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# INTERMUNICIPAL DEVELOPMENT PLAN (IDP) TOWN OF VALLEYVIEW & M.D. OF GREENVIEW No. 16



## DRAFT

V3 COMPANIES

**Visio, Vertere, Virtute**

*The Vision to Transform with Excellence*



**Date Submitted: September 28<sup>th</sup>, 2020**

A low-angle photograph looking up at several tall, slender trees with vibrant yellow autumn foliage against a clear blue sky. The perspective is from the ground looking up, making the trees appear to converge towards the top of the frame. The leaves are bright yellow, and the sky is a pale, clear blue. The overall mood is serene and peaceful.

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A low-angle photograph looking up at several tall, slender trees with vibrant yellow autumn foliage against a clear blue sky. The perspective is from the ground looking up, creating a sense of height and reaching towards the sky. The leaves are bright yellow, and the tree trunks are light-colored and textured.

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section 1

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# Introduction

## Section 1 Introduction

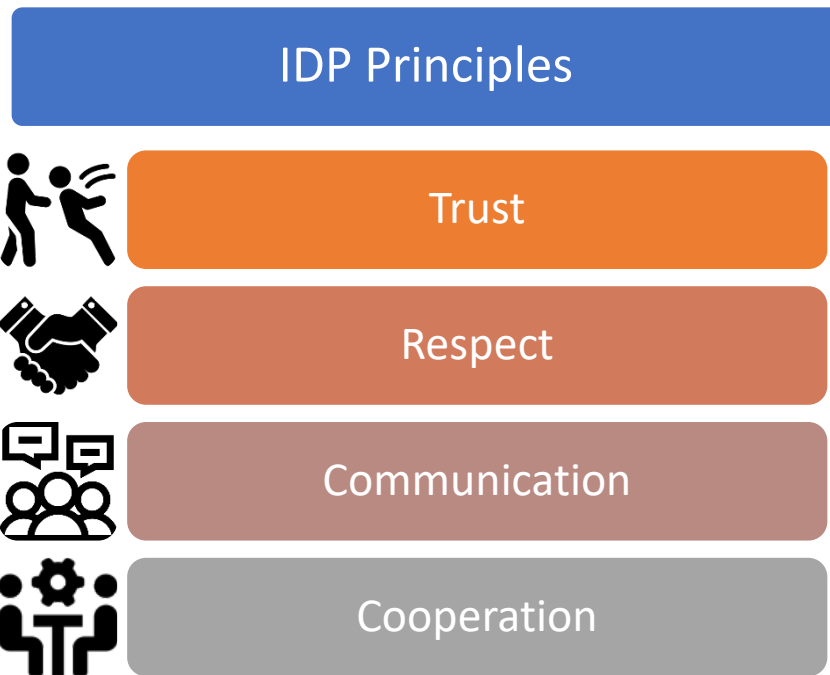
### 1.1 TITLE

The title of this Bylaw shall be the Town of Valleyview & M.D. of Greenview No. 16 Intermunicipal Development Plan (IDP).

### 1.2 PURPOSE

The purpose of this Intermunicipal Development Plan (IDP) is to update the existing IDP to allow the Town of Valleyview and M.D. of Greenview No. 16 (hereinafter referred to as the Town and M.D.) to establish a renewed collaborative framework that guides future planning and development, manages growth, facilitates environmental initiatives, and supports collaboration around *municipal infrastructure* and vital community services.

A comprehensive IDP built on a solid partnership of trust and respect can strengthen the local economy and continue to support the region’s vibrancy through collaborative governance. The IDP will provide a long-term mutually supported framework for future development in the area.



### 1.3 CONTEXT

The Town and M.D. are located in the Southeast Peace Region in the Province of Alberta (Figure 1). The two municipalities are inextricably connected, the M.D. surrounds the Town, creating an environment in which collaboration on growth and development is necessary. The Town is located at the intersection of two significant transportation networks (Highway 43 and 49), and acts as a service centre for the M.D., while the M.D. provides the resource base for the Town.

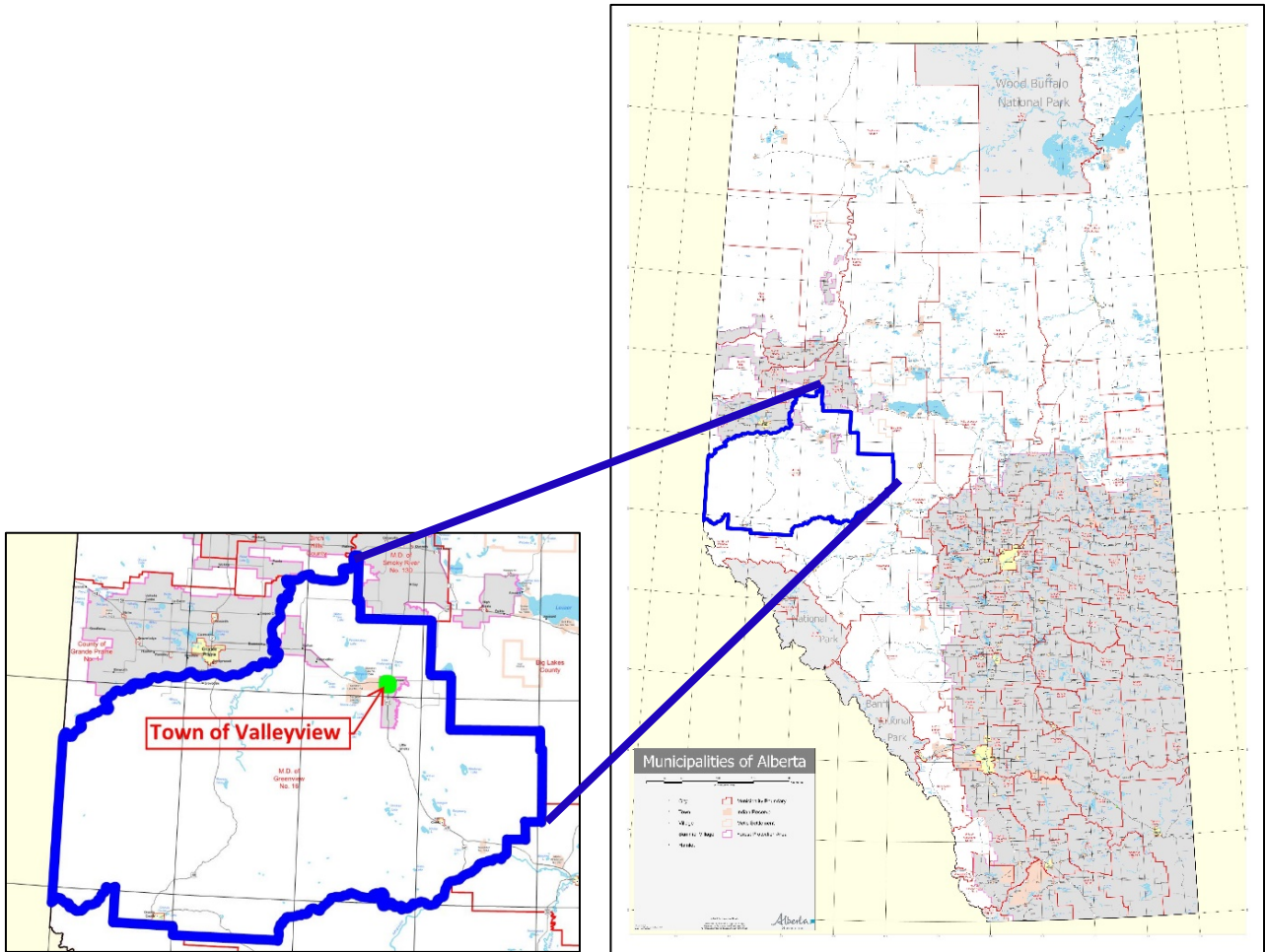


Figure 1: Location Map (Adapted from the Government of AB Municipalities of Alberta Map 2017)

A baseline assessment was carried out during the initial phase of updating the IDP to provide a clear picture of each *municipality* by documenting population and employment statistics and trends. Information regarding the natural environment, transportation, and servicing were mapped, and are included in the baseline assessment. This information was used to forecast population and employment growth to 2027. These forecasts are the foundation on which land demand and policy directions are determined. The baseline assessment and growth forecasts are located in Appendix A and B respectively and focus on the IDP area. The following summary of each *municipality* has been prepared to provide context on the Town and M.D.



The Town has a population of 1,863, and has experienced an average annual growth rate of approximately 1.1% between 2011 and 2017. With a land area of 932 hectares, the Town’s industries are comprised of retail trade, accommodation and food services, health care and social assistance, and businesses related to resource industries. (Statistics Canada).



The M.D. has a population of 9,615 and has experienced an average annual growth rate of approximately 1.0% between 2011 and 2017. With a land area of 3,298,424 hectares, the M.D.’s industries include agriculture, forestry, fishing and hunting, construction, mining, quarrying and oil and gas extraction, and retail trade. (Statistics Canada).

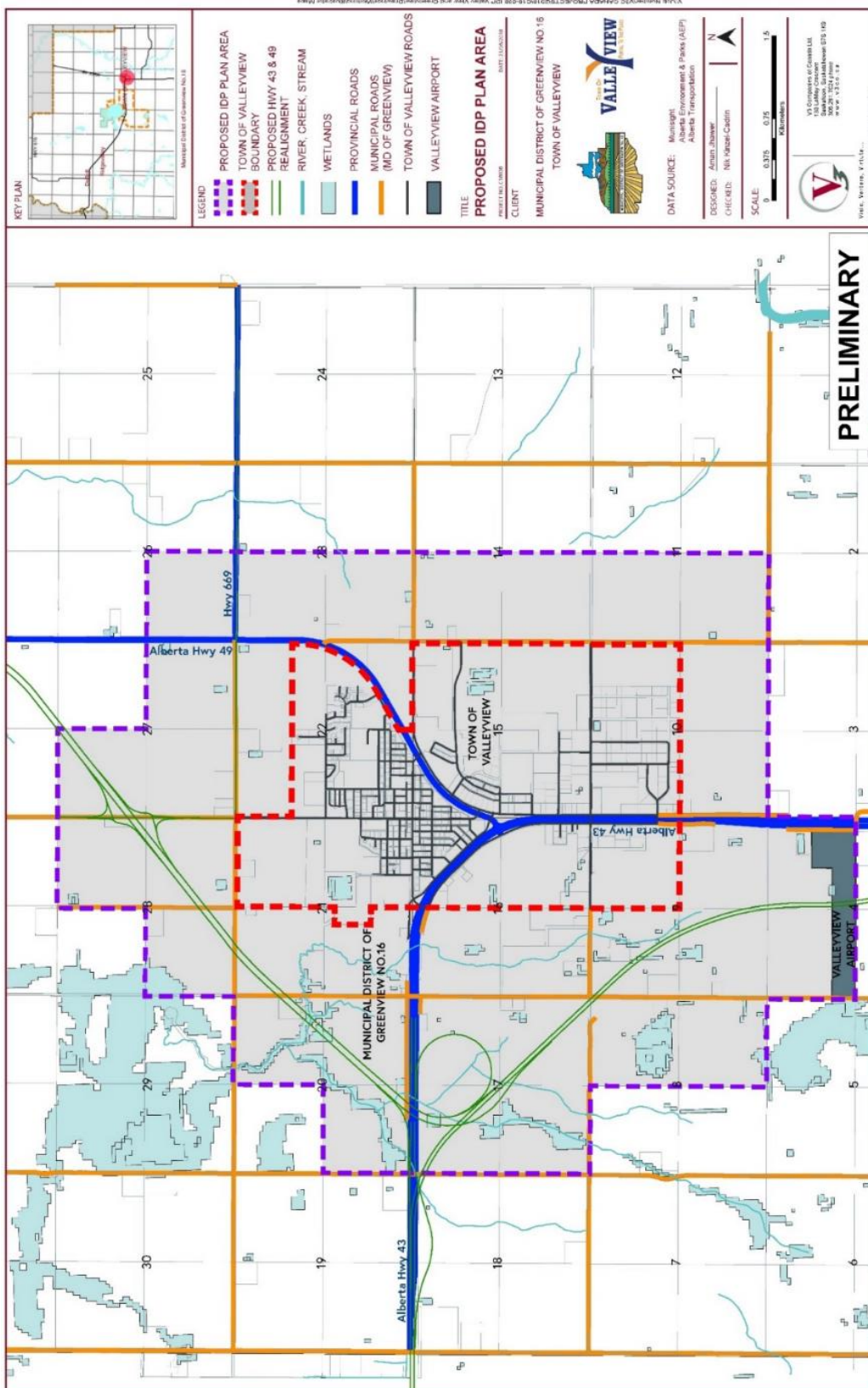
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## 1.4 IDP PLAN BOUNDARY

The IDP Plan Area surrounds, and includes, the Town (Figure 2). The IDP area has been developed using the following reasoning:

1. The proposed realignment of Highway 43 needs to be included within the IDP area, as the realignment will result in growth and development following this transportation corridor that requires joint planning between the MD and Town on how to plan development should this realignment be constructed.
2. The growth forecast (Appendix B) has indicated a potential average growth of around 1.7% in population and jobs in the Town of Valleyview by 2027. Identifying lands and planning for the direction of future growth between both municipalities is important.
3. The Valleyview airport lands are included because it is considered a regional asset that benefits both municipalities and will be impacted in the long term by the realignment of Highway 43.

Figure 2: IDP Plan Area



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## 1.5 LEGISLATIVE REQUIREMENTS

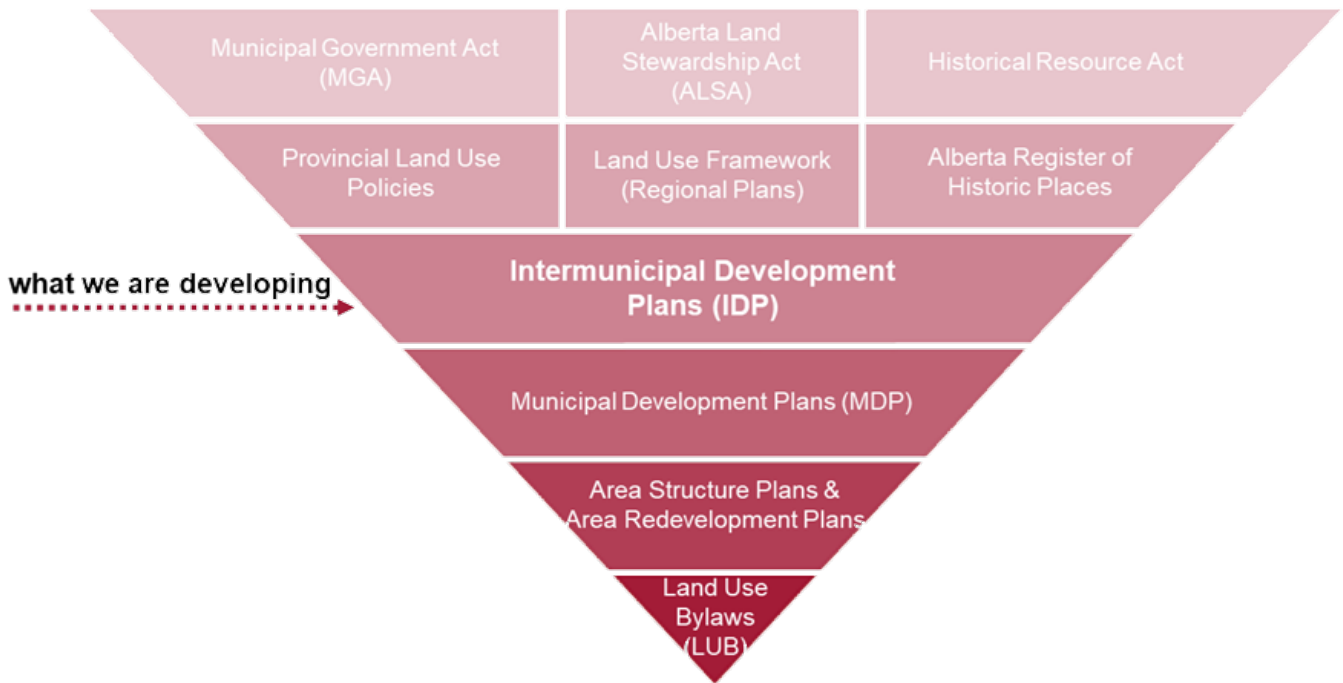
This IDP has been prepared under the legislative authority prescribed in Section 631 of the Municipal Government Act (MGA). In accordance with 631(1) and 631(2), adjoining municipalities are required to adopt an IDP unless both municipalities agree that they do not require one.

Section 631(8) of the MGA states that an IDP:

- a) must address
  - i) the future land use within the area,
  - ii) the manner of and the proposals for future development in the area,
  - iii) the provision of transportation systems for the area, either generally or specifically,
  - iv) the co-ordination of intermunicipal programs relating to the physical, social and economic development of the area,
  - v) environmental matters within the area, either generally or specifically,
  - vi) any other matter related to the physical, social or economic development of the area that the councils consider necessary, and
- b) must include
  - i) a procedure to be used to resolve or attempt to resolve any conflict between the municipalities that have adopted the *plan*,
  - ii) a procedure to be used, by one or more municipalities, to amend or repeal the *plan*, and
  - iii) provisions relating to the administration of the *plan*.

The MGA identifies the hierarchy and relationship of *statutory plans*, so that each plan will be consistent with the plans above it (Figure 3) and, in the event of an inconsistency, which provisions in what plan will prevail. Both the Town and M.D. have adopted MDP's to guide future growth and development within their respective municipalities. Once this IDP has been adopted, the Town and M.D. will need to review their existing MDP's to determine if they are consistent with the newly adopted IDP. The IDP can only be repealed if it is being replaced by a new IDP or the Minister of Municipal Affairs has granted an exemption in accordance with the MGA.

**Figure 3: Hierarchy of Plans**



A low-angle photograph looking up at several tall, slender trees with vibrant yellow autumn foliage against a clear blue sky. The perspective is from the ground looking up, making the trees appear to converge towards the top of the frame. The leaves are bright yellow, and the sky is a pale, clear blue. The overall mood is serene and peaceful.

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section 2

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# **IDP Goals, Objectives & Policies**

## Section 2 IDP Goals, Objectives & Policies

### 2.1 INTERPRETATION OF THE *PLAN*

The structure of the IDP is such that each section follows a topic, and each topic has aspirational goals and desired objectives and policy directions to achieve the objectives and ultimately the stated goal. This structure works best when the document is interpreted in a holistic manner where each of the policies are viewed in the context of one another rather than separately. Generally, the objectives, and ultimately the goals, of the IDP are more likely to be achieved by addressing the complete set of policy directions.

While the policies contained within this document relate to the defined IDP boundary *they do not preclude* the municipalities from expanding the applicable policies beyond the boundary or collaborating with other municipalities based on the mutual agreement of the two municipalities of this IDP.

This IDP contains the operative words '*shall*', '*should*', and '*may*'. The interpretation of these words are outlined below:

*Shall* – indicates that actions are mandatory.

*Should* – indicates direction to strive to achieve the outlined action but is not mandatory.

*May* – is discretionary, meaning the policy in question can be enforced if the *municipalities* choose to do so. This is typically dependent on context and individual circumstances.

Note: Where words are *italicized* the document provides a definition in Section 3.0.

## 2.2 OVERALL GOALS OF THE IDP

The overall goals of the Town / M.D. Intermunicipal Development Plan are to:

Goals	
1.	Provide a consistent approach to intermunicipal discussion.
2.	Enhance each <i>municipality's</i> means of being informed and provide input on planning and development matters within the IDP area.
3.	Meet the requirements of the MGA to include a process for resolving or attempting to resolve intermunicipal conflict and to provide a structure within which communication can occur between each <i>municipality</i> .
4.	Create a process that allows for timely resolution of differences of opinion between <i>municipalities</i> in a respectful manner.
5.	Create a planning framework that is responsive to potential changes to the realignment of the highway.
6.	Building resilience to sustain existing commercial and industrial development while enabling growth of new commercial and industrial development.
7.	Create a range and diversity of housing choices that utilize existing and cost-effective <i>municipal infrastructure</i> .
8.	Encourage and enable continued development of the agriculture sector without adversely impacting the residents in the Town and M.D.
9.	Maintain and expand the economic opportunities within the Town and M.D.
10.	Preserve and enhance an integrated system of open greenspace and provide a variety of natural amenities which improve quality of life though opportunities for passive and active recreation in addition to creating and supporting indoor recreation activities.
11.	Protect the Town and M.D. from damages resulting from flooding and runoff between the municipalities.
12.	Develop a safe and efficient transportation network that is consistent in its condition and design standards, in order to help both <i>municipalities</i> achieve greater efficiencies and provide better services to their residents and businesses.
13.	Coordination of <i>municipal infrastructure</i> planning rights-of-way acquisition in the IDP boundary.
14.	Promote efficient and coordinated intermunicipal community and emergency services.

## 2.3 INTERMUNICIPAL COOPERATION

In order to provide a consistent approach for intermunicipal discussion between administrations, Joint Council meetings shall be utilized to oversee the implementation of the IDP and serve as a forum to address any intermunicipal issues that may arise. These Joint Council meetings shall also serve as a mechanism to allow formal communication between municipalities where the Councils will be responsible for facilitating ongoing communication and sharing of information with respect to administering the IDP. This Joint Council meeting will also be utilized as part of the Intermunicipal Collaboration Framework (ICF) process.

### Goal:

Provide a consistent approach to intermunicipal discussion.

### Objective:

A. To establish a process to consistently monitor the IDP, and act as a forum for discussion on intermunicipal issues.

### Policy:

**2.3.1.** Councils **shall** meet jointly at least once yearly and when one Council requests a joint meeting as necessary (e.g. to resolve an issue or dispute with regard to the IDP). Items that **should** be covered at these meetings include the status of the IDP and whether any amendments to the IDP are necessary.

**2.3.2.** Joint Council meetings **should** be held at a time that aligns with the annual municipal budget cycle process.

**2.3.3.** The municipalities **may** create a Joint Council Committee (JCC) to implement the policies of the IDP. To create the Joint Council Committee, the municipalities **shall** follow the following steps in accordance with the MGA:

- i. The individual Council's must pass their own JCC bylaw pursuant to Section 145 and 146 of the MGA to establish the Council Committee, set out functions and procedures, and address the composition of the committee.
- ii. The individual JCC bylaw may also define the explicit delegation of the Council Authority, as provided for in Section 203 of the MGA.
- iii. The municipalities shall work together to create the bylaw to ensure that they function the same.
- iv. The JCC bylaw does not have the power to adopt bylaws, this must be done during regular Council sessions.

**2.3.4.** Members of Council attending Joint Council meetings for the purpose of the IDP **shall** be responsible for the following provisions unless a Joint MPC is created.

- i.** Making recommendations on intermunicipal issues to the respective municipal Councils.
- ii.** Monitoring the progress of the IDP, including but not limited to reviews of all MDP and LUB amendments, and subdivision, and certain development permits (Discretionary, Variances) within the IDP area.
- iii.** Reviewing proposed amendments to the IDP and providing recommendations to each respective Council.

