked these questions generally, and within the context of five inter-related topic areas: How we Grow; Getting Around in the City; Health and Safety; Quality of Life; and Civic Engagement and Governance. Whenever possible, we also asked people to consider their feedback through the interconnected sustainability 'lenses' of Social Equity, Environmental Sustainability, and Economic Prosperity.

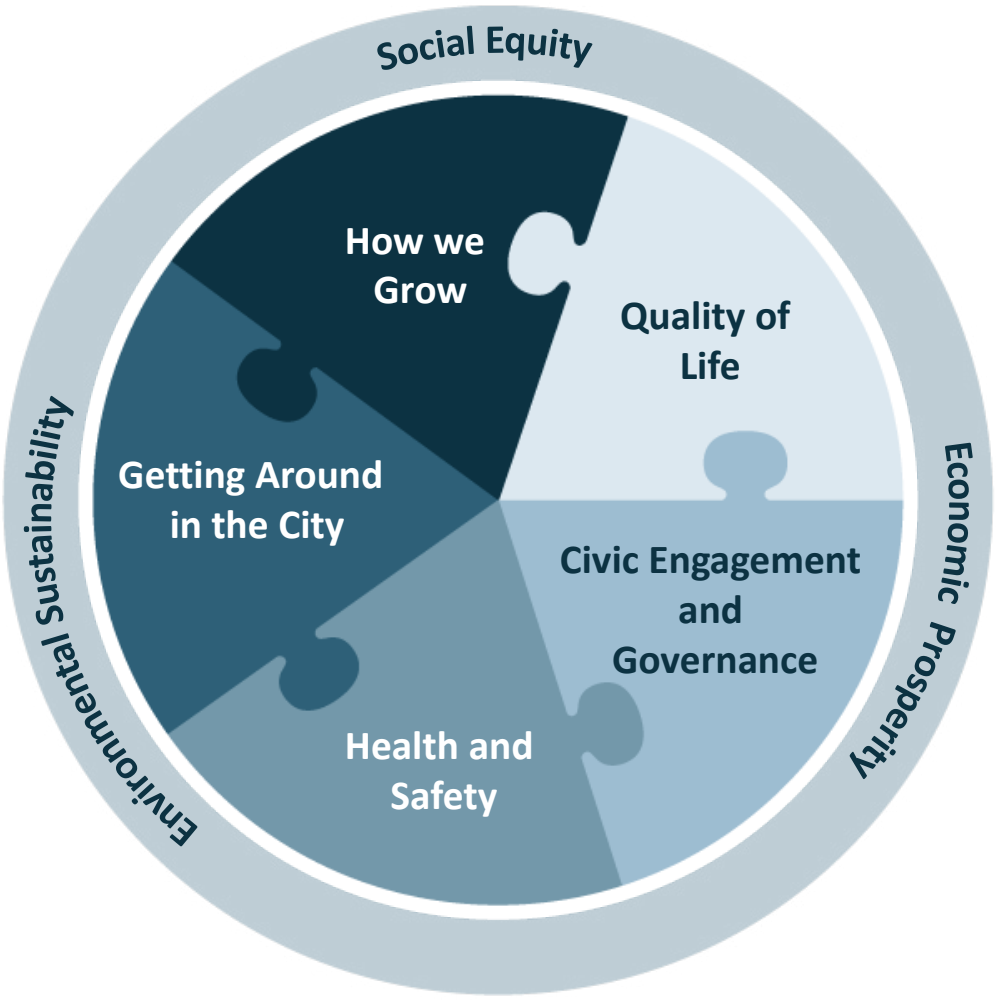


Figure 4: *OurWinnipeg* Review Phase 1 Framework

For a more detailed overview of public engagement activities undertaken in support of Phase 1 of the *OurWinnipeg* review process, please see **Appendix B**.


WINNIPEG

SUMMARY OF FEEDBACK

OurWinnipeg is intended to contain policies related to the City's overarching goals and objectives as well as directions for implementation. When reviewing community feedback for common topics and themes within the five inter-related topic areas, we found that peoples' general messages (or vision) for what the City should be like were generally consistent, but peoples' ideas about how to achieve that vision were at times very different. Understandably, the diversity of people we heard from approached issues from an equally diverse range of perspectives and experiences. Phase 2 of the review will focus on considering specific ideas about how to implement the vision.

In addition to the common themes related to the five topic areas, some input received related more directly to the three overarching sustainability lenses being considered for the review and are presented below as well.

Lenses

Environmental Sustainability:
Comments gathered relate to a desire for strong City leadership to protect the natural environment and natural resources, reduce greenhouse gas emissions, mitigate the impacts of climate change, and adapt municipal and community behaviours to be more resilient.

Social Equity:
Community comments related to social equity focused on access to opportunity for all members of our diverse community, ending racism, addressing the growing income gap between the richest and poorest people, additional supports to reduce barriers to participation, and more attention to the needs of Indigenous peoples, newcomers, women, youth, and seniors.

Economic Prosperity:
Comments gathered that were specific to this lens included supporting and investing in local businesses, education and training supports toward temployment, affordability, poverty reduction and homelessness, fiscal responsibility, and distribution of government resources.

Within the five identified topic areas (How We Grow; Getting Around in the City; Quality of Life; Health and Safety; Civic Engagement and Governance), we heard common topics and messages, detailed on the following pages.

