THE CORPORATION OF THE MUNICIPALITY OF WEST NIPISSING

Leblanc Road Industrial Park Feasibility & Development Study

Version 1.0

Prepared by:

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Funding Provided by:

This project would not have been made possible without the financial support from the provincial and federal government.

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Executive Summary

Purpose of the Feasibility Study

This feasibility study report has been prepared to provide the Municipality of West Nipissing with guidance related to the development of 75 acres of industrial zoned land (out of 85 acres) located at the southwest corner of Bay Street and Leblanc Road.

The proposed Leblanc Road Industrial Park, includes 16 lots, averaging 4.6 acres per lot, of which 6 are already sold. The feasibility study process has culminated in a series of alternatives for the land development. The Municipality's vision of this property is to provide economic growth opportunities, such as job creation, business retention and attraction, investment extraction, etc. These attributes were used as criteria for evaluating the alternatives for the development and in assessing its feasibility.

Scope of Work

The following summarizes the scope of the work for the project:

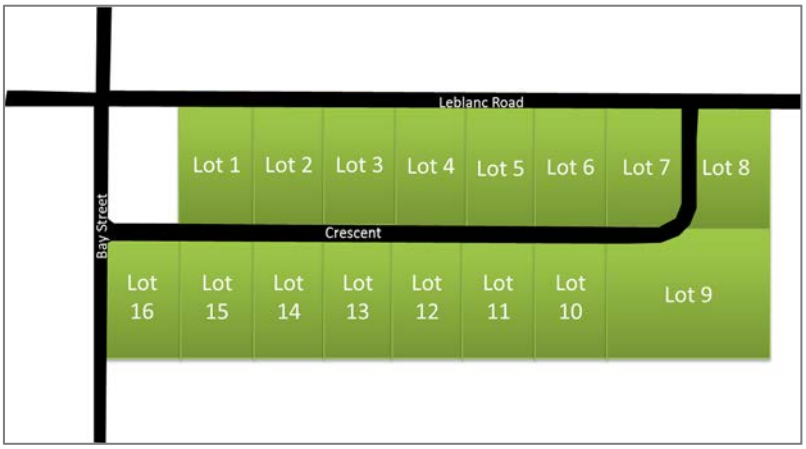
- Determine the feasibility of developing an industrial park for West Nipissing by looking at various key aspects: market demand including a competitive analysis, the creation of a detailed pre-engineering plan, followed by a financial assessment;
- Conduct an assessment of the impacts that a new industrial park would have on local businesses as well as a gap analysis of the area on what businesses would be the best fit for the region, therefore the park;
- Determine the economic impact, by calculating the potential for new jobs and expected municipal revenues that could result from a fully populated industrial park; and,
- Develop a detailed investment attraction strategy and marketing program for the Industrial Park.

Park Development Alternatives

- **Alternative 1**: Fully Serviced Industrial Park in Year 1
- **Alternative 2:** Phased Servicing over Several Years
- **Alternative 3:** Partially Serviced Industrial Park in Year 1
- **Alternative 4:** No Services, Status Quo

▶ Alternative 1

This alternative proposes extending all services and infrastructure to the 75-acre property designated for the Industrial Park. The plan allows for 16 individual lots, each approximately 4.6 acres (2 hectares) with the exception of Lot 9 (11.8 acres) in size with 360 feet (110 metres) of road frontage. All development would be undertaken in Year 1. To date, approximately 500 metres of roughly graded roadway has been partially constructed. The roadwork undertaken as part of the park development will serve to upgrade and extend the previously constructed road way.



Funding would potentially cover two thirds of the development cost, leaving the Municipality to cover the final third ($1.32 M).

The key options associated with Alternative 1 include:

- **16 lots developed in Year 1**
- **Water mains including a loop to Delorme to maintain pressure**
- **Sanitary sewers including a pumping station on the north limit**
- **Utilities (hydro and natural gas would be available)**
- **Communications (Bell Canada does not currently have fiber optic cable in this area)**
- **Road construction and drainage ditching**

Potential Barriers

The following factors were considered in the evaluation of the Park development alternative as being potential barriers for its viability or success.

- Alternative 1 sewage system design and build is highly dependent on the 250 mm force main from the Community of Cache Bay, capacity issue being rectified.
- Funding support is critical to the viability of this project, demonstrated further in Section 3.3.
- The Leblanc Road capacity to handle increased heavy truck traffic for the 0.7 km stretch. Upgrading of this road however this is not part of the study.
- 6 of the 16 lots have been sold below market value therefore setting a precedent and generating significantly less revenue on sales than with sales at market value or serviced lots.

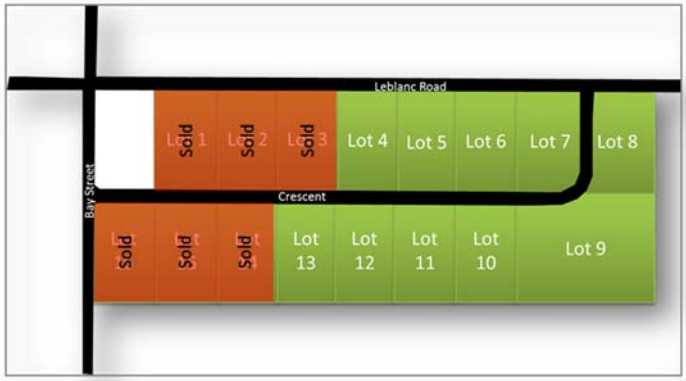
- Several lots have been sold un-serviced with no requirement to connect to services once in place. As a result, businesses that establish in the park in the future may opt to put in their own water/wastewater systems as opposed to connecting to town services unless stipulated in the purchase agreement.
- Condition on sale for development within a certain time frame – currently 3-4 of the sold lots may not develop in the short to medium term.

▶ Alternative 2: Phasing the Servicing over Several Years

This alternative consists of phasing infrastructure construction (road, water, sewer and utilities) in two stages. This option has the potential for lessening the initial financial impact by lowering capital expenditure on the Municipality in Year 1 and allowing the sale of lots in Phase 1, prior to deciding on the right time to develop the second Phase of the park. Developing Phase 2 can be considered once demand increases and sales have been fully realized for Phase 1. Phasing would however delay the proposed water main loop to Delorme Road (impacting water flow) as the water main connection to Leblanc Road would happen only at Phase 2.

The proposed first phase would include a temporary cul-de-sac allowing for the development of nine (9) lots. Additional costs relating to phasing are limited to the cost of construction and removal of the temporary cul-de-sac. There may also be a requirement to increase the water main within the first phase from 200mm to 300mm diameter to reduce friction and allow for fire flows. Some development costs such as offsite and partial onsite servicing with gas, hydro and communications, are included in cost estimates.

The phasing of the infrastructure development would reduce the initial development costs and would allow for calculated and strategic growth and controlled infrastructure investment. This infrastructure phasing would involve the development of infrastructure up to the limit of lot 4 and 12, but as more information has come to light, it has been confirmed that several more lots have been pre-sold. Lots 1, 2, 3, 16, 14 and 15 have been sold with a lot on the corner of Leblanc Road and Bay Street (not part of this study) also currently developed by a local business.



The overall costs when phasing does lessen some of the initial financial burden and risk to the Municipality. Funding would potentially cover two thirds of the development cost, leaving the Municipality to cover the final third ($617K).

They key options associated with Alternative 2 include:

- **9 lots developed in Phase 1 (Year 1), followed by 7 lots including Lot 9, developed in Phase 2**
- **Water main does not extend past the Phase 1 line, at lot 4 and lot 12. Once phase 2 would be implemented the water main loop could be constructed.**
- **Sanitary sewers up to limit of Phase 1 including a pumping station on the north limit completed in Phase 1, with the balance completed in Phase 2.**
- **Utilities (hydro and natural gas would be available)**
- **Communications (Bell Canada does not currently have fiber optic cable in this area)**
- **Road construction and drainage ditching (only to Phase 1 limit)**

Potential Barriers

The following factors impact the viability of the second alternative of phasing the development:

- Delays (only possible in Phase 2) to putting in the proposed water main loop to Delorme Road could impact water pressure
- 6 of the 16 lots have been pre-sold, therefore the phasing would potentially only impact three more lots: 4, 12, and 13, in Year 1
- Additionally, the lots have been sold as "un-serviced" and for below market value, therefore resulting in limited revenue from sales, and no guarantee that these current land owners will want to connect to municipal services (i.e. water and sewer) once available, as they will likely have already drilled wells and septic. On the other hand, a tax levy will be collected once they develop.
- The upfront development costs such as the pumping station, the cul-de-sac construction as well as the water main sizing adjustment that might be necessary to maintain water flow, significantly reduce any potential financial advantage of phasing the development.
- Phasing does not take full advantage of funding potential that are currently available.
- This alternative does not position the community or Industrial Park as being shovel ready which may hinder efforts to attract a larger scale development as much of the unoccupied park would be left un-serviced.

▶ Alternative 3: Partially Serviced Park in Year 1

This alternative would consist of constructing the road and bringing in utilities (hydro, gas and communications) to the Park. This may include the road (crescent) connecting Bay Street to Leblanc Road, improvements to Leblanc Road for increased load bearing and the addition of a turning lane to accommodate traffic and vehicular turning radius.

To be noted that 6 of the 16 lots have been pre-sold, for a very low value of $1,000/acre. This is well below market value and should be updated to reflect the current state of the market, which, as per our updated realtor opinion, brings this number to approximately $6,000 per acre for un-serviced land. Once the re-evaluation has been completed, all subsequent sales should be subject to this new price and development timeline/conditions should be considered and adhered to. With road and utilities coming into the park, this evaluation might go up, but to remain conservative, $6,000 per acre has been considered in the financial assessment.

They key options associated with Alternative 3 include:

- **Site preparation and excavation**
- **Road Construction in entire park looping to Leblanc Road**
- **Utilities (Hydro One, Union Gas and Communications**

Potential Barriers

The following factors are potential barriers to the success of this alternative and are considered:

- A larger industrial tenant will likely be seeking fully serviced property, including water and sewer, this alternative would cause delays in preparing the site for such a tenant;
- This does not provide additional inventory of fully serviced industrial land for promotion for investment from within and outside the community (e.g. expansions, relocations, new investment)

It is important to mention that there could be an Alternative 4, which would be the Status Quo. This is briefly considered below, but has not been considered in the final evaluation as it is a pretty straightforward analysis, some data will however be provided to compare.

▶ Alternative 4: Status Quo – No Services

The Status Quo would consist of continuing to fill the Industrial Park under current conditions. The exception to this may include the road (crescent) connecting Bay Street to Leblanc Road, improvements to Leblanc Road for increased load bearing and the addition of a turning lane to accommodate traffic and vehicular turning radius.

As with Alternative 3, 6 of the 16 lots have been pre-sold, for a very low value of $1,000/acre, the updated realtor opinion of value brings this number to approximately $6,000 per acre. Once the re-evaluation has been completed, all subsequent sales should be subject to this new price and development timeline/conditions should be considered and adhered to. Although no infrastructure development is projected at the Park location, a turning lane might be deemed a requirement by MTO in the future.

Potential Barriers

As with Alternative 3, this alternative, does not position the community or Industrial Park as being shovel ready which may hinder efforts to attract a larger scale development that requires services as the park would be left un-serviced.

Development costs

Based on the proposed scenarios of each alternative, the capital cost breakdown for infrastructure development are as follows, with Alternative 4 assumed to be $0:

Capital Works	**Alternative 1**	**Alternative 2***	**Alternative 3**
Site Preparation and excavation	$ 221,000	$ 86,000	$ 180,000
Road Construction	$ 900,000	$ 466,000	$ 568,000
Sanitary Sewers	$ 859,000	$ 700,000	
Water mains	$ 550,000	$ 335,000	
Contingency (10%)	$ 253,000	$ 159,000	$ 75,000
Engineering & Design (15%)	$ 417,000	$ 262,000	$ 123,000
Sub-total	**$ 3,200,000**	**$ 2,008,000**	**$ 946,000**
Other Capital Works*			
Water main Loop to Delorme Street	$ 363,000		
Other Utilities			
Hydro One	$ 190,000	$ 130,000	$ 190,000
Communications	$ 90,000	$ 50,000	$ 60,000
Union Gas	$ 125,000	$ 75,000	$ 125,000
Sub-total	**$ 405,000**	**$ 255,000**	**$ 375,000**
Overall Total	**$3,968,000**	**$ 2,263,000***	**$ 1,321,000**
Additional Cost – Turning Lane on Hwy 17	**$500,000**	**$500,000**	**$500,000**

* Phase 1 Costs Only

Financial Assessment of Alternatives

The financial feasibility analysis of the Leblanc Road Industrial Park development was conducted on Alternative 1 and Alternative 3, as Alternative 2 had been deemed unfeasible and declared a non-option moving forward, and Alternative 4 represents the status quo with no additional development costs for the park itself. The remaining alternatives were evaluated over a horizon of 5 years, which includes Year 1, when associated servicing and infrastructure development occurs.

The financial analysis of the two remaining alternatives consisted of three scenarios, with the variable being the duration it takes to sell all lots (i.e. all lots sold by Year 1, Year 3 or Year 5). The sale of individual lots (10 unsold) per each scenario are as follows:

- **Scenario 1:** All lots sold in Year 1 and developed that first year.
- **Scenario 2:** 3 lots Y1, 3 lots Y2 and 4 lots Y3.
- **Scenario 3:** 2 lots every year, for 5 years

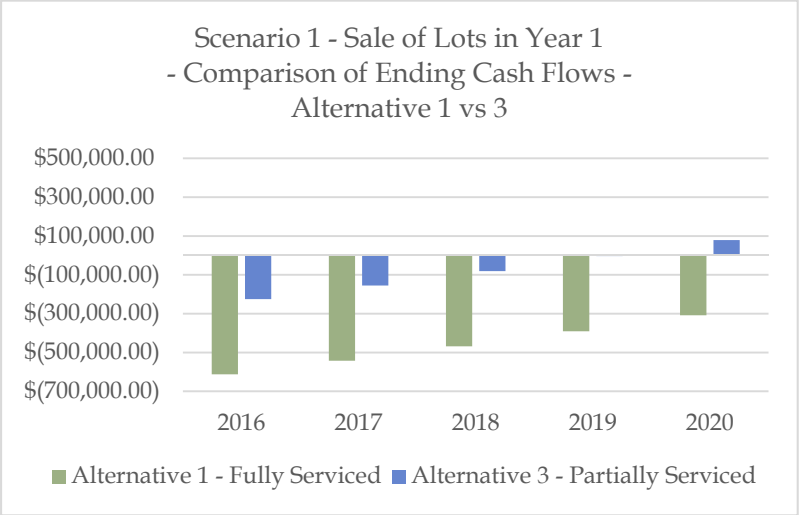
Key assumptions for each alternative were as follows:

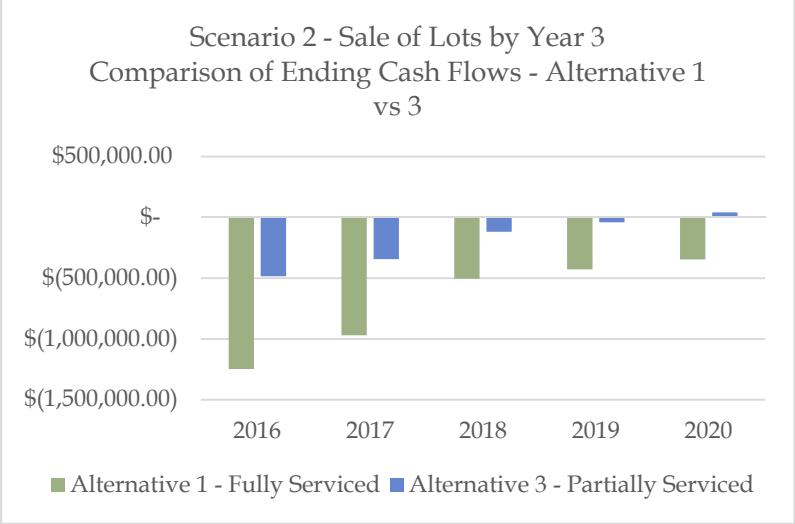
	Alternative 1 – Fully Serviced	**Alternative 3 – Partially Serviced**
Fair Market Value	$15,000	$6,000
Capital Works Development Costs	$3,968,000 or $248,400 per lot	$1,321,000 or $82,500 per lot
Hwy 17 Turning Lane	$500,000	
Lots Pre-Sold	Pre-sold lots (6) accounted for in Year 1 at $5,000 per lot, representing $30,000 opening cash flow	
Tax Revenue	1. The first 9 months of the year of sale, the tax levy will be based on vacant land and the last 3 months will be based on (post construction market evaluation) and will be levied at the Occupied Rate. a. Rate used for Occupied Industrial Land (2016) 1.431119% b. Rate used for Industrial Vacant or Excess Land (2016) 0.930227% 2. Excess land is adjusted in Year 2, reducing the tax levy for the portion of land assumed as Excess land at the Vacant and Excess Land Rate. 3. On the currently sold lots (6), taxes are based on current or estimated market value of their property.	
Sources of Funds for Capital Costs	1/3 Federal Funding 1/3 Provincial Funding 1/3 Municipal Funding	
Utilities revenue	Has not been accounted for as profit is negligible	

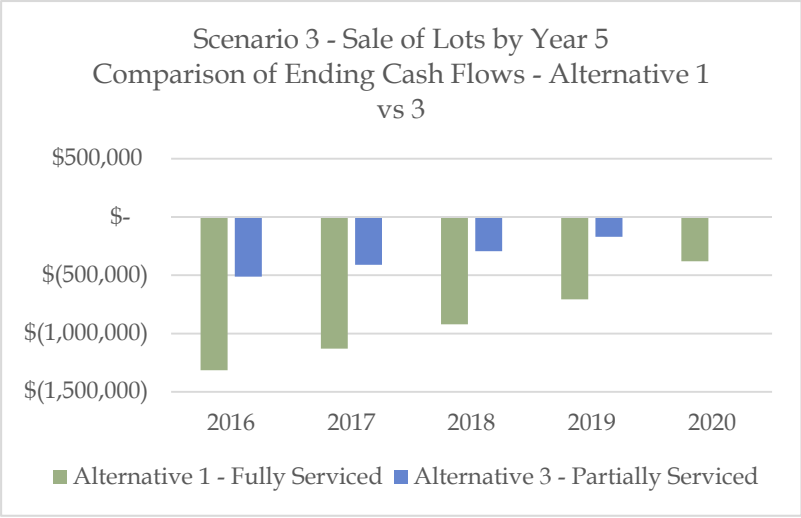
▶ Cash Flow

From these assumptions, cash flow results were determined for each alternative and scenario. Overall, a fully populated park, regardless of the alternative, would generate $77,000 of tax revenue on Occupied Industrial Land and $4,500 on Excess Industrial Land, annually (without accounting for any changes in the tax rates).

Cash Flow Analysis Results







The three charts to the left represent the result of the alternative cash flow analysis compared against each other for each of the lot sales scenarios. For simplicity in representing the result, only the Ending Cash Flows have been included for each of the 5 years projected.

As can be seen in the charts above, Alternative 1 (green) never reaches a positive cash flow within the first 5 years.