## 2.4 CIRCULATION & REFERRAL PROCESS

The purpose of this section of the *Plan* is to establish a clear and consistent referral process whereby each *municipality* is able to provide comments on proposed changes to statutory and non-*statutory plans* as well as proposed subdivisions and certain development applications within the IDP area.

The Town and M.D. recognize the importance of cooperation with one another in the spirit of gaining mutual benefit and avoiding incompatible forms of development within their municipal boundaries. Communication between the two municipalities is the most effective means of avoiding or minimizing intermunicipal conflict. For this reason, this IDP focuses on a commitment to have effective communication by establishing a process for circulation and referral of planning applications, policy, and other information essential to effectively administering the IDP.

### Goal:

Enhance each *municipality's* means of being informed and provide input on planning and development matters within the IDP area.

### Objective:

- A. To provide a clear process for circulation and referral of planning applications that pertain to the IDP area.

### Policy:

- 2.4.1.** Within the IDP area, the two municipalities ***shall*** refer the following to the Chief Administrative Officer (CAO) or their designate, of the respective *municipality*:
- i. *Municipal Development Plans, Area Structure Plans, Area Redevelopment Plans, and any amendments thereto.*
  - ii. *Outline Plans and Conceptual Schemes.*
  - iii. *Land Use Bylaw amendments including redistricting / rezoning.*
  - iv. Development Permit applications for:
    - a. Discretionary uses as per the Town and M.D.'s respective *Land Use Bylaws*.
    - b. Variances for commercial or industrial development as per the Town and M.D.'s respective *Land Use Bylaws*.
    - c. Direct Control Districts as per the Town and M.D.'s respective *Land Use Bylaws*.
  - v. Applications for subdivision creating more than five vacant (5) *lots*.

**vi.** Applications for the disposition of environmental, conservation, municipal and/or school reserves, environmental easements, public utility *lots* and/or road allowances.

**2.4.2.** The receiving municipal authority **shall** acknowledge receiving an application via email within two (2) *working days* of receipt.

**2.4.3.** Each *municipality shall* have ten (10) *working days* from receipt of a referral to review and comment on referrals made pursuant to Policy 2.4.1.(iv), and thirty (30) *working days* from receipt of referral for all other referrals pursuant to Policy 2.4.1. Upon mutual agreement an extension **may** be granted, however if no response is received within one (1) *working day* after it is due, it will be assumed that there are no objections or comments.

**2.4.4.** The administrations of both municipalities **shall** decide which department is to be responsible for responding to intermunicipal referrals.

## 2.5 PLAN ADMINISTRATION, APPEAL & AMENDMENT

To keep the IDP a relevant, meaningful, and living document, it is prudent to review the objectives, policies, and future land use plans to ensure that they are reflective of the current context. As the IDP is intended to be a long-range planning document, it will require regular monitoring and review in order to remain current and accurately reflect changing growth trends in the region. This requires the establishment of a clear process that allows member municipalities to amend the IDP when it is mutually beneficial to do so.

### Goal:

Meet the requirements of the MGA to include a process for resolving or attempting to resolve intermunicipal conflict and to provide a structure within which communication can occur between each *municipality*.

### Objective:

- A. To support the IDP to remain current and adaptive to changing circumstances in the region including the election of new Councillors.

### Policy:

- 2.5.1. A general review of the IDP **should** be completed with Council within one (1) year following a general municipal election to confirm the objectives and policies are still relevant. This review **should** occur simultaneously with the review of the Intermunicipal Collaboration Framework. Throughout the life of this document, amendments to policy **may** be made where agreed to by both Councils.
- 2.5.2. Notwithstanding Policy 2.5.1., if no review is carried out within nine (9) years of adoption of the IDP a full review of the IDP **shall** be completed in the tenth (10) year from the date of adoption.
- 2.5.3. Amendments to the IDP **shall** be subject to agreement by both municipalities and must be adopted by both Councils in accordance with the procedures established in the MGA.
- 2.5.4. An IDP **shall** only be repealed if it is being replaced by a new IDP or the Minister of Municipal Affairs has granted an exemption in accordance with the MGA or if both municipalities agree that they do not require one, in accordance with section 631(2) of the MGA.

## 2.6 INTERMUNICIPAL DISPUTE RESOLUTION

The Municipal Government Act requires municipalities to have their IDP include a procedure to resolve or attempt to resolve any conflict between the municipalities that have adopted an IDP. The intent of the dispute resolution process is to facilitate mediation and a resolution at the municipal level before an appeal is to be launched to the Municipal Government Board (MGB). This process is based on the assumption that each *municipality* will have differences of opinion and a resolution mechanism may be necessary. It is important that throughout the various processes of dispute resolution, all parties engaged to resolve disputes are mindful of and respectful of the rights of the private interests involved.

### Goal:

Create a process that allows for the resolution of differences between municipalities in a respectful manner.

### Objective:

- A. To adopt a dispute resolution process to address disagreements fairly, effectively, and in a timely manner, and is respectful of each other's interests and concerns, and avoids potential costly litigation or arbitration.

### Policy:

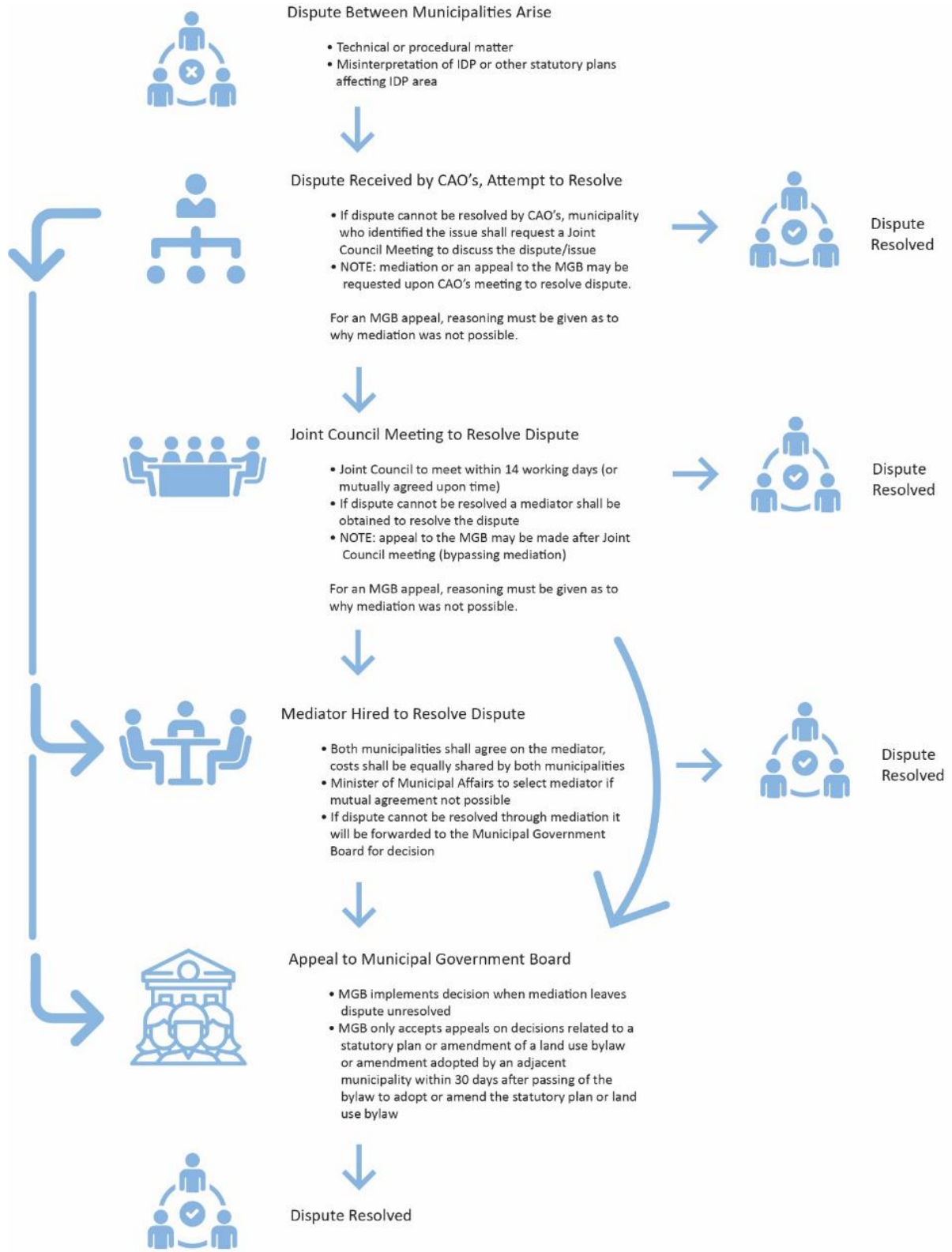
2.6.1. In the case of a dispute, the following process **shall** be followed:

- i. At any time during the dispute resolution process, either *municipality shall* be able to initiate a formal mediation process through a third-party to attempt to resolve the issue/dispute. Such costs **shall** be equally shared by both Municipalities.
- ii. When a potential intermunicipal dispute arises regarding a technical or procedural matter, including a clerical error or any misinterpretation of this IDP or any other plans affecting lands in the IDP area, it **shall** be directed to the Chief Administrative Officer (CAO) of each *municipality*.
- iii. If an issue relating to the IDP area or plans affecting lands in the IDP area cannot be resolved by the respective CAO's, the *municipality* who identified the issue **shall** request that a Joint Council meeting be scheduled to discuss the dispute/issue. At such time, within 14 *working days* of the Joint Council meeting being requested (or a time mutually agreed upon), the Councils **shall** meet and review the issue and attempt to resolve it through consensus.
- iv. If an issue cannot be resolved by a joint meeting of the Councils, a mediator **shall** be obtained to resolve the dispute.

**2.6.2.** Should mediation be necessary, both municipalities **shall** agree upon the mediator, or if they cannot agree, the Minister of Municipal Affairs **shall** choose the mediator. The cost of the mediator **shall** be shared equally between the parties.

**2.6.3.** If a dispute arises involving the adoption of, or amendment to, a *statutory plan*, the *municipality* initiating the dispute **may** file appeal to the MGB in accordance with S.690 of the MGA, in order to preserve the statutory right to file an appeal and avoid missing the time frame which an appeal is allowed. However, the dispute resolution process contained within this IDP **shall** still be followed. An appeal to the MGB **may** be withdrawn if a solution is reached following the dispute resolution process outlined in Section 2.6.1 of this document.

**Figure 4: Dispute Resolution Process**



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## 2.7 LAND USE & GROWTH

Alberta Transportation has proposed a highway realignment to bypass the Town to the west. The intent of the realignment is to enable the efficient movement of goods and services across the province and beyond. However, this is not without consequence; many of Alberta’s small urban communities are built along existing highway transportation corridors, with a significant amount of municipal and private monies invested to leverage the passing-by of vehicles to support their communities and businesses. Revenue generated from services provided alongside highway transportation fiscally supports small communities that generally rely on this income. Historically, economic analysis on the impact of the realignment and how to mitigate this impact is not considered when the Province develop these projects, with the level of community engagement often minimal.

The Town of Valleyview and the M.D. of Greenview have already experienced the effects of highway realignment; the Town itself was built around the original intersection of Highway 43 and Highway 49, with commercial and retail strategically lining the intersection to attract business from regional commuters. When the highway was realigned to by-pass the Town, businesses relocated to continue to draw revenue from commuters. As a result, the existing development alongside the old highway corridor experienced a decline in investment, as it was no longer experiencing the same number of consumers. The fear is that a similar situation may occur as a result of the proposed highway realignment – out of necessity, businesses will need to be relocated and municipal services may need to be expanded to try to maintain the revenue generated.

The proposed highway realignment leaves the Town and M.D. at a unique crossroads. With no timeline for the proposed conceptual realignment and the ever-evolving Provincial mandates, the municipalities have decided to proactively plan for the transition, in the event that the conceptual highway realignment comes to fruition. Effectively, the plan is based on the principal of transition; phase 1 of commercial and industrial development has been positioned to complement existing development patterns; phase 2 of commercial and industrial development are located on lands that would build upon both existing and phase 1 development patterns, while leveraging the highway realignment. It is acknowledged that this realignment is unlikely to happen for a long period of time, however, it is also recognized the importance of planning for any potential changes that could significantly impact the community.

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### 2.7.1 FUTURE GROWTH POLICIES

Growth within the IDP area has been fairly stagnant, with the Town and M.D. experiencing an average annual growth rate since 2011 of 1.1% and 1.0% respectively. Population growth has been forecasted for the Town and M.D to 2027. With an average annual growth rate of 1.9% forecasted, the municipalities are projected to attract 890 (Town) and 668 (M.D.) new residents. The detailed forecasts can be found in Appendix B.

**Goal:**

Create a planning framework that is responsive to potential changes to the realignment of the highway.

**Objective:**

- A. To plan for future growth of industrial and commercial development in a manner that is responsive to potential changes in the Highway alignment.

**Policy:**

- 2.7.1.1. Both municipalities **shall** jointly encourage Alberta Transportation to develop an economic impact assessment to determine the impact of the proposed highway realignment. If the municipalities are unsuccessful in engaging Alberta Transportation, the municipalities **may** jointly develop an economic impact assessment.
- 2.7.1.2. Pending the outcome of policy 2.7.1.1., the municipalities **may** jointly engage Alberta Transportation to refine the conceptual highway realignment to mitigate its impact on the local economy.
- 2.7.1.3. The municipalities **should** jointly engage Alberta Transportation to develop a Corridor Master Plan, to improve existing access, connectivity and aesthetics to increase the safety along the corridor and to make the area more attractive to consumers and future businesses. This Corridor Master Plan **may** build off the Highway 43 & 49, Valleyview Access Management Study (2010).
- 2.7.1.4. The development of the Corridor Master Plan **shall** include two phases that reflect a transition of development patterns around the existing highway and potential construction of the realignment of the highway as indicated in Figure 5.
- 2.7.1.5. Both municipalities **shall** jointly engage Alberta Transportation to determine the timeline for developing the conceptual highway realignment.
- 2.7.1.6. Both municipalities **may** jointly engage Alberta Transportation for the relocation of the southern interchange to the location indicated in Figure 5.
- 2.7.1.7. Both municipalities **should** develop a joint *Area Structure Plan* to address the transition of commercial and industrial development based on the relocation of the highway.

**Objective:**

**B.** To allocate future lands for residential development that meets the needs of the community.

**Policy:**

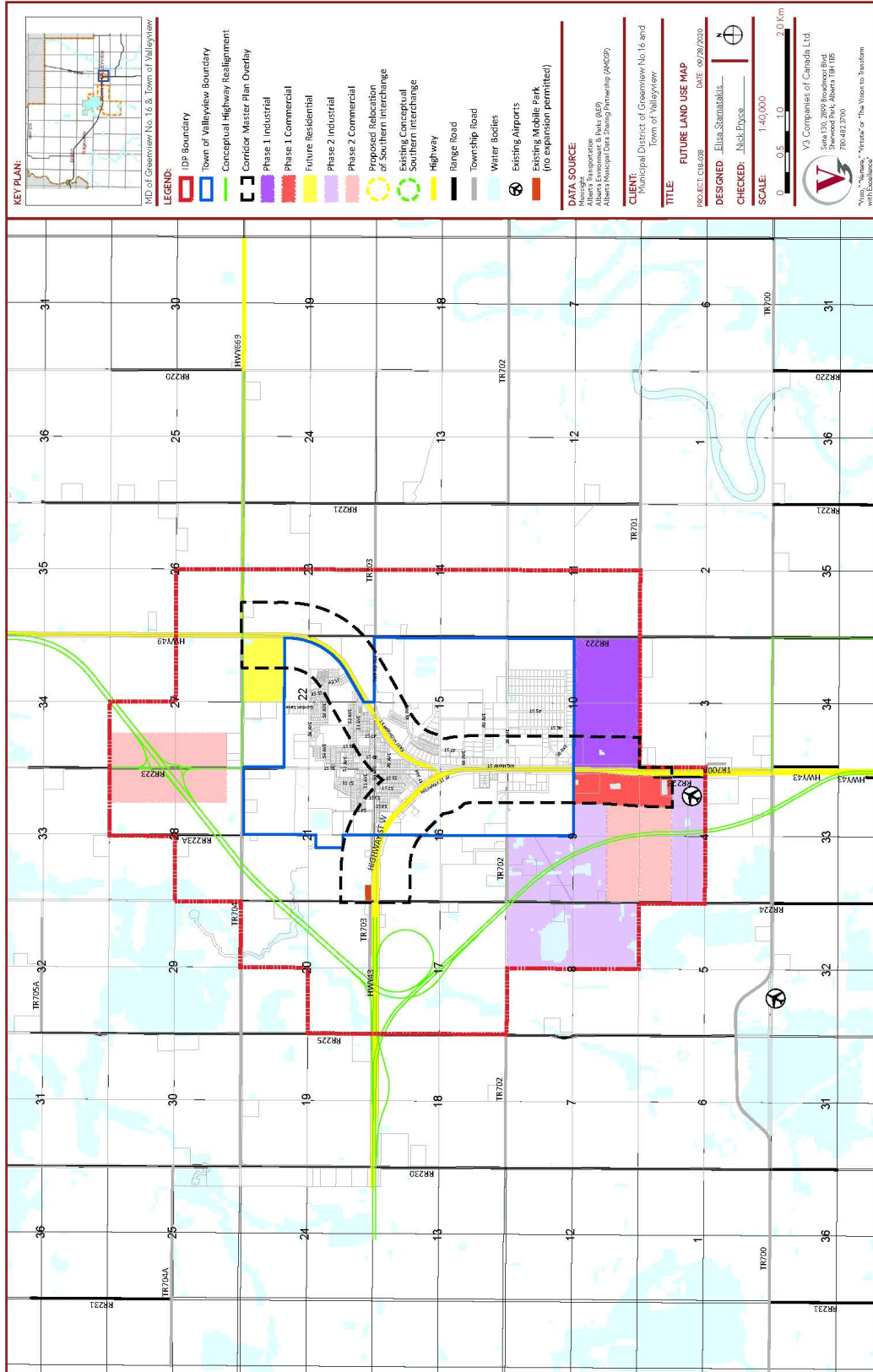
**2.7.1.8.** Residential growth *should* be directed towards the North and North-East in accordance with Figure 5.

**2.7.1.9.** Both municipalities *shall* work together to determine a path forward and timeline for when the annexation of land, located in NE-22-70-22-W5 (Figure 5) is appropriate. The Joint Council *shall* establish mutually agreed criteria on the process and timing for potential annexation of lands for residential development.

**2.7.1.10.** The Town *should* maintain a minimum of a twenty (20) year land supply and growth forecast for its own long-range planning needs, and share this information with the M.D.



Figure 5: Future Land Use Map



## 2.7.2 COMMERCIAL & INDUSTRIAL POLICIES

Commercial and industrial development provides a higher per capita portion of a community's tax revenue than other uses (e.g. residential). Commercial and industrial uses are also responsible for providing many jobs and has a significant impact on the livability of a community. Thus, it is important to successfully plan for a vibrant and robust commercial and industrial sector.

### Goal:

Building resilience to sustain existing commercial and industrial development while enabling the growth of new commercial and industrial development.

### Objective:

- A. To monitor market demand and engage with local businesses to identify opportunities for new commercial and industrial businesses.

### Policy:

- 2.7.2.1. Joint Council **should** receive annual reports from their administrations on regional market demand, prospective new opportunities, and current market conditions related to vacancy rates, availability of shovel ready land development, and employment statistics.
- 2.7.2.2. Administrations from both municipalities **may** conduct a workshop with area businesses to conduct a strength, weakness, opportunities and threats (SWOT) analysis and develop an economic development strategy to identify opportunities where both municipalities **may** focus their efforts.

### Objective:

- B. To enhance the visual appearance of commercial buildings and public spaces that create a welcoming appearance to the Town and M.D.

### Policy:

- 2.7.2.3. Both Councils **should** evaluate their respective *Land Use Bylaw* provisions relating to commercial development to identify cost-effective solutions to enhance the visual appearance and landscaping along key commercial corridors.

**2.7.2.4.** Both Councils **should** establish new complementary roadway standards related to core corridors to enhance the visual appearance through landscaping, way finding, and other streetscaping tools.

**2.7.2.5.** Both Councils **should** jointly work with Alberta Transportation in identifying changes to enhance accessibility, aesthetics, and safety along the highway corridors.

### 2.7.3 RESIDENTIAL POLICIES

The viability of a community is heavily reliant on the provision of adequate housing, and it is important to prevent the provision of housing from displacing other important community contributors such as agricultural operations. Thus, it is important to properly plan and provide for the housing needs of current and future generations of residents.

**Goal:**

Create a range and diversity of housing choices that utilize existing and cost-effective *municipal infrastructure*.

**Objective:**

**A.** To utilize existing serviced and already districted lands for residential development.

**Policy:**

**2.7.3.1.** Both Councils **should** direct new residential development towards utilizing existing serviced and already districted lands.

**Objective:**

**B.** To ensure a range and diversity of supply of housing to meet the demand of residents in the Town.

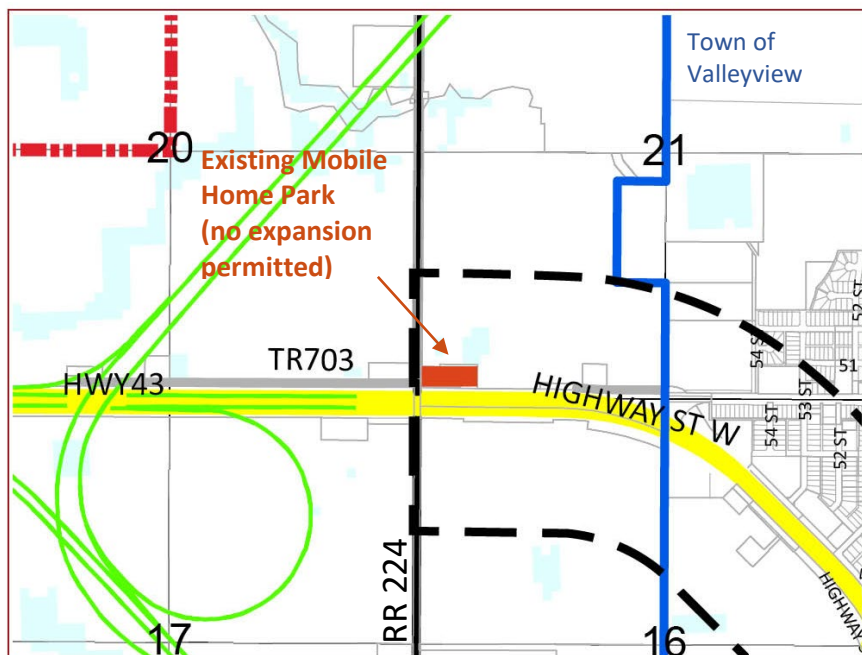
**Policy:**

**2.7.3.2.** The Town **may** share with the M.D. on a yearly basis information regarding: residential vacancy rates, land supply by housing type, rental prices, rental/ownership distribution, the amount of shovel ready and undeveloped residential land, housing construction starts, the amount of seniors housing vacancy and unmet need.