NUMBER ONE

HOW WE GROW

Those who provided feedback on the physical growth of the City recognized that physical growth and change provides opportunities to make existing communities better, and makes sure new development is environmentally, economically, and socially sustainable.

COMMON TOPICS

City-scale growth management, completing communities, downtown, information/asset management, parks and green spaces, public realm, infill strategy, urban agriculture, new communities, transit oriented development, commercial uses, rail, employment uses, development design, heritage, and waterfronts.

COMMON MESSAGES

Plan-based Approach: Where and when the city grows should be based on a clear and strategically prioritized plan.

Existing Communities: Maximize existing infrastructure and services by accommodating growth in existing communities, including downtown, through context sensitive infill and mixed-use development.

New Communities: Make sure new neighbourhoods are designed with a range of housing and *sustainable transportation* options, to meet the broad needs of a diverse community.

Public Spaces: Provide quality public and green spaces in all neighbourhoods.



Winnipeg should grow in a way that encourages more transit use and creates more vibrant spaces. This means continued densification in the inner city and 'regional mixed-use centres and corridors,' as well as encouraging green field development to be less car-oriented.



I envision neighbourhoods where commercial and residential areas are integrated in such a way that people could do most of their daily activities by active transportation or by public transport.

When making decisions about how we grow, we need to consider a range of factors, including the capacity of the road network and piped infrastructure.



NUMBER TWO

GETTING AROUND IN THE CITY

People who provided feedback on this topic want to be able to get around the city in convenient, affordable, safe, and accessible ways. Winnipeggers want transportation options to support healthy lifestyles and a high quality of life, and allow all members of the community to easily access their daily needs – employment, education, services, goods and opportunities. There should be convenient, comfortable and safe access to the places they want and need to reach.

COMMON TOPICS

Public transit, cycling, walking, rapid transit, snow clearing, road conditions, car sharing, construction issues, electric and autonomous vehicles, grade separation, carpooling, Handi-Transit, driver behaviour, parking, speed limits, regional connections, rivers as transportation, taxis/ridesharing, and traffic flow/road expansion.

COMMON MESSAGES

Transportation Options: Increase the range of transportation options, such as walking, cycling and public transit, to help people access daily needs.

Transportation Network Safety: Design and maintain the transportation network to be safe and accessible, paying specific attention to winter conditions.

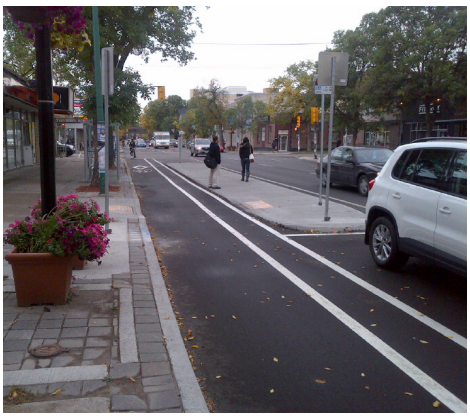
Road Condition and Convenience: Enhance the physical condition of (and traffic flow on) roads, using effective construction methods and schedules that are more responsive to road users and adjacent properties.



> Transportation focused vision: Enable a human-scaled urban form - revitalization, invest in road, transit, pedestrian & cycling facilities. Ensure economic growth, a cost effective transportation system, attract a talented workforce, and encourage innovative technology.

> Thinking about people with mobility issues and how they get around the city. City infrastructure needs to be improved to make the city more accessible. Winter compounds this problem. I'm worried that I will be house-bound for a few months.





> Mobility is one of the most important priorities for cities. A city that is convenient to move around in.

NUMBER THREE

QUALITY OF LIFE

Winnipeggers who shared feedback place a high value on the quality of life and giving everyone who lives here the opportunity to reach their full potential. This means helping to ensure basic needs are met in a supportive service and built environment, with opportunities to build a sense of community.

COMMON TOPICS

Cleanliness, civic attitude and sense of community, festivals, events and farmers markets, public art, arts and culture, recreation, park amenities and maintenance, affordable housing, animal services and dog amenities, insect control, urban forestry and biodiversity, air quality, water quality, waste management, programming, libraries and museums, and community centres, arenas and pools.

COMMON MESSAGES

Affordable Housing: Increase access to affordable housing.

Community Assets, Programs and Events: Enhance community spaces, programs and social interactions to maximize public benefit; ensure easy access, respond to local needs and build a sense of belonging.

Natural Areas and Green Space: Preserve natural areas and provide access to greenspace for recreation.

Reconciliation: Rebuild relationships with Indigenous peoples toward a more equitable future while understanding our shared history and how this history affects us all today.

Arts and Culture: Celebrate the, heritage, arts and cultural diversity of our community.



Support community gardens and community kitchens. Enable community members coming together to grow and cook their harvests. Local experience of newcomers – provides opportunity to network and learn the ropes of the new country, city, and systems.



A city which will be known for its celebration of diversity, a true cultural/arts centre, and for implementing as many of the Truth and Reconciliation Commission's Calls to Action as possible.

Affordable housing and proper mental health services decrease homelessness.



NUMBER FOUR

HEALTH & SAFETY

Winnipeggers who provided input referred to the importance of neighbourhood design, relationships and services that support the physical, social, emotional and spiritual health of all, especially for community members most likely to experience poverty, crime and injury.

COMMON TOPICS

General health, police, general crime, panhandling, smoking by-laws, safety for immigrants and refugees, emergency response, "eyes on the streets"/crime prevention through environmental design, street patrols, downtown safety, gangs, drugs and prostitution, vacant and derelict housing, physical safety, general safety, mental health, road safety, and health care.