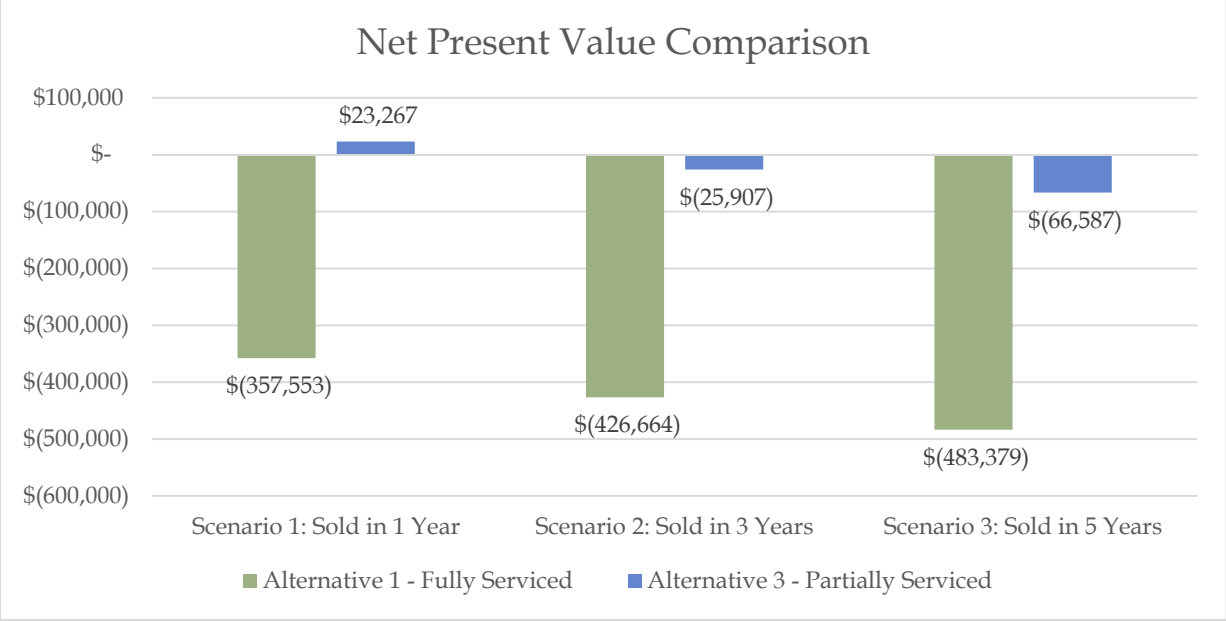
▶ Breakeven Analysis Results

A break-even analysis was performed to determine when each alternative achieves a positive cash flow under each scenario**.** When comparing both Alternative 1 and Alternative 3, we can see that in Scenario 3, where lots would be sold over the next 5 years, that there is a 4-year gap at reaching the breakeven point.

	Scenario 1 Sold in Year 1	**Scenario 2** Sold in 3 years	**Scenario 3** Sold in 5 years
Alternative 1 Fully Serviced	9 years	9 years	10 years
Alternative 3 Partially-serviced	5 years	5 years	6 years

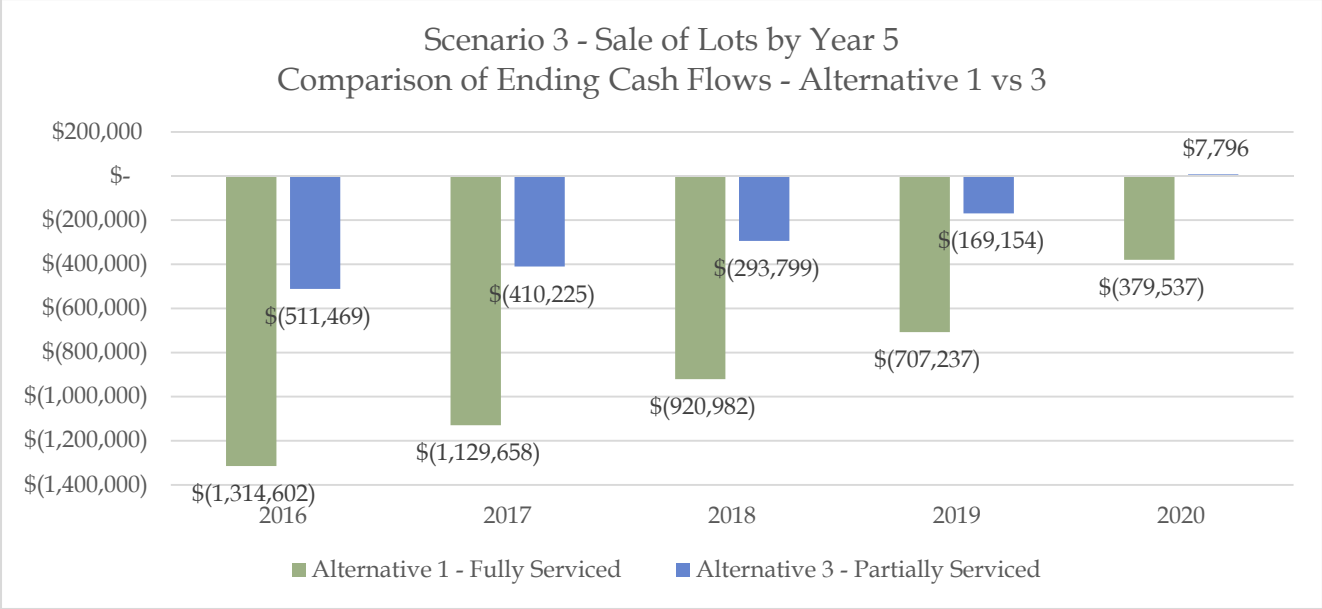
▶ Net Present Value Results

Net Present Value (NPV) is the difference between the present value of cash inflows and the present value of cash outflows, where present value (PV) is the current value of a future sum of money or stream of cash flows given a specified rate of return. The discount rate utilized in this calculation was 3.45% which represents the Municipal borrowing rate of prime (2.7%) plus 0.75%, and was calculated after a 5-year period. NPV is an important calculation used in capital budgeting to analyze the profitability of a projected investment or project. The following chart shows the Net Present Value results for each alternative under each of the 3 scenarios.



It is clear from that chart that Alternative 1 brings a significant debt burden to the Municipality. Since capital expenditures are significantly higher in Year 1, recovery is much slower and the risk level is higher.

As detailed in the Financial Assessment, certain key results were compared, the Ending Cash Balances, the Breakeven Point and the Net Present Value for each of these Alternatives under the three scenarios. The following is a quick recap of these results. Scenario 3 has been retained for this purpose, as it is more realistic to think that it would take some time to sell the remaining 10 lots, with 5 years still being ambitious and requiring an aggressive strategy.



The ending cash balance comparison gives us a good visual of the result of the cash flow analysis, showing us the first 5 years of debt repayment.

Economic Impact Assessment

Overall, the Leblanc Road Industrial Park would stimulate important economic and social development essential for the area. The Park could help to diversify the economy by adding high quality primary jobs in manufacturing, warehousing and construction. In addition, a significant portion of the jobs created by the Industrial Park tenants would potentially be net new jobs thereby growing the economy both locally and regionally. The attraction of new businesses and new job creation to West Nipissing would also support significant additional indirect economic activity (i.e. increased spending, and increased jobs and payroll as a result of increased sales for local supplier and consumer businesses.) The following subsections summarize the findings of the impact assessment.

▶ Impact on Job Creation

Industrial employment (or secondary industry employment) in West Nipissing has remained low, representing less than 15% of the total workforce). Therefore, job creation is an important factor in economic development. The following table provides the estimated job creation potential for West Nipissing based on a fully developed industrial park.

	Direct Jobs	Indirect Jobs	Total FTE jobs
Permanent	74.3	39.6	**113.9**
Temporary	42.7	22.8	**65.5**
Total	**117.0**	**62.4**	**179.3**

The level of construction activity related to the development of the park and the lots would result in a one-time economic impact of $6.47 million (development and infrastructure costs + building costs), and one-time $2.2 million in annual personal income from temporary jobs. These construction impacts are in addition to the operational impacts of the Industrial Park. The operational impacts include directly and indirectly supporting an estimated 114 permanent jobs, resulting in $3.88 million in annual personal income, assuming the average individual income in West Nipissing is $34,120.

It is most likely the unemployed, especially low skilled workers, who will benefit. However, it is also possible that employed individuals will benefit as well, as these individuals would now have the opportunity to be employed in West Nipissing, rather than commuting to neighbouring cities for employment opportunities in their field. The labour flow analysis showed that almost 2000 West Nipissing residents commute outside of West Nipissing to work. Specifically, for secondary industry jobs (i.e. construction and manufacturing), 175 individuals commute outside of West Nipissing for work. This could be reduced significantly, both on a permanent and temporary basis.

▶ Impact on Spending

When Industrial Park tenants make direct expenditures these amounts enter the general economy, with each dollar being available for additional spending. This creates a “multiplier effect” that increases employment, income and total economic activity in the region. Since tenants are not secured at this stage of the project, it is hard to estimate these figures, as expenses can vary significantly from industry to industry and business to business. However, if the Municipality focusses on attracting those identified as target markets (i.e. value added manufacturers and processers), who source their materials from the primary sector businesses in the region (i.e. agriculture and forestry industries), then the economy will be impacted directly by the additional spending staying within the region.

Increased spending will also result from the jobs being created through the establishment of businesses in the industrial park. More employees in the region, means more consumer spending. As well, if fewer employees are travelling outside of the region for work, leakage as a result of these individuals shopping in the cities in which they work in (i.e. North Bay or Sudbury) would potentially be reduced.

▶ Impact on Local Businesses

Factors related to the establishment of the Industrial park are assessed on local businesses as either having a negative or positive impact. Overall, results are provided in the table below, however, these impacts will vary depending on the type of local business and the products and/or services they offer.

POSITIVE	NEGATIVE
Direct	
➢ New businesses in the industrial park, could mean more sales for local business owners ➢ Supplier businesses will have the potential to grow their businesses at above average growth rates ➢ Secondary suppliers will be closer to their customers ➢ Create business opportunities and business retention ➢ Relocation of existing businesses could open up the inventory of available lots in desirable/visible areas of the community ➢ Relocation of existing industrial businesses to the park may allow for rezoning of previous property to be better suited to the surroundings (e.g. residential)	➢ Possible increase in competition, however target markets should not create direct competition for existing businesses, this should be part of a long-term economic development vision and plan ➢ Increased competition for industrial land with these potential new properties on the market, having a negative impact on owners of industrial land currently available in the Municipality ➢ An already limited workforce resulting in the possibility of employee poaching
Indirect	
➢ Higher sales could translate to higher profits, which could be reinvested into the regional economy, distributed to employees, leading to increased consumer spending ➢ Creation of new skills and skills retention ➢ Relocation of families in the area, cost of living remaining under North Bay and Sudbury, this bedroom community would be ideal for businesses and employees relocating to the area.	➢ Per capita income will increase, which may result in increased wages to retain employees ➢ With increased business, companies may need to hire higher skilled resources ➢ Increased transport traffic coming off of Highway 17 onto Leblanc Road. ➢ Current infrastructure of Leblanc Road might need upgrading, turning lane might be a requirement. ➢ Industrial park, located on way to museum and KOA, could possibly make areas less attractive for tourists ➢ Increases truck traffic in residential area along Bay street

Evaluation of Alternatives

As this is a risk-based decision, it is not the intent of the Project Team to recommend one alternative over another, rather to determine the feasibility of each option based on the financial, economic impact and market assessments and to present said facts to the Municipality so as to make an informed decision regarding the development of the proposed Park. Only Council is in a position to decide on the amount of risk they are willing and able to take in order to develop this Industrial Park.

As such, a comparison of the Alternatives 1 and 3 is provided below, in the form of a summary of the advantages and disadvantages associated to each option.

▶ Comparison of Retained Alternatives

ALTERNATIVE 1 – FULLY DEVELOPED AND SERVICED	
PROS	**CONS**
➢ Easier to promote for external investment and it is more economical than regional industrial land supply ➢ Shovel ready ➢ Can sell for more per acre ➢ Ability to generate revenue through provision of additional services (e.g. water) ➢ Could increase land assessment values and associated tax revenues ➢ Federal and provincial funding is available now to cover up to 2/3 of eligible costs	➢ Cost to develop is significant and will require substantial investment from the Municipality ➢ Upgrades to Leblanc Road over the short term may be required (not included in capital costs) ➢ A turning lane on HWY 17 may be required, presenting additional immediate costs (included in capital costs) ➢ May be difficult to sell to local businesses for relocation/expansions due to precedent set from previous land sales within park ➢ Potential resistance from local private land owners ➢ Financial and human resources will need to be allocated to actively promote the park to ensure timely ROI

ALTERNATIVE 3 - PARTIALLY-SERVICED	
PROS	**CONS**
➢ Low list price may be attractive to start-ups ➢ Low list price may be attractive to local businesses looking to expand/relocate (promote via BR&E) ➢ Lower upfront development costs to municipality ➢ Leblanc Road upgrades can be deferred and incorporated into capital plan in a more strategic manner ➢ Potential to build on momentum of lots that have already been sold ➢ Onus on land owner to put in septic and well which poses no cost to the municipality and provides opportunity for area businesses to supply said services	➢ More difficult to attract outside investment ➢ Not shovel ready ➢ Potential that buyers seeking cheap land will purchase at going rate with no intention to develop over the short term ➢ A turning lane on HWY 17 may be required, presenting additional immediate costs (included in capital costs)

▶ Evaluation Matrix

The purpose of utilizing an Evaluation Matrix and developing criteria was to provide an unbiased tool and a documented process for evaluating the alternative Industrial Park development options for this specific project.

Evaluation Criteria

Evaluation criteria were derived from the Municipal vision and policies as well as the project goals, objectives and principles identified previously by the Municipality, as well as through best practice research. A relative weight was then assigned to each evaluation criteria.

The **highest weights** were attributed to:

- Net Return on Investment – NPV of Revenue Stream
- Market Driven Development
- Potential for Direct and Indirect Permanent Job Creation

The **lowest weighted** criteria were attributed to:

- Potential for Direct and Indirect Temporary Job Creation
- Adaptability for future Change or Opportunity

The evaluation criteria were used to quantify the Industrial Park development alternatives and identify a highest and best case alternative.

Scoring of Alternatives

Alternative 3 scored the highest on the evaluation, represented below, as this option provides future flexibility and opportunity for economic development in West Nipissing yet does not have the same level of financial risk as Alternative 1.

Evaluation Criteria for Industrial Park Development Alternatives

No.	Evaluation Criteria (Combined Average Weight Factors Determined by CB Team with validation at the Municipal Project Committee)	Weight	Leblanc Road Industrial Park Development Alternatives (Evaluation by CB Team) (Raw Performance Score, Scale 1 to 10)	
			Alternative 1	Alternative 3
1	Net Return on Investment (NPV of Revenue Stream)	10.0	3	7
2	Market Driven Development	8.0	3	6
3	Business Retention and Expansion	7.0	6	9
4	Support of the Overall Municipal Vision	6.0	8	8
5	Potential for direct and indirect job creation - tenant based	8.0	7	7
6	Potential for direct and indirect job creation - park development	5.0	6	3
7	Increased pressures on overall infrastructure	7.0	3	8
8	New Resident Attraction	6.0	7	7
9	Investment Attraction - Inward	7.0	7	5
10	Adaptability for Future Change or Opportunity	5.0	4	8
	Maximum Possible Score	690.0		
	Alternative Raw Performance Score (Sum of All Raw Scores)		54	68
	Weighted Score (Individual Criteria Weight x Raw Score)		362	473
	Percent of Maximum Possible Score		52.46%	68.55%

Implementation Recommendations

Regardless of whether the Municipality opts to develop the Park as serviced, partially serviced or un-serviced, there are a number of fundamental factors and gaps which should be addressed to ensure their success. Best practices as they related to economic development and investment attraction and which address some of the gaps and challenges that have come to light as a result of this study formed the basis of the implementation recommendations.

▶ Fundamental Success Factors and Gaps

Intended to support council, administration and staff who will be responsible for the development of the Industrial Park, recommendations which address key fundamental factors/gaps include items such as:

- Increase economic development budget and secure additional qualified staffing resources
- Implement an ongoing BR+E Program
- Undertake an investment readiness assessment
- Collect and document site selection data standards
- Implement a single point of contact for businesses
- Create a uniform and transparent process through the development of permitting flow charts and checklists
- Have clear submittal requirements and a user's guide to local permitting
- Utilize technology to streamline the permitting process

The recommendations outlined in this report can be used as a guide for change at the broader system level or at the specific service-delivery level.

▶ Marketing and Communications Plan

The Municipality's marketing and communication objective is to promote the Leblanc Road Industrial Park and the overall community as a desirable location in which to invest via either business establishment or relocation. The marketing efforts should include a comprehensive, cohesive and cooperative external and internal marketing and communications program, targeting both inward investment from business prospects outside the region, and internal investment from existing businesses, stakeholders and allies within the community. Overall the general message for both internal and inward investors should focus on affordable cost of land, streamlined site preparation and the proximity to North Bay and Sudbury.

This marketing plan should be initiated as soon as pre-development is underway and a development concept plan can be shown to prospective tenants.

Conclusion

Success will be dependent upon the Municipality's ability to obtain appropriate financing, achieve market penetration through an aggressive marketing program, and create an efficient business-like operation intended to increase service levels and long-term growth potential.

Our research has identified a range of factors, some of which are in support of the proposed Industrial Park, some that might indicate certain elements of risk in this project. In light of these factors, our recommendation is to consider the two alternatives presented as well as the status quo.

Whether the Council will decide to go ahead with the development of the Leblanc Road Industrial Park will be highly dependent on the following key factors:

- The level of risk they are able and willing to take;
- The capacity and resources required to develop and promote the Industrial Park;
- Funding support from provincial and federal government bodies; and,
- Their priorities in the next few years for economic development and infrastructure investments.

▶ Next Steps

With the completion of the feasibility study and the identification and assessment of various alternatives for the development of the Industrial Park, Council and Administration are now armed with the information they require to make an educated decision on how to move forward with the development of the Park.

Should the Municipality opt to proceed with servicing the park, the next logical step in the process would be the development of a formal business plan in order to secure government funding.

Part 1. Introduction

1.1 Purpose

In 2008, the Corporation of the Municipality of West Nipissing (the "Municipality") received NOHFC funding to extend its municipal services to the western boundary of the Town of Sturgeon Falls to establish an industrial park. This allowed for the attraction of Dywidag-Systems International (DSI), formerly known as Jenmar Canada; a mining materials manufacturing company. To further expand its industrial infrastructure, the Municipality is looking at developing a fully serviced industrial park on Leblanc Road, which has approximately 75 acres of property. The Municipality is undertaking this project to determine the potential return-on-investment (ROI) associated with establishing a fully serviced industrial park which may appeal to potential private sector investors. In order to determine the viability of the proposed Leblanc Road Industrial Park, the Municipality has opted to conduct a feasibility study.

The Municipality did not have the necessary resources to complete a preliminary feasibility study for the development of the proposed land, and therefore contracted Collins Barrow SNT, in partnership with Markey Consulting and C2S Engineering, to conduct the study.