<b>Objective:</b> C. To evaluate the fiscal impacts for servicing future neighbourhoods to the Town.
<b>Policy:</b> 2.7.3.3. Prior to developing any new <i>greenfield</i> lands, the Town <b>may</b> carry out a fiscal impact assessment and long-term municipal services impacts of future development based on different housing typologies and land use scenarios to understand the financial burden on both municipalities.

<b>Objective:</b> D. To manage the development of manufactured home parks within the Plan Boundary.
<b>Policy:</b> 2.7.3.4. Manufactured home parks within the Plan Boundary <b>shall</b> be directed to locate in an area agreeable to both municipalities.  2.7.3.5. The existing mobile home park located on the SW 21-70-22-W5 west of the Town <b>shall</b> not be permitted to expand the current number of trailers or expand their existing boundaries, as indicated in Figure 6.

Figure 6: No Mobile Home Park Expansion Lands



#### 2.7.4 RURAL & AGRICULTURE POLICIES

Agriculture is an intrinsic component with the Town and the M.D. As one of the largest economic driver industries, it is important to place a high value on the lifestyle and livelihood of agricultural operations in the region.

**Goal:**

Encourage and enable continued development of the agriculture sector without adversely impacting the residents in the Town and M.D.

**Objective:**

**A.** To restrict confined feeding operations and intensive livestock operations within the IDP area.

**Policy:**

**2.7.4.1.** The IDP *shall* prohibit the development of confined feeding operations (CFO) and intensive livestock operations (ILO) within the IDP Plan boundary.

**Objective:**

**B.** To maintain agricultural designated land and uses within the IDP area.

**Policy:**

**2.7.4.2.** The Town and the M.D. *should* avoid development that results in the fragmentation of productive agricultural lands where possible.

**Objective:**

**C.** To mitigate the negative impacts of invasive species and harmful chemical use.

**Policy:**

**2.7.4.3.** Both municipalities *should* develop complementary bylaws to manage and control invasive species in each community.

**2.7.4.4.** The Town and the M.D. *should* manage the use and spread of harmful chemicals from spreading through residential and commercial areas within the IDP boundary.

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## 2.8 ECONOMIC DEVELOPMENT

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### 2.8.1 ECONOMIC DEVELOPMENT POLICIES

The Town and M.D. recognize the importance of economic development, namely its role in providing employment opportunities, a variety of services, economic diversity and tax revenues. Lands within the IDP are attractive to business as they encompass a major highway intersection (Highway 43 and 49), an airport that has the potential to serve the region by air. A coordinated economic development strategy is needed to provide confidence to potential businesses seeking to locate in the area. In order to effectively promote the area as a stable and attractive place to do business, and to effectively lobby provincial and federal government, intermunicipal cooperation is needed where resources can be combined and each *municipality* has the opportunity to share in the costs and benefits of economic development.

**Goal:**

Maintain and expand the economic opportunities within the Town and M.D.

**Objective:**

A. To jointly work on creating a framework that promotes and enables economic growth.

**Policy:**

**8.1.1.1** Both municipalities *should* work together to establish a joint economic development entity and unified strategy that promotes the Town and M.D. as one region. This entity *may* be established by working with existing stakeholder groups such as the Valleyview Chamber of Commerce and/or Agricultural Society.

**8.1.1.2** The economic development strategy identified in Policy 2.8.1 *may* engage existing local businesses to conduct a SWOT analysis and prepare an economic development strategy to identify opportunities to focus community resources, and develop marketing and promotional material.

**Objective:**

- B.** To collaborate together in encouraging the expansion of existing businesses and attraction of new business opportunities.

**Policy:**

**8.1.1.3** Both municipalities *may* encourage and support the Valleyview Chamber of Commerce and other economic agencies (e.g. Valleyview Agricultural Society) to explore the potential for creating a local business incubator or enterprise centre to support start-up businesses and that fosters innovation of existing businesses.

**8.1.1.4** Both municipalities *should* jointly explore opportunities to support and develop secondary products arising from the agricultural resource sector.

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## 2.9 NATURAL ENVIRONMENT

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### 2.9.1 PARK, OPEN SPACE, RECREATION & ENVIRONMENTAL POLICIES

Parks, open spaces, and recreation opportunities are vital to the wellbeing of any community, and provide incentive for persons outside of the region to visit.

**Goal:**

Preserve and enhance an integrated system of open greenspace and provide a variety of natural amenities which improve quality of life through opportunities for passive and active recreation in addition to creating and supporting indoor recreation activities.

**Objective:**

- A. To efficiently maintain parks and open spaces.

**Policy:**

- 2.9.1.1. A Master Recreation Plan **should** be jointly developed to manage recreational activities, programming of existing facilities, and identifying linkages between uses and facilities within the IDP area.

**Objective:**

- B. To work collaboratively to identify appropriate lands for future parks/open spaces and seek to provide active transportation connections to and between each.

**Policy:**

- 2.9.1.2. The Town and M.D. **should** collaborate on the identification of lands within the IDP area that are appropriate for future parks/open spaces that could be interconnected.
- 2.9.1.3. *Riparian margins* and *wetland* areas **should** be protected from all uses with the exception of trail development. These *environmentally significant areas* **should** be jointly explored for the creation of an active trail network to integrate with existing trails within the Town.

<p><b>Objective:</b></p> <p>C. To protect <i>environmentally significant areas</i> from inappropriate development.</p>
<p><b>Policy:</b></p> <p><b>2.9.1.4.</b> <i>Environmentally significant areas shall</i> be identified within municipal documents such as <i>Area Structure Plans, Outline Plans, and the Land Use Bylaw</i>.</p> <p><b>2.9.1.5.</b> Both municipalities <i>shall</i> recognize the importance of protecting <i>environmentally significant areas</i> such as <i>riparian</i> and <i>wetland</i> areas. Both municipalities <i>shall</i> work together when reviewing proposal containing these elements within the IDP area and seek to preserve them in their natural state.</p> <p><b>2.9.1.6.</b> The planting of <i>riparian margins may</i> be encouraged to further develop the open space and natural environment network within the IDP area.</p> <p><b>2.9.1.7.</b> Both municipalities <i>should</i> share information on the environment with one another, including but not limited to: water testing information, geotechnical reports, contaminated sites, and abandoned well sites.</p>

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## 2.9.2 STORM WATER MANAGEMENT POLICIES

Managing storm water has been identified as an important component in planning for the future in the IDP area. Reducing runoff and runoff pollution between the Town and M.D. can assist in protecting *municipal infrastructure*, housing and businesses from flooding.

<p>Goal:</p> <p>Protect the Town and M.D. from damages resulting from flooding and runoff between the municipalities.</p>
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<p><b>Objective:</b></p> <p>A. To mitigate the impact of storm water runoff between the Town and M.D.</p>
<p><b>Policy:</b></p> <p><b>2.9.2.1.</b> The <i>municipalities should</i> jointly develop a Storm Water Management Plan in accordance with Alberta Environment and Parks requirements, to assist in protecting <i>municipal infrastructure</i>, housing and businesses from flooding, and to manage storm water runoff between the Town and M.D.</p>

## 2.10 INFRASTRUCTURE & SERVICES

### 2.10.1 TRANSPORTATION POLICIES

The IDP area contains several key components of the provincial, regional, and local transportation systems for each *municipality*. The system contains a hierarchy of roads, two provincial highways, and an airport within the IDP area. When transportation networks cross municipal boundaries, communication, coordination and long-range planning are essential to support efficiency and functionality of the system and maximize its benefit to the community.

#### Goal:

Develop a safe and efficient transportation network that is consistent in its condition and design standards, in order to help both *municipalities* achieve greater efficiencies and provide better services to their residents and businesses.

#### Objective:

- A. To establish and maintain roadway standards that promote the safe and efficient movement of people and goods within and between the Town and M.D., and surrounding region.

#### Policy:

- 2.10.1.1. Both municipalities **should** jointly review their municipal transportation network plans, roadway engineering standards and maintenance programs, particularly as they affect the IDP area so that transportation connections and maintenance programs are compatible across municipal boundaries.
- 2.10.1.2. Both municipalities **may** jointly review their engineering roadway design standards and maintenance programs to identify potential operational efficiencies and budget savings.
- 2.10.1.3. Where a roadway that directly connects between both municipalities is planned for capital construction or rehabilitation upgrades within the IDP area, the *municipality* undertaking the work **should** advise the other *municipality* in order to potentially coordinate projects, and increase efficiencies and reduce disruption to the residents and businesses.

<b>Objective:</b>
<b>B.</b> To work with Alberta Transportation to identify potential improvements to the existing municipal roadway network within the IDP area.
<b>Policy:</b>
<b>2.10.1.4.</b> The municipalities <i>should</i> jointly engage Alberta Transportation in the future planning and maintenance of major roadways and Provincial highways in the IDP area for the purposes of coordination and cost-sharing of maintenance related to the whole roadway network.
<b>2.10.1.5.</b> The municipalities <i>should</i> jointly engage Alberta Transportation for the purpose of actively planning for and implementing an interim access management plan to improve the safety and aesthetic enhancement of Highways 43 and 49 through the IDP area.
<b>2.10.1.6.</b> The Town and M.D. <i>should</i> jointly engage Alberta Transportation for the purpose of actively participating in the future design and construction of the bypass for Highways 43 and 49 in order to allow for accessibility to adjoining lands and connection into the Town.

<b>Objective:</b>
<b>C.</b> To assess the current viability and future role of the Valleyview Airport.
<b>Policy:</b>
<b>2.10.1.7.</b> The Town <i>should</i> gather airport flight statistics, such as number of trips and types of use (i.e. commercial, recreation/personal aviation, shipping/receiving goods), and prepare a business case that evaluates the current operational and capital needs, and the future business potential and viability of the airport facility.
<b>2.10.1.8.</b> Both municipalities <i>shall</i> evaluate the Valleyview Airport business case on the viability of retaining the transportation service, based on the outcome of Policy 2.10.1.6.
<b>2.10.1.9.</b> Based on the business case evaluation, both municipalities <i>should</i> determine the future of the airport that takes into account Alberta Transportation’s bypass right-of-way plans.

## 2.10.2 UTILITIES & SERVICING POLICIES

Coordinating *municipal infrastructure* network expansion and aligning servicing standards are effective methods to meet demand for existing and future residents and businesses, and to provide consistent service delivery to people within the IDP area.

**Goal:**

Coordination of *municipal infrastructure* planning and rights-of-way acquisition in the IDP boundary.

**Objective:**

- A. To explore and coordinate areas of common interest in the planning of both utility and servicing *municipal infrastructure* between the Town and M.D. in the IDP area.

**Policy:**

- 2.10.2.1.** Both municipalities **should** jointly identify and explore opportunities to collaborate in the planning of both utility and servicing *municipal infrastructure* as a means to achieving increased coordination, utilization and efficiency of such services as water, wastewater, sanitary, and shallow and overhead *utilities*.
- 2.10.2.2.** Both municipalities **should** explore and collaborate to create common servicing standards throughout the IDP area.
- 2.10.2.3.** Both municipalities **should** jointly examine the business case, and implement where feasible, the use and production of alternative energies from solar, wind, and geothermal sources.
- 2.10.2.4.** Both municipalities **may** encourage and promote to the public alternative energy use through a variety of means including public education sessions and marketing materials, rebate and incentive programs, demonstration projects, and creating municipal policies and bylaws to support initiatives and reduce barriers.

<b>Objective:</b>
B. To review the existing utility and servicing <i>municipal infrastructure</i> capacity and determine the <i>municipal infrastructure</i> needs for both communities in order to accommodate future growth.
<b>Policy:</b>
2.10.2.5. Both municipalities <b>should</b> jointly prepare master servicing plans to determine existing capacities, existing <i>municipal infrastructure</i> lifecycle and replacement needs, and future <i>municipal infrastructure</i> needs to accommodate growth within the IDP boundary.

<b>Objective:</b>
C. Prepare both municipalities to capitalize on future technologies and telecommunication systems.
<b>Policy:</b>
2.10.2.6. Both municipalities <b>should</b> explore opportunities to partner with telecommunication and fibre optic companies to improve existing and plan for future improvements for community connectivity.
2.10.2.7. Both the Town and M.D. <b>should</b> explore opportunities to partner with telecommunication and fibre optic companies in developing social and economic enterprises, programs and services in the communities.

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### 2.10.3. PROGRAMS & SERVICES POLICIES

The provision of needed and desired services is vital to retain and attract residents.

<b>Goal:</b>
Promote efficient and coordinated intermunicipal community and emergency services.

<b>Objective:</b>
A. To coordinate, where mutually agreed, the intermunicipal planning and provision of community services including but not limited to recreation services, family and community support programs, cemeteries, recycling centres, library services, and emergency services.
<b>Policy:</b>
2.10.3.1. The Town and M.D. <b>should</b> coordinate emergency services throughout the IDP area to increase the efficiency, effectiveness, and potentially increase service levels, while reducing the cost of these services.

- 2.10.3.2.** The Town and M.D. **may** explore opportunities to collaborate and share professional resources in the areas of engineering, planning, information technology, and accounting.
- 2.10.3.3.** The Town and M.D. **should** explore opportunities to coordinate and share resources for bylaw enforcement services, snow clearing and maintenance (eg. equipment maintenance), and weed management.
- 2.10.3.4.** The Town and M.D. **may** jointly explore opportunities to engage with area school districts to provide integrated services, programs, and facilities to the communities. The municipalities **may** explore opportunities to include the school districts within agreements established through the ICF process.
- 2.10.3.5.** The Town and the M.D. **should** jointly explore opportunities related to new capital projects (e.g. recreation facilities, senior facilities, etc.) with area school districts to identify ways to integrate mutually beneficial services into a building complex or on lands associated with other public structures.
- 2.10.3.6.** The Town and M.D., through the ICF process, **shall** establish agreements for the provision of any joint services, contracted services and mutually coordinated services, that include but are not limited to: parks and road maintenance; weed management; and recreation facilities, new community facilities and any other services identified.

section 3

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# Definitions

## Section 3 Definitions

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**Area Redevelopment Plan** – means a plan adopted by a Council, in accordance with the requirements of Section 634 & 635 of the MGA, for the purpose of providing a framework for subsequent subdivision and development of an area of land in a *municipality*.

**Area Structure Plan** – means a plan adopted by a Council, in accordance with the requirements of Section 633 of the MGA, for the purpose of providing a framework for subsequent subdivision and development of an area of land in a *municipality*.

**Conceptual Scheme** – see “*Outline Plan*”.

**Environmentally Significant Areas (ESA)** – means areas containing rare or unique characteristics, or areas that include elements that may require special management consideration due to their conservation needs. ESAs are more generally defined as areas that are important to the long-term maintenance of biological diversity, physical landscape features and/or other natural processes, both locally and within a larger spatial context.

**Greenfield** – Undeveloped land, typically on the fringe of urban municipalities, used for agricultural purposes or left in its natural state and is being considered for urban development.

**Land Use Bylaw** – the bylaw that divides a *municipality* into land use districts and establishes procedures for processing and deciding on development application. It contains rules that affect how each parcel of land in a *municipality* may be used and developed.

**Lot** – means ‘lot’ as defined under Part 17 of the *Municipal Government Act*.

**Municipal Development Plan** - means a plan adopted by a Council, in accordance with the requirements of Section 632 of the MGA.

**Municipal Infrastructure** – means infrastructure owned or operated by a *municipality* that provides service to the *municipality’s* ratepayers. Examples include municipal sanitary systems, municipal water systems, municipal storm systems, municipal road systems.

**Municipality** – refers to one of either the Town of Valleyview or the M.D. of Greenview No. 16.

**Outline Plan** – means a non-statutory land use plan adopted by resolution of Council that provides a detailed land use, transportation and servicing concept for the future subdivision and development of land within the area encompassed by the plan boundaries.

**Plan** – refers to the Town of Valleyview / M.D. of Greenview No. 16 Intermunicipal Development Plan.

**Riparian Margins** – means an area of land characterized by vegetation growing on or near the banks of a stream or other watercourse that is dependent on water from the stream or other watercourse and where sufficient soil moisture supports growth of moisture-loving vegetation.

**Statutory Plan** – means a Joint Plan, an Intermunicipal Development Plan, *Municipal Development Plan*, or *Area Structure Plan* prepared and adopted in accordance with the MGA.

**Utilities** – refer to natural gas, sanitary, storm and water services, telephone/cable/internet and electricity.

**Wetlands** – means an area of land that shows a presence of shallow water or flooded soils (or saturated) for part of the growing season, has organisms adapted to this wet environment, and has soil indicators of this flooding, such as hydric soils.

**Working Days** – means Monday to Friday, excluding general holidays as outlined in the government of Alberta’s employment standards.

\*All other words or expressions shall have the meanings respectively assigned to them in the MGA, the Subdivision and Development Regulation, and the Alberta Land Use Framework.

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# Appendix A – Baseline Report

A low-angle photograph looking up at several tall, slender trees with vibrant yellow autumn foliage against a clear blue sky. The perspective is from the ground looking up, making the trees appear to converge towards the top of the frame. The leaves are a bright, golden-yellow color, and the sky is a pale, clear blue. The overall mood is bright and serene.

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# MUNICIPAL DISTRICT OF GREENVIEW No.16 & TOWN OF VALLEYVIEW

## INTERMUNICIPAL DEVELOPMENT PLAN

SYNOPSIS OF BACKGROUND RESEARCH

SEPTEMBER 11TH, 2018



DRAFT



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A – Growth Forecasts

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# 1.0 BACKGROUND

## 1.1 INTRODUCTION

This document will serve to outline the baseline research that was undertaken to assist in moving forward with the re-write of the 2009 Intermunicipal Development Plan for the M.D. of Greenview No. 16 and the Town of Valleyview. A number of data sources were taken into consideration, including but not limited to economic and population data and forecasts, environmental factors, existing intermunicipal agreements and statutory/non-statutory plans currently in place. Finally, a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) was prepared using the compiled baseline information in order to understand the context of the community and its existing relationships between municipalities. This document's purpose is to inform those involved in the IDP process; to help guide the discussion of the plan's development.

## 1.2 LEGISLATIVE BACKGROUND

### *Intermunicipal Development Plan (IDP)*

When the government of Alberta passed new legislation in October 2017 as part of the *Modernized Municipal Government Act (MMGA)*, Intermunicipal Development Plan's (IDP) were introduced and made mandatory, with the primary goal being to improve municipal relationships, planning processes, and local decision-making.

An IDP is intended to ensure that development in and around shared boundaries of municipalities takes place in an environmentally responsible and sustainable manner without significant unnecessary costs and unacceptable negative impacts on either municipality. Under the new MMGA, an IDP is mandatory and must be adopted within two years of the legislative requirements coming into force, the alternative being arbitration.

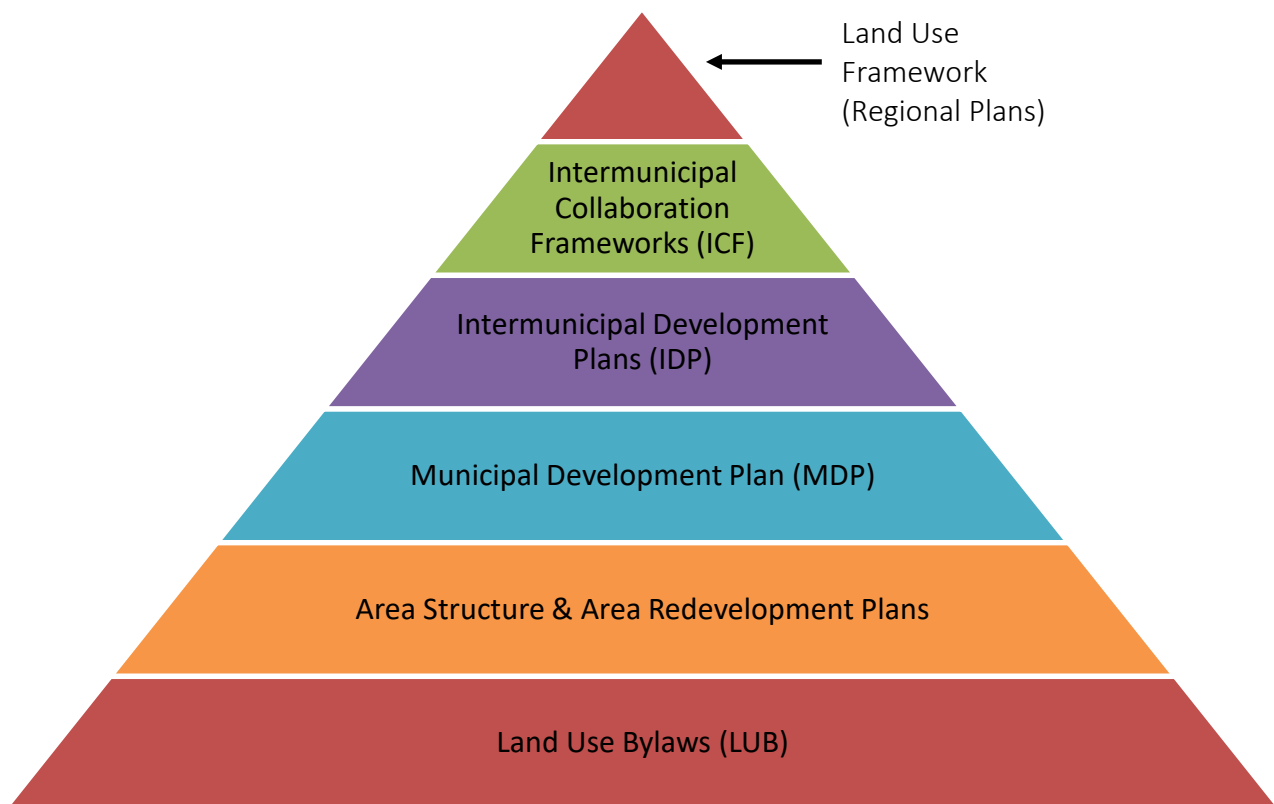
Intermunicipal Development Plan's (IDP) were introduced and made mandatory, with the primary goal being to improve municipal relationships, planning processes, and local decision-making.

Intermunicipal Collaboration Framework's (ICF) are also required under the MMGA legislation. An ICF is a legislative tool to provide for integrated service delivery, manage resources effectively, and to ensure municipalities contribute to funding services that benefit their residents. An IDP

will typically take the form of an appendix to a municipality's ICF, deals with issues specifically related to land use, and contains the following:

- Future land use within the area (as defined by the parties involved);
- How proposals are handled for future development of the area;
- The provision of transportation systems for the area;
- The coordination of intermunicipal programs relating to the physical, social and economic development of the area;
- Environmental matters within the area
- Any other matter related to the physical, social or economic development of the area that the councils consider necessary

Figure 1: Hierarchy of Plans in Alberta



It should be noted that there is an overlap between an ICF and an IDP. The related sections of legislation came into effect on April 1, 2018, meaning ICF's/IDP's must be in place by April 1, 2020, unless an extension has been agreed upon.

### 1.3 EXISTING INTERMUNICIPAL COLLABORATION

The Town of Valleyview and M.D. of Greenview No. 16 are inextricably connected, the M.D. surrounds the Town, creating an environment in which collaboration on growth and development is necessary. Part of the baseline research process included examining the links between the municipalities from an economic and demographic standpoint, and the findings indicate that M.D. residents account for many of the workers in the Town, and that the Town is the primary service provider most of the M.D. within the region.