COMMON MESSAGES

Proactive Approach: Increase the impact of City resources by proactively addressing root causes and doing it right the first time.

Health Services: Ensure access to health services and provide emergency response services that address the needs of the community.

Mental Health and Addictions Supports: Support people who are living with mental illness and addictions to address their needs, and support the health and safety of all community members.

Food: Increase access to healthy, local and affordable food.

Safety: Address the real and perceived feelings of personal safety, injury prevention and well-being in public spaces and neighbourhoods so people are comfortable to go out any time of day.

Water Quality and Waste Management: Manage community waste and provide access to clean water and stewardship of water resources to protect the environment and public health.



> Work to decrease the need to have emergency services (e.g. crime prevention rather than policing, reduce racism, crime, violence, poverty and homelessness).

> Taking care of people with substance abuse issues, mental health issues, and those living in poverty, and implement active strategies to address these issues.

> Putting policies in place that reduce waste, find more uses for recycled goods.

> A place where the police service works with communities to reduce crime.



NUMBER FIVE

CIVIC ENGAGEMENT & GOVERNANCE

Many of those we heard from spoke of the importance of open and transparent civic decision-making that represents community diversity. They also value accessible services and processes that provide all members of the community the opportunity to participate in community life and in the decisions that impact their lives.

COMMON TOPICS

Education, political behaviour, transparency, open data, intergovernmental relations, City revenues, finding efficiencies, regional and inter-municipal relations, relationships with other organizations, permits, by-law enforcement, project management and administration, public engagement and communications, grants and community partnerships, decision-making, voting, 311 service, and residents' associations.

COMMON MESSAGES

Implementation: Ensure that planning efforts result in timely and effective implementation.

Guided by Principles: Align City goals with principles of environmental sustainability, social equity, and economic prosperity.

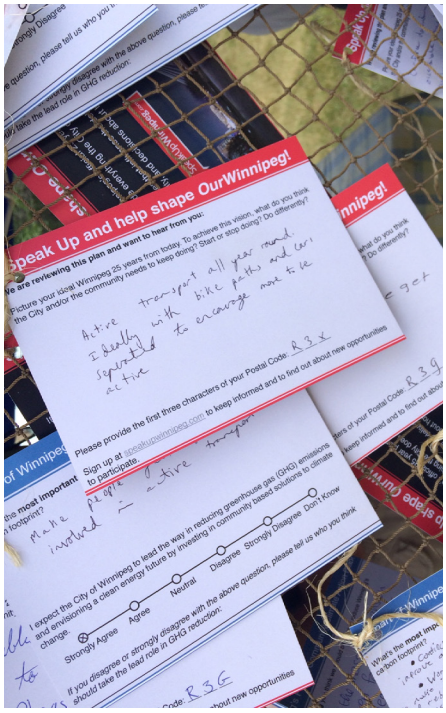
Evidence-Informed Decision Making: Make sure all decisions are based on solid data and analysis, and outcomes are evaluated to make sure the City is on the right track, to help make better decisions in the future.

Innovation: Embrace innovation to support more sustainable practices and outcomes.

Trust: Desire for government decision-making processes and political and administrative leadership to be more transparent, accountable, evidence-informed and visionary.

Responsive Engagement: Improve existing decision-making process and increase access and awareness about how to participate. Listen to and meaningfully incorporate representative community feedback into decisions.

Coordinated Partnerships: Invest in relationship building, community organizing, and collaboration between community members, leaders, organizations and the City to realize Winnipeg's full potential.

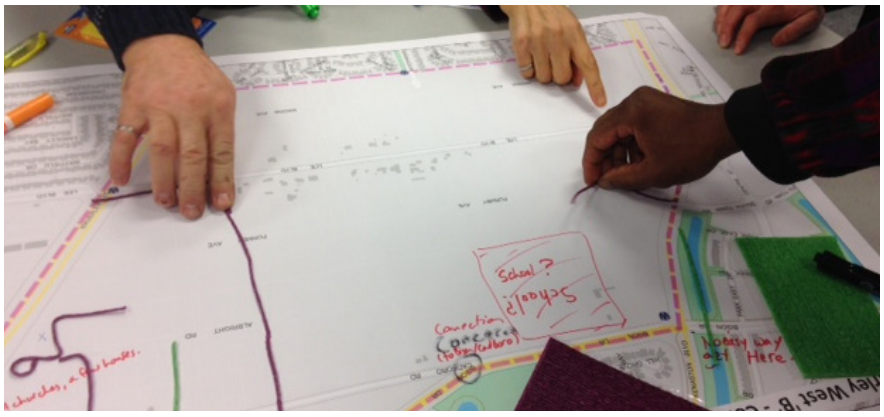


Stop asking citizens to participate and then have little come from the process. Keep updating citizens on what has been achieved, and tie it back to policy priorities. Walk the talk.



Eliminate departmental silos, work better together. See systemic barriers not short sighted issues.

Implement the plans we already have.



WHERE WE GO FROM HERE

What we heard and learned in Phase 1 showed us that the existing *OurWinnipeg* policy generally continues to reflect the issues and values of our community. However, there are opportunities to adjust existing policy, consider new policy, and find ways to better achieve and implement the goals and objectives reflected in the plan.