1.2 Scope

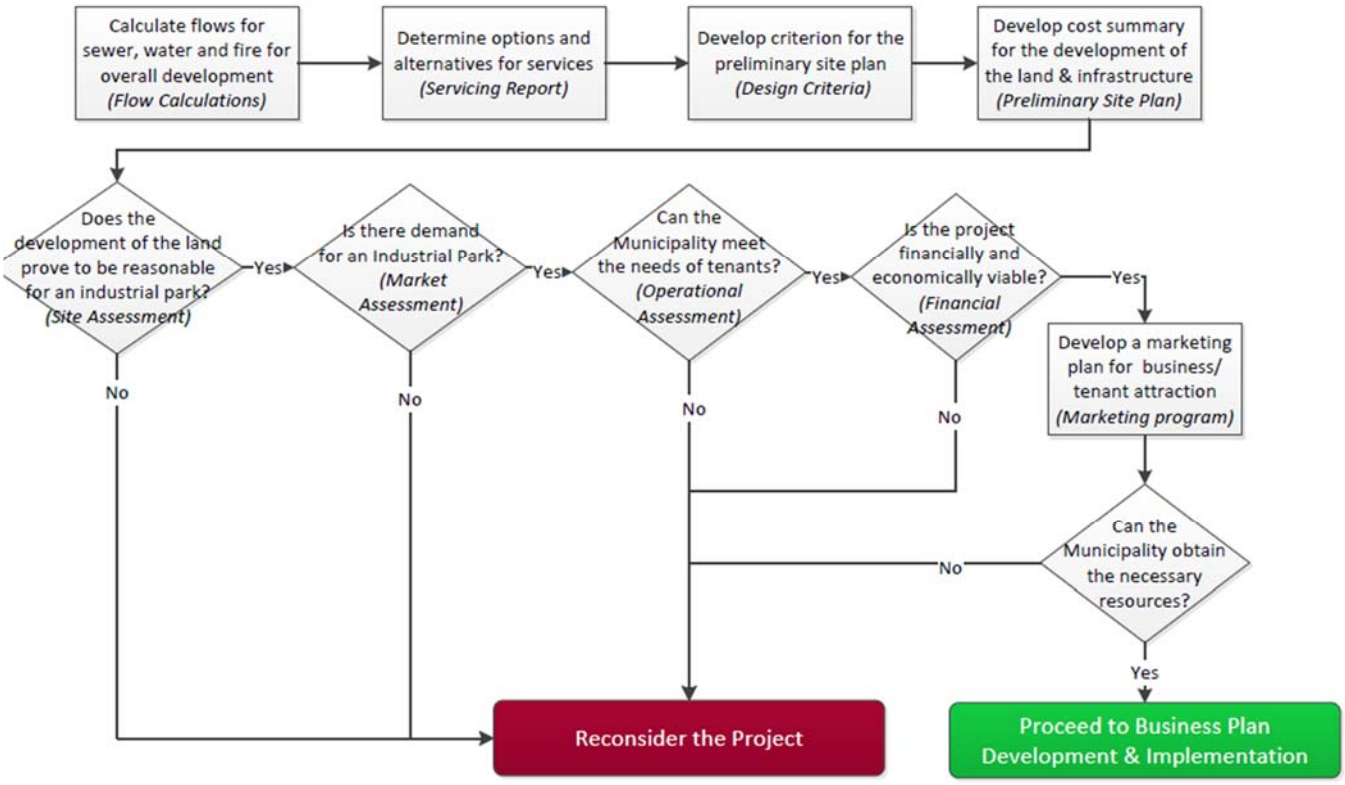
This study focused on assessing the potential ROI of establishing the Park as well as the investment attraction opportunities for the 75 acres of land (out of 85 acres) currently set aside by the Municipality. The objectives of the study were to:

- Determine the feasibility of developing an industrial park for West Nipissing and identify the types of businesses that could be attracted to invest in and establish themselves in the park;
- Create a detailed pre-engineering plan for the industrial park based on its most likely uses;
- Conduct an assessment of the impacts that a new industrial park would have on local businesses as well as a gap analysis of the area on what businesses would be the best fit for the area and the local and regional economy;
- Determine what the number of new jobs and the expected municipal revenues would result from a fully populated industrial park; and,
- Develop a detailed investment attraction strategy and marketing program for the industrial park.

1.3 Feasibility Study Methodology

The following approach was used in determining the feasibility for the proposed industrial park. It indicates the key steps and decision points that were considered when formulating conclusions and recommendations. As can be seen in the figure below, there are three key components to determining overall feasibility:

- The results of the site assessment and servicing report;
- The results of an operational assessment, including detailed market assessment; and
- The results of a financial and economic assessment.



In order to assess the various components, the Project Team conducted primary and secondary research, including consultations with key stakeholder groups and the Municipality. The study findings and conclusions are based upon this collected data. The following is a summary of the sources of information that have formed the basis for the report.

▶ Secondary Data Sources

Secondary data sources represent reports, analyses and statistical summaries prepared by third parties and relied upon by the Project Team. While care was taken to ensure the comparability and accuracy of specific data sources, we have not audited nor otherwise attempted to verify the information contained in the secondary data sources. The following is a list of reference documents used in this study:

- Corporate Affairs International, West Nipissing Positioning Plan (May 2003)
- Precision Management Catalysts, West Nipissing Labour Market Study (November 21, 2003)
- Mid-North Appraisals Ltd., Land Value Assessment (December 13, 2010)
- West Nipissing Chamber of Commerce, West Nipissing Market Feasibility Study (2015)
- West Nipissing Chamber of Commerce, West Nipissing Leakage Analysis (2015)
- Economic Partners-Sudbury East/West Nipissing Inc., Socio-economic Profile (March 2014)
- Municipality of West Nipissing Official Plan (Approved with Modifications, December 7, 2011)
- Municipality of West Nipissing Comprehensive Zoning By-Law 2014-45 (July 8, 2014)
- Greater Sudbury Chamber of Commerce, Municipal Red Tape Report (September 2010)

▶ Primary Data Sources

Primary data represents information obtained through interviews with industry representatives and direct information requests. In certain instances, the primary information provided to us is considered to be proprietary in nature and as such has been aggregated for presentation purposes to ensure the confidentiality of the information provided.

Local Business and Economic Partner Surveys and Interviews

A web-based survey was distributed to 18 specifically targeted local businesses; 8 responses were received. The survey and results can be found in Appendix B. As well, one-on-one interviews were conducted with local and regional businesses and economic partners in order to gather information above and beyond that which was acquired from the surveys. The summarized results from these interviews can also be found in Appendix B.

Other Industrial Park Interviews

One-on-one interviews were conducted with representatives from 7 municipalities/towns with regards to their industrial parks. This included: Temiskaming Shores, Kapuskasing, Espanola, Fort Frances, Red Lake, Kenora, and Orillia. The findings from these interviews are integrated into the Best Practices section of this report, and are also summarized in Appendix C.

Steering Committee Meetings

Throughout the project process, the Project Team conducted steering committee meetings and coordinated with Municipal staff on a regular basis. The following is a summary of the topics discussed at the steering committee meetings.

- **November 27th, 2016 – Project Kick-off meeting.** During the meeting the Project Team worked with the municipality's project team to confirm the goals and objectives for the project, and the anticipated timeframe for the project.
- **January 27th, 2016 – Review of work plan and communication plan.** During the meeting the Project Team presented a detailed work plan with key milestones to the Municipality's Steering Committee. As well, discussions were had on the progress of the pre-engineering plan, and draft stakeholder consultation material was provided for review and to gather feedback.
- **April 1st, 2016 – Review of Financial Projections, Assumptions, and Discussion on findings to date.** Initial findings were discussed regarding related market opportunities and constraints for the Industrial Park and its development. Expectations on the deliverable and possible options for the analysis were discussed which allowed for the study to conclude in an efficient manner.
- May 5 – **Delivery and presentation of Feasibility Study draft.**
- May 5 – **Delivery of final Feasibility Study Report.**

▶ Report Organization

The content of this Feasibility Study includes:

- Part 1: Introduction
- Part 2: Market Assessment

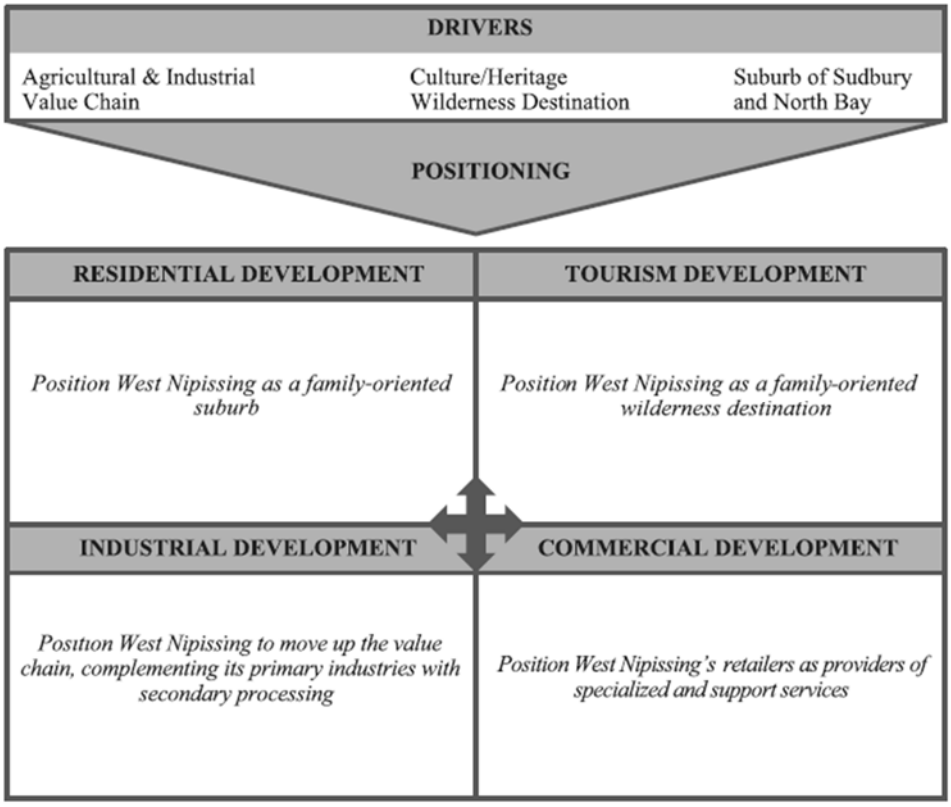
- Part 3: Operational and Feasibility Analysis
- Part 4: Implementation Recommendations
- Part 5: Conclusion
- Appendix

▶ Feasibility Study Review and Approval

The feasibility study was presented to the Municipality on May 5, 2016. Comments and input were subsequently noted and incorporated into the final plan. On June 7, 2016 the Final Feasibility Study will be presented to the Municipal Council, subsequently a French and English executive summary will be provided for the community at large.

1.4 Project Considerations (Assumptions and Constraints)

The planning of the Municipality of West Nipissing's industrial park is guided by 'triple bottom line' principles, which are based on sustainable practices for environmental, economic and social issues. The Municipality has an economic development strategy[1] set out with these principles in mind, and has implemented it within its laws and the adopted Official Plan[2].



West Nipissing Strategic Positioning Diagram

[1] West Nipissing Positioning Plan (2003)
[2] Municipality of West Nipissing Official Plan (Approved with Modifications, December 7, 2011)

In 2003, the West Nipissing Positioning Plan was completed which provides a long-term strategic plan that encourages the sustainable growth of the Municipality. Implementing the recommendations of the Municipality's Positioning Plan is one of the objectives designed to meet the needs of the Municipality, while positioning them for new investment and further economic diversification. The following specific Positioning Plan recommendations, also reiterated in the Official Plan, were considered throughout this feasibility assessment for the proposed Industrial Park.

Recommendations from Positioning Plan
➢ Support a regional movement in agriculture up the value chain by encouraging secondary processing of primary products;
➢ Build on existing educational programs to strengthen the links between industry and the educational community;
➢ Establish a joint industry and education sector lobbying body to influence the centrally administered curriculum;
➢ Determine the market potential for modular homes and establishing a facility in West Nipissing;
➢ Contribute to efforts to attract a value-added, engineered wood-product facility;
➢ Develop a centre of excellence in mining supplies and services; and,
➢ Establish and support a call centre training initiative.

▶ Economic Considerations

The following economic considerations are the foundation of any and all development and business opportunities:

- Provide business opportunities and employment for residents;
- Provide economic opportunity for growth;
- Generate revenues early in the development process;
- Enable the Municipality to leverage provincial and federal funding; and,
- Create the potential partnership development (3P).

▶ Social and Legal Considerations

The industrial development must satisfy all legal requirements defined by the Municipality, and meet the goals set forth for integrated and sustainable industrial development. These policies are laid out in the West Nipissing Official Plan[3] and include employment, health and welfare, community services and governance.

[3] Municipality of West Nipissing Official Plan (Approved with Modifications, December 7, 2011)

The Municipality's economic development department endeavours to investigate and pursue economic opportunities for the purpose of job creation and enhancing community prosperity. This study considered these two factors in assessing overall feasibility.

▶ Environmental Considerations

No soil analysis or drainage tests were requested as a part of this study, the subject's subsoil is assumed to have suitable load-bearing capacity and that the soil is free of contaminants and environmentally safe for green field development.

Locations should be avoided which will create land use conflicts or where the type of industry has the potential to pollute groundwater or surface water resources. Furthermore, access to industrial areas shall not be permitted through a residential area, with controlled access. [4]

[4] West Nipissing Official Plan - Section 3.06.8

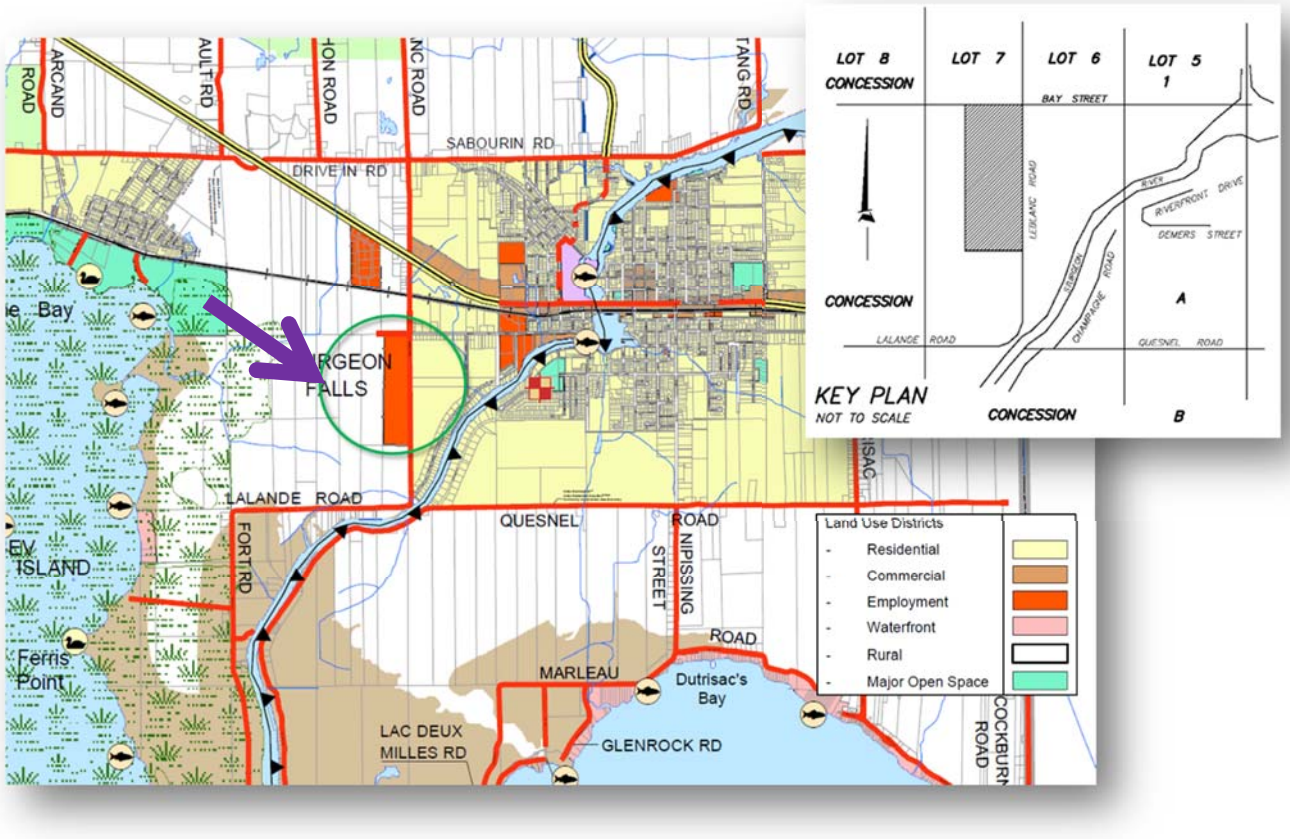
Part 2. Market Assessment

2.1 West Nipissing Leblanc Road Industrial Pak

The proposed site of the Leblanc Road Industrial Park (the "Industrial Park") is located on the southwest corner of Bay Street and Leblanc Road, a short distance southwest of the former Town of Sturgeon Falls and just south of Highway 17. The land is in an area developed with a mixture of industrial and rural residential properties. In the 2010 market assessment of the land, completed by Mid-North Appraisals LTD, the highest and best use of the subject property was its assumed industrial use.

Legal Description

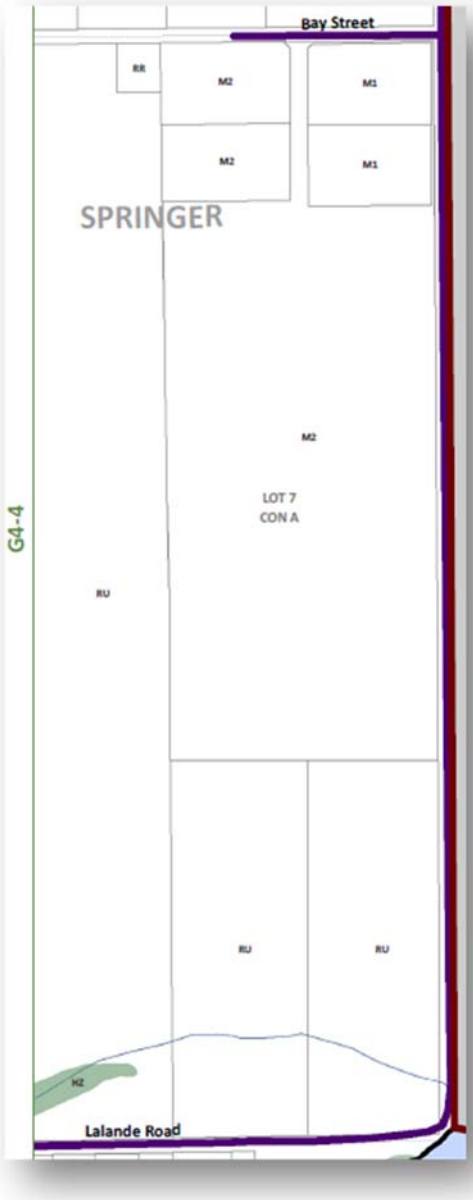
Parcel 25857 NIP being part of Lot 7 Concession A, geographic Township of Spring, Municipality of West Nipissing, District of Nipissing, designated as Parts 2 and 8 reference plan 36R6022. PIN 49076-0393(RT)



Leblanc Road Industrial Park, as per West Nipissing Official Plan

The proposed land for the Industrial Park covers 75 acres, and is divided into 16 lots (approximately 4.69 acres each). Six (6) of said lots had been sold prior to the commencement of this study, and an additional 5-acre parcel not included as part of the Industrial Park. The land is relatively level, with vegetation cover of trees and brush. Standard rural services are available to the subject site and include: hydro, telephone and Provincial Police projection, while private water and sewage disposal systems are required. These will be addressed in **Part 3**.

The use of the land is regulated by two municipal documents; the Official Plan[5], and the Zoning By-Law[6]. The Official Plan is a long-term policy document which dictates proposed land uses for zoning purposes and addresses issues such as traffic, transportation and servicing matters throughout the Municipality. The Zoning By-Law is a detailed regulatory document, outlining guidelines for construction and development of land.