The findings indicate that M.D. residents account for many of the workers in the Town, and that the Town is the primary service provider most of the M.D. within the region.

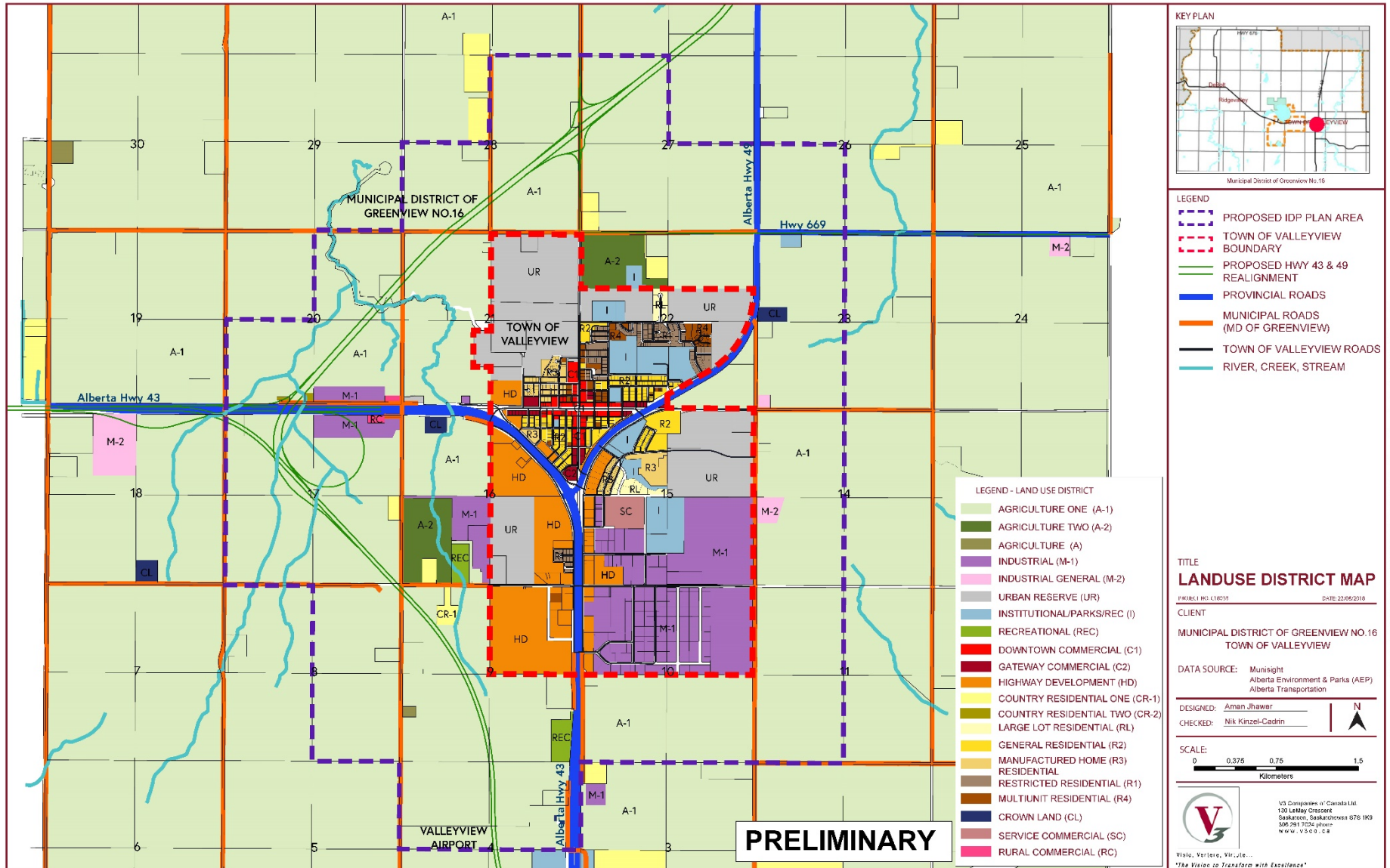
A relationship between the interconnected municipalities was formalized when an IDP was adopted in 2009. Promoting cooperation and communication between the Town and M.D. was a key focus of the IDP, and the plan established a growth strategy for both the urban and rural area. The IDP supports Valleyview as the service centre of the region, and also acknowledges the importance of agriculture to the M.D. Sharing in the area's future growth and development is the basis on which the IDP was formed, and the two municipalities created an environment which provided the mechanism to strike a balance between urban and rural development. Future land use areas were broken down into the following categories, and allocated to areas that represent the desired future direction of the area:

- Agriculture
- Airport
- Industrial Reserve
- Commercial Reserve
- Environmentally Sensitive Areas
- Residential Reserve
- Rural Industrial

Policies and goals were included in each land use, and serve as the implementation tool of the IDP's growth strategy. The IDP also includes policies that centres around the sharing of municipal utilities and recreation/tourism. Growth must be consistent with provisions of the Subdivision & Development Regulations.



Figure 3: Existing Land Use Districts



## 2.0 KEY BASELINE OUTCOMES

The following is a summary of information analyzed in establishing an understanding of the factors that influence the Town of Valleyview and areas of the M.D. of Greenview No.16 that surround the Town. This baseline information serves to inform the stakeholders involved in the IDP process, to provide information to assist in order to have more effective dialogue moving forward.

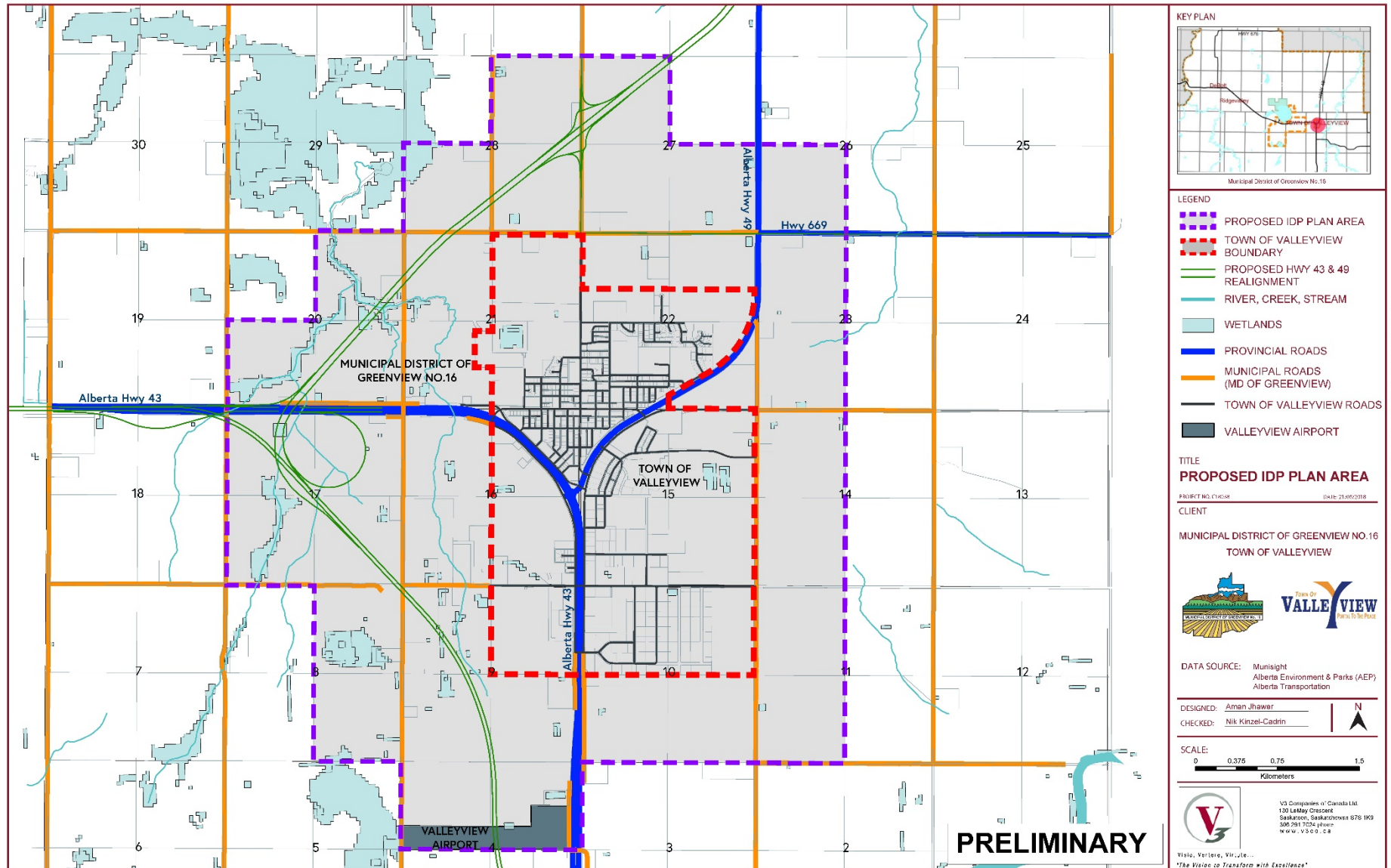


Source: Valleyview Property

The proposed IDP Boundary shown on the following page (Figure 4) has been developed based on the following reasons:

1. The economic growth report has indicated a potential growth of around 2.0% in population and jobs. Based on land absorption for development (residential, commercial, industrial, etc.) and recognizing the size of a rural lot (between 3 to 20 acres), the plan recommends extending at least a quarter section out from the Town to provide the land capacity that will accommodate long-term growth.
2. Based on the size of the Town of Valleyview it is recommended to include the entire Town.
3. The boundary is also being strongly guided towards the west because of the proposed realignment of Highway 43. This realignment will result in growth and development following this transportation corridor.
4. Where land uses are likely to expand and develop have also influenced the direction of the proposed IDP boundaries. For example, it is expected that residential growth from the Town will expand to the north while industrial and commercial development will likely develop to the south and west around the Highway transportation corridor.
5. The airport is considered a potential regional asset that benefits both.

Figure 4: Proposed IDP Area



## 2.1 ECONOMIC & POPULATION FORECASTS

The detailed Growth Forecast is attached to this report in Appendix A. Some of the key elements identified from this analysis are outlined as follows.

### Municipal Profiles

A baseline municipal profile was prepared to understand the general overview of each municipality included in the study. The Town of Valleyview and the M.D. of Greenview No. 16 were examined by looking at demographics such as age, growth rate, the highest level of attained education, and participation rate (Table 1). The Economic Sub-Region which the IDP area is included was also defined, and population figures have been provided to understand of total population in the area (Table 2).

**Table 1: Municipal Profiles**

Municipality	Population Increase (2011-2016)	Growth Rate	Median Age (Provincial Average)	Advanced Education (Provincial Average)	Participation Rate (Provincial Average)
Town of Valleyview	1,761 – 1,863	1.1%	38.6 years (36.7 years)	45% (55%)	67.8% (71.8%)
M.D. of Greenview No. 16	5,299 – 5,583	1.0%	39.9 years (36.7 years)	41% (55%)	72.7% (71.8%)

Note: Advanced Education defined as possessing a post-secondary certificate, diploma or degree.

**Table 2: Economic Sub-Region Populations**

Geography	2017 Population*
Valleyview	1,863
M.D. of Greenview No. 16	5,583
Grande Cache	3,571
Fox Creek	1,971
Sturgeon Lake No. 154	1,512
Grande Prairie	64,785
County of Grande Prairie	22,858
<b>Total</b>	<b>102,143</b>

\*Population figures generated using the Federal Census Profiles (2016) and historical rates of average annual growth.

### Labour Force

The second component of the baseline population and economic growth forecasting was determining the labour force for the Town of Valleyview and M.D. of Greenview No. 16. Net commuters to both the Town and M.D. was determined to understand the movement of people and goods that affect the IDP area. The Growth Forecast in Appendix A outlines a comprehensive list of industry categories (compiled from the North American Industry Classification System) that are present in the areas.

Labour forces have been determined for both the Town and M.D., and have been estimated using the numbers of workers (by industry) residing in each geography, retrieved from 2016 Federal Census of Population Community Profiles. Commuting flow from geography of residence to geography of work data is derived from 2016 Federal Census', and the data represents the number of workers who commute to another geography. A detailed labour force breakdown by industry can be found in Appendix A, pages 7 - 8. The purpose of this section is to highlight the economic driver industries Labour Force and Net Commuters within this summary of background information. Please note that information on transient workers movement is not available and therefore not included in this analysis. Reference to "All Other Industries" includes all the remaining industries detailed in the table on page 7 - 8 of the Growth report contained in Appendix A.

**Table 3: Town of Valleyview Labour Force**

Industry	Labour Force	Current Jobs	Net Commuters
Construction	90	242	152
Mining, Quarrying, Oil and Gas Extraction	135	233	98
Retail Trade	135	219	84
Accommodation and Food Services	130	207	77
Health Care and Social Assistance	105	164	59
All Other Industries	390	685	295

The Town of Valleyview has a positive net commuter value for each of the economic driver industries (all industries in the detailed report) which signifies that people commute each day into the Town for work. Having a net positive commuter balance solidifies the Town’s presence as a significant employer and service centre for the region.

Each economic driver industry has a positive net commuter value, meaning people commute everyday into the Town for work.

**Table 4: M.D. of Greenview Labour Force**

Industry	Labour Force	Current Jobs	Net Commuters
Mining, Quarrying, Oil and Gas Extraction	390	417	27
Agriculture, Forestry, Fishing, Hunting	585	397	-188
Construction	405	298	-107
Retail Trade	245	164	-81
Transportation, Warehousing	225	154	-71
All Other Industries	1,260	850	-410

The M.D. has a net negative commuter flow, meaning most residents commute to another municipality for work purposes, and that there are more workers than jobs in the M.D. The Town of Valleyview has a labour deficit (more jobs than workers), which results in many M.D. residents commuting to the Town and participating in the Town’s local economy on a daily basis.

The negative commuter flow for the M.D. indicates that most residents commute to another municipality for work purposes. There are more workers than jobs in the M.D.

The labour force estimates for the Town and M.D. are based on permanent employees for each municipality. For the labour estimates to be comprehensive, analysis of transient workers is also needed. As of September 2018, as many as 64 work camps were estimated to be in operation in the M.D. of Greenview No. 16. Please note that obtaining

data regarding worker camps is not easy and not reflected in Federal or Provincial census data. Through analysis of meeting agendas and minutes from the M.D.'s Municipal Planning Commission, the total capacity of these camps is almost 9,000 workers. Total capacity of a camp known, however, the number of workers at each camp at any point is uncertain. Camps are permitted to operate for a period of one year before being required to renew their permit, and often times the camp does not operate during the whole year making worker numbers more difficult to estimate. Commuter flow cannot be determined using these numbers, as no data is available for where transient workers reside while working in a camp. For the purpose of the IDP, the total capacity of camps (almost 9,000 workers) should be considered the maximum limit of workers at any point in time. A detailed breakdown of Work Camps in the M.D. can be found in Appendix A, pages 9 - 10.

### Driver Industries

Based on the most popular industry categories above, four (4) driver industries have been created and serve as the focus for economic growth. These industries are expected to drive job growth in the region. The extent to which the municipalities are connected creates a situation for mutually beneficial growth and a shared outlook. The driver industries identified for the proposed IDP area are:

- Agriculture & Related
- Support Activities for Oil Extraction
- Retail Services
- Tourism

#### Economic Driver Industries:

1. Agriculture & Related
2. Support Activities for Oil Extraction
3. Retail Services
4. Tourism

Driver Industries expected to guide economic development in the IDP.

A number of sub-sectors have been categorized under each driver industry. Through economic analysis and forecasting for the region, the results predict solid economic growth in the IDP area by focusing development on opportunities presented in Table 5 on the following page.

**Table 5: Driver Industry Sub-Sectors**

Economic Driver	Sub-Sectors
Agriculture & Related	<p>Agri-Tourism</p> <ul style="list-style-type: none"> <li>• Agricultural operation or activity that attracts visitors</li> <li>• E.g. Local Farmers Market, Summer’s Gold U-Pick Strawberries</li> </ul> <p>Commercial Greenhouse</p> <ul style="list-style-type: none"> <li>• Local ventures capable of servicing region, instead of relying on larger grocers that have foreign sources</li> <li>• Lower transportation costs, cheaper food</li> <li>• E.g. Summer’s Gold Greenhouse</li> </ul> <p>Agricultural Processing</p> <ul style="list-style-type: none"> <li>• Processing raw materials and intermediate products</li> <li>• Meat, dairy, grain, vegetable, fruit, oilseed potential</li> <li>• E.g. Moore Seed Processors</li> </ul> <p>Agri-Hubs</p> <ul style="list-style-type: none"> <li>• Collections of agriculturally-focused businesses that support each other</li> <li>• E.g. Valleyview and Districts Agricultural Society</li> </ul>
Supportive Activities for Oil Extraction	<p>Sub-Sectors for this economic driver include support services for:</p> <ul style="list-style-type: none"> <li>• Mining, quarrying and oil and gas extraction</li> <li>• Construction</li> <li>• Transportation and warehousing</li> <li>• Professional, scientific, and technical services</li> </ul> <p>Resource extraction drives Alberta’s economy, and for the IDP area, businesses in that sector are primarily oil-related equipment rental and transportation services.</p>

Economic Driver	Sub-Sectors
Retail Services	<p>Growth in this industry is typically associated with local population growth, but Valleyview’s location at the junction of Highways 43 and 49 exposes their service market to non-local retail spending.</p> <p>Strategic specialization and expansion of local retail initiatives could attract more consumers to Valleyview, with most retail spending flowing into Grande Prairie.</p> <p>The largest segment of the retail sector is “convenience,” including:</p> <ul style="list-style-type: none"> <li>• Grocery and specialty foods</li> <li>• Personal services</li> <li>• Pharmacy</li> <li>• Alcohol and tobacco</li> <li>• Health services</li> </ul> <p>The presence of Grande Prairie poses a threat to the retail economy within the IDP area, with as much as 60% of Valleyview's spending estimated to flow into Grande Prairie. An opportunity presents itself to specialize and expand the local economy within the IDP area to attract consumers within the area, and from Grande Prairie.</p> <p>The Provincial Highway will impact the retail industry in the IDP area:</p> <ul style="list-style-type: none"> <li>• Existing commercial uses along the highway will likely need to shift with the proposed bypass to continue to capture the highway consumer traffic.</li> <li>• Existing land around the present highway corridor will need to be re-examined, to determine how to focus on local services.</li> </ul>
Tourism	<ul style="list-style-type: none"> <li>• Information and cultural industries</li> <li>• Arts, entertainment, and recreation</li> <li>• Accommodation and food services</li> <li>• Retail trade</li> <li>• Agriculture</li> </ul>

Retail service sector growth is typically associated with local population growth, however the IDP Area’s location at the junction of Highway 43 and 49 exposes their service market to non-local retail spending.

**Growth Forecasts**

The following data provides the baseline on how the growth forecasts for the population were created to project a 10-year growth period. The projections have been broken down by geographies, for the purpose of understanding where people and jobs are located to date (Table 6). A 10-year forecast was made, projecting population for the region to 2027 using the following factors (Table 7):

- Fertility rates
- Mortality rates
- Migration
- Population capacity
- Geography sequencing
- Growth status

**Table 6: Geographies Used in the Forecast, Base Year Information**

<b>Geography</b>	<b>Description</b>	<b>Population (2017)</b>	<b>Employment (2017)</b>
Airport	Valleyview Airport	0	15
Rest of MD of Greenview	Greenview, excluding the Hamlets, IDP areas, and Industrial Park	4,787	1,946
Hamlets	Hamlets of DeBolt, Grovedale, Landry Heights, Little Smoky, and Ridgevalley	778	319
IDP - Commercial	IDP areas designated for Commercial development	0	0
IDP - Industrial	IDP areas designated for Industrial development	0	0
IDP - Industrial (Rural)	IDP areas designated for Industrial development (not subject to future annexation applications)	0	0
IDP - Residential	IDP areas designated for Residential development	0	0
Industrial Park	Big Mountain Industrial Park	0	0
Rest of Valleyview	Town of Valleyview, excluding all IDP areas	1,865	1,750
Study Area Total	All Study Area geographies	7,430	4,030

**Table 7: Population Forecast by Geography, 2017-2027**

Geography	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Airport	0	0	0	0	0	0	0	0	0	0	0	-
Rest of MD of Greenview	4,787	4,810	4,831	4,850	4,867	4,883	4,897	4,910	4,922	4,933	4,943	0.3%
Hamlets	778	782	786	795	863	933	1,003	1,072	1,144	1,217	1,290	5.2%
IDP - Commercial	0	0	0	0	0	0	0	0	0	0	0	-
IDP - Industrial	0	0	0	0	0	0	0	0	0	0	0	-
IDP - Industrial (Rural)	0	0	0	0	0	0	0	0	0	0	0	-
IDP - Residential	0	0	0	0	50	82	213	294	380	467	555	-
Industrial Park	0	0	0	0	0	0	0	0	0	0	0	-
Rest of Valleyview	1,865	1,869	1,873	1,879	1,927	1,975	2,024	2,072	2,121	2,171	2,200	1.7%
Study Area Total	7,430	7,461	7,490	7,524	7,707	7,872	8,137	8,348	8,567	8,787	8,989	1.9%

Note: population growth forecasts for IDP Commercial, Industrial, Industrial (Rural), and Industrial Park are not expected to see an increase in residents as residential uses within these zones are not permitted. Residential population is expected to increase in the IDP Residential areas starting in 2021, when the area starts developing more land to accommodate a growing population.

Employment growth is the second forecast that was made to create a 10-year employment forecast for the region (Table 8), using the following factors:

- Driver industry growth
- Support employment growth
- Participation rates
- Employment capacity
- Employment profiles
- Geography sequencing

**Table 8: Total Job Forecast by Geography, 2017 to 2027**

Geography	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Airport	15	15	15	15	16	16	17	18	18	19	19	2.6%
Rest of MD of Greenview	1,946	1,946	1,966	1,982	1,992	2,000	2,000	2,000	2,000	2,000	2,000	0.3%
Hamlets	319	342	353	367	384	413	443	473	503	533	563	5.9%
IDP - Commercial	0	0	0	0	0	1	2	11	15	20	25	-
IDP - Industrial	0	0	0	0	1	3	6	12	16	21	26	-
IDP - Industrial (Rural)	0	0	0	0	1	3	6	12	16	21	26	-
IDP - Residential	0	0	0	0	0	1	3	10	15	19	25	-
Industrial Park	0	0	0	0	2	6	12	23	31	41	51	-
Rest of Valleyview	1,750	1,779	1,793	1,809	1,829	1,870	1,910	1,951	1,993	2,034	2,075	1.7%
Study Area Total	4,030	4,082	4,127	4,173	4,226	4,314	4,398	4,509	4,607	4,708	4,811	1.8%

Average Annual Growth Rate (AAG) for Employment Growth in the Town of Valleyview is forecast to be 1.7%, indicating moderate job growth. The AAG for the IDP areas denoted in the Growth Forecasts cannot be calculated because there is no existing development on these lands, therefore growth rates are technically infinite. In the IDP Areas:

- 25 Commercial Jobs are forecasted to be created by 2027
- 26 Industrial Jobs are forecasted to be created by 2027
- 26 Industrial Jobs (Rural) are forecasted to be created by 2027
- 25 Residential Jobs are forecasted to be created by 2027

The growth forecasts are a critical piece of information for the purpose of this project. They provide a comprehensive snapshot of the current (and projected) state of the population and economy. The way the growth report is structured provides an explanation on the regional affects and then narrows the focus down to the municipalities participating in the IDP. This provides greater context than solely focusing on the Town and M.D. The complete growth forecast is attached in Appendix A.