For the plan to achieve the community's goals and objectives, we will need to:

- Update existing policy and craft new policy that aligns with the findings from the first phase of the review process;
- Update the policy language to be clearer and more intentional;
- Consider relative prioritization of actions for greater impact;
- Carefully consider how and where the city grows to accommodate anticipated population growth. As part of this we will need to consider the impacts that growth has on quality of life, how we get around in the city, and our community's physical, social, economic and environmental goals; and
- Commit to measuring, evaluating and reporting on progress.

As we consider potential changes to *OurWinnipeg* policies as part of Phase 2 of the review process, we will consider the specific ideas collected from Winnipeggers in Phase 1 and seek further community input to make sure that the proposed changes and direction reflect the community's values and priorities.

To keep informed about the ongoing *OurWinnipeg* review, please subscribe to our email list, follow the City of Winnipeg on Twitter or Facebook, or check speakupwinnipeg.com for updates and events.



APPENDIX A:

SUMMARY OF BACKGROUND RESEARCH

Key findings from the background research and analysis conducted to date are summarized below:

Fueled largely by immigration, Winnipeg's population has experienced considerable growth and change – a trend expected to continue.
After a decade of slow population growth between 1990 and 1999, Winnipeg's population growth has steadily increased. Between 2010 and 2016, Winnipeg's population grew by more than 66,000 people, nearly double the growth experienced during the preceding 20 year period.[1] It is expected that Winnipeg will experience population growth of more than 200,000 people over the next 20 years.[2]

Winnipeg has the largest proportion of Indigenous peoples of any major Canadian city in Canada at approximately 11%.[3] Based on the 2016 census, Winnipeg's Census Metropolitan Area (CMA) had 92,810 people identifying as Indigenous – First Nations, Métis and Inuit.[4] Approximately 50% of Winnipeg's Indigenous population is younger is than 25 years of age.[5] Between 2006 and 2016, Winnipeg's Indigenous population grew by 37.1%.[6]

In recent years, immigration has become the largest aspect of population growth, which is in turn influencing major trends. The merit-based Provincial Nominee Program represents approximately 75% of annual immigration into Manitoba. Winnipeg, in turn, receives on average 70% of these individuals.[7] The majority of immigrants to Winnipeg are highly educated – holding one or more university degrees. While unemployment rates upon first arrival are slightly higher than the average, they tend to be equal to or less than the total within 5 years of arrival.[8] From 2010 to 2016 over 80% of immigrants arrived from 12 different countries. The vast majority originate from the Philippines and India, although the number of immigrants arriving from African and Middle Eastern Countries is increasing. The remaining 20% of immigrants come from 156 different countries.[9]

This major growth in population from international sources, coupled with a growing Indigenous population is changing our demography in terms of its diversity. When the 1996 Census of Population for Winnipeg was taken, approximately 1 in 10 individuals were of visible minority.[10] This is now estimated at 1 in 4.

The significant proportion of immigrant and Indigenous population has significantly changed the overall age distribution of our population. In the late 1990's there were concerns that the largest share of our population at the time, baby boomers, would leave the workforce and be replaced by a smaller share of people of younger age; however as a result of the younger age demographic of Winnipeg's Indigenous and immigrant populations, this concern has been alleviated. Indeed, the largest share of population is now those between the ages 25 to 29 at 7.4%.[11] This currently reflects over 52,000 individuals and a tremendous opportunity to supply the local labour demand.

Population trends translate into growing and changing demands for housing.

Strong population growth has translated into annual housing starts of approximately 4,000 dwelling units each year, a trend expected to continue. By 2040, nearly 100,000 new dwelling units are anticipated, with approximately 60% of those new units being multi-family, such as apartments and townhomes, with the remaining 40% as single-family dwellings. Baby boomers looking to downsize from single detached homes and the growing immigrant and millennial population all contribute to an increased demand for multi-family housing within the Winnipeg housing market.[12]

Housing prices have increased significantly over the last decade. As at July 2017, the average sold price of a residential dwelling in Winnipeg was around $305,000 which marks the first time in Winnipeg's history the average home sold is over $300,000 as recorded by the Multiple Listing Service (MLS).[13]

Despite these significant changes in housing type and prices over Winnipeg's history, Winnipeg remains one of the most affordable cities in Canada according to the Royal Bank of Canada. In fact, Winnipeg's affordability has remained close to its average affordability since 1985. Other than cities like Calgary and Saskatoon which have seen significant change in house prices due to recent oil price declines, Winnipeg's affordability has decreased the least by only 2%. This is low compared to cities like Vancouver, Toronto, Victoria, and Canada overall, where affordability has declined by 45%, 36%, 26% and 14% respectively.[14]

The rate of population growth in Winnipeg is consistently lower than the rate of growth in the rest of the Census Metropolitan Area.

Generally, on a percentage basis, the rate of residential growth in Winnipeg has been lower than within the rest of the CMA. However, within the past few years, Winnipeg's growth has exceeded the rate of growth in the CMA.[15] By

Census Canada's definition of CMA, "to be included in the CMA, other adjacent municipalities must have a high degree of integration with the core, as measured by commuting flows derived from previous census place of work data". Approximately 35,000 vehicles commute to Winnipeg daily.[16]

The City has a sufficient supply of greenfield land to accommodate forecasted growth over the next 20 years, but will need to ensure these lands are serviced in a timely manner.