According to Schedule G5-3 of the Zoning By-Law 2014-45, the land for the proposed industrial park is zoned M1 and M2, Light Industrial and Heavy Industrial, respectively, as can be seen in the image on the left. The industrial zones established by By-Law 2015-45 are as follows:

Zone		Description
M1	Light Industrial Zone	Industrial uses primarily within a building that do no create significant compatibility issues
M2	Heavy Industrial Zone	Industrial uses more intensive in nature which may include portions of the operation outdoors
M3	Extractive Industrial Zone	Licenses pit and/or quarry operations
M4	Waste Disposal Industrial Zone	Public and private waste management uses

For the purposes of this feasibility study, the focus is on M1 and M2 zoning. The different permitted uses for this land, extracted from the Zoning By-Law 2014-45, can be found in Table 8.1 in Appendix D. Additionally, Appendix D includes zoning by-laws specific to Industrial Zones, as well as Zoning By-Law 2014-45 Schedule G5-3, which identifies the Industrial Park zoning.

Pricing of Land – Fair Market Value

The sale price per acre of the lots that were pre-sold within the Park was based on a professional evaluation (2010) of undeveloped industrial land market values, which resulted in lots being sold for $1,000 per acre. The market value report also stated that this $1,000 per acre was for the entire park and that smaller parcels (example given of 2 to 3 acres) should be sold for closer to $5,000 per acre.

[5] Municipality of West Nipissing Official Plan (Approved with Modifications, December 7, 2011)
[6] Municipality of West Nipissing Comprehensive Zoning By-Law 2014-45 (July 8, 2014)

The feasibility study demonstrates the market value comparison, which brought the potential selling price to $15,000 to 20,000 per acre depending on location and size of lot. The larger the lot, the lower dollar per acre value. The Opinion of Value obtained from Marleau Real Estate Ltd. Brokerage on April 13, 2016 is provided in Appendix R.

2.2 Situational Analysis

▶ Location

Founded in 1999 through the amalgamation of Cache Bay, Crystal Falls, Desaulniers, Field, Kipling, Lavigne, North Monetville, River Valley, Sturgeon Falls, Verner and 17 ½ unincorporated townships, the Municipality of West Nipissing is a vibrant municipality located in northeastern Ontario. It spans 1,992.08 km^2 and benefits from being within close proximity of Sudbury to the West and North Bay to the east.

The most significant rail and highway transportation corridors in Northeastern Ontario pass through its borders, making it easily accessible from all four geographic corners. West Nipissing is served by the TransCanada Highway 17, near the Highway 11 junction, while also being serviced by six other secondary and tertiary highways: Highway 64, Highway 535, Highway 535A, Highway 539, Highway 575, and Highway 805.

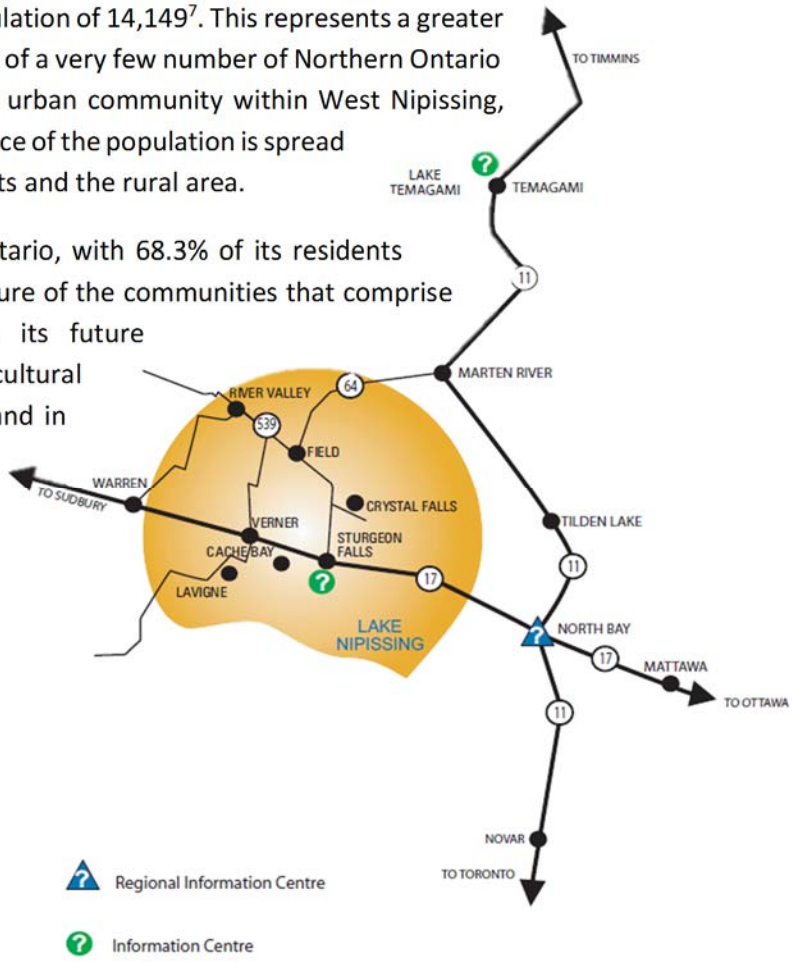
Due to its strategic location, West Nipissing draws consumers from the communities of North Bay, French River, Markstay-Warren, St.-Charles, Nipissing First Nation, Dokis First Nation and Greater Sudbury, resulting in a regional trading area of approximately 233,588 people.

Distances to Major Markets from West Nipissing

City	Travel Time (approx.)	Kilometres	Miles
Hamilton	5 hours	432	268
Kingston	6.5 hours	497	308
Kitchener	5 hours	900	559
London	6 hours	532	330
Montreal	7 hours	597	370
North Bay	**30 minutes**	**34**	**21**
Ottawa	4 hours	402	249
Rouyn Noranda, Qc	**3.5 hours**	**276**	**172**
Sudbury	**1 hour**	**88**	**54**
Témiscamingue, Qc	**1 hour 20 minutes**	**102**	**63**
Timmins	**4 hours**	**360**	**224**
Toronto	4 hours	382	237
Windsor	8 hours	717	445

▶ Culture and Community

According to the 2011 Census, West Nipissing has a population of 14,149[7]. This represents a greater than 7% increase since 2001, making West Nipissing one of a very few number of Northern Ontario municipalities showing population growth. The largest urban community within West Nipissing, Sturgeon Falls, holds 47.1%[8] of the population. The balance of the population is spread across numerous smaller hamlets, cross road settlements and the rural area.



West Nipissing is the most bilingual community in Ontario, with 68.3% of its residents fluent in both English and French[9]. The history and culture of the communities that comprise the Municipality are seen to be fundamental to its future development. The Municipality is rich in its multi-cultural character, its francophone heritage, Aboriginal roots and in the diversity of its rural and small urban landscapes.

The Municipality and residents of West Nipissing embody *Joie de vivre*, which is about living life to its fullest, and this is a driving force in the desire to continue to build a wonderful municipality.

The Municipality has a total of 10 educational facilities through 4 school boards, a post-secondary institution, as well as 4 adult retraining and continuing education options. The Municipality is home to the West Nipissing General Hospital, as well as a newly established Community Health Centre. Furthermore, the municipality offers a variety of recreational facilities, police and fire services, five municipal libraries, a museum, waterfront park and a marina, to name a few.

The average household income is $75,158 with an average individual income of $34,120. The majority of adults aged 25 to 64 have no certificate, diploma, or degree (18.2%) or a high school diploma (25.3%). The average value of a dwelling is $215,149, significantly less than those in neighbouring municipalities (i.e. North Bay - $251,356 and Greater Sudbury - $250,513).

▶ Industrial Land Supply and Demand

Supply

West Nipissing has an existing inventory of quality industrial land for businesses development. According to the West Nipissing Community and Business Profile (2015), there are 37 industrial properties in West Nipissing, of

[7] Statistics Canada, 2011 Census

[9] Municipality of West Nipissing Community and Business Profile, 2015

which 14 have sewer and water services, 14 are serviced by Sudbury hydro and 22 are serviced by Hydro One.[10] A total of 18 of these lots are located within the town of Sturgeon Falls. Research determined that at this time there are 5 industrial lots for sale within the West Nipissing, and 2 which have recently sold.

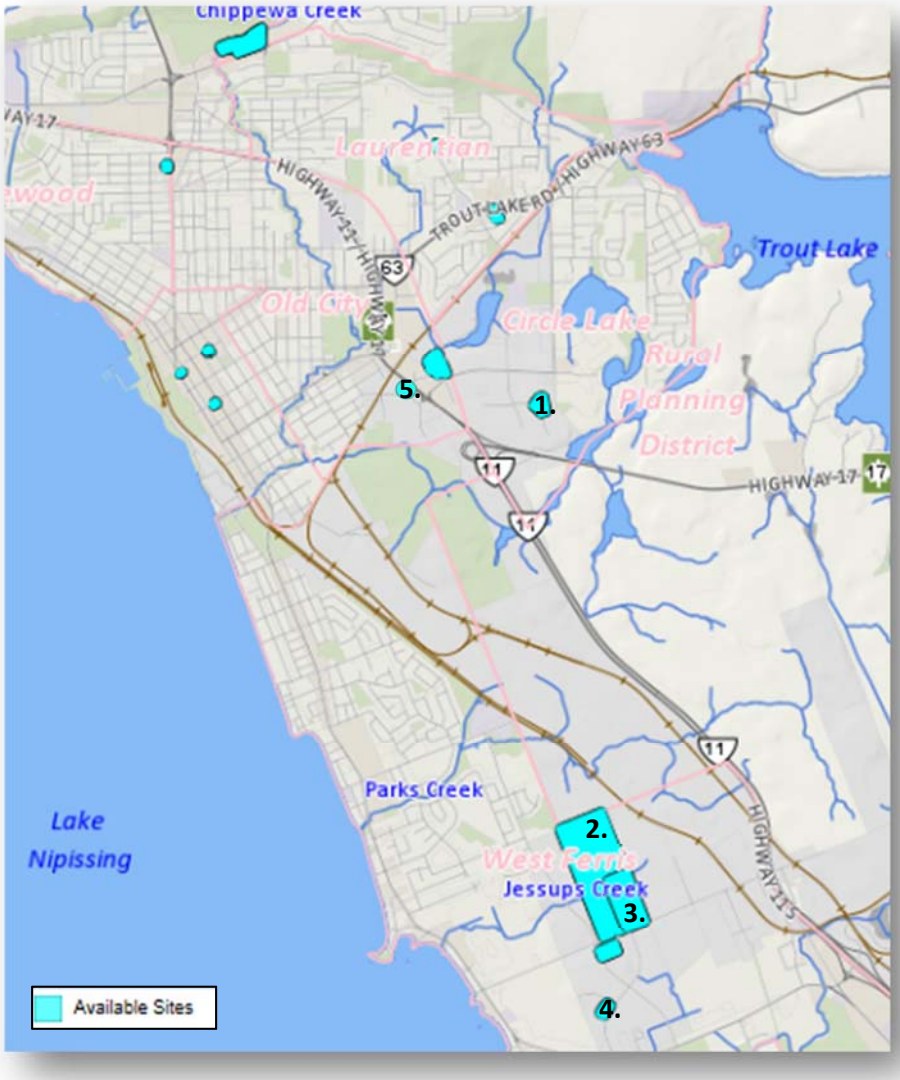
Available infrastructure in the Municipality includes 8" and 10" water mains, 8" sewer mains and a full loop road accessing all lots. Most areas along Highway 17 have high-speed Internet access as well as cellular phone service, which is available throughout the Municipality on the Bell Network. The electrical requirements of West Nipissing businesses and residents are served by Hydro One, the new supplier of hydro in the province and by West Nipissing Energy, the regional distributor. In addition, solid waste disposal is accomplished through transportation to the municipal landfill, which is currently owned and operated by the Municipality of West Nipissing. [11]

When considering the supply of industrial land, it was important to consider industrial land available in neighbouring communities, as the target markets, those wishing to establish a business in an industrial park in the region, will not necessarily care where in Northeastern Ontario they be situated. Therefore, research was conducted on the availability of industrial land in both the City of North Bay and the City of Greater Sudbury, the largest cities surrounding West Nipissing.

North Bay

North Bay's GIS property search tool[12] identifies industrial and commercial properties for sale or lease in the City of North Bay. The following image shows the results of the search, with the industrial property's identified. This includes vacant lots and industrial buildings for sale or lease. The table which follows highlights only those lots which are being sold as vacant industrial lots. A search on Mallette-Goring North Bay[13] found an additional property (#5).

[10] West Nipissing Community and Business Profile, 2015
[11] West Nipissing Positioning Plan (2003)
[12] North Bay – Finding a Location GIS property search tool
[13] http://mallettegoringnorthbay.ca/?s=&post_type=listing&status=for-sale&locations=&property-types=industrial



Industrial Properties	Description from GIS Site Selector Interactive Map
1. 160 Progress Road Seymour Industrial Park	3.5 acres with 8,000 sq. ft. building, 7 loading doors and 3 acres common parking/storage area
2. Birch's Road	79 Acres of vacant industrial land (15 acres zoned M3, the remaining zoned O2)
3. 280 Birch's Road	20 Acres, ready to build, zoned M3
4. 0 Ferris Road	Site is partially prepped, blasting and storm water management study done.
5. 105 Dury Road	$1,400,000 for 3.527 acres zoned MCH

A detailed map of North Bay with the identified land zones can be found in Appendix E.

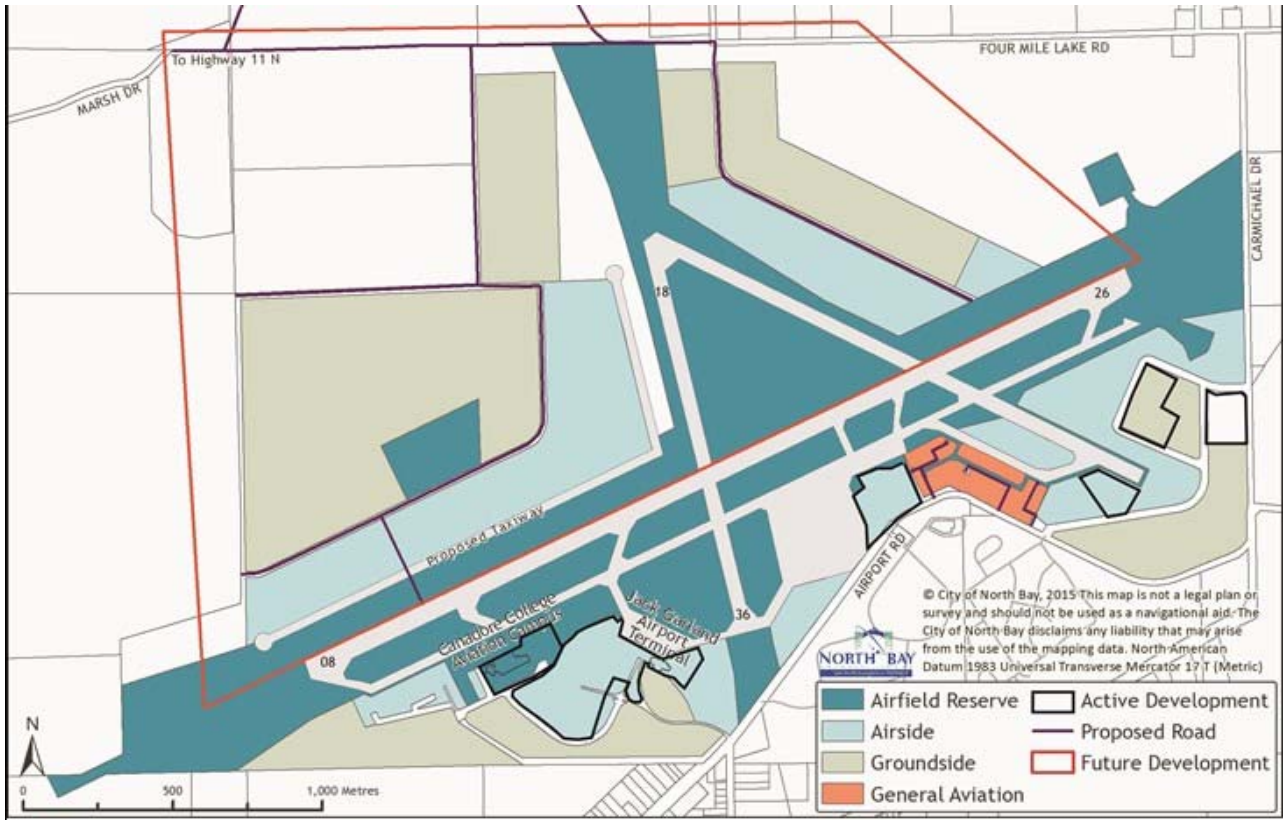
In addition, a series of investments by the City of North Bay has recently extended full municipal services to the first phase of their Airport Industrial Business Park (AIBP) where currently, 120 acres of shovel ready airside and groundside land that can be custom-sized are available for sale or lease. Airside lots range in size from 2.2 to 10 acres, while groundside land parcels range in size from 1.4 to 10.1 acres with road access and nearby utilities. The

guideline sale price per acre within the AIBP is $40,000, with the final price being determined by the merits of the project (i.e. job creation, wage rates, etc.). While the AIBP will consider purchase offers for development of the AIBP, the focus is on leasing the land with lease rates set at $2.33 per square foot and based on square footage requirements for a proposed project.

The City of North Bay has developed a targeted incentive initiative for new builds, expansions or improvements to City approved developments located in the Airport Industrial Business Park. Airport Community Improvement Plan investment incentives include:

- **Tax incremental Base Grant:** refunds the municipal portion of property tax associated with improvements (100% of the increase in year one, 66% in year two, and 33% in year three with resumption of full remittance in year four).
- **Municipal Fee Rebate Program:** waives industrial development charges and provides a refund of municipal planning, legal and building permit fees related to development approval.
- **Landfill Tipping Fee Reduction:** provides a reduction in landfill tipping fees associated with site preparation

Available and active development lands in North Bay's Airport Industrial Business Park are pictured below.



Greater Sudbury

In the City of Greater Sudbury, the current supply of industrial land can be classified under one of three categories:

Legal lots of record	Typically land already zoned and only requires permit approval for development
Draft plan	Typically land which is a few years away from development as work on achieving the required conditions is satisfied in order to approve
Designated developable	Typically land which does not have any development approvals and are a number of years away from being developed, but are understood to be areas of future development

The following table provides a summary of industrial land supply for Sudbury given the definitions above. A detailed map which reflects these figures can be found in Appendix F.

Industrial Land Supply in Greater Sudbury	Hectares (ha)
Designated Developable	795.9
Draft Plans	175.1
Legal Lots of Record	162.4
Total Industrial Land	**1133.40**

Based on the definitions given above, the legal lots of record have the biggest impact on short-term industrial land supply. There is 162.4 hectares of industrial land in Greater Sudbury ready for immediate development. In order to determine the long-term supply of industrial land, we focus on the designated developable land. This is land which does not have any development approvals, and would not be developed for years to come. In Greater Sudbury, there is almost 800 hectares of land which could be developed in the future for industrial uses. There have been requests to expand the settlement boundaries in Greater Sudbury to include more land for industrial development (53 hectares to be exact); however, these requests are not justifiable given the current supply. Therefore, the figures in the table above will most likely not increase as the availability of industrial land already meets and exceeds provincial requirements.

Additional analysis of available properties and cost calculations per acre are provided in Section 2.3 Industrial Land Market Assessment, and aided in determining the average cost per acre of the proposed LeBlanc Road Industrial Park.

Demand

According to the West Nipissing Building Permit Report 2007-2014[14], the number of industrial permits indicates that since 2009 no permits have been issued, and therefore industrial building construction has not taken place. The last recorded amount was in 2008 which was valued at $3,775,000. A lack of industrial development is reflective of a low demand for industrial land during this time.