## 2.2 TRANSPORTATION

### 2.2.1 Highway Network

The Town of Valleyview is situated in a strategically advantageous location, two major provincial highways intersect in the Town resulting in a large number of regional travellers passing within the IDP boundary on a daily basis. Highway 43 is the major transportation network connection from Grande Prairie to Highway 16 (Yellowhead Highway), and Highway 49 connects the Town to Highway 43 and then Highway 2 between Edmonton and Calgary. Development along these highways has concentrated on their highway orientation and is a large reason why the “convenience” retail category is the largest in Valleyview.

Alberta Transportation proposes to realign the two major provincial highways, creating a bypass around the Town of Valleyview (Figure 5). The highway realignment could be seen as one of the biggest threats to the IDP area, and it will be important to plan the commercial area to transition alongside the highway realignment. It's recognised that future access to the Highway from the retail industry will be completely different to the current setup and changes will likely not make it as easy to access the retail stores. However, visibility from the highway is critical to businesses and interchanges can be planned to accommodate similar commercial uses to what currently exists. The economy of the area captures a great amount of highway traffic, which is seen by the amount of highway commercial development along the arterial roads. When the highway realignment is completed and all the existing traffic bypasses the Town, the existing highway commercial development will predominantly be used by local traffic. Two major considerations need to be made regarding the highway realignment moving forward: how to accommodate and promote the transition of highway commercial development around the proposed realignment, and how to effectively utilize land around the present highway corridor after the bypass is complete.

The proposed highway realignment bypass could be seen as one of the biggest threats to the IDP area. Significant land use and economic considerations will need to be made to make sure the IDP area transitions with the realignment.

### 2.2.2 Airport

The Valleyview Airport is located approximately 3 kilometres south of the Highway 43 and 49 intersection in the Town of Valleyview. Within M.D. of Greenview No. 16 corporate boundaries, the airport is owned and operated by the Town of Valleyview. As it currently stands, development within the airport lands is regulated by the M.D.'s Land Use Bylaw. The Valleyview Airport is certified by the federal government.

Having an airport within the IDP area creates opportunities and challenges. Emergency services benefit from the ability to quickly get into the air, whether that be for airlifting an accident victim to a major hospital or for planes used to help fight fires. The airport has the opportunity to serve as a connection to the larger region. The primary use of the airport is for personal/recreation purposes, as such the airport does not act as a connection to the wider region, for people or goods. The proposed highway realignment by Alberta Transportation (Figure 5) is planned to go through the existing Valleyview Airport lands, resulting in major implications for the airport and surrounding areas. A discussion point during the engagement process will be centred around the value that the airport has to the IDP area, business and the municipalities, and whether or not the airport should be relocated or discontinued.

The Valleyview airport creates opportunities and challenges for the IDP. If incorporated well, the airport has many benefits; however, the highway realignment is slated to go right through the existing airport lands which has major implications.

## **2.3 SERVICING**

### **2.3.1 Water & Wastewater**

The Town of Valleyview is serviced by water from the Little Smoky River. Raw water is drawn from the river and pumped to the Town's water reservoir, where the water is held in two holding ponds. The raw water is treated (at the adjacent water treatment plant), fluoridated and pumped through the community via in-ground water utility lines. The M.D. of Greenview No. 16 is providing water through a network of water points where the public can fill their water tanks. Both potable and non-potable water are available within the M.D. at certain water points, in total there are 6 potable and 4 non-potable locations. None of these water points are in the proposed IDP area. The M.D. uses sourced groundwater to service all water point locations.

The Town is serviced by a sanitary sewer system. The wastewater treatment plant treats the wastewater, while the sewage lagoon holds the treated wastewater until the timed discharge releases it into a named creek, eventually ending up in Sturgeon Creek. The wastewater treatment facility is located on the same lot as the sewage lagoon, and has a 5-cell treatment system. When the wastewater is treated, it is held in the aerated sewage lagoon. From there, treated wastewater is discharged three (3) times per year using a timed-release system via a drainage ditch into an unnamed creek, eventually ending up in Sturgeon Creek. An old wastewater treatment facility was located within the Town, but has since been decommissioned and serves as a daycare centre. The M.D. of Greenview No. 16 does not provide wastewater services, instead, they approve private septic tank developments. Residents in the M.D. have private septic service, and deposit their wastewater at either the Sturgeon Heights, Little Smoky, or Grovedale sewage lagoons. The wastewater is treated for one year before being discharged back to the nearest creek. None of the M.D.'s sewage lagoons are located near the IDP area, so environmental concerns do not exist around these sensitive areas.

### **2.3.2 Power**

The Town of Valleyview and M.D. of Greenview No. 16 are serviced by ATCO's distribution grid. Two generating plants (natural gas turbine generators) service the distribution grid, and has a

capacity of 90 megawatts. Continuous development of the ATCO distribution grid (increasing capacity) can be made at the request of municipalities, and it was conveyed that the current capacity of the two generators is sufficient to service the needs of the growth forecast.

### 2.3.3 Emergency Services

The IDP area has emergency servicing consisting of fire, RCMP, and ambulance. The M.D. has five (5) Fire Departments to cover the entire region that are located in Fox Creek, Valleyview, DeBolt, Grovedale and Grande Cache, with the majority of members being volunteers. A fire servicing agreement is in place between the M.D. Valleyview Fire Department and the Town of Valleyview, for which fire services are jointly funded by each municipality for the area of interest, including the IDP.

An RCMP detachment is located in the Town of Valleyview and serves the area encompassing: Calais, Clarkson Valley, New Fish Creek, Sturgeon Heights, Sturgeon Lake First Nation, Sunset House, Sweet House Creek, Valleyview, Snipe Lake and both Young's Point and Williamson Provincial Parks. The RCMP detachment is made up of twelve (12) officers and four support staff. The M.D. also has a contract with the County of Grande Prairie to augment the RCMP services with Peace Officers to better serve the region. Another agreement is in place between the M.D. and the Alberta RCMP, a Memorandum of Understanding (MOU) that states the M.D. will pay for one advanced position to the RCMP detachment. The position is currently vacant, but when occupied will be financed by the M.D.

Ambulance services within the IDP area are provincially run by Alberta Health Services. While no joint service agreement is in place with the M.D. and Town, the EMS occupies the same building as the Fire Department resulting in a cost sharing mechanism for renting the space.

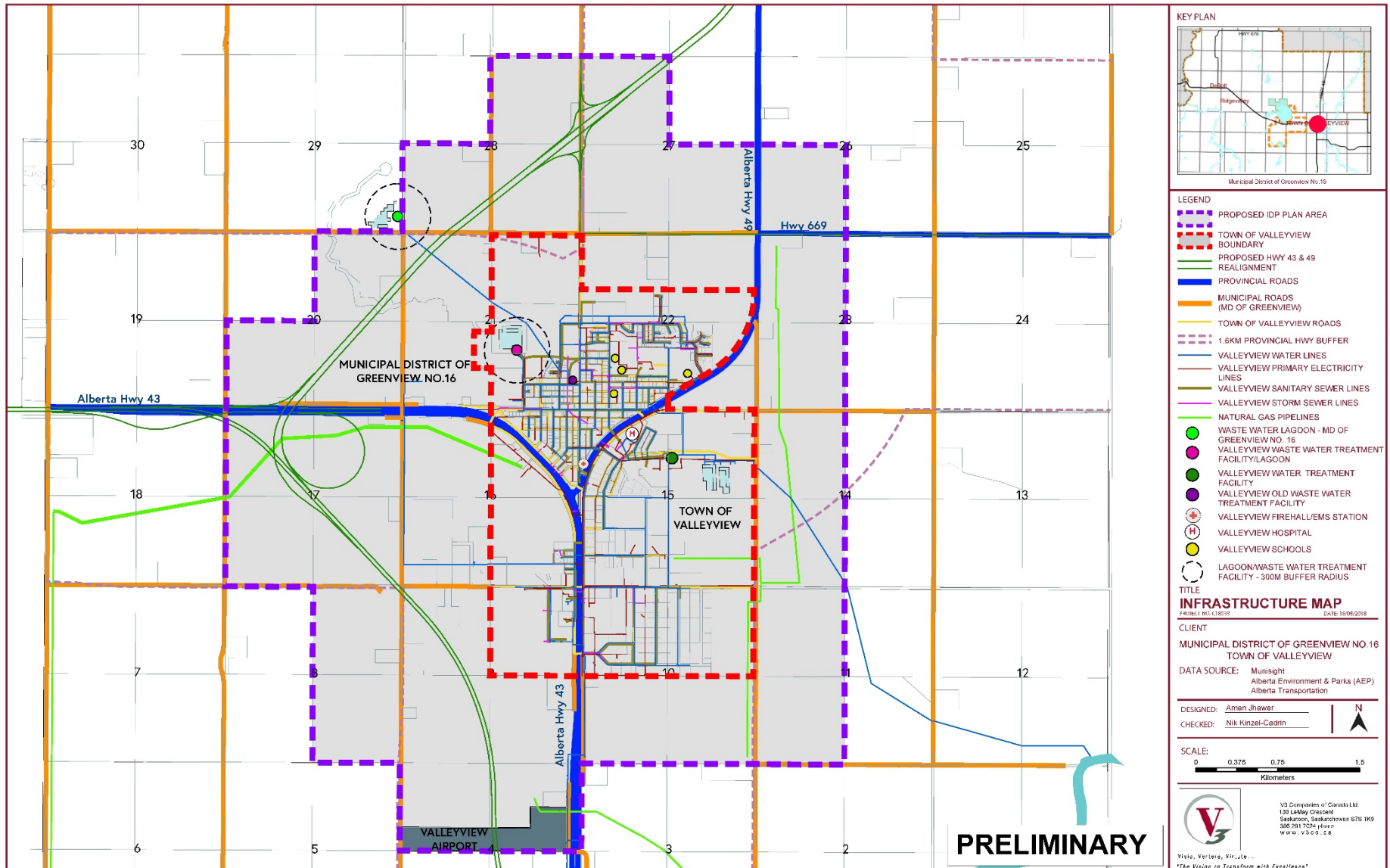
IDP Area has Fire, RCMP and Ambulance emergency services.

The Town and M.D. have a joint agreement in place for Fire services.

The RCMP is federally run, no joint agreement between the M.D. and Town.

Ambulance services is provincially run by Alberta Health Services.

Figure 5: Infrastructure Map



**2.3.4 Environmentally Sensitive Areas**

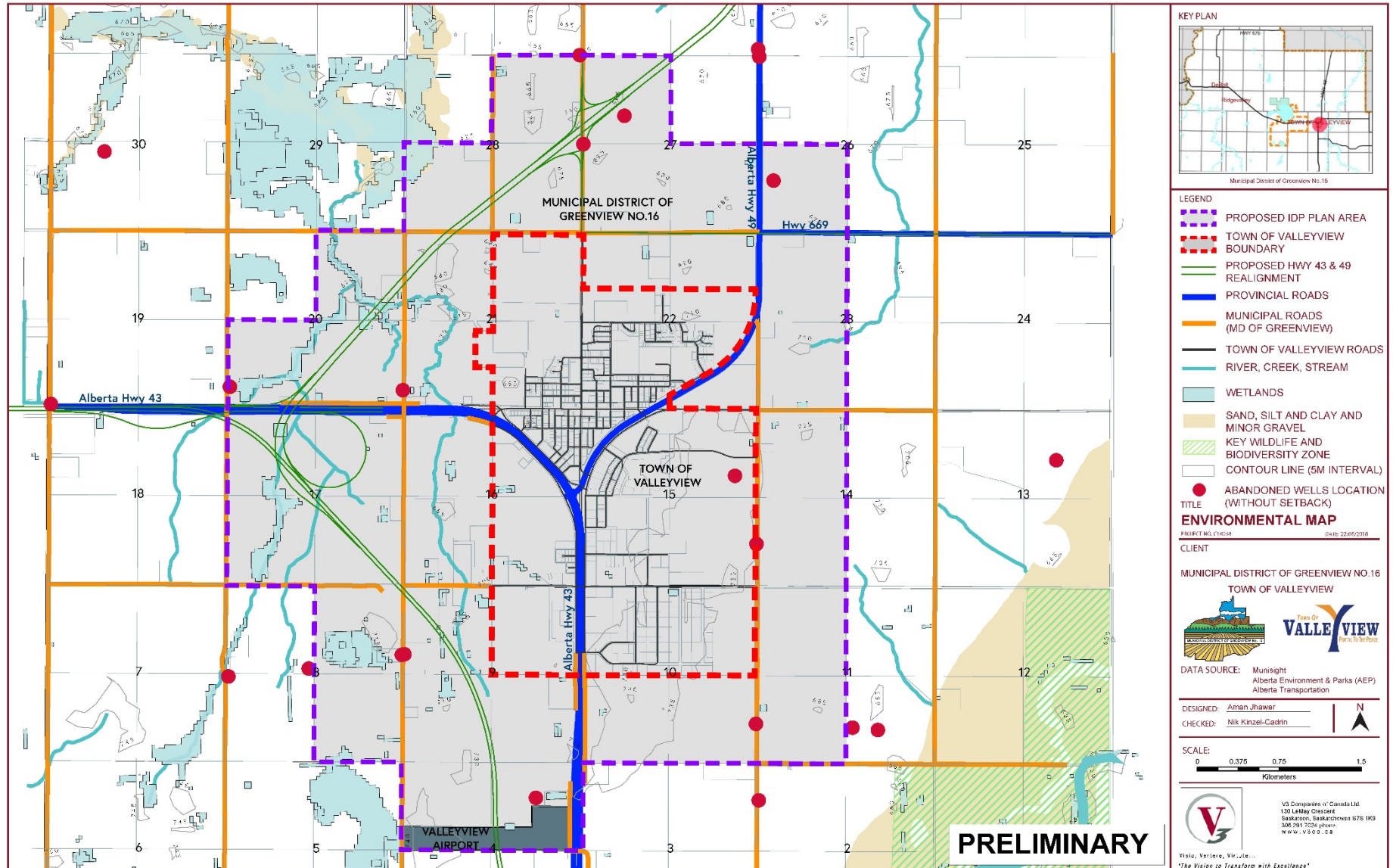
Several environmentally sensitive areas within the IDP area were identified during the baseline research and analysis. As shown on Figure 5, an active sewage lagoon and wastewater treatment facility are located within the boundaries of the proposed IDP. Both municipalities have stated that future development must adhere to policies within the Subdivision and Development Regulation. As such, minimum setback distances have been established for each of the aforementioned environmentally sensitive areas as indicated below:

**Table 9: Environmentally Sensitive Areas within IDP Area**

Environmentally Sensitive Area	Comments
Town of Valleyview Sewage Lagoon & Wastewater Treatment Facility	Located in the NW portion of the proposed IDP area, the active sewage lagoon presents opportunities and threats for future development. Residential, institutional and public use developments must be buffered by 300m from a sewage facility, and future land use maps need to incorporate this requirement. Development near the lagoon should focus on industrial and commercial opportunities.
Town of Valleyview Water Treatment Facility & Water Reservoirs	Located on the eastern side of the Town, the water treatment facility is not considered an environmentally sensitive, however, development adjacent to the facility and water reservoirs should consider the impact on the large public works.
Town of Valleyview Landfill	Although located outside of the proposed IDP area, policy regulations exist that buffer residential, institutional and public use development by 450m from an active landfill.

Also shown on the Environment Map (Figure 6) are locations of abandoned wells within the IDP boundary. Twelve (12) abandoned wells have been identified, but none are anticipated to impact future development within the IDP area. There are no known wildlife biodiversity zones within the IDP boundary, and almost all of the wetlands are located just outside the IDP area to the northwest.

Figure 6: Environmental Map



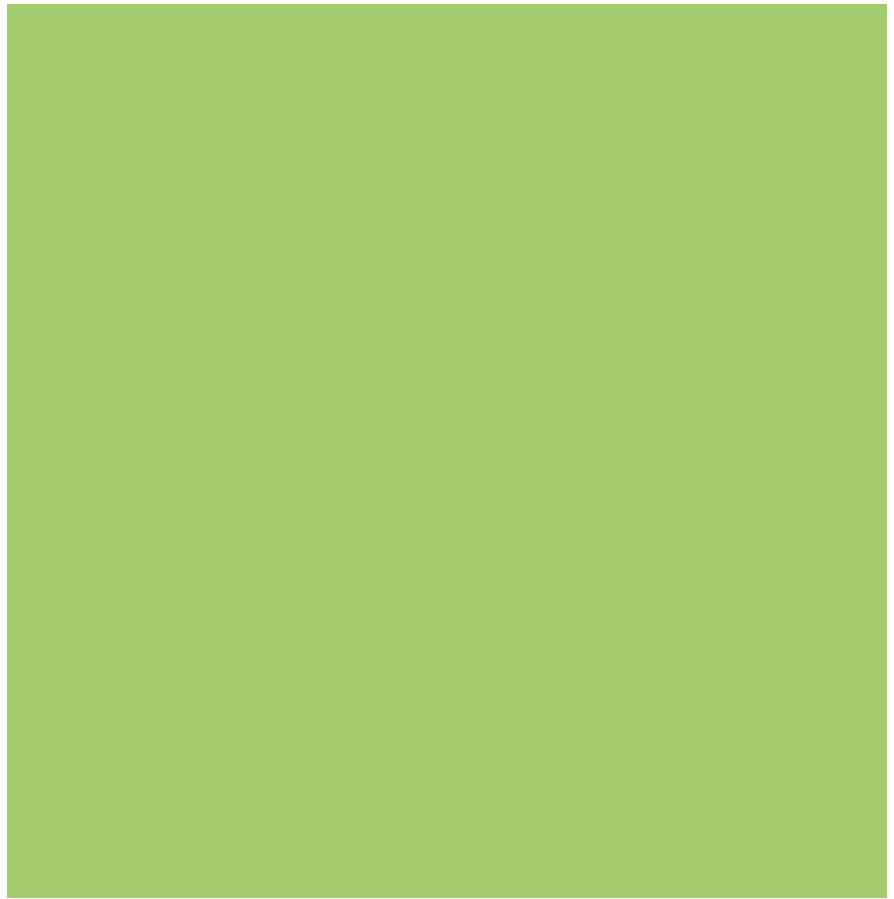
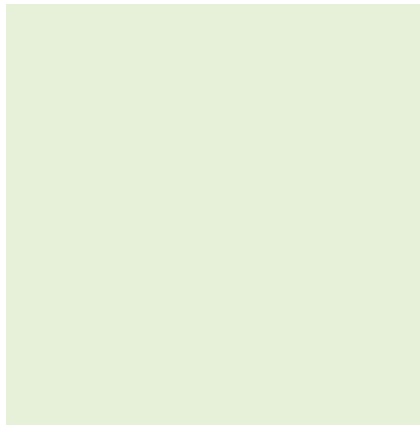
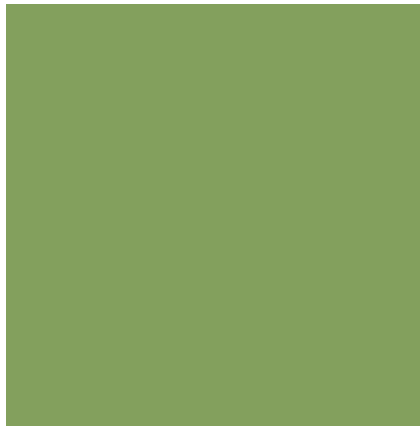
### 3.0 SWOT ANALYSIS

The following table (Table 10) is a high-level summary of the SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) to help inform the IDP process and guide discussion moving forward. Please note that this is not limited and subject to change.

**Table 10: SWOT Analysis**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>- Expected economic and population growth over the next 10 years</li> <li>- Strategic location along provincial highway network</li> <li>- History of municipal collaboration (2009 IDP)</li> <li>- The region is resource rich (agriculture, oil/gas)</li> <li>- Existing facilities and community assets (park system, trails, recreational facilities, library, theatre, community hall, schools)</li> <li>- Airport</li> <li>- The relationship between the Town and M.D., large movement of people and goods between the two</li> </ul>	<ul style="list-style-type: none"> <li>- Environmentally Sensitive Areas (sewage lagoon, water reservoir) limit growth opportunities on adjacent areas within the IDP boundary</li> <li>- Profile and image as a highway service centre, low amounts of tourism and extended stays</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>- Untapped tourism potential</li> <li>- To improve on existing agreements through further collaboration and joint decision making</li> <li>- Transportation corridor/airport</li> <li>- To gain savings and efficiencies for tax payers</li> <li>- To effectively manage land development costs</li> <li>- Industrial conglomerate between M.D. and County of Grande Prairie, will increase commuters and employment spinoffs in the area</li> </ul>	<ul style="list-style-type: none"> <li>- Future highway bypass and its affect on land uses, the airport, and the Town’s economy</li> <li>- Other communities competing for business</li> <li>- Political changes (all levels of government)</li> <li>- Economic shifts</li> </ul>

## Appendix B – Growth Forecast



# Municipal District of Greenview and the Town of Valleyview Growth Forecasts

**WORKING PAPER  
INTERNAL DRAFT 3**

Sep 10, 2018



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# Executive Summary

This analysis assumes that future economic, employment and population growth in the Study Area (comprised of the Town of Valleyview and Municipal District of Greenview) will be led by a number of 'driver industries', defined to include Agriculture and Related, Support Activities for Oil Extraction, Retail Services, and Tourism. The remaining sectors of the Study Area economy are assumed to be 'support industries', and generally grow in tandem with population.

Assuming a moderate economic growth outlook that is generally in line with historical trends, the Study Area's population is expected to increase from 7,430 in 2017 to approximately 9,000 by 2027, representing an average annual growth rate of 1.9 per cent. Across the same time period, the total number of jobs located in the Study Area is projected to increase from 4,030 to about 4,800, representing an average annual growth rate of 1.8 per cent.

This analysis denotes a number of 'Intermunicipal Development' (IDP) areas, generally located around the municipal border of Valleyview. These IDP areas are primarily undeveloped as of 2017, but have been assigned a development type (residential, commercial, industrial, agricultural) intended for future use.

Using geographic and land use definitions and designations outlined in the Valleyview Intermunicipal Development Plan<sup>1</sup> (2009), this analysis finds that the IDP areas are expected to remain undeveloped until at least 2021, regardless of intended development type. Valleyview presently contains a significant amount of undeveloped urban reserve, which was found to be a more likely site for development relative to the IDP areas. Using these assumptions, this analysis found that population in IDP areas (residential) would reach approximately 550 by 2027. The total number of jobs in IDP areas (residential, commercial and industrial) would reach approximately 100 by 2027. While estimated residential and employment development capacities within the Town of Valleyview would be approached in this forecast, only a small portion of developable area is utilized in IDP areas. These IDP areas do not include the planned Big Mountain Industrial Park in the MD of Greenview or the Valleyview Airport.