"Greenfield lands" refer to areas most commonly located on the outskirts of the city and are intended to accommodate new suburban development. Assuming the existing development patterns continue, and Winnipeg keeps growing at its current rate, *OurWinnipeg*'s designated greenfield areas represent 33 years of supply, while 8.5 years of this supply has been planned to-date.[17] However, it is not enough that the City simply maintains a sufficient land supply; it is also important that it provides regional roads, pipes, and other infrastructure to enable development. As a result, the City must keep track of how much serviced greenfield lands are available and ensure that there is an adequate supply to meet anticipated demand. Serviced lands in subdivided and rezoned greenfield areas are currently estimated at seven years of supply.

Infill and redevelopment presents additional opportunities to accommodate residential growth; however infrastructure capacity limitations and other challenges create significant barriers.

OurWinnipeg identifies Transformative Areas – areas of the city that provide the best opportunity to accommodate growth and change. Many of these Transformative Areas are located within the built up areas of the city, such as Major Redevelopment Sites (like Fort Rouge Yards), Regional Mixed Use Corridors (like Portage Avenue, Main Street or Regent Avenue) and the Downtown. Many of Winnipeg's established neighbourhoods (like Linden Woods or Garden City) also present opportunities to accommodate moderate growth and change over time. Since *OurWinnipeg* was approved in 2011, approximately 45% of building permits for new dwelling units has been located within these urban areas, with the remaining 55% in greenfield areas.[18]

While infill and intensification provide many benefits, they can also be constrained by existing infrastructure such as the combined sewer system and/or opposition from existing neighbourhood residents.

Winnipeg continues to experience strong economic growth and boasts some of the lowest business costs in North America.

Our business costs are among the lowest in North America. According to KPMG's annual business cost comparison, Winnipeg has lower costs than most cities in Canada and the United States.

From an economic growth perspective, Winnipeg's GDP has grown by around 2.4% on average from 2012 to 2016, and is expected to maintain around 2.2% growth over the next few years. Compared to the rest of Canada, Winnipeg has experienced one of the fastest growth rates and it is expected to remain above the national average.

There have been significant changes to the labour market over the recent past, from 2002 to 2016 total employment grew by 14%.

In terms of the hourly wage rate, Manitoba remains among the lower wages in Canada – in fact, around 10% lower than the average Canadian median wage or approximately 15% lower than competing provinces.[19]

Winnipeg appears to have a significant shortfall of serviced industrial lands.

Ensuring that Winnipeg has an adequate supply of lands that meet the needs of service and goods producing employment land users will be important to the long term economic well-being of the city.

The City is currently undertaking an Employment and Commercial Lands Study. Initial findings from this study suggest that the City currently has a significant shortfall of serviced industrial lands to accommodate forecasted growth over the next 20 years. Over the last decade, such growth has largely been accommodated through expansions of existing facilities and the development of partially vacant parcels. While such intensification can be expected to accommodate a portion of future growth, new serviced sites will also be needed.

The City will need to explore opportunities to address this shortfall which may include the servicing of greenfield industrial areas and key redevelopment sites.

Winnipeg's supply of vacant commercial land is more than sufficient to accommodate future demand.

Preliminary findings from the Employment and Commercial Lands Study suggest that the City of Winnipeg's supply of vacant commercial lands can easily accommodate forecasted growth over the next 20 years. This supply includes both land currently available as well as land anticipated to be available in the near future.

This surplus of commercial land will affect retail commercial intensification development opportunities. In the near future, there will likely not be much market-related incentive to develop retail commercial space in multi-level or mixed-use formats in much of the City.

Winnipeg has the lowest property taxes and lowest expenditures among major Canadian jurisdictions.

Since 1998, the City of Winnipeg has increased its property tax by only 9%, due largely to 13 years of property tax freezes. This compares with an average increase for other comparable Canadian cities of 96%. Put differently, comparative cities have roughly doubled their property taxes while Winnipeg has increased by 9%.[20]

In 2015, Winnipeg had the lowest operating expenditures per capita compared with similar Canadian jurisdictions. After adjustments were made to more accurately compare between cities, the operating expenditure per capita in 2015 was $1,357 for Winnipeg versus the average of the other cities, $1,681 – a difference of 24%.[21] If the City of Winnipeg spent the average amount of other Canadian cities per capita, the operating budget would be increased by approximately $233 million per year.

Between 1999 and 2016, the relative priority of service area operating budget allocation had shifted such that Police and Fire Paramedic Services now represent the highest portions of the City's tax-supported operating budget at 30% and 15% respectively.[22]

Winnipeg is facing an overall budget deficit and a significant infrastructure deficit with many unfunded capital projects.

The City of Winnipeg has to balance a multitude of competing spending priorities with a limited availability of funding.

Many service areas are experiencing operating budget shortfalls based on previously defined service levels. Inflation and the operational requirements associated with new facilities (e.g. transportation, parks) contributes to an annual increase to this deficit. The tax-supported operating budget deficit for the upcoming fiscal period is approximately $89 million in 2018, and 10 years later, by 2027, faces a projected deficit of $415 million.[23]

As the City continues to grow, the need to make sustainable, well-timed investment decisions in infrastructure is essential to ensuring critical services continue to be delivered to citizens. Over the past five years the City of Winnipeg has spent an average of $689 per person on infrastructure, which is approximately $90 less per person compared to other similar Canadian jurisdictions.[24] If the City of Winnipeg spent a similar amount of funding compared to the average, the capital expenditures would increase on average approximately $65 million per year. This increased level of spending is still not sustainable and would not be sufficient to address the infrastructure deficit.