Tax rates are of significant importance, as they may be an influential factor in whether a business establishes or relocates their business to West Nipissing. Of specific interest are the tax rates which apply to industrial land

[14] West Nipissing Community Profile (2015)

(2015), which saw a slight decrease from 2014 rates. The table which follows provides municipal property tax rates for industrial land property classes in West Nipissing.

Property Class	West Nipissing[15]
Industrial Occupied	1.467566 %
Industrial Excess Land	0.953918 %
Industrial Vacant Land	0.953918 %
Large Industrial Occupied	6.763644 %
Large Industrial Excess Land	4.396369 %

In addition to municipal property tax rates, development charges and building permit fees are also important for investors and potential tenants of an industrial park. A detailed comparison of these fees and rates for West Nipissing, Greater Sudbury, North Bay and Temiskaming Shores is provided in the Industrial Land Market Analysis section. This comparative information is used when assessing the level of future demand. This section also looks at the current available, and recently sold industrial properties in West Nipissing and the surrounding area.

▶ Local Economy

The economic base of West Nipissing is very diverse. In addition to a resource base of agriculture, mining supply and services and forestry, is a thriving construction and retail trade sector. As well, tourism operations and service-based retail are key drivers of the local economy.

With a wide range of existing assets at its disposal, the municipality's strengths lie in the following sectors: forestry, agriculture, health, education, retail services, government services and tourism. The remainder of this section will address these sectors in West Nipissing.

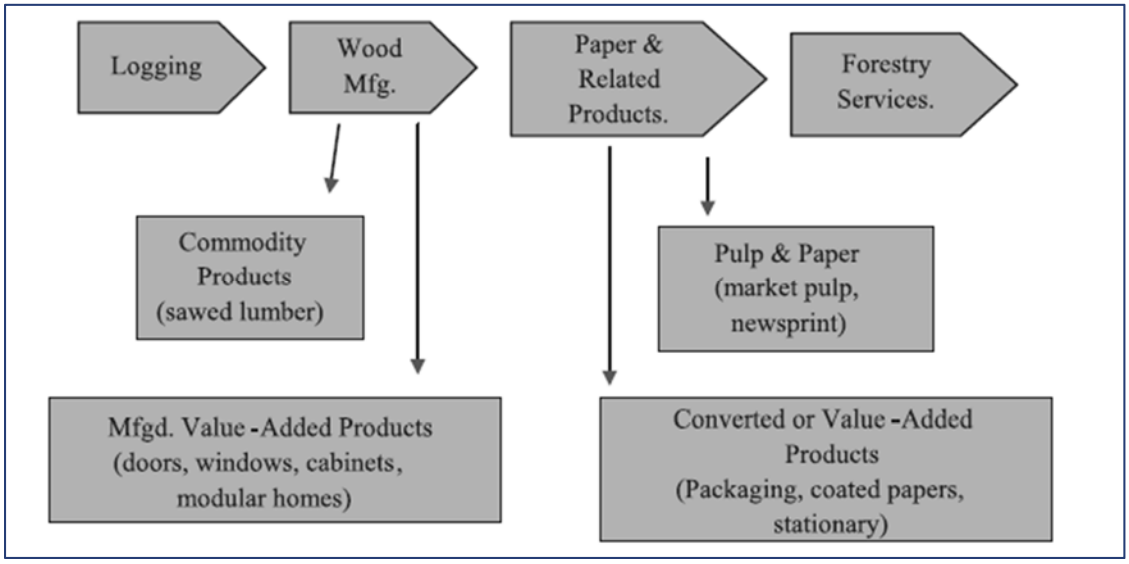
Forestry and Mining

West Nipissing is located in the centre of one of Canada's most concentrated forests, which stretches outward from the Municipality in all directions. The forestry sector is one of the most developed sectors of the municipality's economy, having exploited the woodlands for over 150 years, and with one of the largest employers still being the local sawmill.

Located less than 90 km from Sudbury, West Nipissing benefits from being in close proximity to one of the world's most productive, technologically advanced, and environmentally aware mining centres. This mining cluster provides economic opportunity to the region through its mining operations, and robust supply and services sector. An example of a West Nipissing business serving the mining sector is that of a local farming operation that produces and provides hay to various Sudbury mines. In terms of direct connectivity to the mining industry, West Nipissing is home to DSI, a multi-national mining supply and services company. In addition, to the north and west of West Nipissing, the wilderness stretches to areas rich with granite and feldspar, where exploration is currently under way.

[15] http://www.westnipissing.ca/images/docs/FinancialServices/2015-38_-_Set_Tax_Rates_for_Penalties_on_default_payments___May-19-2015.pdf

Both the forestry and mining sectors, part of the primary industry, are important assets to West Nipissing, as they provide opportunities for secondary or tertiary sector development such as commodity or value added wood and building products. The following industry value chain is represented below in order to better understand the opportunities for the forestry sector in West Nipissing.



Source: West Nipissing Positioning Plan (2003)

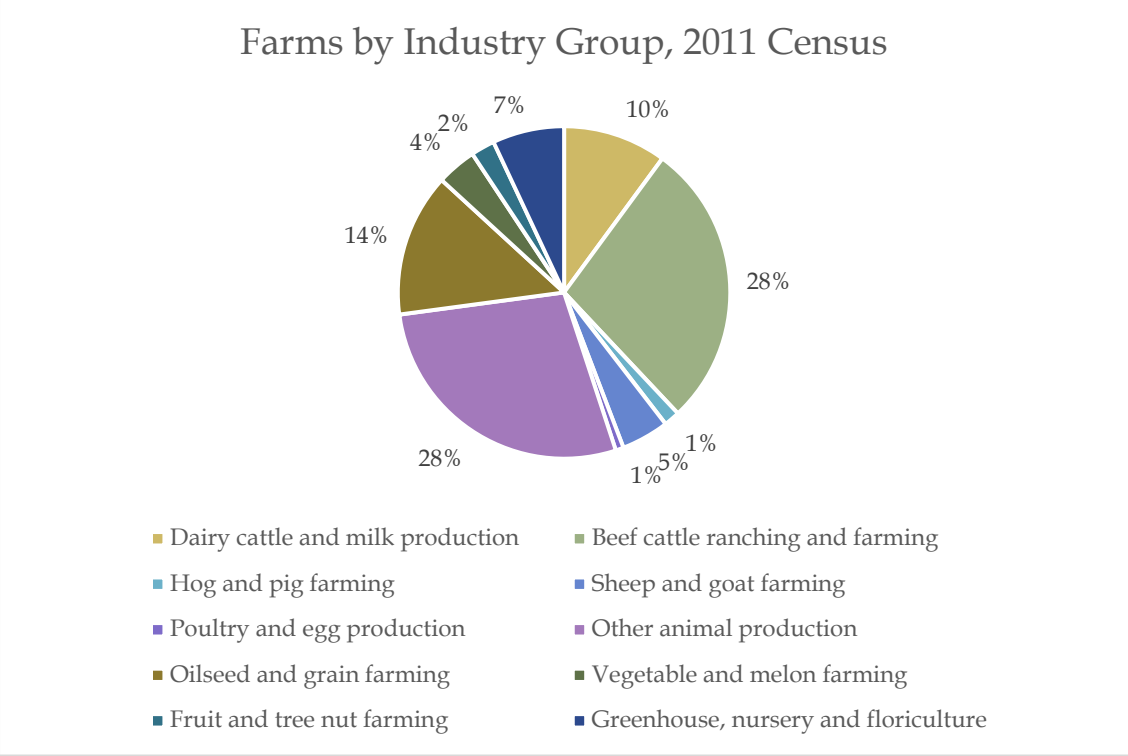
Tourism

West Nipissing is located along the north shore of Lake Nipissing, making tourism around the lake an important part of West Nipissing's economy. In 2011, Northeastern Ontario attracted 4.3 million visitors, of which 30% visited the Nipissing District. There are 38 lodges, campgrounds and resorts within the Municipality to satisfy visitors and locals alike. The vast wilderness also provides opportunities for outdoor tourism activities, such as angling, hunting, hiking and biking. In recent years, large investments have been made to support the municipality in being a destination for tourists. For example, in 2013 the municipality opened a $10 million Minnehaha Bay Community Waterfront. [16]

Agriculture

The area's agricultural roots are evidenced by many prosperous farms that dot the municipal countryside. The land in the West Nipissing area is part of an ancient lake basin, and as such, it is richer than much of northeastern Ontario's typical soil. In the southwest portion of the Municipality, the agriculture sector is the primary economic activity, heavily dependent on dairy farming, simple forage and cash crop cultivation. Dairy farming is the primary agricultural industry, and accounts for more than 80% of farm sales in the area, which contributes 8 million dollars to the local economy. The chart below provides a high level summary of the number of farms by industry group in the Nipissing District (2011). For addition statistics on agriculture in the Nipissing District see Appendix G, obtained from the 2011 Census of Agriculture and Strategic Policy Branch, OMAFRA.

[16] West Nipissing Community Profile (2015)



Note: *Other Farms* (118) was removed for visual representation purposes.

This sector is well organized in terms of its supply chain as a result of the presence of the Co-opérative Régionale de Nipissing-Sudbury, a local cooperative, jointly owned by local members of the agricultural community. A grain elevator in Verner demonstrates prosperity for the future of agriculture in the area. The long-term effects of climate change (i.e. the warming of the continent) has helped the production of cash crops in West Nipissing, allowing primary producers to plant a wider variety of crops than previously thought possible. On the sell side, there exists unexploited opportunities in distributing products locally and regionally. As well, new lines of products are still in their early stages of introduction or absent from the West Nipissing region, including organic products and non-timber forest products such as essential oils, plant fibres, forest foods, and floral products.

Agriculture Industry Supply Chain

There also exists untapped potential in West Nipissing for food processing, which is one of Canada's largest manufacturing sectors, and is the single largest market for Canadian agriculture products, providing employment for 296,000 Canadians. Processing and preparing local food involves transforming agricultural products into

another form as market-ready products through washing, peeling, packaging, freezing, canning, and meat processing. Local agriculture is already a strong contributor to the region's economy creating a strong basis for value-added food processing in the region. Appendix H provides the Municipality with a guide on best practices in local food, and can be useful to strengthen and expand the agriculture and food processing industry in West Nipissing. As well, provided in Appendix I is an extensive list of agriculture opportunities and initiatives which were identified in the West Nipissing Positioning Plan (2003), and updated to reflect today's environment. It is estimated that for every dollar in farm revenue generated, there is an additional $1.30 in sales for businesses that deal with farmers, and every farm job in Northern Ontario supports 1.3 to 1.5 additional jobs outside agriculture. These are both promising statistics which can promote economic development in West Nipissing. All the opportunities outlined in this section, some of which are already underway, could benefit from the additional space in an industrial park for either establishing or expanding agriculture businesses.

Manufacturing

Situated between Greater Sudbury and North Bay, West Nipissing is a spatial mid-point of Canada's largest mining cluster. This factor has attracted, and has the opportunity to attract, large national and international manufacturing companies to relocate or establish a Canadian base in West Nipissing. For example, DYWIDAG-Systems International Canada Ltd.(DSI), (formerly Jenmar). CEO of DSI Underground Americas, Alan Henderson, says the Sturgeon Falls facility "…will be our largest manufacturing facility in Canada and in time will be a ground support product super plant."[17] With strong primary industries in the region (i.e. forestry, agriculture, mining, etc.), the manufacturing or processing of these materials into value added products provides West Nipissing with a very lucrative economic opportunity to expand their manufacturing sector. This is particularly true for manufacturing and processing of local food products, as was discussed above in the agriculture sector. Other opportunities for value-added manufacturing are identified in the following Leakage Analysis section.

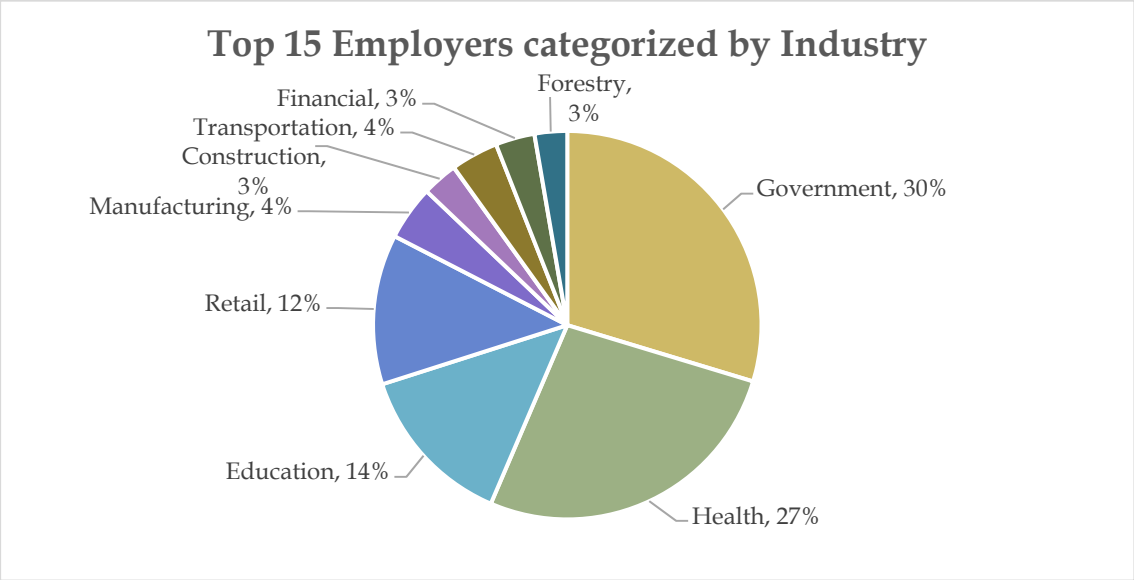
Retail & Services

The retail sector is one of the most developed elements of West Nipissing's economy and one of the fastest growing industries in Northeastern Ontario. Over 230 of the 500 businesses in West Nipissing are related to the retail/service sector.[18] Expected retail sales in West Nipissing represent about $160 million per year in 2014 dollars. In West Nipissing, the retail industry employed 17.5% (736) of the total workforce in West Nipissing in 2015, making it the largest sector among private industries. It is also important to note that another 3.3% (139) of the workforce is employed in the wholesale trade industry.

An important relevant factor considered is the proximity of West Nipissing to North Bay and Greater Sudbury. This can have a negative impact on West Nipissing retailers as a result of two factors: 1) an undetermined number of West Nipissing residents work in North Bay or in Greater Sudbury, which entices them to shop and obtain various services in the larger centre, and 2) the inevitable Reilly's Law of retail gravitation, which states that customers are willing to travel longer distances to larger retail centers given the higher attraction they present to customers.

[17] *DSI acquires Jenmar's Canadian Operations* (November 2014), Sudbury Mining Solutions Journal.
[18] West Nipissing Market Leakage Analysis (2015). West Nipissing Chamber of Commerce

In addition to retail, the West Nipissing economy also revolves around services, with the public sector playing a large role. Nine of the fifteen largest employers are in the public sector (mainly education, health care and government institutions). This represents 71% of all the employees employed by the Top 15 employers. The combined total workforce employed in public institutions (i.e. health care sector, utilities sector, the educational service sector and the public administration sector) in West Nipissing represents almost 40% (1,649) of the total workforce for West Nipissing in 2015. An industrial park or industrial development in general, in a community, can directly impact jobs in construction, manufacturing and transportation industries, while indirectly impacting the primary and tertiary industry jobs through economic development.



Source: West Nipissing Community and Business Profile, 2015

▶ Leakage Analysis for West Nipissing

Retail leakage occurs when residents spend outside the region of their main residence. Further to this, company and institution leakage occurs when locally based businesses and institutions acquire goods and services outside of the region.

In the West Nipissing Leakage Analysis, completed in 2015, it was determined that 42% of purchases by individual consumers are made outside of the region. Some of the top reasons given by West Nipissing consumers to justify their purchases were: convenience, variety and price. While it was important to consider consumer leakage estimates, it was exceedingly more important for the purposes of this study, to examine leakages made by institutions and businesses as part of their operating expenses, capital expenses and purchases. These findings were a useful resource used to identify industrial and manufacturing opportunities in West Nipissing.

Looking at the leakage levels of business purchases or expenses (i.e. the proportion of goods and services acquired outside the region by West Nipissing based companies and institutions) it was determined that businesses and institutions make on average 49% of purchases outside of West Nipissing.[19]

[19] West Nipissing Market Leakage Analysis (2015), West Nipissing Chamber of Commerce.

Sector	Leakage Percentage
Retail	52%
Manufacturing	43%
Banking	44%
Service	82%
Agriculture	40%
Institutions	43%
Tourism	42%
Average	**49%**

Source: West Nipissing Leakage Report (2015)

These high leakage rates could seriously impact a community; however, they also help in identifying potential opportunities for economic development in West Nipissing, and for the industrial park in particular.

In summary, the consumer leakage rate of 42% proves there are opportunities for new businesses to be created to help alleviate the leakage. A consumer leakage of about 25% is considered average for a community the size of West Nipissing. The main leakage areas for local businesses and institutions are *Products for Resale, Professional Services* and *Capital Expenditures*. Both *Products for Resale* and *Capital Expenditure* leakage results identified potential opportunities from an industrial park. Due to the fact that there are not many local manufacturers in West Nipissing, local companies do not have much choice but to source products for resale from outside the region. This results in virtually 100% leakage, and represents an opportunity for the establishment of manufacturers in the Industrial Park. Institutions represent a large market for capital expenditures and infrastructure spending. Reducing these leakage levels would be extremely beneficial for local businesses, local employment and the local economy as a whole, as there would be an increase in economic activity in the region.

It is important to note that leakage may not necessarily represent an opportunity. This is most notable when strong competitors in neighbouring communities dominate a market. However, factors that can attract strong retailers into a community are related to primary market size (i.e. the local population), and secondary market size (i.e. the population attracted to local retailers because of their importance and attractiveness).

The opposite of economic leakage, is the level of spending that occurs within the region's geographic boundaries by consumers who are not residents of the area. That is, money which is coming into the local economy through expenditures on goods and services. In certain sectors, West Nipissing attracts consumers and businesses to the area for the purchase of products and services offered by West Nipissing-based businesses. For instance, there are many consumers which come from outlying areas to purchase gasoline due to the reduced prices. As well, local farms encourage spending by non-residents related to tourist attractions and local food purchases, as well as to source products for manufacturing/processing, allowing West Nipissing's agricultural sector to emerge as a leader of the local economy through the adoption of cooperative and innovative practices.

▶ Situational Analysis Summary

The Municipality of West Nipissing's economy benefits from a wealth of natural resources, wilderness, proximity to two major northern cities, affordable real estate, a diverse and rich cultural heritage, and strong educational and health services. Over the years, West Nipissing's economy has grown and evolved, largely shaped by activities surrounding the exploitation of natural resources and agriculture, as well as tourism.

Seen in this situational analysis and the recently completed leakage study, it is evident that the economy is based on economic activities at the lower end of the value chain (i.e. forestry and agriculture), resulting in wealth that is generated from such resources to flow elsewhere. This can leave a local economy over-exposed to the uncertainty and instability of global commodity markets. With a view towards elaborating upon their assets, this section touched on opportunities which exist given the current situational analysis, and highlighted the opportunities for further processing and manufacturing of natural resources and agricultural goods.

The results from the Economic Leakage Study (2015) identified opportunities to increase economic activity within West Nipissing and recapture some of the economic leakage. One way to do this is to provide current and future businesses with the land required to establish or grow their businesses. However, if we consider the results from the analysis on the supply and demand for industrial land, this may not be the sole or best solution.