The proposed realigning of Highways 43 and 49 does not impact forecasts of aggregate population and job growth. However, the realigning would likely impact the geographic prioritization of commercial and industrial development. Job growth would occur sooner in IDP areas close to the new highway location, with the timing of development and corresponding job growth in Valleyview's urban reserve slowing as a result. The timing of the highway realignment would obviously be a major factor in determining the timing of growth in these IDP areas. This adjusted forecast finds that total jobs in commercial and industrial IDP areas exceeds 300 by 2027, compared to about 75 jobs in the prior forecast. As a result, job growth in the rest of Valleyview slows to 0.8 per cent, from 1.7 per cent in the prior forecast.

Forecasts related to residential IDP areas are unaffected by the proposed highway realignment.

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<sup>1</sup> Valleyview Intermunicipal Development Plan, April 2009. <http://mdgreenview.ab.ca/wp-content/uploads/2013/12/VVIDP-Final.pdf>

# Growth Scenarios

A population and employment forecasting model was used to project growth for each of three scenarios.

- ▶ **Low Scenario:** This scenario represents a continuation of the current slowdown in the economic growth in the region, including lower growth in the oil industry, which does not recover to the pre-oil price decline levels of 2014. Further, this scenario assumes that little to no action is taken in the region to encourage its potential as a tourism hub. Population growth in the region is assumed to continue to exhibit only minimal growth.
- ▶ **Base Scenario:** This scenario represents the 'best guess' as to the growth which can be expected for the region and assumes that energy prices recover to levels which will remain slightly below those that existed prior to the oil price declines of 2014. Further, this scenario assumes that the development guidelines introduced in the Town of Valleyview are somewhat successful in establishing the region as a tourism hub, bringing corresponding output and employment gains in the retail sector. Population growth is assumed to increase relative to recent trends, but remains below the projected provincial average.
- ▶ **High Scenario:** This scenario represents an 'optimistic' picture of future growth that can be expected for the region, including a return of oil prices to levels similar to those that existed prior to the oil price declines of 2014. Further, this scenario assumes that Valleyview is successful in establishing itself as a tourism hub; and that that a revitalized Valleyview commercial sector initiates a period of high growth in retail activity. Population growth in the region is assumed to increase substantially, driven primarily by employment-induced migration.

# Base Year Profile

## TOWN OF VALLEYVIEW

Between 2011 and 2016 the Town of Valleyview's population increased from 1,761 to 1,863 according to the Federal Census- an average annual growth rate of about 1.1%. Based on analyzing historical population trends, along with population projections completed by Alberta Treasury Board and Finance,<sup>2</sup> Valleyview's 2017 population was estimated to have not changed substantially from its 2016 level.

The median age of Valleyview's population in 2016 was 38.6 years, compared to the provincial average of 36.7 years. As well, according to the 2016 Federal Census Profiles,<sup>3</sup> approximately 45% of Valleyview's labour force possessed a postsecondary certificate, diploma or degree, compared to the provincial average of 55%; and the town's participation rate was 67.8% (compared to the provincial average of 71.8%).

## MUNICIPAL DISTRICT OF GREENVIEW

Between 2011 and 2016 the Municipal District (MD) of Greenview's population increased from 5,299 to 5,583 according to the Federal Census - an average annual growth rate of about 1.0%. Based on analyzing historical population trends, along with population projections completed by Alberta Treasury Board and Finance,<sup>4</sup> the MD of Greenview's 2017 population was estimated to have not changed substantially from its 2016 level.

The median age of the MD of Greenview's population in 2016 was 39.9 years, compared to the provincial average of 36.7 years. As well, according to the 2016 Federal Census Profiles,<sup>5</sup> approximately 41% of the MD of Greenview's labour force possessed a postsecondary certificate, diploma or degree, compared to the provincial average of 55%; and the district's participation rate was 72.7% (compared to the provincial average of 71.8%).

## OTHER GEOGRAPHIES

Other geographies included in this analysis, which possess significant economic linkages with both Valleyview and the MD of Greenview, include the Town of Grande Cache, the Town of Fox Creek, Sturgeon Lake 154 (Reserve), the City of Grande Prairie, and the County of Grande Prairie. These economic linkages exist in the form of commuting relationships and retail spending overlap.

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<sup>2</sup> Alberta Treasury Board and Finance, Alberta Population Projections (2017-2041), CD18 (Medium Scenario). <https://www.alberta.ca/population-statistics.aspx>

<sup>3</sup> Statistics Canada. 2017. Valleyview, T [Census subdivision], Alberta and Alberta [Province] (table). Census Profile. 2016 Census. Statistics Canada Catalogue no. 98-316-X2016001. Ottawa. Released November 29, 2017.

<sup>4</sup> Alberta Treasury Board and Finance, Alberta Population Projections (2017-2041), CD18 (Medium Scenario). <https://www.alberta.ca/population-statistics.aspx>

<sup>5</sup> Statistics Canada. 2017. Greenview No. 16, MD [Census subdivision], Alberta and Greenview No. 16, MD [Census subdivision], Alberta (table). Census Profile. 2016 Census. Statistics Canada Catalogue no. 98-316-X2016001. Ottawa. Released November 29, 2017.

## 2017 Population of Municipalities in the Economic Sub-Region

Geography	2017 Population Estimate
Valleyview	1,863
MD of Greenview	5,299
Grande Cache	3,571
Fox Creek	1,971
Sturgeon Lake 154	1,512
Grande Prairie	64,785
County of Grande Prairie	22,858

### BASE LABOUR FORCE AND YEAR JOBS

The estimated labour force along with the number of jobs located in the Town of Valleyview and the MD of Greenview in the base year (2017) are shown in the tables below, according to 2-digit NAICS categories.

Labour force data by 2-digit NAICS were retrieved from 2016 Federal Census community profiles.<sup>6</sup> These estimates represent the number of workers (by industry) residing in each geography. Commuting flow from geography of residence to geography of work was estimated using data derived from the Federal Census.<sup>7</sup> The labour force composition of the geography of residence was used to estimate the industry for employment for commuters.

The difference between the labour force and jobs measures is that the former estimates the industry of employment for workers residing in the geography, while the latter estimates actual employment by industry in the geography.

The Town of Valleyview's labour force and job total were estimated at 985 and 1,750 respectively. This means that in total, there are 765 workers that commute to Valleyview to work each day (on a net basis).<sup>8</sup>

The MD of Greenview's labour force and job total were estimated at 3,110 and 2,280 respectively. This means that there are 830 workers in the MD that commute to another community for work each day (on a net basis).<sup>9</sup>

Note that these labour force estimates include only permanent residents of the municipalities, and do not consider work camps or mobile workers in the study area. A discussion of this non-permanent labour force is included later in this report.

<sup>6</sup> Statistics Canada, Census Profiles, 2016, <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/index.cfm?Lang=E>.

<sup>7</sup> Statistics Canada, Commuting Flow from Geography of Residence to Geography of Work - Census Subdivisions. <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/dt-td/Rp-eng.cfm?APATH=3&DETAIL=0&DIM=0&FL=A&FREE=0&GC=0&GID=0&GK=0&GRP=1&LANG=E&PID=111332&PRID=10&PTYPE=109445&S=0&SHOWALL=0&SUB=0&THEME=125&Temporal=2016&VID=0&VNAMEE=&VNAMEF=>

<sup>8</sup> Public administration employment in the Town of Valleyview represents jobs associated with federal, provincial, and municipal levels of government. As well, the jobs total would be reflective of the positions with the MD of Greenview that are located in the Town.

<sup>9</sup> Public administration employment in the MD of Greenview represents jobs associated with federal, provincial, and municipal levels of government. As well, the jobs total would be reflective of the positions with the MD of Greenview that are located in the Town.

## Town of Valleyview, Labour Force and Jobs Estimates by Industry, 2017<sup>10</sup>

Industry	Labour Force	Jobs	Net Commuters
11 Agriculture, forestry, fishing and hunting	30	56	26
21 Mining, quarrying, and oil and gas extraction	135	233	98
22 Utilities	25	25	0
23 Construction	90	242	152
31-33 Manufacturing	30	35	5
41 Wholesale trade	20	37	17
44-45 Retail trade	135	219	84
48-49 Transportation and warehousing	30	54	24
51 Information and cultural industries	15	15	0
52 Finance and insurance	25	28	3
53 Real estate and rental and leasing	0	19	19
54 Professional, scientific and technical services	15	35	20
55 Management of companies and enterprises	0	0	0
56 Administrative and support, waste management and remediation services	25	64	39
61 Educational services	55	59	4
62 Health care and social assistance	105	164	59
71 Arts, entertainment and recreation	10	22	12
72 Accommodation and food services	130	207	77
81 Other services (except public administration)	40	95	55
91 Public administration	70	142	72
All industry categories	985	1,750	765

<sup>10</sup> Net Commuters is equal to the number of jobs in the community minus the local labour force. Where Net Commuters is positive, there is a net inflow of workers to the municipality. Where Net Commuters is negative, there is a net outflow of workers from the municipality.

## MD of Greenview, Labour Force and Jobs Estimates by Industry, 2017<sup>11</sup>

Industry	Labour Force	Jobs	Net Commuters
11 Agriculture, forestry, fishing and hunting	585	397	-188
21 Mining, quarrying, and oil and gas extraction	390	417	27
22 Utilities	45	29	-16
23 Construction	405	298	-107
31-33 Manufacturing	130	89	-41
41 Wholesale trade	90	60	-30
44-45 Retail trade	245	164	-81
48-49 Transportation and warehousing	225	154	-71
51 Information and cultural industries	0	2	2
52 Finance and insurance	35	23	-12
53 Real estate and rental and leasing	55	38	-17
54 Professional, scientific and technical services	110	77	-33
55 Management of companies and enterprises	0	0	0
56 Administrative and support, waste management and remediation services	80	59	-21
61 Educational services	170	110	-60
62 Health care and social assistance	180	116	-64
71 Arts, entertainment and recreation	25	18	-7
72 Accommodation and food services	85	55	-30
81 Other services (except public administration)	160	115	-45
91 Public administration	95	60	-35
All industry categories	3,110	2,280	-830

### WORK CAMPS

Data regarding the development permits issued for work camps were collected from the meeting agendas and minutes of the MD of Greenview's Municipal Planning Commission.<sup>12</sup>

As of September 2018, as many as 64 work camps were estimated to be in operation in the MD of Greenview. The total capacity of these camps was almost 9,000 persons, with an average capacity of about 140 persons. Work camp capacity ranged from as high as 1,250 persons to as few as 2.

While the permitted capacities of these camps are known, the number of workers residing at each camp at any point in time is uncertain. Further, a camp is permitted to operate for a period of one year before renewal, but the duration of operation for each camp (whether the camp is in operation for the entirety of the year) is unknown. For these reasons, the figures provided for work camp capacities could be considered an upward limit of workers at any point in time.

<sup>11</sup> Net Commuters is equal to the number of jobs in the community minus the local labour force. Where Net Commuters is positive, there is a net inflow of workers to the municipality. Where Net Commuters is negative, there is a net outflow of workers from the municipality.

<sup>12</sup> Municipal District of Greenview, MPC Minutes and Meeting Dates, <http://mdgreenview.ab.ca/governance/mpc-minutes-meeting-dates/>

Camp employment is generally associated with energy and forestry projects. Larger capacity camps (100+ persons) are primarily concentrated around the areas of Fox Creek, along Highway 40 between Grande Prairie and Grande Cache, and in the central part of the MD between Highways 40 and 43. These larger camps constitute the majority of total camp-based employment (about 90%).

The non-permanent employment associated with these camps is not included in the labour force and jobs estimates detailed in the section above.

### Work Camps in the MD of Greenview

Operator	Coordinates	Capacity (Persons)	Renewal	Area
SEVEN GENERATIONS ENERGY LTD	2-11-64-4-W6	20		Kakwa
ORLEN UPSTREAM CANADA LTD	2-17-63-5-W6	10		Kakwa
OMERS ENERGY	NE-1-61-1-W6	2	YES	Simonette
MILLAR WESTERN FOREST PRODUCTS LTD	11-9-59-23-W5	25	YES	Berland
HORIZON NORTH CAMP & CATERING	NE-22-64-26-W5	179	YES	Simonette
CONOCOPHILLIPS CANADA OPERATIONS LTD	SW-31-60-2-W6	12		Resthaven
SUREWAY LOGGING	NW-30-68-6-W6	40	YES	Elmworth
TRILOGY RESOURCES LTD	5-15-63-19-W5	8	YES	Kaybob North
RIGHT CHOICE CAMPS AND CATERING LTD	NW-30-63-5-W6	250	YES	Kakwa
CHEVRON CANADA LIMITED	NE-26-61-21-W5	20		Kaybob South
MODERN RESOURCES INC	NE-9-62-8-W8	2	YES	Route
SEVEN GENERATIONS ENERGY LTD	SE-30-63-5-W6	144	YES	Kakwa
STRATH RESOURCES LTD	6-17-61-3-W6	304		Jayar
MODERN RESOURCES INC	SE-21-62-8-W6	20		Route
ATHABASCA OIL CORPORATION	15-19-62-22-W5	8	YES	Grizzly
MODERN RESOURCES INC	SE-29-63-8-W6	20		Red Rock
MODERN RESOURCES INC	SW-10-64-9-W6	20		Red Rock
MODERN RESOURCES INC	SW-3-65-9-W6	20		Red Rock
RIGHT CHOICE CAMPS & CATERING / JUPITER RESOURCES INC	4-16-60-2-W6	147		Resthaven
XTO ENERGY CANADA ULC	NE-20-60-20-W5	256		Kaybob
IRON PINE CONTRACTING LTD / WEYERHAEUSER CANADA	NE-10-62-6-W6	35		Kakwa
D & J ISLEY AND SONS CONTRACTING LTD / WEYERHAEUSER COMPANY LIMITED	NW-22-62-4-W6	25		Kakwa
PEACE COUNTRY LAND LTD / CHEVRON CANADA LIMITED	SW-32-62-23-W5	4		Waskahigan
RIGHT CHOICE CAMPS & CATERING LTD / COMPASS GROUP CANADA LTD	NW-5-64-1-W6	532		Latornell
CHEVRON CANADA LIMITED	1-33-62-16-W5	42		Two Creeks
KEYERA ENERGY LTD	NE-6-63-25-W5	40		Simonette
HARVEST OPERATIONS CORP	SW-33-62-6-W6	6	YES	Kakwa
PEACE COUNTRY LAND LTD / CHEVRON CANADA LIMITED	NW-9-62-23-W5	46		Waskahigan
BLACK DIAMOND GROUP LIMITED PARTNERSHIP	SE-30-64-24-W5	234		Simonette
CARIBOU LAND SERVICES LTD / ENERPLUS CORPORATION	SW-36-66-24-W5	6	YES	Ante Creek
MCTAVES CAMP & CATERING LTD	NE-35-62-20-W5	250	YES	Kaybob South
HORIZON NORTH CAMPS & CATERING / DEVCO DEVELOPMENTS CORP	SE-34-67-5-W6	390		Gold Creek
ALTUS GEOMATICS / BLUE RIDGE LUMBER INC	SW-34-62-20-W5	60	YES	Kaybob South

Operator	Coordinates	Capacity (Persons)	Renewal	Area
PEMBINA PIPELINE CORPORATION	12-9-63-2-W6	2		Lator
HORIZON NORTH CAMP & CATERING	SW-16-67-7-W6	685	YES	Wapiti
HORIZON NORTH CAMPS & CATERING	10-3-63-19-W5	540	YES	Fox Creek
HORIZON NORTH CAMPS & CATERING	SE-5-64-5-W6	362	YES	Kakwa
CEQUENCE ENERGY LTD	12-13-62-27-W5	160	YES	Simonette
INTEGRITY LAND INC / RIFE RESOURCE LTD	14-8-62-4-W6	4	YES	Kakwa
WEYERHAEUSER COMPANY LIMITED	NW-27-63-12-W6	25	YES	Narrowway
RIGHT CHOICE CAMPS & CATERING LTD / MURPHY OIL COMPANY LTD	SE-10-63-25-W5	212		Simonette
RIGHT CHOICE CAMPS & CATERING LTD	NE-19-62-20-W5	300	YES	Kaybob South
ANCTIMBER LTD	SE-17-59-23-W5	12	YES	Berland
PEYTO EXPLORATION & DEVELOPMENT CORP	2-11-60-4-W6	6	YES	Smoky
ENCANA CORPORATION	NW-19-62-22-W5	1,250	YES	Grizzly
TIMBER PRO LOGGING LTD / CANADIAN FOREST PRODUCTS LTD	SE-11-63-27-W5	25	YES	Simonette
TOURMALINE OIL CORP	NW-28-61-6-W6	25	YES	Kakwa
TOURMALINE OIL CORP	12-15-62-6-W6	25	YES	Kakwa
TOURMALINE OIL CORP	7-7-61-4-W6	25	YES	Kakwa
TOURMALINE OIL CORP	7-10-62-6-W6	8	YES	Kakwa
MURPHY OIL COMPANY LTD	SW-23-64-18-W5	80	YES	Kaybob North
MURPHY OIL COMPANY LTD	NW-2-65-18-W5	80	YES	Kaybob North
DJ CATERING LTD	NW-10-63-25-W5	377	YES	Simonette
DJ CATERING LTD	04-15-59-23-W5	254		Berland
XTO ENERGY CANADA	SE-10-60-01-W6	15	YES	Wanyandie
SEVEN GENERATIONS ENERGY LTD	14-11-64-05-W6	20		Kakwa
SEVEN GENERATIONS ENERGY LTD	01-21-63-02-W6	3	YES	Lator
SEVEN GENERATIONS ENERGY LTD	NW-04-64-05-W6	304	YES	Kakwa
SEVEN GENERATIONS ENERGY LTD	02-11-64-04-W6	20	YES	Kakwa
SEVEN GENERATIONS ENERGY LTD	07-04-64-06-W6	2	YES	Kakwa
CEQUENCE ENERGY LTD	NW-13-62-27-W5	376		Simonette
SUREWAY LOGGING LTD	NW-33-69-06-W6	20	YES	Grovedale
RIGHT CHOICE CAMPS & CATERING LTD	SE-31-68-08-W6	532		Grovedale
LOW IMPACT INC	NE-17-70-22-W5	20	YES	Valleyview
<b>TOTAL:</b>		<b>8,946</b>		

# Driver Industries

This section of the report provides information on the driver industries defined for the Town of Valleyview and the MD of Greenview, and rationales as to why these industries are expected to drive near-term job growth in the region. While the Town of Valleyview and the MD of Greenview differ from each other in terms of industry prevalence and economic strengths possessed, the high degree of interrelatedness between the two municipalities generally allows for mutually beneficial growth and a shared outlook.

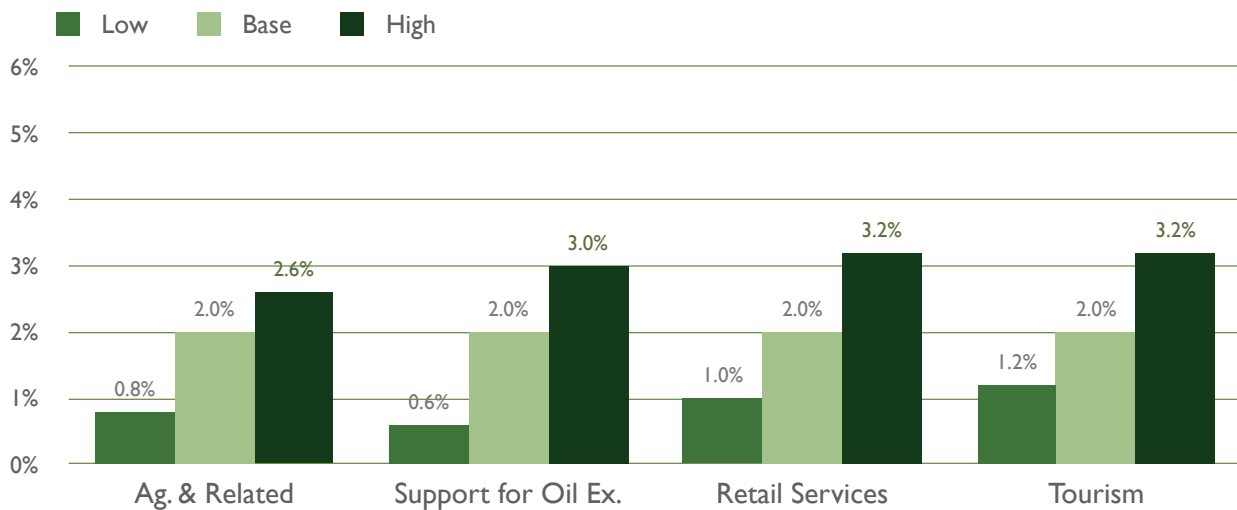
In general, the driver industry groups listed above act to support economic growth in both the Town of Valleyview and the MD of Greenview, with exceptions noted in the driver industry descriptions section below. It is also noted that the expected output and employment growth rates of these regional drivers are reliant to some extent on economic conditions which may be external to the region (i.e. oil prices, economic and labour market conditions in other regions of Alberta, etc.)

For each scenario, a series of growth rates were developed for the industries (or industry groups) that are expected to lead growth in the region – referred to as ‘Driver Industries’. For the Study Area, four Driver Industry groups have been identified as follows:

- ▶ Agriculture and Related
- ▶ Support Activities for Oil Extraction
- ▶ Retail Services
- ▶ Tourism

Each of the industries included as Driver Industries has been determined to have a particular level of influence on employment in the Town of Valley and/or the MD of Greenview. Growth of these industries has been determined to have an affect on the net migration of workers and their families to the region. The importance of each industry to either municipality is summarized in the following section. The information presented for each industry category has been based on research of publicly available information, with sources are provided as they are referenced below.

## Scenario-Specific Driver Industry Employment Growth Rates (Average Annual)



The growth rates for each driver industry in each scenario have been based on a review of the historical growth patterns for these industries in the context of the expected growth of the region and province in the future.

## AGRICULTURE AND RELATED

Agriculture is an important industry of employment in both the Town of Valleyview and the MD of Greenview. While the majority of the region's primary agriculture activity occurs in the MD of Greenview, a number of related and supporting and specialized sub-sectors provide opportunities for growth in the region as a whole. These sub-sectors are outlined below.

### Agri-Tourism

Agri-tourism is a form of niche tourism involving any agriculturally based operation or activity that brings visitors to a farm or ranch. The sector could include employment in the agriculture, forestry, fishing and hunting as well as the food and accommodation sector.

Agri-tourism is growing in popularity internationally, as evidenced by nearby Smoky Lake's 2-day pumpkin festival which drew an estimated attendance of 5,000 people.<sup>13</sup>

An example of a business already operating in the region is Summer's Gold U-Pick Strawberries (Greenview).

### Commercial Greenhouses

Valleyview and Greenview primarily rely on Freson Bros. and Co-op Foods (or larger grocers in Grande Prairie) for their produce, which source most of their fruit and vegetables from California and other major producing regions. This means that the produce must travel long distances to reach the area and can only provide a limited range of specialty food products. Commercial greenhouses are capable of providing higher-quality produce, niche food items, and crops that are native or popular in the region - with typically much lower transportation costs. Commercial greenhouses can also provide agri-tourism opportunities.