Based on each department's infrastructure needs and associated spending plans over the next 10 years, the gap between total capital investment required and

estimated future capital funding is an approximately $6.9 billion deficit. 58% of that deficit relates to maintaining existing infrastructure, and 42% to new infrastructure needs. 63% of the total deficit is attributed to transportation infrastructure needs (roads, bridges and transit).[25]

A majority of Winnipeggers use motor vehicles to get around in the city.

A majority of Winnipeggers use motor vehicles rather than transit, walking, or cycling as the primary mode of travel for work purposes and the proportion of work trips by vehicle drivers continues to rise, although at a decreasing rate.

In 2016, 72% of commuters in the Winnipeg CMA commuted by car, truck or van as drivers, while 7.1% commuted in cars, trucks or vans as passengers. Approximately 13.6% used transit, 4.6% walked and 1.7% cycled. It took an average of 36 minutes for transit commuters in the Winnipeg CMA to travel to work, while the average trip length for car commuters was 23 minutes.[26]

Compared to other large Canadian CMA's, Winnipeg experiences lower transit ridership than Ottawa-Gatineau and Calgary (18.3% and 14.4% respectively) but surpasses ridership in Edmonton at 11.3% and Quebec City at 11.1%. At 14.8%, the Winnipeg CMA experiences the highest rate of carpooling among large Canadian CMAs.[27] Bicycle mode share of work trips in the Winnipeg CMA has only experienced a marginal increase over the past 10 years – from 1.6% in 2006 to 2% in 2011 and 1.7% in 2016.[28]

The greatest proportion of Winnipeg's GHG emissions come from transportation and buildings

84.3% of Winnipeg's GHG emissions come from buildings and vehicles. 50.5% comes from transportation (32.1% from personal vehicles, 17.6% from commercial vehicles and 0.8% from transit) and 33.8% comes from buildings (33.5% from natural gas and 0.3% from electricity). Emissions from waste disposal follow closely behind at 14.9% of total GHG emissions. The 0.9% comes from waste water.

When measuring GHGs, carbon dioxide (CO2) comprises the greatest portion of all GHG emissions. Major Canadian municipalities showed a range of 4.8 to 13.5 tonnes of CO2 equivalent per person per year, with Winnipeg coming in at the lower end at 7.8 tonnes of CO2 equivalent per person per year. Cities such as Winnipeg, Vancouver and North Vancouver show low levels of greenhouse gas emissions primarily due to the use of hydroelectricity as a major source of electricity.[29]

Health and safety issues in Winnipeg remain pronounced

In Winnipeg, injury is the fourth leading cause of death for all age groups. Each year, 360 Winnipeg residents die and 5,100 are hospitalized due to injury. Falls are the leading cause of injury-related death and the primary cause of injury-related hospitalizations (for all age groups), with 82% of all deaths and 56% of hospitalizations due to falls occurring in the population 75 years of age and older.[30]

Fifty-four per cent of residents over 18 are overweight or obese, and 62 per cent consume less than the daily recommended intake of fruit and vegetables. While overall mortality rates have been decreasing and life expectancy has been increasing within the city, residents of lower income households are more likely to die at an earlier age. Lower income households are more likely to be diagnosed and treated for chronic diseases, have higher mental disorder and substance abuse prevalence, and experience higher rates of intentional and unintentional injury rates.[31]

After experiencing decreased crime rates over the past decade, rates are showing a slight increase. This trend is apparent in several other major Canadian cities. The proportion of time spent on reactive policing has been trending upward in the past 3 years (56% in 2016).[32] While the total number of fires of all types is declining slightly over the long term, Winnipeg's fire service responds to more incidents than many other fire services due to the integrated service model that dispatches paramedic-staffed fire trucks to moderate the medical incident volume assigned to ambulance units.[33]

Poverty and other socio-economic issues persist in Winnipeg, despite strong economic growth, competitive business environment, and relative affordability

There are many structural and systemic factors that influence why people experience poverty, social exclusion and homelessness including colonialism, discrimination and housing affordability, as well as educational attainment, income security, spending time in the child welfare or justice system, and health, mental health and addictions.[34] In Manitoba, women, Indigenous peoples, newcomers and people with disabilities experience higher rates of poverty.[35] The estimated hourly living wage in Winnipeg needed to support a family of four with two parents working full time is $14.54, while the minimum wage is $11.15.[36] There is also a significant disparity between employment among people with disabilities and employment rates in general (56.4% of Manitobans with disabilities are employed compared to 77.3% without disabilities).[37] Though high-school graduation rates have recently trended upward, the Indigenous community continues to experience much lower rates than Winnipeg in general (in 2014 77.2% overall, Indigenous 47.2% and in 2016 83.1% overall, 58.4% Indigenous).[38]

Fifty-four percent of Manitobans live paycheque to paycheque while 47% of those surveyed feel overwhelmed by debt.[39] In March 2016, 56,342 people used a Winnipeg Harvest food bank and the need continues to increase.[40] There are large gaps between Winnipeggers who are wealthy and those with low incomes depending on where you live in Winnipeg.[41] Using a point in time count, on October 25, 2015 there were 1,400 people experiencing homelessness in Winnipeg,[42] 294 of them were youth aged 15-29.[43]

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APPENDIX B:

PUBLIC ENGAGEMENT

In-person Engagement

Method	Description	#of Participants
Pop-Ups; Idea Cards	In the summer and fall 2017, the *OurWinnipeg* Review team "popped up" at 30 different places across the city, including neighbourhood and street festivals, public concerts, malls, and other public places and events. The intent was to raise awareness of the initiative and to connect with people who may be unable or less inclined to attend public meetings or open houses. We encouraged people to complete Idea Cards; postcard-sized cards with space for participants to write their vision for Winnipeg. When people did not feel like filling out (or were not able to fill out) an idea card, they would tell their vision to an *OurWinnipeg* review team member, who would record it. It took about 2-5 minutes to complete an idea card. Some filled out more than one card, while others included many ideas on the same card.	724
Workbooks	Used as a physical alternative to online surveys (detailed below) – workbooks contained the same questions, presented in paper format.	11
Presentations, Meetings and Workshops	Meetings, presentations, and workshops (related to the *OurWinnipeg* review) with 24 different stakeholder and citizen groups (e.g. developers, greenspace advocates, City citizen committees, a seniors' group, college classroom, etc.)	683
Community Leaders' Event	We invited community leaders (identified through news articles, referrals, previous invitation lists, sector lists, and other recommendations) to provide input on five topic areas. We also requested participants' help to promote the *OurWinnipeg* reivew through their networks.	73
Total		**1,491**

Pop-Up Locations/Events	Date
Winnipeg Folk Festival	July 7, 2017
Winnipeg Folk Festival	July 8, 2017
Winnipeg Folk Festival	July 9, 2017
Fringe Fest	July 26, 2017
Fringe Fest	July 28, 2017
Canada Summer Games	August 3, 2017
Folklorama at Assiniboine Park	August 10, 2017
Rockin' the Village at St. John's Park	August 12, 2017
Downtown Transcona Farmers' Market	August 24, 2017
Indigenous Concert Series, Portage Place	August 25, 2017
Filipino Street Festival	August 26, 2017
St. Norbert Farmers Market	August 30, 2017
Storefront MB Pop-up	August 30, 2017
U of W Orientation	September 8, 2017
Sherbrook Street Festival	September 9, 2017
ManyFest	September 10, 2017
March for Peace - MERC	September 20, 2017
Chalmers Neighbourhood Renewal Corp	September 26, 2017
William Whyte AGM	October 11, 2017
CCEDNet MB Gathering Hallway Table	October 20, 2017
St. Vital Mall	October 27, 2017
World Town Planning Day, Millennium Library	November 8, 2017
West End BIZ AGM	November 14, 2017
Seven Oaks Wellness Institute	November 15, 2017
Exchange District BIZ AGM	November 16, 2017
St. James Civic Centre	November 20, 2017
Downtown BIZ AGM	November 21, 2017
University of Manitoba - University Centre	November 23, 2017
North Kildonan Community Centre Craft Sale	November 25, 2017
Meet Me at the Bell Tower	December 8, 2017
TOTAL # of Pop Ups	**30**

Meetings, Presentations and Workshops	Date	#of Participants
Employment and Commercial Land Study workshop	June 30, 2017	50
City Staff Leadership presentation	September 29, 2017	120
Urban Design Advisory Committee	October 10, 2017	10
Historical Building and Resources Committee	October 12, 2017	6
Historical Building and Resources Committee	October 12, 2017	6
Citizen Equity Committee	October 16, 2017	10
Seven Oaks Seniors' Group	October 16, 2017	26
Exchange District Business Improvement Zone	October 17, 2017	4
CCEDNet Gathering workshop	October 20, 2017	21
Red River College Community Economic Development Class	26 October, 2017	10
Access Advisory Committee	October 26, 2017	12
Winnipeg Committee for Safety	October 27, 2017	11
Mayor's Age Friendly and Seniors Advisory Committee	November 17, 2017	11
Developer Information Exchange	November 17, 2017	29
Planning Consultant Information Exchange	November 23, 2017	9
OURS-Winnipeg and Save Our Seine Roundtable Discussion	November 23, 2017	60
Employment and Commercial Land Study Workshop	November 27, 2017	22
Social Planning Council of Winnipeg Roundtable Discussion	December 4, 2017	50
City Staff Leadership workshop	December 8, 2017	85
Manitoba Artist Run Centres Coalition Presentation	December 13, 2017	9
Mayor's Indigenous Advisory Circle	December 14, 2017	13
Francophone Network	January 16, 2018	14
Chamber of Commerce	January 31, 2018	15
City Staff Leadership workshop	January 26, 2018	80
TOTAL # of meetings: 24		**683**

Feedback received from these events was compared to what we heard through the analysis of the feedback received through Idea Cards, surveys and workbooks, and helped us develop and refine the key messages of what we heard from all engagement activities.