The analysis on the supply of industrial land in West Nipissing concluded that there are several, quality, un-serviced, industrial lots available in the Municipality. However, with a sufficient supply of vacant industrial land, and lots going for below asking price, there was a good indication that there is not a high demand. In the neighbouring communities, firstly Sudbury, there are industrial lots available for immediate development, however they were costlier when compared to West Nipissing; and although North Bay has limited industrial land in areas that have previously been developed for industrial applications, the recent establishment of the Airport Industrial Park provides ample opportunity for development. Although parcels are being promoted based on the guideline price of $40,000 per acre, the incentive programs and option for leasing serviced airside or groundside lots presents an attractive package to potential developers. While this has a definite impact on West Nipissing's ability to compete, the community is well located and can take advantage of its close proximity to Sudbury, lower per acre and development/building permit costs. However, with the large supply, and limited demand for land in West Nipissing, this does not prove to be a positive situation for the development of the Leblanc Road Industrial Park.

2.3 Comparative Analysis

In order to determine the Municipality of West Nipissing's position in the market, a comparative analysis of communities in Northeastern Ontario and adjacent municipalities was conducted. Further to this, best practices research was conducted by interviewing key contacts from other municipality industrial parks, which included industrial parks in Kapuskasing, Red Lake, Fort Frances, Kenora, Temiskaming Shores, Espanola, and Orillia. The results of these interviews are detailed in the best practices section, which also includes a Red Tape Analysis and best practices in municipal permitting processes.

▶ Economic Comparative Data

Using Emsi's Analyst software, we were able to gain insight into the full spectrum of local labour markets across the region. The software allowed us to gather labour market data to help in understanding the connection between economies, people, and work in West Nipissing, and other comparative municipalities in the region. Three key areas were analyzed and compared: Demographics, Occupations and Industries.

It is important to understand that Ontario averages are driven by southern Ontario figures and do not reflect the unique situation of northern regions such as West Nipissing, therefore the following census subdivisions were

considered for this comparison, including Nipissing District, and the combined districts which make up Northeastern Ontario and Northern Ontario: West Nipissing, Greater Sudbury, North Bay, Espanola and Temiskaming Shores. [20]

In order to quantify how concentrated a particular industry, cluster, occupation, or demographic group is in a sub-district or district as compared to the region or province, the location quotient (LQ) was calculated. A location quotient is a ratio used to compare a region to a larger reference region, Northeastern Ontario and Northern Ontario in this case, according to some characteristic or asset. When the LQ is greater than 1, this indicates that the particular characteristic or asset is more concentrated in the specific sub-district than in the larger reference region. On the other hand, if the LQ is less than 1, the opposite is true, indicating that the sub-district is less concentrated than the larger reference region given some particular characteristic. The location quotient can be an important ratio used to reveal what makes a particular region unique.

The data collected from the EMSI Analyst software, used in this comparative analysis, can be found in Appendix J. Key findings are provided in the remainder of this section.

Demographics

Nipissing District in Northeastern Ontario, the census district in which West Nipissing is included, has a population of 87,269 (2015), and is one of the most densely populated districts in Northern Ontario.

The Nipissing District population aged 20 to 34 is on average 1.06 times more concentrated than Northeastern Ontario and Northern Ontario. However, Nipissing District is 0.93 times less concentrated when compared to Ontario. This tells us that Nipissing has a greater concentration of those 20 to 34 in the region, a promising statistic as this population group is highly employable.

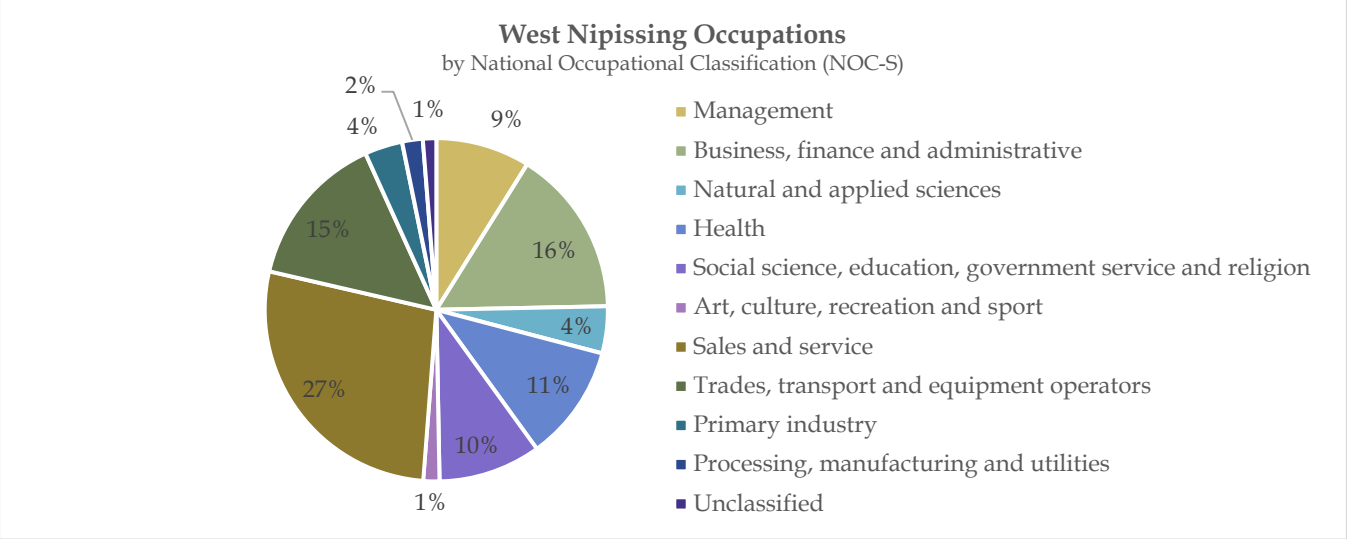
On the other hand, the population aged 50 years and over (over 43% of the total population) is on average 1.18 times more concentrated than the Ontario population in this age category. This is explained by the growing population in this age group, which averaged a 12% change in population from 2010 to 2015. When comparing this age group to Northeastern Ontario, and Northern Ontario populations, the proportion in this age group is consistent, around 43%. These growing populations show an aging workforce in the region. However, this is in contrast to a growing population between the ages of 25 to 34, which averaged an 8% increase from the 2010 population in Nipissing District.

This is an encouraging sign for West Nipissing. Even with a large aging population, there is a growing population of highly employable residents in Nipissing from which West Nipissing businesses can employ. However, it will be important for the Municipality to continue to look for economic development opportunities to ensure that this population group stays in or is attracted to the area.

[20] EMSI 2015.3: Employees + Self-Employed

Occupations

In 2015, the workforce in West Nipissing was 4,211. When looking at the workforce by occupation type (NOC-S), a majority (27%) of these occupations are related to sales and service, followed by 16% business, finance and administration occupations, and 15% in trades, transport and equipment operators and related occupations.



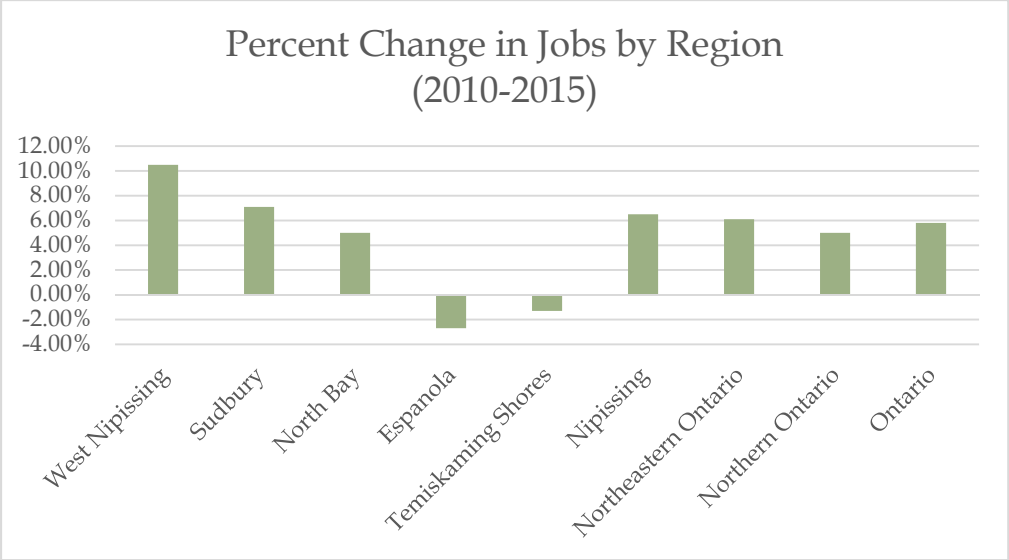
When we break down the workforce by industry, the following top 15 employer industries in West Nipissing are as follows:

NAICS Industry	2015 Jobs	% of Total	Growth / (Decline)*
Health care and social assistance	756	18%	6%
Retail trade	736	17%	22%
Public administration	497	12%	10%
Educational services	366	9%	21%
Accommodation and food services	356	8%	6%
Construction	230	5%	-
Agriculture, forestry, fishing and hunting	223	5%	55%
Transportation and warehousing	192	5%	16%
Finance and insurance	144	3%	5%
Manufacturing	140	3%	20%
Wholesale trade	131	3%	(14%)
Other services (except public administration)	126	3%	(14%)
Professional, scientific and technical services	85	2%	27%
Administrative & support, waste management & remediation services	54	1%	(7%)
Arts, entertainment and recreation	32	1%	(11%)

* Change % from 2010 to 2015

One of the goals of the Industrial Park would be to increase jobs in the primary and secondary industries (i.e. agriculture, forestry, fishing and hunting, manufacturing, wholesale trade, and, construction). These jobs require skilled employees and contribute to keeping spending and dollars within the Municipality.

Since 2010, West Nipissing has seen an increase in jobs by 11%. This is a greater increase than was seen in any of the other municipalities considered in this analysis (i.e. Espanola, Temiskaming, Sudbury, North Bay), with Sudbury being the next closest with a 7% increase.



With no significant investments made in economic development, it is anticipated that from 2015 to 2022, the number of jobs will only increase by 2.14%, or 93 jobs. This translates to an average annual increase in jobs of 0.4%. This is slightly low compared to the other municipalities and regions, which average a 3.17% increase over the same period (2015-2022). The highest increase was forecasted in North Bay (4.5%), with the lowest increase seen in Temiskaming Shores (1.03%). The development of an Industrial Park in West Nipissing provides the opportunity for the number of jobs to grow substantially, as it is common for industrial land to average about 15 jobs per hectare[21] (or 6 jobs per developed acre). With the proposed Industrial Park site covering about 85 acres, there is a possibility of creating about 450 jobs if each acre is fully developed, however, this is unlikely.

The following key observations were made with regards to the concentration of occupations in the various municipalities when compared to the reference regions, providing evidence as to what sets these municipalities apart. High location quotient occupations are important to a municipality because they provide a workforce-oriented perspective of the region's economic base.

- **West Nipissing** has a high concentration of *Management* and *Health Related Occupations* when compared to Northeastern Ontario and Northern Ontario regions.
- **Temiskaming Shores** has a high concentration of *Trades, Transport and Equipment Operators* when compared to Northeastern Ontario and Northern Ontario regions.
- **Espanola** has a high concentration of *Processing, Manufacturing and Utilities Related Occupations* when compared to Northeastern Ontario and Northern Ontario regions.

[21] Greater Sudbury Growth and Settlement Policy Discussion Paper (2013)

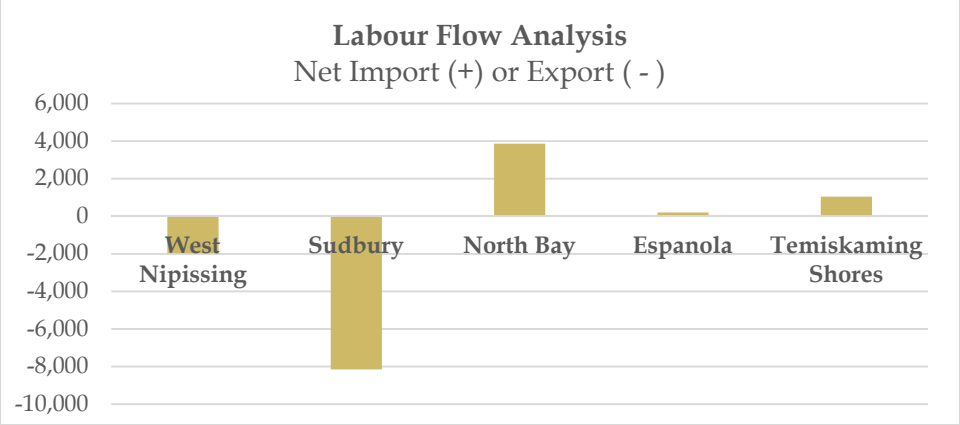
- **Sudbury** has a high concentration of *Occupations related to Primary Industry* when compared to the Northern Ontario region.

Occupation categories which are less concentrated can provide possible areas of future opportunities and development. Specifically, an industrial park in West Nipissing can support the Municipality with increasing the number of *Trades, Transport & Equipment Operators*, and *Processing, Manufacturing & Utilities* occupations to be consistent with the concentration of these jobs in Northeastern and Northern Ontario.

Labour Flow Analysis by Industry

A labour flow analysis provides a picture of the movement of labour in and out of a municipality. It compares the number of jobs in each sector held by local residents (who may work outside the community) with the number of jobs in the same sectors held by people working in the community (some of whom may live outside the community).

Overall, West Nipissing has a net export of labour of 1,970, which means, of the employed residents in the region, 1,970 people work outside of the region (most likely commuting to North Bay or Greater Sudbury). The largest labour export industry is *Construction* (405), followed by *Health Care and Social Assistance* (295) and *Educational Services* (180). The only positive (import) sectors in West Nipissing, (i.e. those sectors which employ people who commute into West Nipissing to work), are *Arts, Entertainment and Recreation* (5) and *Finance and Insurance* (35). When comparing overall labour flows to the other municipalities, the results are as follows:

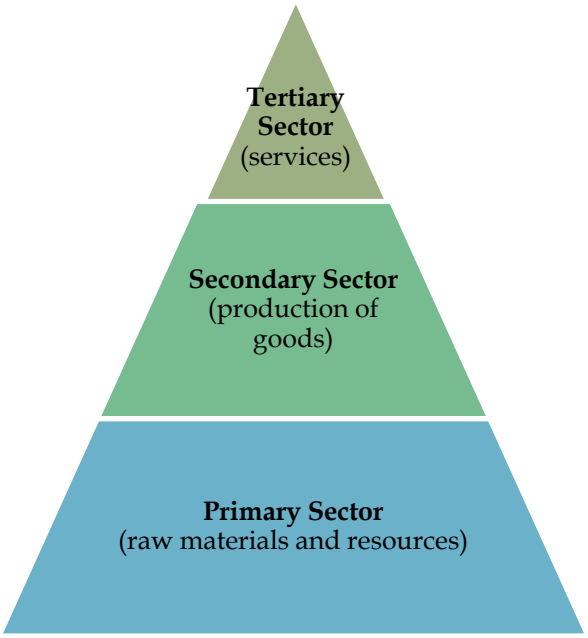


A detailed table of the labour flow analysis by sector and region can be found in Appendix K.

A large negative labour flow (or export) concludes that the size of the employed labour force is larger than the number of jobs available in the sector in the Municipality. This figure suggests that opportunities in West Nipissing exist for developing local businesses in the sectors that are exporting labour to other areas, as well that there is a large workforce which could be employed by businesses which establish themselves in the Industrial Park, therefore, reducing the export of labour to other regions (i.e. reducing leakage from labour).

Industries

This section analyzed the workforce by the industries they are employed in. While occupation classifications focus on skill sets of the people who live in West Nipissing, industry classifications focus on the types of employers in the community. For example, an agriculture company may employ a labourer, bookkeeper and a truck driver. These jobs would be listed under three different occupation categories in the previous section, but using industry classification they would all fall under Agriculture. Analyzing the numbers this way provides a sense of what type of industries are operating in the Municipality.



The three broad industry categories, represented in the following figure, are important as they provide a good high level picture of a region's economy. The sectors categorized as tertiary or service industries are responsible for a large portion of jobs across all municipalities. This sector includes *Health Care and Social Assistance, Retail Trade*, *Educational Services* and *Public Administration.* In West Nipissing, the tertiary industry accounts for almost 85% of 2015 employment. This portion is slightly more concentrated in West Nipissing than what is seen in Northeastern Ontario and Northern Ontario regions (1.07 and 1.05, respectively).

The manufacturing and construction industries are categorized as secondary industries, those which produce a finished, useable product production and construction. Manufacturing is an important activity to promote economic growth and development and can also be an important source of well-paying jobs for the middle class, for instance, a good source for engineering job opportunities. In West Nipissing, the secondary industries account for 9% of employment or 370 jobs in 2015. The mining, agriculture and forestry sectors are classified as primary industries, which collect and produce raw material. These industries employ 236 (or 6%) of West Nipissing's workforce. A strong primary sector provides opportunities and strength to the secondary and tertiary sectors.

Industry location quotients were determined to help in identifying which industries make the regional economy unique and identify the most export-oriented industries in the region. Industries with high LQ are typically (but not always) export-oriented industries. These industries are important because they bring money into the region, rather than simply circulating money that is already in the region (as most retail stores and restaurants do). The top *unique* employment industries in each respective region are identified in the table below. For a complete list of industries and their respective number of jobs, see appendix J. These findings should be of no surprise given our knowledge of the regions, and the industries which make up their economic base.

Municipality	Top Unique Industry*
West Nipissing	• Agriculture, forestry, fishing and hunting industry (2.94)
Sudbury	• Mining, quarrying, and oil and gas extraction (1.40)
Espanola	• Manufacturing (2.16) • Agriculture, Forestry, Fishing and Hunting (2.15)
Temiskaming Shores	• Utilities (2.65) • Construction (1.46)

* based on high LQ compared to Northeastern Ontario

Source: EMSI 2015.3 Employees + Self-Employed

In West Nipissing, the least concentrated industries (i.e. those with a low LQ) include Mining, Quarrying, and Oil and Gas (0.06), Real Estate (0.23) and Manufacturing (0.56). These industries are significantly less concentrated in West Nipissing than what is seen in Northeastern Ontario. It is important to not jump to conclusions and assume that a low location quotient for a particular sector suggests that the community invest in that sector because it represents a "gap" in the local economy. It would be unrealistic to strive to have every sector represented, especially for smaller communities. However, every community should have a balanced mix of sectors, and should not be overly dependent on one or two sectors. To identify sectors that should be developed, decision makers need to consider the existing sector mix, and "driving" sectors. If the community is importing goods that are used as inputs for local "driving" sectors, it would be good to explore opportunities for "import-substitution" through investment attraction targeted at companies that produce the same inputs and might consider locating to the community. These factors are taken into consideration and reflected in the competitive analysis and identification of target sectors.

▶ Industrial Land Market Assessment

To ensure a comprehensive industrial land market analysis, the following characteristics were reviewed for Sudbury, North Bay, West Nipissing and other Northeastern Ontario communities:

- Tax Rates for Industrial Properties
- Development Charges
- Building Permit Fees
- Industrial Land Costs
- Land Costs

These are costs which potential tenants will consider when determining where to relocate or establish an industrial business in the region. The rates, fees and charges provided for the Municipality of West Nipissing were also relevant for the financial assessment of the park, as they represent forms of revenue coming from the Leblanc Road Industrial Park.

Taxes

From 2010 to 2015 the Municipality of West Nipissing increased its Industrial Occupied property tax rates slightly (+1.13%), whereas decreases were seen in the other municipalities (average about 8% for *Industrial Occupied* properties, and over 10% for *Industrial Excess or Vacant* land.