The aforementioned Summer's Gold (Greenview) is the only commercial greenhouse currently operating in the region- though there is significant evidence of growth potential with 230 commercial greenhouses operating in Alberta. A growth limitation in this sub-sector is that commercial greenhouses are only typically economically viable at a minimum size of 1-2 acres, with much larger operations exhibiting improved sustainability.

### Agricultural Processing

Processing raw materials and intermediate products derived from the agricultural sector allows for significant value-added potential. Agri-processing includes activities such as meat and dairy processing, grain and oilseed milling, and fruit and vegetable preserving.

While the region hasn't yet exhibited strong gains in this sub-sector, food and beverage processing businesses is Alberta's third-largest manufacturing sector and employs 20,400 province-wide (17.7% of Alberta's manufacturing jobs). Alberta is also the third largest producer and exporter of agri-food products in Canada. Employment grew at a robust annual average of 3.2% nationally in this sub-sector between 2013 and 2016.

While the region does not yet exhibit a high degree of specialization in this sub-sector, an example of a business currently operating and offering specialized agriculture support services is Moore Seed Processors (Greenview).

### Agri-Hubs

Agri-hubs are collections of agriculturally-focused businesses that support each other, and exist to promote growth in the industry. An agri-hub has already been formed in the region, with the Valleyview and Districts

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<sup>13</sup> Alberta Agriculture and Forestry, Agri-tourism: Rural Festivals and Special Events. [http://www1.agric.gov.ab.ca/\\$department/deptdocs.nsf/all/agdex1364](http://www1.agric.gov.ab.ca/$department/deptdocs.nsf/all/agdex1364)

Agricultural Society active since 1967. The Society organizes events such as an agricultural fair, horse show, and rodeo, and provides equipment and facilities for agricultural events.

At present, it has been estimated that approximately 80 of the jobs located in Valleyview are directly involved in the agriculture and related driver industry group (representing about 5% of total local jobs). In Greenview, about 380 jobs are associated with the agriculture and related industry group (representing about 17% of local jobs).

Employment in the region's agriculture and related driver industry group is expected to increase at an average annual rate of 2.0% in the base growth scenario; 2.6% in the high growth scenario; and 0.8% in the low growth scenario.

## SUPPORT ACTIVITIES FOR OIL EXTRACTION

The support activities for oil extraction sector has played a significant part in the economic growth of the region. This driver industry group includes jobs across a variety of industries, including mining, quarrying and oil and gas extraction, construction, transportation and warehousing, and professional, scientific and technical services. For 2017, it has been estimated that there approximately 295 jobs related to support activities for oil extraction in the Town of Valleyview (representing about 17% of total jobs), and approximately 540 related jobs in the MD of Greenview (representing 24% of total jobs).

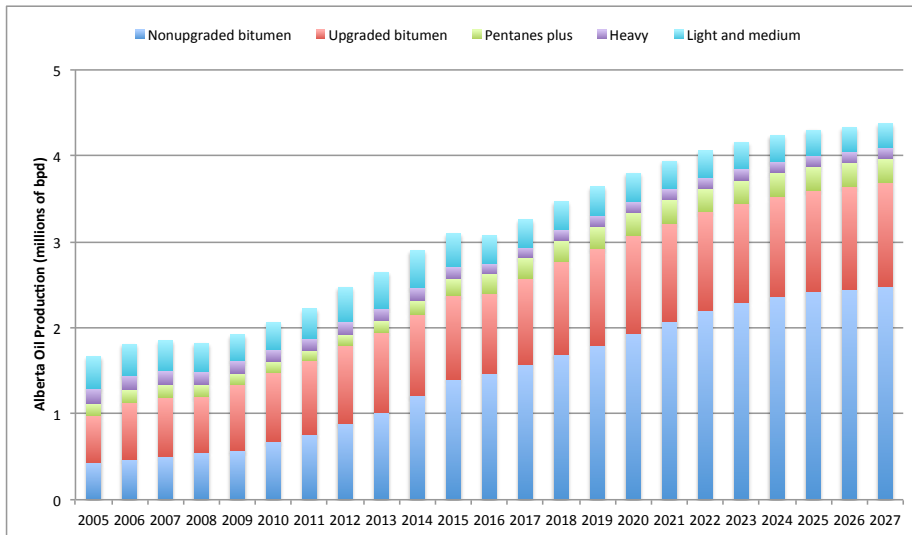
Resource extraction is the primary driver of Alberta's economy, including oil and gas fields along the eastern slope of the Rockies, oil sands to the north of Edmonton, and extensive mining operations in Alberta and the Northwest Territories. For Valleyview and Greenview, businesses in this industry are primarily involved in oil-related equipment rental as well as transportation services.

Based on the latest forecast from the Alberta Energy Regulator,<sup>14</sup> crude oil production in Alberta is expected to increase from an average of 3.26 million barrels per day in 2017 to 4.38 million barrels per day by 2027, an average annual increase of about 3%. While this rate of production growth is below that observed in Alberta between 2007 and 2017 when crude production increased at an average annual rate of 5.8%, the industry has yet to fully recover from the price collapse that began in 2014 and capital investment in new, large-scale extraction projects has been limited. Historical and projected levels of provincial oil production (according to the type of oil produced) are shown in the chart below:

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<sup>14</sup> Alberta Energy Regulator, Alberta supply of crude oil and equivalent, Base case forecast, March 2018, [https://www2.aer.ca/t/Production/views/ExecutiveSummaryFigure7Albertasupplyofcrudeoilandequivalent/Figure7Albertasupplyofcrudeoilandequivalent?embed=y&showShareOptions=true&:display\\_count=no&showVizHome=no](https://www2.aer.ca/t/Production/views/ExecutiveSummaryFigure7Albertasupplyofcrudeoilandequivalent/Figure7Albertasupplyofcrudeoilandequivalent?embed=y&showShareOptions=true&:display_count=no&showVizHome=no)

## Alberta Oil Production by Type, Historical and Forecast, 2005 to 2027



The gradual stabilization of crude oil prices is a critical factor in achieving the increased production growth described above. In its 'base case' forecast,<sup>15</sup> the Alberta Energy Regulator expects the benchmark price of West Texas Intermediate (WTI) to increase from the 2017 average of US\$50.95 to US\$84.47 by 2027. This price forecast supports the assumption of moderate production growth, with the 'breakeven' price for new projects estimated to be around US\$55.<sup>16</sup> Forecasters are generally not optimistic that oil prices will soon return to the highs observed in previous years, when WTI reached a peak of US\$98.05 in 2013.

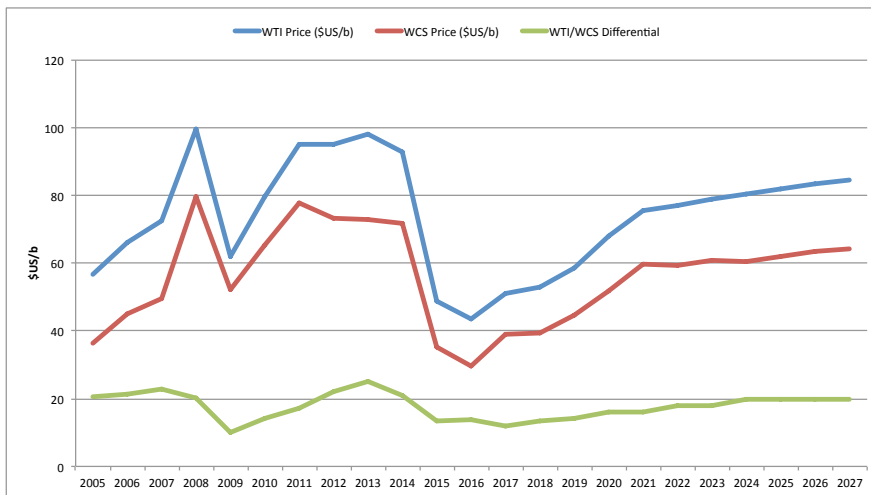
It is noted that producers of heavy oil in Alberta do not typically receive the WTI price for their product. Heavy oil prices are discounted for the extra costs required for transportation and upgrade. The benchmark price for Alberta producers is better reflected by the Western Canadian Select (WCS) benchmark, which typically trades at a US\$10-25 discount relative to WTI. While WCS traded at an average discount of about US\$12 in 2017, this differential is expected to widen to US\$20 by 2027, due primarily to pipeline capacity and upgrading constraints. While a provincial government initiative that intends to provide \$1 billion to bitumen upgrading investment between 2019 and 2027 could assist in narrowing the price gap,<sup>17</sup> forecasters anticipate a widening of the WTI/WCS price differential - another factor likely to moderate growth in Alberta's oil sector relative to recent historical averages, and correspondingly limit growth somewhat in the supporting industries located in the region.

<sup>15</sup> Alberta Energy Regulator; Price of WTI, Base case forecast, March 2018, [https://www2.aerca/t/Production/views/ExecutiveSummaryFigure3PriceofWTI/ExecutiveSummaryFigure3PriceofWTI?embed=y&showShareOptions=true&:display\\_count=no&:showVizHome=no](https://www2.aerca/t/Production/views/ExecutiveSummaryFigure3PriceofWTI/ExecutiveSummaryFigure3PriceofWTI?embed=y&showShareOptions=true&:display_count=no&:showVizHome=no)

<sup>16</sup> Nia Williams, Canada's oil sands survive, but can't thrive in a \$50 oil world, Reuters, October 18, 2017.

<sup>17</sup> Dean Bennett, Alberta to investment \$1B over 8 years on bitumen upgrading projects, Global News, February 26, 2018.

## WTI and WCS Price and Differential per Barrel, Historical and Base Forecast, 2005 to 2027



This driver category includes a wide variety of sub-industries with support relationships to the oil sector, such as nonresidential maintenance and repair, services to buildings and dwellings, waste management and remediation, scenic and sightseeing transportation and support activities for transportation, commercial and industrial machinery and equipment rental and leasing. Direct support industries to the energy sector are also included in this driver category, such as mineral exploration, geophysical services and surveying. Industries related to manufacturing and distribution can also be included in this category, such as cutting and machine tool accessory, rolling mill, and other metalworking machinery manufacturing, material handling equipment manufacturing, valve and fittings other than plumbing, wholesale trade, and warehousing and storage.

Examples of businesses currently operating in the region that fall into this driver industry group include Direct Pressure (oilfield trucking) and Lukan 4 (oilfield maintenance) in Valleyview; and Debolt Contracting Ltd. (oilfield equipment supply) and Northland Tank and Heavy Haul Ltd. (oil-related tank transportation) in Greenview.

Employment in the region's support for oil extraction driver industry group is expected to increase at an average annual rate of 2.0% in the base growth scenario; 3.0% in the high growth scenario; and 0.6% in the low growth scenario.

### RETAIL SERVICES

While growth in retail services activity is typically driven by local population growth, the Town of Valleyview's strategic location at Highways 43 and 49 allows for access to a market of non-local retail spending.

Highway traffic contributes to retail spending, with potential consumers who may be in Valleyview on a temporary (travelers passing through) or semi-temporary (tourists in the region) basis. A substantial number of workers in the oil and agricultural sectors also pass through Valleyview. It is estimated that traffic on Highway 43 has increased by more than 40% since 2009. These impermanent consumers represent a significant opportunity for output and employment growth in Valleyview's retail sector.

Proximity to Grande Prairie also serves as an opportunity for local retailers. While Grande Prairie retailers are competitors with Valleyview (with as much as 60% of Valleyview's retail spending estimated to flow into Grande Prairie), strategic specialization and expansion on part of local retailers could attract a greater number of consumers from the Grande Prairie area. Valleyview is strategically located in the southeastern area of Grande Prairie's 'Primary Trade Area'.<sup>18</sup> Residents within a 45-minute drive time of Valleyview (many

<sup>18</sup> Retail Market & Gap Analysis - City of Grande Prairie, Cushing Terrell Architecture Inc., 2016.

of whom lacking access to a variety of retail services in their own municipalities) represent a potential consumer base that is approximately 2.5 times larger than that which Valleyview presently serves.

Valleyview's capacity to attract consumer spending from outside of the municipality is supported by a 2016 inventory of retail space, which estimated a total of 165,000 square feet of space - significantly more than the estimated 90,000 square feet that would be required if Valleyview's resident spending were entirely self-contained.<sup>19</sup>

A comprehensive set of commercial development guidelines introduced in 2016 should assist Valleyview in attracting a greater amount of retail spending. These guidelines encourage the development and beautification of downtown Valleyview through aesthetic and accessibility improvements with an "aim to encourage design that communicates the traditional commercial and civic heart of the community, and enhances the character, pedestrian orientation and vitality of downtown and as an important community focal point."<sup>20</sup> The development guidelines also include a plan for highway commercial areas that aim to improve signage, landscaping, pedestrian accessibility, and safety. The downtown and highway commercial development guidelines should enhance Valleyview's ability to generate additional retail spending from all sources of non-local consumers.

The largest segment of the local retail sector is comprised of the "convenience" category, which includes grocery and specialty foods, personal services, pharmacy, alcohol and tobacco, and health services, representing 47% of utilized retail space. Notable growth potential exists in this sub-sector, as Valleyview is estimated to retain less than 50% of local resident spending in this category. Examples of highway commercial businesses that fall into this category include the recently developed Tim Hortons as well as the Shell Super Station.

The "comparison goods" category, which includes home furnishings, clothing and apparel, home improvement and garden, jewelry and accessories, sporting goods, toys and hobbies, and auto parts and accessories, represents 22.5% of utilized retail space. Valleyview retailers likely face significant competition in this category from larger Grande Prairie retailers. Specialization in this sub-sector could enhance downtown Valleyview's ability to attract inter-regional "destination retail" consumers. An example of a business currently operating in Valleyview that falls into this category is House of Treasures, a jewelry store focusing on rare/antique items.

The "food and beverage, entertainment" category, which includes entertainment and leisure and food and beverages, comprises just 18.2% of local utilized retail space. Growth in this sub-sector might be linked to the town's ability to increase tourism activity. An example of a business currently operating in Valleyview that falls into this category is the Western Valley Bar and Grill.

A vacancy rate of about 12.2% in Valleyview's retail space should allow for growth to occur throughout each retail sub-sector of this driver industry.

At present, it has been estimated that approximately 130 of the jobs located in Valleyview are directly involved in retail services (representing about 8% of total local jobs). Approximately 100 jobs in the MD of Greenview have been allocated to the retail services driver industry group, representing about 4% of local jobs in 2017.

Employment in Valleyview's retail services driver industry group is expected to increase at an average annual rate of 2.0% in the base growth scenario; 3.2% in the high growth scenario; and 1.0% in the low growth scenario.

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<sup>19</sup> Valleyview Economic Development Strategy, August 2017, Prepared by Modus and Urban Systems.

<sup>20</sup> Valleyview Development Guidelines, July 26, 2016, Prepared by Modus.  
<http://valleyview.ca/wp-content/uploads/2016/10/FINAL-Valleyview-Development-Guidelines-v4.compressed.pdf>

## TOURISM

Tourism is an already-important industry in the Town of Valleyview and MD of Greenview- and is a sector that possesses significant growth potential. Sub-sectors within this driver group include information and cultural industries, arts entertainment and recreation, accommodation and food services, retail trade, and agriculture (related to the agri-tourism sub-sector described earlier).

The outlook for tourism in the Valleyview and Greenview is correlated to some of the factors discussed in the prior section outlining the important of retail as a driver industry. For example, Valleyview's location at the junction of Highways 43 and 49 generates the immediate potential to retain visitor traffic. Traffic volume patterns suggest that between 7,000 and 7,800 vehicles pass Valleyview on Highway 43 to the north, between 4,800 and 6,900 on Highway 43 to the south, and between 2,240 and 3,070 on Highway 49 to the northeast on a daily basis.<sup>21</sup> Given the strategic highway location, along with very few other urban centres in close proximity, Valleyview has the potential to enhance its position as a tourism hub in the region, with surrounding Greenview benefiting

Further supporting the potential for tourism growth in the region, the Valleyview Visitor Centre is acknowledged as being one of the most popular, high growth visitor centres in Alberta. The number of annual visits to the Centre increased rapidly from 17,170 visitors in 2014 to 21,900 in 2016. Visitor tracking data suggests that approximately 55% of the region's tourism-oriented visitors are Albertans, while 16% are from other parts of Canada and 8% are U.S. residents.

The region already has a total of 10 hotel/accommodations businesses, with 2 located in downtown Valleyview, 4 in Valleyview's highway commercial area, and 4 in Greenview. The recently constructed Paradise Inn and Suites adjacent to Highway 43 suggests that there remains the capacity for further growth in this sector:

Tourist attractions in the Valleyview include: the Red Willow Player's theatre company, the Valleyview Farmer's Market, a recently constructed indoor recreation centre, and a number of bars and restaurants. Tourism destinations are more outdoor-focused in Greenview, which include Young's Point Provincial Park, Snipe Lake, Swan Lake, Greenview Golf Resort, and a number of campgrounds and businesses supporting outdoor recreation (such as boat rentals and fishing/hunting supply stores).

Along with food and accommodation businesses and arts and recreation-oriented activities, tourism can also generate growth in more loosely-related sectors. For example, six pet boarding businesses already exist in the region- presumably to accommodate tourists.

In total, an estimated 300 jobs exist in this driver industry group (190 in Valleyview and 110 in Greenview), spread across a variety of industries; and representing approximately 7% of regional employment.

Employment in the region's tourism driver industry group is expected to increase at an average annual rate of 2.0% in the base growth scenario; 3.2% in the high growth scenario; and 1.2% in the low growth scenario.

## Support Industries

While industries such as health and educational services are recognized as being important employers in the region, representing a combined 220 jobs in the Town of Valleyview and 230 in the MD of Greenview, the region possesses only a marginal ability to influence growth in these sectors through its own policy initiatives and strategies. Growth in these industries is more likely to be driven by demographic shifts in the region, with higher birth rates increasing the demand for education services, and an aging population increasing the demand for health services, as seniors tend to utilize a relatively greater amount of health care.

Of those other industrial sectors investigated, none were determined to be of sufficient significance in terms of direct employment in the region to be included as a Driver Industry for this study.

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<sup>21</sup> Valleyview Economic Development Strategy, August 2017, Prepared by Modus and Urban Systems.

The region's Support Industries include all of those that are not classified as being Driver Industries, and were estimated to represent approximately 2,200 jobs in the entire Study Area in 2017. Employment in these Support Industries is generally assumed to change in proportion with population, which is affected by migration (related to Driver Industry growth) and natural increase considerations.

# Forecast Results

All results presented and discussed in this section of the report reflect the Base scenario. Forecast results associated with the High and Low scenarios can be found in the Appendix.

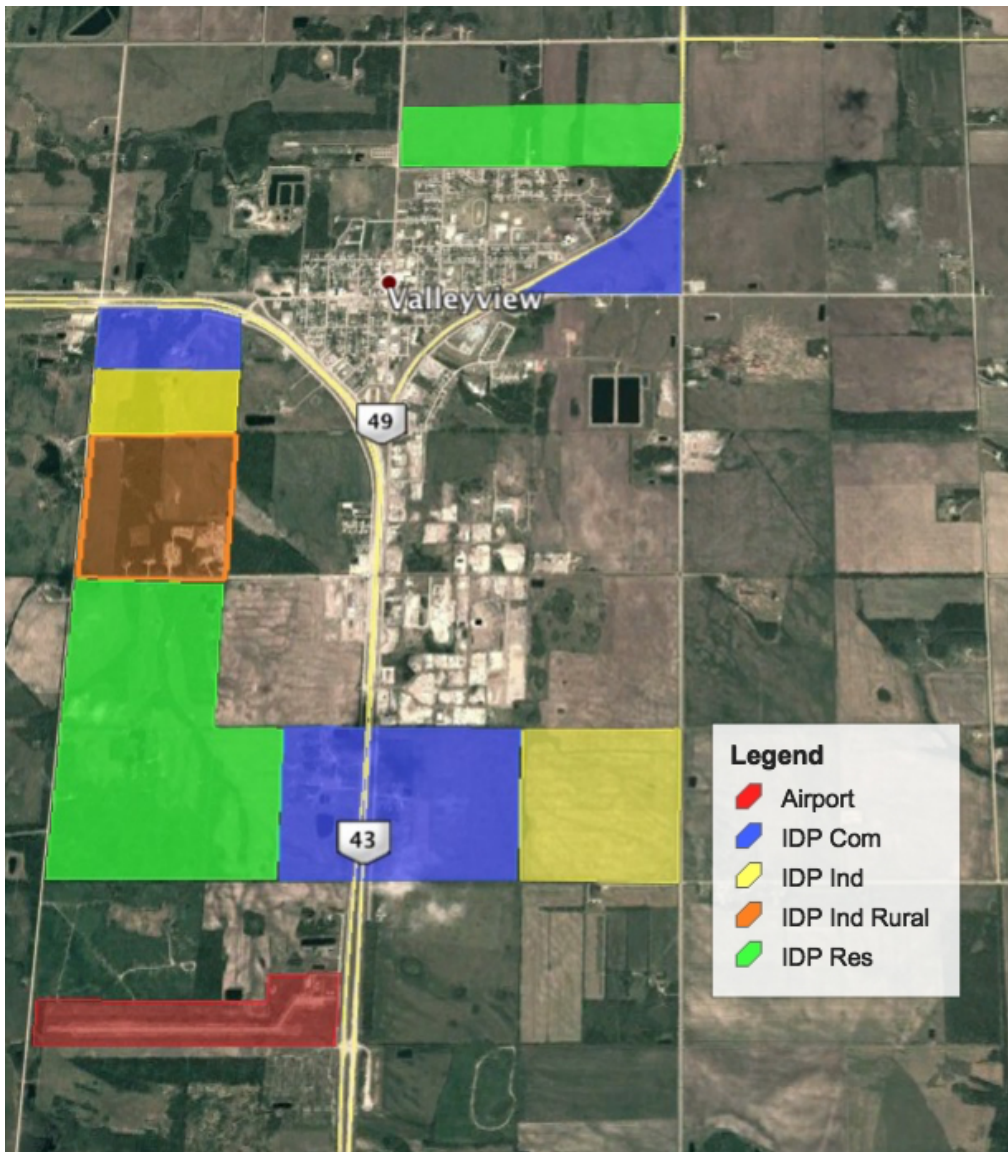
## Geographies

For the purposes of this analysis, geographies in the Study Area have generally been disaggregated according to location and future land use. Geographies denoted as 'IDP' refer to sections of land adjacent to the Town of Valleyview, included in the 2009 Valleyview Intermunicipal Development Plan (IDP)<sup>22</sup> with an assigned future land use (Residential, commercial, industrial or agricultural reserve). Lands designated in the IDP for future agricultural use were not disaggregated and were included as part of the 'Rest of MD of Greenview' geography. These IDP areas are shown on the map below.