Online Engagement

Method	Description	#of Participants
Website Visits	The project website, SpeakUpWinnipeg.com, is being used as an online hub throughout the review process to share information and to get Winnipeggers involved. The site includes an event calendar, blog posts, and relevant documents. Background information, surveys, and static web pages are available in both English and French. Although the website launched in July, we started tracking visits on September 20, 2017.	Over 3,600 sessions 2,500 visitors Over 7,500 page views
Online Survey (general)	Online surveys were offered on the SpeakUp website, as an alternative for people to provide their answers to the key questions being asked in this phase. Information about the questionnaires was shared through email networks, City of Winnipeg social media accounts, and word of mouth. Participation in the survey was voluntary.	223
Online Survey (topic-specific)	Similar to the general online survey, but participants were asked the standard questions about the five topic areas: How we grow Getting around in the City Health and Safety Quality of Life Civic Engagement	Total: 292 81 109 39 37 26
Email List Serve	Three emails were sent to stakeholder organizations email addresses that were compiled for *OurWinnipeg*. (October 24, November 2, and November 27)	1,004 members
Emails	Individual emails received and responded to.	20

Feedback collected via idea cards and surveys

A total of 1239 individual inputs were received via on-line surveys and idea cards. These were recorded and coded by topic area and subtopic. This analysis helps us understand the issues that were most important to those who participated.
The most common topics of input collected were (starting with the most frequent):

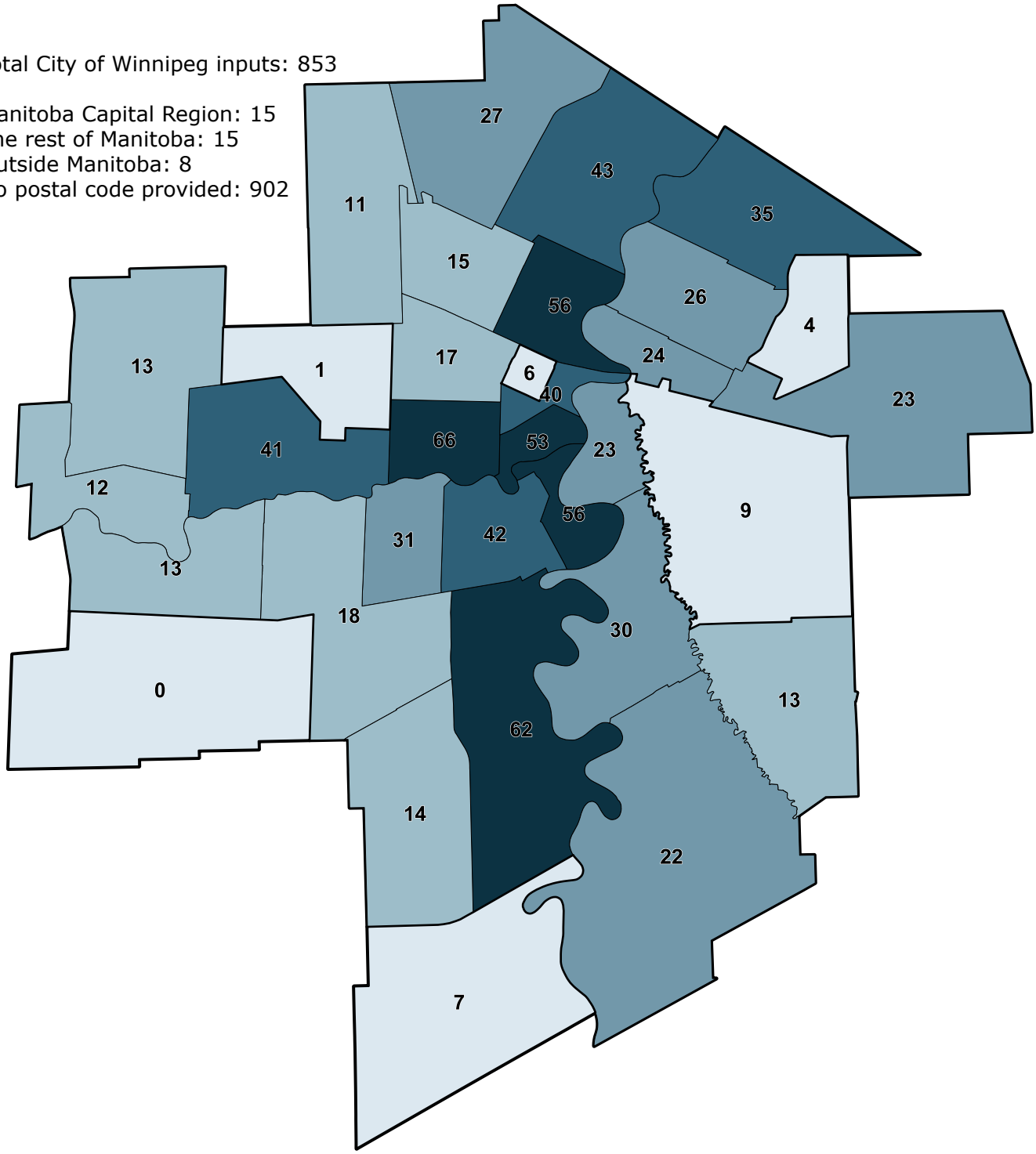
1. Transit
2. Cycling
3. Walking
4. Housing and Homelessness
5. Completing Communities
6. Rapid Transit
7. Traffic Flow/Road Expansion
8. Recreation, Park Amenities, and Maintenance
9. Downtown
10. Public Realm

Participation by Postal Code

Idea card and surveys provided an opportunity to track postal codes of respondents. We tracked these as inputs were recorded, and pursued pop-up locations later in Phase 1, with the intent of reaching Winnipeggers in areas where lower participation rates were observed. While attempts were made to reach Winnipeggers from all parts of the city, the map below demonstrates the variation of neighbourhood representation for those who participated at pop-up events or via the on-line surveys.

Total City of Winnipeg inputs: 853

Manitoba Capital Region: 15
The rest of Manitoba: 15
Outside Manitoba: 8
No postal code provided: 902



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