Characteristics	West Nipissing	Sudbury	North Bay	Temiskaming Shores	Iroquois Falls	Kapuskasing	Smooth Rock Falls	Timmins	Cochrane	Average
Distance from WN (KM)	0	88	34	150	325	490	425	360	370	249
Taxes 2015 (including education)										
Industrial Occupied	2.932%	4.929%	3.000%	4.092%	1.852%	4.856%	3.717%	2.357%	3.775%	3.501%
Industrial Excess/Vacant	1.727%	3.204%	2.100%	2.660%	N/A	3.157%	1.301%	N/A	2.454%	2.372%
Large Industrial Occupied	2.932%	5.428%	3.000%	4.092%	4.269%	9.438%	7.882%	2.934%	3.775%	4.861%
Large Industrial Excess Land	1.727%	3.528%	2.100%	2.660%	N/A	6.135%	2.759%	N/A	2.454%	3.052%

This could have a negative implication in the eyes of business owners, however West Nipissing has the lowest tax rates for industrial land when compared to the cities of Greater Sudbury, North Bay, Kapuskasing, Smooth Rock Falls, Cochrane and Temiskaming Shores. The average tax rate for *Industrial* Occupied land is 3.5% and 2.37% for I*ndustrial Excess/Vacant* land, whereas West Nipissing has tax rates of 2.93% and 1.73%, respectively. This indicates that West Nipissing has highly competitive tax rates compared to its neighbouring municipal competitors.

Development Charges

Development charges are collected by municipalities to recover a portion of the growth-related costs associated with the capital infrastructure needed to service new development. West Nipissing does not have development charges for industrial development. This is a factor which encourages industrial development in the Municipality.

The Municipality of West Nipissing is not the only municipality to take this route. In North Bay, they state that industrial development is not subject to development charges. This encourages industrial development and provides North Bay with a large competitive advantage. On the other hand, Greater Sudbury has development charges starting at $2.43/Sq. Ft. for development excluding water and wastewater service, going up to $4.40/Sq. Ft. for all services.

Building Permit Fees

Building Permit fees are costs associated with ensuring that construction/building plans are in line with municipal requirements, such as zoning regulations and building designations. Building permit fees are based on the “value of construction”, which means *the bigger the job, the higher the fee*. They are most commonly calculated based on per $1,000 in construction value, with some municipalities implementing minimum amounts and/or a base fee. For potential industrial park tenants, these costs are important, as the fees can be significant given the uses of the land and extensive construction work.

Building Permit Fees	West Nipissing	Sudbury	North Bay	Temiskaming Shores	Average
Per $1,000 construction value (CV)	$6.00	$10.70	$11.23	$8.45	$9.10
Minimum		$108.00	$765.00	$84.50	$319.17
Base	$50.00				$50.00

In West Nipissing, building permit fees are $6.00 per $1,000 construction value plus a base fee of $50. This is significantly lower than the average building permit feet of $9.10 per $1,000 CV. The highest rates were in North Bay ($11.23 per $1,000 CV) followed by Sudbury ($10.70 per $1,000 CV). In the table above you see the comparable municipalities have minimum building permit fees averaging about $320.

Industrial Land Comparison

To assess the industrial land, both vacant industrial lots for sale, as well as recently sold vacant industrial lots were considered. This comparison also helped in determining the average value per acre of industrial land in the region (i.e. West Nipissing, North Bay and Sudbury). Appendix L provides a detailed summary of this land obtained through consultations with local realtors and realtor sites.

Currently in West Nipissing, there are 5 industrial lots for sale, averaging about $55,000 per acre, most of which are not serviced, but can be serviced at cost, with highway frontage. It is important to note that as the number of acres per lot increases, the price per acre decreases. For instance, although an acre of land could potentially sell for $50,000 in West Nipissing, it is not uncommon to see a 5-acre lot listed at $20,000 per acre. Two recently sold industrial lots in West Nipissing sold for $10,000 below asking. This indicates a low demand for industrial land in West Nipissing.

In North Bay, the recent establishment of the Airport Industrial Park has significantly increased the inventory of serviced industrial land for sale or lease within the community. Demand is strong with recently sold lots in North Bay being sold for asking price. North Bay's pro-active approach and incentive programs are attractive to prospective developers and businesses looking to relocate or expand. This has a direct impact on West Nipissing's ability to compete on a regional level.

The City of Greater Sudbury also reflects a market with high demand, and low supply, with lots averaging in and around $160,000 per acre. In Sudbury, there were only three industrial lots available for sale. Two parcels were located on Lasalle Blvd, with lots of frontage and good visibility. These lots are priced at over $180,000 per acre. A parcel located further from the city's centre, in Chelmsford, is priced slightly lower at $113,000 per acre, with services to the lot line, and highway frontage. In general, where the city's infrastructure already exists (e.g. Valley East Industrial Park) the lots average $175,000, while un-serviced averaging at approximately $115,000 per acre. There were instances in the past where the City of Greater Sudbury would subsidize the land costs to encourage industrial development. For example, in the established Walden Industrial Park, the City would subsidize lots, which would then sell for $55,000 to $60,000 per acre.

Overall, if we consider the tax rates, development charges, building permit fees and industrial land availability and costs, West Nipissing can be seen as a solid option for companies looking for a community to establish their business in the region, however, the demand is currently not evident for this land.

	West Nipissing	Greater Sudbury	North Bay
Approx. Avg. Industrial Land Cost (per acre)	$55,000	$160,000	$85,000
Occupied Industrial Tax Rate	2.932%	4.929%	3.00%
Industrial Development Charges	None	up to $4.40/Sq. Ft.	None
Building Permit Fees (per $1000 of CV)	$6.00 (+ $50 base)	$10.70 (minimum $108)	$11.23 (minimum $765)

▶ Best Practices Research

A best practice is a technique that has consistently shown results superior to those achieved with other means. They can be very beneficial, as they can be used, or adapted for use, in other circumstances, resulting in reduced risks, resources and chances of failure. To obtain information on best practices for industrial park development and management, the Project Team conducted various interviews with representatives from other municipal industrial park developments across the region and province, as well as information obtained from secondary research. The results and key findings of this research are provided below.

The following are key highlights taken from interviews with other municipalities located primarily in Northern Ontario that are comparable in size or region to West Nipissing. During these interviews best practices were shared with the Project Team members and various statistics about these parks were noted.

- **Comparative Size:** The size of the various parks considered in this best practice research (from 7 municipalities) ranged in size from 15 acres to 200 acres with lots ranging from 0.5 acre to 27-acre parcels (i.e. solar farms) with the average being 1 to 3 acres. One tactic that has been adopted in some municipalities is to sell smaller parcels to limit the Excess/Vacant land designation for taxes, therefore maximizing tax levies. Additionally, to encourage expansion, the first right of refusal goes to the adjacent or neighbouring tenant on any new land enquiries.
- **Anchor Tenants and Diversification**: Funding is typically dependent on having an anchor tenant in place. Some communities that were interviewed had potential investors lined up early, which subsequently fell through. This forced them to revisit their strategy and seek a diverse mix of businesses to fill their parks. Diversity seems to be key, and with a common message being: ensure the anchor tenant is fully invested prior to customizing the development to their needs.
- **Development Charges**: A majority of municipalities do not have development charges for industrial projects. One exception is Fort Frances, where they charge $10,000/acre upfront “deposit”, which is reimbursed if the project moves forward within a 2-year period.

- **Development Strategy and Phasing**: Phasing depends on the regional market, but it also varies from preparing lots one at a time, to fully serviced lots available in a developed park. Some municipalities have opted for phasing, especially when property is of a significant size. Some of these parks are owned by Economic Development Corporations or other incorporated bodies who then sell or lease to the developer.
- **Project Development and Management:** In most cases, the Economic Development Corporations, or departments, in the respective municipalities, are responsible for promoting and selling the land.
- **Response Time and Communication:** Communities have existing policies in place regarding a maximum response time of 24 hours for all local and external inquiries. Access to key municipal staff, and having a single point of contact to direct questions and opportunities, has had great success and positive feedback from the business community in these areas. This was evident to the Project Team when conducting interviews, as timely responses were received by all.
- **Ongoing BR+E**: These programs facilitate ongoing communications and relationship building with the business community and often result in successful growth initiatives.

Statistics show that the small and medium sized businesses in Canada spend $30.5 billion a year in order to comply with obligations from all levels of government including municipalities. This is largely due to the fact that they cannot benefit from economies of scale. This size of business makes up the majority of businesses in Northeastern Ontario, and is the case for West Nipissing as well. Knowing that the largest potential for tenants of an industrial park will come from within the Municipality or larger region, this information should impact processes within the Municipality. The Municipal Red Tape Report[22] was the result of a study conducted by a Greater Sudbury Chamber of Commerce task force, in 2010. Conclusions drawn from this report, outlined below, can help ensure that the Municipality of West Nipissing does not fall into the same traps and that these recommendations influence how businesses can access support for growth and development.

- Adopting a culture of change, resulting in a more customer-service oriented mentality, is key to economic growth and successful business growth initiatives and support. This starts with the front-line workers.
- To have an “expediter” within the municipal administration which provides a single point of contact for builders, contractors and ratepayers and assists in the permitting process.
- To provide priority client status to contractors and developers.
- Follow-up with building permits within 7 days of application.
- Maintain consistent building inspection processes and interpretations of building code, along with efficient final inspections.
- Provide online access to all forms of regulations, tendering, permitting processes and other forms, allowing for ease of conducting business from both within and outside of the region.
- Make an effort to communicate effectively and in a simple way to business owners.
- Delegate authority and responsibility to the front lines, empowering staff to use their creativity and experience to solve problems.
- Ensure that by-law staff conveys current knowledge of main principles of the by-laws and that they are up to date, clear and reviewed on a periodic basis.

[22] Sudbury Municipal Red Tape Report

- Adopt procedures to conveniently and efficiently share information across all departments with the end goal of integrating services for businesses so they can have easy access to the right personnel and proper department as well as increasing efficiency in processes.

Further to this, when business owners speak of how "business friendly" a community is, often times they are referring to how easy or difficult it is to start up or expand a business. The biggest factors are how long it takes and how much it costs. In some cases, businesses are willing to pay higher fees for a faster permitting process, but not all businesses are able to do this, especially new and small businesses. Fair, predictable, timely, and transparent regulatory and permitting processes are needed to provide businesses and investors with the certainty they need to make decisions about where to invest and grow in a competitive marketplace. This is further discussed in the recommendations.

2.4 Business Climate and Opportunities

In general, all businesses surveyed or interviewed agreed that the community is a great place to live. As customers and partners, residents of West Nipissing are loyal, generous and have a great sense of "Joie de Vivre." All those interviewed and surveyed mentioned the importance of having strong community infrastructure, affordable living, a healthy cultural and tourism sector, amongst others as key factors to attract a healthy labour pool. Having these elements present make this area attractive to potential outside investors, encouraging them to want to establish themselves and their employees here.

Several of the interviewees had strong feelings towards the Municipality's perceived lack of support for local businesses, limited focus on economic development, the growing complexity or rigidity of building codes and regulations, the absence of a dedicated body focused on the downtown, such as the former Business Improvement Area (BIA), and the cancellation of the Community Improvement Plan (CIP). There is a perception that very little is being done to attract new businesses and that economic development and business retention and expansion (BR & E) has not been a priority.

Businesses interviewed as part of the stakeholder engagement process highlighted the following advantages and disadvantages of doing business in West Nipissing.

Advantages	Disadvantages
• Community support • Farming sector is strong • Location – Close to everything & highway access • Proximity to North Bay and Sudbury • Good economy • Affordable living • Infrastructure • 8,000 to 10,000 vehicles per day passing through • Tourism sector – much potential • Natural resources • Perception by some that North Bay and Sudbury present challenges for development may help to position West Nipissing as an attractive option	• Higher transportation costs +$1,000 to detour Hwy 11 • No or little support from Municipality to local businesses, poor customer service • Doesn't seem to be a community development strategy – permits given to competing businesses – no diversification • Absence of vision for the future or no communication • No alignment of initiatives – flavor of the month • Labour pool is limited • Lack of capacity at Municipality – understaffed • Lack of communication and collaboration

There seems to be a disconnect between the Municipal Administration, Council and the business community. Building bridges with this community should happen prior to any other development project. Current businesses might be considering relocating out of West Nipissing, as they do not feel supported, nor feel they can collaborate with the Municipality. The Chamber of Commerce could play a greater role in this regard, helping the Municipality to open the lines of communication through collaborative initiatives such as BR+E. Communication needs to be re-established as soon as possible.

2.5 Competitive Analysis

It is not enough to believe that if the park is fully serviced that industry will automatically be attracted to establish operations in the community. Many factors influence businesses in their site selection for expansion or relocation projects. When companies undertake a site search, they are evaluating three key elements:

1. How to reduce the total cost of operation;
2. How to reduce the risk of business interruption; and,
3. How to improve speed to market for customer deliveries.

All three of these elements can be greatly impacted by various critical location factors. The priority that a business will give to particular critical site selection factors will vary with industry or nature of the business but the following are the typical factors that are considered.[23]

- **Access to high-quality transportation systems:** lowering transportation costs (supply chain and manufacturing operations).
- **Occupancy and construction costs:** as it relates to land and site prep costs.
- **Custom-build vs. existing buildings**: if the business needs to make a move in a short delay or if an existing building is well suited to their needs, a simple relocation might be their best choice. For others, having the opportunity to custom-build according to operations and budget might be an ideal scenario.
- **Availability of properly zoned land:** available land in a good location with infrastructure or readiness for development and incentives, especially when the cost of retrofitting an existing building is similar to building a new one. For industrial projects, land is a much larger factor in the overall decision process.
- **Labour costs and availability of skilled labour** are always a top priority.
- **Availability and affordability** reducing/managing energy costs is always an important consideration, two of the most sensitive project types are data centers and manufacturing.

In addition to these basic critical site selection criteria, other factors can contribute to the decision making process to expand and/or relocate within a given area. These factors can include unique features that might be present in a particular location that give it that much more of an advantage over what is currently available within a market or region.

▶ Community Attractiveness SWOT Analysis

A SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) is the foundation for evaluating the internal potential and limitations and the probable/likely opportunities and threats from the external environment. It

[23] Areadevelopment.com

views all positive and negative factors inside and outside an organization/community that affect success. A consistent study of the environment in which the community operates helps in forecasting the changing trends and also assists in including them in the decision-making process. For the purposes of this Study, the SWOT analysis was used to evaluate the attractiveness of West Nipissing as a place to do business, as well as identify opportunities for the community which will assist in the identification of target markets.

Strengths and Weaknesses

For the proposed Industrial Park, the SWOT analysis plays a large role in the planning process. Specific internal strengths and weaknesses, identified in the West Nipissing Market Study (2015)[24] and in consultations with stakeholders, which are relative to the attractiveness of the community, are detailed below.

STRENGTHS	WEAKNESSES
➢ Rail serviced community (freight rail service opportunities as long as no intermodal terminal is needed in order to transfer containers between road and rail) ➢ Intersected by Trans-Canada highway 17 (i.e. high level of highway 17 transient traffic ➢ Bilingual community (French and English labor force) ➢ Lower municipal taxes than neighbouring communities ➢ Lower housing costs than neighbouring communities ➢ Low cost of commercial and industrial building permits ➢ Lower labour costs ➢ Lower costs for utilities such as water/sewer as compared to North Bay ➢ Well organized agriculture sector, with Nipissing-Sudbury Co-operative acting as a catalyst ➢ Significant tourism activities contributing to regional economy	➢ Difficulty attracting and retaining workforce. ➢ Limited size of total labour force (i.e. youth outmigration, 40% of population is 55 years+) ➢ Lack of skilled human resources within the community ➢ Average household income represents 86.25% of the provincial average ($55,032 vs $71,523) ➢ Lack of regional public transportation ➢ Limited high-speed connectivity in rural areas (internet, phone services, etc.) ➢ Lack of branded casual dining restaurants and higher-end dining options ➢ Untimely hours of operations of most businesses might deter families from moving here, convenience being critical which may impact a new businesses ability to recruit and retain qualified staff ➢ Difficult to provide goods to be resold locally ➢ Difficult to source goods locally ➢ Potential for collaborative efforts with the Municipality ➢ Lack of communication and relationship between the Municipality and the business community. ➢ Abundant provincial funding opportunities for expansion projects ➢ No investment attraction strategy or efforts by the Municipality

[24] West Nipissing Chamber of Commerce, West Nipissing Market Study (2015)

Opportunities and Threats

The following opportunities and threats can impact the speed at which weaknesses can be shifted to strengths. These external variables should be considered on an ongoing basis when developing and reassessing the Industrial Park. The external factors can also influence the level of priority attached to each weakness.

OPPORTUNITIES	THREATS
➢ Strategic location near the heart of Ontario's mining supply cluster ➢ Benefit from potential development in agriculture (i.e. value added processing, organic farming) ➢ Benefit from potential developments in non-timber forest and value added products ➢ Potential for investments from the renewable energy sector ➢ Introduce a regional transportation system ➢ Build economic activity and enhance entrepreneurship in the region ➢ A lot of potential given the high level of spending made outside of the region from both businesses and consumers ➢ Build on a strong tourism sector, making the area attractive first to visitors, then to investors	➢ Increasing industrial growth pressures can diminish the local quality of life and regional environment amenities ➢ Better employment opportunities from neighbouring cities/communities ➢ Larger centres offer more services (i.e. public transportation, qualified workforce, larger markets, etc.) ➢ Greater Sudbury is more suited to mining sector – service industry, proximity to the mining clients is a distinct advantage for related industries. North Bay is also well established for the related mining and civil engineering sector

▶ Leblanc Road Industrial Park Competitive Position

Throughout the various sections in this market assessment, the following conclusions can be made on the competitive advantages to the Leblanc Road Industrial Park, as well as foreseen challenges.

COMPETITIVE ADVANTAGES	RELATED CHALLENGES
Market → The market is relatively stable with expansion and investment being driven by existing local business. The proximity to larger centers and the location (on a major TransCanada highway) keeps this area on the map. Bilingual workforce and community.	The proximity to larger centers that still have room for industrial land development is a major factor. There are available parcels of industrial zoned land in the West Nipissing that have a more attractive location and are already fully serviced and ready for development. They are not selling at this time which is an indication of the current market state.
Image → A brand new serviced park would be a great asset to the community that currently has little available with this size of acreage, proximity to Highway 17 would allow for some visibility yet, ample space for development.	The Park, as well as the Municipality, would need to be promoted as a location to consider for relocation. An ongoing BR&E program needs to be implemented to build relationships and ensure local businesses are retained and consider expanding to the park.