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<sup>22</sup>Valleyview Intermunicipal Development Plan, April 2009. <http://mdgreenview.ab.ca/wp-content/uploads/2013/12/VVIDP-Final.pdf>

Map of Town of Valleyview with IDP Geography Overlay (2009 Designations)



## Geographies Used in the Forecast, Base Year Information

Geography	Description	Population (2017)	Employment (2017)
Airport	Valleyview Airport	0	15
Rest of MD of Greenview	Greenview, excluding the Hamlets, IDP areas, and Industrial Park	4,787	1,946
Hamlets	Hamlets of Debolt, Grovedale, Landry Heights, Little Smoky, and Ridge Valley	778	319
IDP - Commercial	IDP areas designated for Commercial development	0	0
IDP - Industrial	IDP areas designated for Industrial development	0	0
IDP - Industrial (Rural)	IDP areas designated for Industrial development (not subject to future annexation applications)	0	0
IDP - Residential	IDP areas designated for Residential development	0	0
Industrial Park	Big Mountain Industrial Park	0	0
Rest of Valleyview	Town of Valleyview, excluding all IDP areas	1,865	1,750
Study Area Total	All Study Area geographies	7,430	4,030

Total base year (2017) population and employment estimates for each geography included in the analysis are presented in the table above. Note that in the base year (2017), it was assumed that no residential, commercial or industrial development had been started in any of the IDP areas. This assumption was supported by satellite images of the region retrieved from Google Earth.

Note that the hamlets located in the MD of Greenview have been disaggregated and assessed as a unique geography. These hamlets include Debolt, Grovedale, Landry Heights, Little Smoky, and Ridge Valley. Where available, informal population estimates were collected for each hamlet. In cases where a population estimate was not available, satellite images retrieved from Google Earth were used to approximate a hamlet's current population. In total, these hamlets were estimated to represent a population of 778 and a job base of 319.

Disaggregating the hamlets from the MD of Greenview was deemed necessary due to the relatively higher growth and development plans related to hamlets such as Grovedale. Per the hamlet's Area Structure Plan,<sup>23</sup> long-term population growth rates as high as 8.1 per cent were projected, with relatedly high rates of job growth associated with the nearby Big Mountain Industrial Park.<sup>24</sup> Such significant rates of population and employment growth are generally not anticipated in the rest of the MD of Greenview.

## Population

Population forecasts were performed using 2017 as a base year and covered the period extending to 2027. Factors considered in the population include:

- Fertility rates: The ten-year (2007-16) average of birth rates according to age cohorts was calculated for Census Division 18 and applied to the Study Area to forecast the annual number of births.

<sup>23</sup> Grovedale Area Structure Plan, October 16, 2017 - Draft #2, Version #8, File #1320-01, <http://mdgreenview.ab.ca/wp-content/uploads/2013/12/GASP-October-16-2017-Draft2-Version8.pdf>

<sup>24</sup> Big Mountain Industrial Park Area Structure Plan, Opus Stewart Weir Ltd, June 2016, <http://mdgreenview.ab.ca/wp-content/uploads/2013/12/Big-Mountain-Industrial-Park-Area-Structure-Plan.pdf>

- ▶ Mortality rates: The five-year (2013-17) average of mortality rates according to specific age was calculated for Census Division 18 and applied to the Study Area to forecast the annual number of age-specific deaths.<sup>25</sup>
- ▶ Migration: The amount of in-migration to the Study Area was projected relative to the expected level of job growth within the Study Area, and the ability of the existing local population to fill these positions. An age- and gender-specific migration profile was calculated based on the ten-year (2008-17) average of in-migration population growth in Census Division 18.<sup>26</sup>
- ▶ Population capacity: In geographies containing population (or the potential for residential development), a 'full buildout' capacity was estimated based on the existing amount of residential development and population, the remaining amount of land available for development in the geography, and prevailing population density estimates. These capacities were used as a general limit to migration-based population growth, and is a 'soft' constraint in the sense that a geography's population may exceed this capacity in the case of natural growth.
- ▶ Geography sequencing: Residential geographies were assumed to grow in population according to a general sequence. For example, it was assumed that currently vacant land designated for residential purposes within the Town of Valleyview would be developed and approach a threshold close to its population capacity before residential development occurred in IDP geographies.
- ▶ Growth status: Growth status is used in this analysis to allocate and prioritize migration-based population growth. For example, the MD of Greenview (excluding its hamlets and IDP geographies) was assumed to receive no migration-based population growth, and grows only in accordance with its projected natural rate of increase (births minus deaths).

### Total Population Forecast by Geography, 2017-2027

Geography	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Airport	0	0	0	0	0	0	0	0	0	0	0	-
Rest of MD of Greenview	4,787	4,810	4,831	4,850	4,867	4,883	4,897	4,910	4,922	4,933	4,943	0.3%
Hamlets	778	782	786	795	863	933	1,003	1,072	1,144	1,217	1,290	5.2%
IDP - Commercial	0	0	0	0	0	0	0	0	0	0	0	-
IDP - Industrial	0	0	0	0	0	0	0	0	0	0	0	-
IDP - Industrial (Rural)	0	0	0	0	0	0	0	0	0	0	0	-
IDP - Residential	0	0	0	0	50	82	213	294	380	467	555	-
Industrial Park	0	0	0	0	0	0	0	0	0	0	0	-
Rest of Valleyview	1,865	1,869	1,873	1,879	1,927	1,975	2,024	2,072	2,121	2,171	2,200	1.7%
Study Area Total	7,430	7,461	7,490	7,524	7,707	7,872	8,137	8,348	8,567	8,787	8,989	1.9%

In the Base scenario, the total population in the Study Area is projected to increase from 7,430 in 2017 to 8,989 in 2027, representing an average annual growth rate of 1.9 per cent. The highest rate of population growth is expected to occur in the hamlets of the MD of Greenview, with an average annual growth rate of 5.2 per cent. Conversely, the remainder of the MD of Greenview is expected to grow at just 0.3 per cent

<sup>25</sup> Statistics Canada, CANSIM Table 17-10-0085-01, Components of population growth by census division, age group and sex, <https://www150.statcan.gc.ca/t1/tbl/en/tv.action?pid=1710008501>

<sup>26</sup> Ibid.

over the ten-year period, driven exclusively by a higher projected number of births relative to deaths. The Town of Valleyview is expected to reach its estimated population capacity of about 2,200 by the end of the forecast, with all existing developable residential land consumed. The gradually diminishing amount of developable residential land in Valleyview is expected to initiate development in the adjacent IDP area designated for residential use beginning in 2021, though it is unlikely that this geography will near its population capacity within the scope of this forecast, reaching approximately 555 by 2027. Residential development has not been assumed to occur in any other geography of the Study Area.

A more detailed forecast reporting the age and gender of each geography's population, as well as the components of population growth, can be found in the Appendix.

## Employment

Employment forecasts were performed using 2017 as a base year and extending to 2027. Note that these employment forecasts reflect the respective job locations according to geography, rather than the location of the labour force employed in these occupations. Factors considered in this analysis include:

- ▶ Driver Industry growth: Driver Industry Groups and their respective scenario-specific rates of employment growth are described in an earlier section of this document. These Industry Groups can be generally thought of as the primary motivators of economic growth in the Study Area, spurring migration-based population growth as well as job growth in Support Industries.
- ▶ Support employment growth: Those industries designated as support in the Study Area are discussed in an earlier section of this document. Job growth in support industries is assumed to occur according to population growth.
- ▶ Participation rates: Labour force participation rates in the Study Area impact the ability of the local population to fill newly created jobs that are generated in Driver and Support Industries. The five-year (2013-17) average of labour force participation rates in Alberta were calculated according to age cohort<sup>27</sup> and applied in the forecast.
- ▶ Employment capacity: In geographies containing commercial or industrial activity (or the potential for development), a 'full buildout' capacity was estimated based on the existing amount of development and jobs, the remaining amount of land available for development in the geography, and prevailing employment density estimates.
- ▶ Employment profiles: These profiles are specific to NAICS, and reflect the type of jobs that would be expected to be located in a geography based on its designation. For example, a geography designated as industrial would contain a greater proportion of manufacturing jobs in its profile; while a residential or commercial geography would contain more retail-based jobs. These profiles can also impact the rate and timing of growth in different types of geographies. If the oil and gas sector is expected to exhibit a relatively higher rate of growth in the forecast, it would make sense that these jobs be located in industrial geographies.
- ▶ Geography sequencing: Geography-specific job growth was assumed to occur according to a general sequence. For example, it was assumed that currently vacant land designated for employment purposes within the Town of Valleyview would be developed and approach a threshold close to its capacity before development occurred in IDP geographies.

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<sup>27</sup> Statistics Canada, CANSIM Table 14-10-0018-01, Labour force characteristics by sex and detailed age group, <https://www150.statcan.gc.ca/t1/tbl/en/tv.action?pid=1410001801>

## Total Job Forecast by Geography, 2017 to 2027

Geography	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Airport	15	15	15	15	16	16	17	18	18	19	19	2.6%
Rest of MD of Greenview	1,946	1,946	1,966	1,982	1,992	2,000	2,000	2,000	2,000	2,000	2,000	0.3%
Hamlets	319	342	353	367	384	413	443	473	503	533	563	5.9%
IDP - Commercial	0	0	0	0	0	1	2	11	15	20	25	-
IDP - Industrial	0	0	0	0	1	3	6	12	16	21	26	-
IDP - Industrial (Rural)	0	0	0	0	1	3	6	12	16	21	26	-
IDP - Residential	0	0	0	0	0	1	3	10	15	19	25	-
Industrial Park	0	0	0	0	2	6	12	23	31	41	51	-
Rest of Valleyview	1,750	1,779	1,793	1,809	1,829	1,870	1,910	1,951	1,993	2,034	2,075	1.7%
Study Area Total	4,030	4,082	4,127	4,173	4,226	4,314	4,398	4,509	4,607	4,708	4,811	1.8%

From an estimated base of just over 4,000, the total number of jobs in the Study Area is expected to reach 4,811 by 2027, representing an average annual growth rate of 1.8 per cent. Similar to the total population forecast described in the prior section of this document, the highest average annual rate of job growth is expected in the hamlets of the MD of Greenview (5.9 per cent). Job growth in the Big Mountain Industrial Park (expected to begin in 2021) is also related to high growth in the nearby Hamlet of Grovedale. Job growth in the rest of the MD of Greenview is minimal, reaching its estimated capacity of about 2,000 by 2022. Moderate job growth is anticipated in the Town of Valleyview at an average annual rate of 1.7 per cent, given the relatively abundant amounts of undeveloped commercial and industrial land available at present. Given the potential for job growth in Valleyview, it is unsurprising that commercial and industrial development in the adjacent IDP areas occurs at a relatively slow pace, beginning in 2021 but exhibiting only slight growth through 2027.

### NAICS

The North American Industry Classification System (NAICS) is a commonly used method of classifying businesses according to type of economic activity performed. In this forecast, employment is analyzed and presented according to 2-digit NAICS, of which there are 20 categories.

Note that the employment results presented at the 2-digit NAICS level do not always conform to how one might view industries in the economy. For example, with respect to forestry, primary employment activity would be included in NAICS category 11 (Agriculture, forestry, fishing and hunting). However, other activities related to the forestry sector such as lumber production would be included in NAICS 31-33 (Manufacturing).

## Total Job Forecast by NAICS, 2017 to 2027

NAICS	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Accommodation and food services	262	266	270	274	279	285	291	298	304	311	317	1.9%
Administrative and support, waste management and remediation services	123	123	124	124	125	127	129	132	134	137	139	1.3%
Agriculture, forestry, fishing and hunting	453	462	471	481	491	500	510	521	531	542	553	2.0%
Arts, entertainment and recreation	41	41	42	43	44	45	46	47	48	49	50	2.0%
Construction	540	545	549	552	556	569	581	599	614	630	646	1.8%
Educational services	169	170	171	171	172	176	179	185	189	193	198	1.6%
Finance and insurance	51	51	51	52	52	53	54	55	56	58	59	1.4%
Health care and social assistance	280	282	283	284	285	291	296	304	310	317	323	1.4%
Information and cultural industries	17	17	17	18	18	18	19	19	19	20	20	2.0%
Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0	0	-
Manufacturing	124	125	126	126	127	130	133	137	141	144	148	1.8%
Mining, quarrying, and oil and gas extraction	650	662	676	689	704	718	732	747	762	777	792	2.0%
Other services (except public administration)	210	211	212	213	214	219	223	230	235	241	246	1.6%
Professional, scientific and technical services	112	113	114	115	116	119	122	125	128	131	134	1.9%
Public administration	202	204	204	205	206	209	212	217	221	225	230	1.3%
Real estate and rental and leasing	57	57	57	57	58	59	60	61	62	63	64	1.3%
Retail trade	382	389	394	400	407	416	424	434	444	453	463	1.9%
Transportation and warehousing	208	210	213	216	218	223	228	234	239	245	250	1.9%
Utilities	54	55	55	55	55	57	58	60	61	63	65	1.8%
Wholesale trade	97	97	98	99	99	101	103	106	109	111	114	1.6%
Total	4,030	4,082	4,127	4,173	4,226	4,314	4,398	4,509	4,607	4,708	4,811	1.8%

The table above presents a total job forecast in the entire Study Area by the 20 2-digit NAICS categories.

As might be expected, the highest rates of average annual job growth are observed in those industries closely correlated with the Driver Industry groups described earlier in this document. Industries including agriculture, forestry, fishing and hunting (Agriculture and Related), arts, entertainment and recreation (Tourism), information and cultural industries (Tourism), mining, quarrying, and oil and gas extraction (Support Activities for Oil Extraction), and retail trade (Retail Trade Services) generally exhibit the highest rates of average annual job growth of around 2.0 per cent.

Conversely, jobs in industries that are more closely related to Support Industries, such as public administration, real estate and rental and leasing, and health care and social assistance, generally exhibit lower rates of average annual growth. Job growth in these Support Industries is correlated with population growth in the region, but in some cases may increase at a rate less than that of population. These Support Industry growth trends are based on the analysis of historical trends in Alberta.

## Estimated Jobs by NAICS and Geography, Base Year (2017)

NAICS	Airport	Greenvie w	Hamlets	IDP Com	IDP Ind	IDP Ind Rural	IDP Res	Ind Park	Valleyvie w	Total
Accommodation and food services	0	48	8	0	0	0	0	0	207	262
Administrative and support, waste management and remediation services	0	50	8	0	0	0	0	0	64	123
Agriculture, forestry, fishing and hunting	0	341	56	0	0	0	0	0	56	453
Arts, entertainment and recreation	0	16	3	0	0	0	0	0	22	41
Construction	0	256	42	0	0	0	0	0	242	540
Educational services	0	94	15	0	0	0	0	0	59	169
Finance and insurance	0	20	3	0	0	0	0	0	28	51
Health care and social assistance	0	100	16	0	0	0	0	0	164	280
Information and cultural industries	0	1	0	0	0	0	0	0	15	17
Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0
Manufacturing	0	76	13	0	0	0	0	0	35	124
Mining, quarrying, and oil and gas extraction	0	358	59	0	0	0	0	0	233	650
Other services (except public administration)	0	99	16	0	0	0	0	0	95	210
Professional, scientific and technical services	0	66	11	0	0	0	0	0	35	112
Public administration	0	52	8	0	0	0	0	0	142	202
Real estate and rental and leasing	0	32	5	0	0	0	0	0	19	57
Retail trade	0	141	23	0	0	0	0	0	219	382
Transportation and warehousing	15	119	20	0	0	0	0	0	54	208
Utilities	0	25	4	0	0	0	0	0	25	54
Wholesale trade	0	52	8	0	0	0	0	0	37	97
<b>Total</b>	<b>15</b>	<b>1,946</b>	<b>319</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1,750</b>	<b>4,030</b>

## Jobs Forecast by NAICS and Geography, End of Forecast (2027)

NAICS	Airport	Greenvie w	Hamlets	IDP Com	IDP Ind	IDP Ind Rural	IDP Res	Ind Park	Valleyvie w	Total
Accommodation and food services	0	49	14	3	0	0	2	0	249	317
Administrative and support, waste management and remediation services	0	51	13	1	0	0	0	0	74	139
Agriculture, forestry, fishing and hunting	0	356	105	0	6	6	0	12	69	553
Arts, entertainment and recreation	0	16	5	0	0	0	0	0	27	50
Construction	0	260	71	2	7	7	0	14	284	646
Educational services	0	95	25	3	0	0	6	0	69	198
Finance and insurance	0	20	5	1	0	0	1	0	32	59
Health care and social assistance	0	101	27	3	0	0	3	0	190	323
Information and cultural industries	0	1	0	0	0	0	0	0	18	20
Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0
Manufacturing	0	78	21	0	2	2	0	4	41	148
Mining, quarrying, and oil and gas extraction	0	374	110	0	6	6	0	12	285	792
Other services (except public administration)	0	100	27	5	0	0	5	0	110	246
Professional, scientific and technical services	0	67	19	1	1	1	0	3	42	134
Public administration	0	52	13	1	0	0	0	0	163	230
Real estate and rental and leasing	0	33	9	0	0	0	1	0	22	64
Retail trade	0	146	42	4	0	0	8	0	264	463
Transportation and warehousing	19	123	36	0	2	2	0	4	64	250
Utilities	0	25	7	0	2	2	0	0	29	65
Wholesale trade	0	52	14	1	1	1	0	2	43	114
Total	19	2,000	563	25	26	26	25	51	2,075	4,811

The tables above report the estimated number of jobs, by geography and NAICS, in both 2017 and 2027.

### DRIVER AND SUPPORT INDUSTRIES

In this analysis, industries are allocated in proportions to Driver and Support groups. Employment in Driver Industries is driven by scenario-specific rates of job growth; and Support employment is generally driven by

regional population growth. A description of how Driver Industries were designed and used in this analysis can be found in an earlier section of this document.

### Total Driver Industry Jobs by Industry Group, 2017 to 2027

Driver Industry Group	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Agriculture and Related	462	471	480	490	500	510	520	530	541	552	563	2.0%
Support Activities for Oil Extraction	841	858	875	893	911	929	948	967	986	1,006	1,026	2.0%
Retail Services	229	234	239	244	248	253	258	264	269	274	280	2.0%
Tourism	298	304	310	316	323	329	336	342	349	356	363	2.0%
Total	1,831	1,867	1,905	1,943	1,982	2,021	2,062	2,103	2,145	2,188	2,232	2.0%

The table above shows the total number of jobs in the Study Area related to Driver Industries through the forecast. From a base of 1,831 in 2017, Driver Industry jobs increase across all groups at an average annual rate of 2.0 per cent to reach a total of 2,232 by 2027.

## Total Support Jobs by NAICS, 2017 to 2027

NAICS	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Accommodation and food services	79	79	80	80	80	82	84	87	89	91	94	1.8%
Administrative and support, waste management and remediation services	123	123	124	124	125	127	129	132	134	137	139	1.3%
Agriculture, forestry, fishing and hunting	0	0	0	0	0	0	0	0	0	0	0	-
Arts, entertainment and recreation	0	0	0	0	0	0	0	0	0	0	0	-
Construction	486	490	492	494	497	509	520	537	551	565	580	1.8%
Educational services	169	170	170	171	172	176	179	185	189	193	198	1.6%
Finance and insurance	51	51	51	52	52	53	54	55	56	58	59	1.4%
Health care and social assistance	280	282	283	283	285	291	296	304	310	317	323	1.4%
Information and cultural industries	0	0	0	0	0	0	0	0	0	0	0	-
Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0	0	-
Manufacturing	111	112	113	113	114	117	119	123	126	130	133	1.8%
Mining, quarrying, and oil and gas extraction	0	0	0	0	0	0	0	0	0	0	0	-
Other services (except public administration)	210	211	212	213	214	219	223	230	235	241	246	1.6%
Professional, scientific and technical services	73	73	73	74	74	76	78	80	82	84	87	1.8%
Public administration	202	203	204	204	206	209	212	217	221	225	230	1.3%
Real estate and rental and leasing	57	57	57	57	58	59	60	61	62	63	64	1.3%
Retail trade	115	116	116	117	117	120	123	127	130	133	137	1.8%
Transportation and warehousing	104	105	105	105	106	109	111	115	118	121	124	1.8%
Utilities	54	55	55	55	55	57	58	60	61	63	65	1.8%
Wholesale trade	87	88	88	88	89	91	92	95	97	100	102	1.6%
Total	2,199	2,215	2,223	2,230	2,244	2,293	2,336	2,407	2,463	2,521	2,579	1.6%

A forecast of job growth across Support Industries is shown in the table above. Support jobs represent 2,199 positions in 2017, and increase at an average annual rate of 1.6 per cent to reach 2,579 jobs by 2027.

Support job growth is strongest in industries such as retail trade, construction, and transportation and warehousing (1.8 per cent). Support jobs in industries such as public administration, real estate and rental and leasing, and administrative and support, waste management and remediation services grow at a relatively lower rate (1.3 per cent).

Note that some 2-digit NAICS do not report any employment categorized as Support - this is because the entirety of that industry was assumed to a Driver in this analysis.

## Proposed Highway Realignment

Economic growth associated with development along Highways 43 and 49 is an important consideration within the Study Area. As such, the proposed realignment of these highways has the potential to impact the economic forecasts discussed in this report.

The proposed realigning of Highways 43 and 49 does not impact forecasts of aggregate population and job growth. However, the realigning would likely impact the geographic prioritization of commercial and industrial development. Job growth would occur sooner in IDP areas close to the new highway location, with the timing of development and corresponding job growth in Valleyview's urban reserve slowing as a result.

This analysis assumes that commercial and industrial development in the relevant IDP areas would occur one year sooner (2020), relative to the forecast results discussed earlier in this report. The timing and construction details of the highway realignment project would obviously impact this assumption. Note that job growth in the residential IDP areas is unaffected by the highway realignment, as this job growth is correlated to population growth in the respective area(s). Population forecasts related to residential IDP areas are unaffected by the proposed realignment.

A total job forecast by geography is shown in the table below. Total jobs in commercial and industrial IDP areas reaches just over 300 by 2027 in this forecast, compared to a total of 77 in the forecast where highway realignment was not considered. The higher rate of job growth in IDP areas has the effect of reducing the amount of new jobs created in the rest of Valleyview, which reaches about 1,900 (average annual growth of 0.8 per cent), compared to a total of 2,075 in the prior forecast (average annual growth of 1.7 per cent).

## Total Job Forecast by Geography, 2017 to 2027 (Highway Realignment)

Geography	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Airport	15	15	15	15	16	16	17	18	18	19	19	2.6%
Rest of MD of Greenview	1,946	1,946	1,966	1,982	1,992	2,000	2,000	2,000	2,000	2,000	2,000	0.3%
Hamlets	319	342	353	367	384	413	443	473	503	533	563	5.9%
IDP - Commercial	0	0	0	0	0	8	13	47	64	81	99	-
IDP - Industrial	0	0	0	5	10	24	39	52	68	85	103	-
IDP - Industrial (Rural)	0	0	0	5	10	24	39	52	68	85	103	-
IDP - Residential	0	0	0	0	0	1	3	10	15	19	25	-
Industrial Park	0	0	0	0	0	0	0	0	0	0	0	-
Rest of Valleyview	1,750	1,779	1,793	1,800	1,814	1,829	1,843	1,857	1,871	1,886	1,900	0.8%
Study Area Total	4,030	4,082	4,127	4,173	4,226	4,314	4,398	4,509	4,607	4,708	4,811	1.8%