Cost → Cost of development is much lower than neighbouring cities, therefore very competitive. Lot price is very low, once infrastructure is developed the price could be increased but will remain very competitive factoring in the location and proximity to centers.	Developing infrastructure with the potential assistance from funding agencies (federal and provincial) would keep costs to the Municipality lower but still significant and are available to businesses looking to establish in ANY community in Northern Ontario.
Industry → Historically the major industries have been forestry and agriculture, proximity to these sectors provides opportunities for processing or value-chain manufacturing. Other manufacturing or processing centres could be interested in the availability of large properties, and the possibility of buying more than one lot, the access to main highways and the proximity to Greater Sudbury and North Bay are all reasons to invest in the area. Proximity to suppliers or clients would be a critical factor; lower development costs might trump proximity depending on the business.	Forestry industry is cyclical, and opportunities would have to be explored further, discussion with current forestry businesses in the area would have to take place to develop a growth strategy. Agricultural opportunities exist, but Verner could potentially be favoured and would potentially be in a better position. Mining sector as previously mentioned is still more interested in establishing themselves or expanding operations in Greater Sudbury or North Bay, with the availability of industrial land and the potential for further development in the Lively area or North Bay's Airport Park being a more logical choice.
Location → The proposed industrial park is located just off the main Highway 17, and is 20 minutes from Highway 11, giving it a clear advantage for transportation of goods. The potential for large purchase of land with low development costs is a major attractant for industries that would already be shipping to various client markets.	Surrounding communities like North Bay and Greater Sudbury offer many more advantages to businesses (i.e. stronger customer - supplier relationships, labour availability advantages and better distribution channels). North Bay is at the intersection of HWY 11 and 17 and has a well serviced airport with one of the longest runways in the province. Sudbury is well connected by air and road via Hwy 69. They also have available industrial zoned land, and their proximity to industry is a definite advantage.
Land → The land is relatively flat with no issues related to PSW or other potential environmental impacts resulting in shorter permitting and approval times as well as lower site prep costs.	The topography in Sudbury and North Bay pose some challenges, often requiring blasting or significant fill. Also, both communities have many areas that limit development due to PSW or other environmental factors such as waterways. However, proximity to Sudbury and North Bay, where industrial land is still available is a definite barrier.
Demand → Currently 6 of the 16 lots have been purchased by local businesses that are either expanding their businesses or looking to establish new operations. This has been achieved without the extension of any services. These new tenants were required to invest in road construction for lot access along with putting in well and septic systems.	Lots were sold for a nominal fee which has potentially set a precedent. Significant efforts will be required to position West Nipissing and the Industrial Park as a legitimate development option in the marketplace. Local private owners have some industrial zoned land available in the community and this proposed industrial park could directly compete with them.

In conclusion, should the project move forward, there are definite competitive advantages for the Leblanc Road Industrial Park. When considering Site Selector Criteria that are measured by potential investors, West Nipissing should place emphasis on the following key advantages: highway access, low development costs and tax rates, cost of land, labour costs and availability, availability of various sizes of flat parcels and the proximity to larger centers.

To encourage economic development and business investment and attraction to the area, the community of West Nipissing will have to offer price advantages for the purchase of the industrial land as well as maintain their low development costs and other incentives, when attracting new businesses. The community has a qualified workforce, many of which travel to Sudbury or North Bay for work, depending on the industry that would come into the Park, some of these transient workers could be interested in working in their own community versus commuting 2 hours a day. West Nipissing has good infrastructure and the developed Industrial Park would allow easy access to services accommodating a large variety of types of operations and installations. Efficiency could be achieved with proximity to larger centers (Sudbury, North Bay) providing opportunity to access suppliers or client markets in the value chain without excess transportation costs. The Leblanc Road Industrial Park development would offer some clear advantages for businesses than Greater Sudbury and North Bay, mainly in the land and site prep costs.

2.6 Target Business Sectors

In a move to protect itself from market fluctuations, and in a proactive effort to generate sustainable wealth and employment within the Municipality, the proposed Industrial Park can be used to build upon its existing strengths in the primary industries and seek to integrate value-added manufacturing and processing for resource products.

Additional processing of a commodity product or primary sector output creates specialty products whose value is more than the original product. These value-added products become part of the secondary sector of the economy. The production of value-added products generates jobs and revenue for many towns. Many of these industries consume large quantities of energy and require factories and machinery to convert the raw materials into goods and products. Further information on specific target sectors for the Industrial Park are identified below in the fields of: value added manufactured wood products, mining and related manufacturing industries, and value added secondary food processing. Also included are opportunities to attract businesses in the energy and environmental sectors.

Value Added Secondary Food Processing Opportunities

Value added agriculture refers most generally to the process of changing a raw agricultural product into something new through packaging, processing, cooling, drying, extracting or any other type of process that differentiates the product from the original raw commodity. Ontario's food processing sector is one of the largest in Canada, employing over 100,000 people (2013). In Northern Ontario, approximately 6,200 people are employed in the food processing industry, with Northern Ontario boasting well-established cash crops, dairy and beef industries. Although the Northern Ontario agricultural sector is small in size compared to other parts of Ontario, Northern Ontario has:

- A beef industry that is larger than that of any Atlantic province
- A dairy industry that is comparable in size to New Brunswick
- An innovative maple syrup industry, including the largest producer in the province,
- An aquaculture industry that provides 90% of the provinces fish stock.

These all reflect instances where an opportunity exists for value added agriculture businesses to establish themselves in the Leblanc Road Industrial Park. Value-added agriculture is regarded by some as a significant rural development strategy. Small-scale, organic food processing, non-traditional crop production, agri-tourism, and bio-fuels development are examples of various value-added projects that can create jobs in rural areas.

A growing trend is the establishment of *kitchen incubators*. Stringent food-safety regulations make it illegal in most places to sell many types of food products from home and starting a food business legally typically requires working out of a fully licensed commercial kitchen. Kitchen incubators offer shared workspace, equipment, and business advice for small catering companies, pushcart vendors, bakers, and specialty-food makers. At a kitchen incubator, entrepreneurs pay only for the kitchen time they need, typically at below-market-rate prices of about $10 to $40 per hour, plus storage fees. The kitchen incubator is still a relatively new concept, but it has proved to be a seductive idea for dozens of municipalities, universities, and not-for-profit and for-profit companies. An example of a recently opened incubator kitchen is provided in Appendix M, which also highlights the key features and services offered, a list of organizations who were partners on the project, and the sources of funding. The development of this type of facility in the Industrial Park has the potential to positively impact many agriculture businesses and entrepreneurs, and encourages further economic development in the community, much like business incubators.

Another trend we have seen in agriculture processing is the rising number of micro/craft breweries appearing across the region. Brewery incubator facilities, similar to kitchen incubators, focus on immersive education and mentorship for future brewers, with a goal to help experienced, passionate home brewers minimize the risk associated with bringing their award-winning brews to market. A brewery incubator consists of a shared production brewery and retail tap-room space. It generally is designed to be occupied by several small production breweries simultaneously. Each separately licensed brewer would brew, transfer, quality control and package their own beer. This model allows nano-breweries to begin operations quickly, cheaply and be scalable.

These are but a few examples of potential tenant opportunities given recent trends in the sector. Other examples of opportunities and initiatives can be found in Appendix I, which were updated from the opportunities and initiatives identified for agriculture in the West Nipissing Positioning Plan (2003). A key opportunity which requires highlighting is:

- **Cold Pressed Canola Oil Market**. Cold pressing is a technique that consists of extracting canola oil from the canola seed. It is simpler than the conventional method and the production facilities can be smaller

than traditional production facilities, while still producing a significant amount of cold pressed canola oil. There is no need to install distillation towers, hexane baths, clay filtrations systems, etc. [25]

Value Added Wood Products & Forestry Related Opportunities

In the Local Economy section, we mentioned that opportunities exist for West Nipissing region's forestry sector in the form of value-added processing or manufacturing, as was seen in the sector value chain. Two main areas of opportunities identified in the Positioning Plan (2003) are:

- **Engineering Wood Products**
  Given the proximity of West Nipissing to major industry players such as Domtar and Tembec, there may exist opportunities to attract investments in engineered wood products. In addition to the opportunities associated with the *direct manufacturing* of these types of products, there are additional value-added *processing* opportunities directly associated with the engineering of wood products. For example, most engineering wood products use an adhesive to bind laminates of wood for structural strength. Therefore, opportunities may exist for the production of the adhesive.

- **Value-added Wood Products**
  Opportunities exist for entrepreneurial firms in the area of value-added wood manufacturing. More specifically, there is an apparent demand for manufactured wood products, including pre-fabricated housing, doors, windows, kitchen cabinets, hardwood flooring, pallets and related millwork. Another consideration would be the construction of modular homes cottages – which could provide employment opportunities for cabinet makers, carpenters, contractors and millwrights.

Energy and the Environment Opportunities

The energy and environmental sector is comprised of a range of industries that are focussed on power generation, waste management, and the management, measurement, prevention and correction of environmental damage. This sector also includes clean technology designed to reduce environmental damage pollution and energy consumption. For consideration is the momentum gained by the Canadian solar energy industry in the past decade, creating a firm foundation for Canadian solar energy products and businesses. While many of Canada's significant traditional and renewable energy resources are centralized, solar energy is both ubiquitous and abundant in each Canadian community, and solar energy receives more public support than any other source of energy.[26] Incentive programs established by the various levels of governments across Canada, provide a solid foundation for growth for this industry. A target market of potential tenants in the energy and environment sector could be any type business along the supply chain. For example, on one end of the supply chain we have the solar farms, whereas on the other, we have the solar panel distributors and manufacturers. Consideration should however be placed on the fact that solar farms themselves do not create many employment opportunities, take up a great deal of land mass and, are dependent on grid space for revenue generation through government FIT programs.

[25] Pleasantvalleyoilmills.com
[26] CanSIA. State of the Industry: Overview of the Canadian Solar Industry

Mining and related services Opportunities

While there are approximately 500 mining supply firms in Northern Ontario, 72% of the jobs they create are located in Sudbury and North Bay. Although mining operations within West Nipissing are limited, its location within a globally recognized cluster in mining and mining technologies provides the municipality with opportunities to develop mining-related activities.

As some mining supply firms expand to respond to world demand, they will likely be seeking ways to manage costs in order to mitigate the effects of a cyclical industry. This may include relocating their operations to areas which provide more affordable land and development opportunities. This presents an opportunity for West Nipissing to promote its location and the availability of affordable industrial land in a highly accessible location that provides easy access to Sudbury, North Bay, Kirkland Lake, Timmins and Northern Quebec.

This being said, substantial and concerted efforts would need to be made to position West Nipissing to the mining supply and services market. All of the aforementioned communities have prioritized the mining supply and services sector as part of their respective investment attraction strategies, to which they have made significant inroads. Not only do they have existing local clusters, they are also directly served by several innovation and commercialization centers and programs. As such, cheap land may not be enough to convince businesses within this sector to set up shop in West Nipissing.

Target Sector Tenants: Summary Table

Sectors & Opportunity
Value Added Secondary Food Processing • Kitchen Incubators • Brewery Incubators
Energy and the Environment • Solar farms • Bio-mass (pellet production)
Value Added Wood Products & Forestry • Engineering Wood Products • Value-added Wood Products
Mining technology and related services • Mining supply and service sector (manufacturing; engineering; distribution)

2.7 Market Summary

The market assessment addressed and analyzed many elements of the market.

Beginning with the situational analysis, the broader community of West Nipissing was considered with Key attributes being its access to rail and highway transportation corridors and its strategic location, and proximity to

Sudbury and North Bay. It was also observed that West Nipissing, the most bilingual community in Ontario, with a population of 14,149 (2011), was one of very few Northern Ontario municipalities showing population growth. The community's average individual incomes and dwelling costs are much lower than neighbouring municipalities.

It was determined that West Nipissing's economic base is diverse, with its strengths lying in the following sectors: forestry, agriculture, health, education, retail sales, government services and tourism. Further analysis determined important opportunities that exist for the primary and secondary sectors (i.e. forestry, agriculture and manufacturing), which include value added secondary food processing, energy and environment opportunities, value added wood and forestry products, and mining and technology related services.

Findings from interviews with local and neighbouring business owners were conducted to determine the current business climate. They identified West Nipissing as a great place to live, with strong community infrastructure, affordable living and a healthy labour pool. However, strong feelings towards the Municipality's lack of support for local businesses was seen to be a concern with regards to economic development, the growing complexity or rigidity of building codes and regulations, the absence of a dedicated body focused on the downtown, and the cancellation of the Community Improvement Plan (CIP). The best practices findings and implementation recommendations provide important information which can be considered to address these concerns.

Land market comparisons (summarized in the table below) determined that West Nipissing has the ability to provide industrial land at much lower rates than neighbouring communities. As well, the Municipality offers lower industrial land tax rates, development charges and building permit fees than the neighbouring communities as well.

	West Nipissing	Greater Sudbury	North Bay
Approx. Avg. Industrial Land Cost (per acre)	$55,000	$160,000	$85,000
Occupied Industrial Tax Rate	2.932%	4.929%	3.00%
Industrial Development Charges	None	up to $4.40/Sq. Ft.	None
Building Permit Fees (per $1000 of CV)	$6.00 (+ $50 base)	$10.70 (minimum $108)	$11.23 (minimum $765)

Concluding results determined the competitive advantages of the Leblanc Road Industrial Park include:

- a stable market being driven by existing local business,
- cost of land is less than half the price per acre than neighbouring communities,
- its location just off Highway 17, and 20 minutes from Highway 11,
- large bilingual labour pool,
- demand is evident with 6 of the 16 lots already being sold, and
- development/site preparation costs are lower due to the relatively flat land.

Overall, our research has identified a range of factors, some of which are in support of the proposed Industrial Park, some that might indicate certain elements of risk in this project.

Part 3. Operational and Feasibility Analysis

This section of the report presents the findings of the operational and financial feasibility analysis in four themes with the evaluation of alternatives and scenarios concluding the analysis.

3.1) The Site Servicing Plan;
3.2) Description of alternatives;
3.3) Financial Assessment and the; and
3.4) The economic impact.

3.1 Preliminary Site Servicing Plan

As part of the Project Team, C2S Engineering was commissioned to assist with identifying the requirements for servicing and developing the Leblanc Road Industrial Park. The full Preliminary Site Servicing Report can be found in Appendix N. Key results from the report are provided below.

The overall scope of the report was to determine the general requirements for providing complete servicing for the 16 lots within the development based on the concept plan received from the Municipality, September 2015[27].

▶ Current Site

The proposed development is represented by a plan that allows for 16 individual lots, each of approximately two hectares in size with 110 metres (360 feet) of road frontage.

The entire existing property is undeveloped and is mostly a grassed farmland field with heavily treed areas on the south east portion and along the east side adjacent to Leblanc Road. This should remain as a visual buffer from Leblanc Road. The land slopes very gently from north to south towards the Sturgeon River, which is approximately one kilometre south of the property. A roughly graded roadway of imported fill has been partially constructed southerly from Bay Street for approximately 500 metres.

[27] It should be noted that a topographic or engineering survey of the entire property was not undertaken as of the date of this report.

▶ Development Requirements

The following table provides an overview of the various aspects required for developing and serving the Leblanc Road Industrial Park. Complete details can be found in appendix N.

Sanitary Sewers	Total flows for development are calculated at 71.7 litres per second (LPS). Sewage will be collected from each lot via a gravity sewage service and collection system. An in-ground sewage pumping station will be located at the north limit of property. The system will require the installation of a force main on Bay Street from the proposed pumping station (approximately 180 metres), which will connect to an existing municipal force main (250 mm). At the centre of each lot, as the locations of buildings is unknown, 150 mm services will be installed.
Water Mains	An existing 250 mm municipal water main, located at the Bay and Leblanc intersection, servicing the Cache Bay community, is said to have adequate capacity and pressures to accommodate the required flows. It is recommended that the system be looped through the development to the south east end of the property, as well as the continuation of the water main to the existing 200 mm water main on Delorme Road. A maximum pipe size of 200 mm within the development will accommodate flows, with 100 mm services to each lot. Services may be reduced to a lesser size at the lot line depending on the requirements of the lot owner.
Roads	An onsite access road will run through the Industrial Park, with access to either Bay Street or Leblanc Road. A lane width of 4.0 metres is recommended along with 0.5 metres width of paved shoulders, given the potential of a high volume of large vehicles. Do to the suggested clay-type soils, a substantial base and sub-base road structure will be required. For costing, 900 mm is estimated along with two layers of 90 mm of hot mix asphalt. Road costs include the onsite access road only, and not individual lot driveways or driveway culverts (responsibility of the lot purchaser). It was observed Leblanc Road will likely require additional work and costs to hold up to the increased traffic (quantity and vehicle size / weight) as a result of this development.
Turning Lane	The costs for a turning lane are not included in this Preliminary Site Servicing Report, as at this time there is no proof of requirement. However, if required, it is estimated that this could present an additional cost to the Municipality upwards of $500,000. It is recommended that a Traffic Impact Study (TIS) be undertaken to assess if the projected traffic levels and turning radius requirements warrant a westbound left turn lane or an eastbound right turn lane and/ or taper.

Drainage	An open ditch rural cross section is recommended therefore storm sewers would not be required. Road side ditching will drain to open ditches along Bay Street and Leblanc Road (cross culverts may be required). Individual lot drainage can be accomplished with open swales flowing to road ditching.
Lot Grading	During the road design, a lot grading plan must be developed which will indicate positive drainage requirements from each lot and set minimum building floor elevations. Costs for lot grading are not part of the site development. They will be left as a requirement for the purchaser. The temporary roadway that has been previously constructed from imported fill materials should be excavated and spread in lower lots.
Clearing	Clearing of heavy vegetation within the areas of lots has not been included for the purposes of this report, except for clearing for the road allowance, which is provided within the road right of way at the south end.
Hydro	This area is serviced by Hydro One, with three phase power available at the Bay and Leblanc intersection, which will provide adequate power to the development. To service the development 200 metres of new line will be required. It is recommended that all interior hydro lines for building services and outside lighting be installed with overhead wiring with pole mounted transformers to service each building.
Natural Gas	The gas line on the north side of the property, along Bay Street is only a single line service and not sufficient for additional properties. Union Gas will provide service to the development from the Bay and Leblanc intersection, at the Municipality's expense, unless there are enough potential customers to enable Union Gas to calculate their ROI period. Therefore, costs to install gas service are included.
Communications	Bell Canada does not currently have fibre optic cable at this location, and an allowance has been made for this provision. Similarly, Eastlink does not service this area. It is assumed that communications providers would share the use of poles with Hydro One.

▶ Summary of Costs to Service the Development

The following servicing cost estimate is prepared without the benefit of detailed design or without topographic surveys or geotechnical information. Costs are based on benchmark unit prices typical of the area. Cost to provide some services such as hydro and communications have been provided by the utility provider based on the conceptual design drawing CP-1 of Appendix N, which also includes the assumptions for the following costs.

Capital Works	
Site Preparation and excavation	$ 221,000
Road Construction	$ 900,000
Sanitary Sewers	$ 859,000
Water mains	$ 550,000
Contingency (10%)	$ 253,000
Engineering & Design (15%)	$ 417,000
Sub-total	**$3,200,000**
Other Capital Works*	
Water main Loop to Delorme Street	$ 363,000
Other Utilities	
Hydro One	$ 190,000
Communications	$ 90,000
Union Gas	$ 125,000
Sub-total	**$ 405,000**
Overall Total	**$3,968,000**

* The cost to loop the water main to Delorme Street is not necessary for the Industrial Park development, but recommended.

In brief, the development servicing costs are estimated at $3.968 Million. The Municipality has confirmed that there is adequate water supply available at the Bay Street and Leblanc Road intersection. Sewage capacity to accommodate the development is also available with the understanding that future work will be required to address the filtration issue of the sanitary sewer system in the Cache Bay area. In addition, the Municipality has suggested that the water main within the development is to be looped to connect to Delorme Street. This could be eliminated to reduce development costs. All other services such as gas, hydro, telephone and communications will be made available at the time of development. Natural gas costs could be eliminated if Union Gas has proof of potential customers to warrant the required work. Lot clearing and grading and driveways and driveway culverts will be the responsibility of the purchaser. A Traffic Impact Study will need to be conducted to determine the need for a westbound or eastbound turning lane, which could result in an additional $500,000 in development costs, based on previous such capital projects in the area.

It should be noted that this construction and development may be phased based on three alternatives. The particulars for the three development alternatives are described below, and vary from partially serviced to fully-serviced. The development costs for each alternative are summarized in the following table.

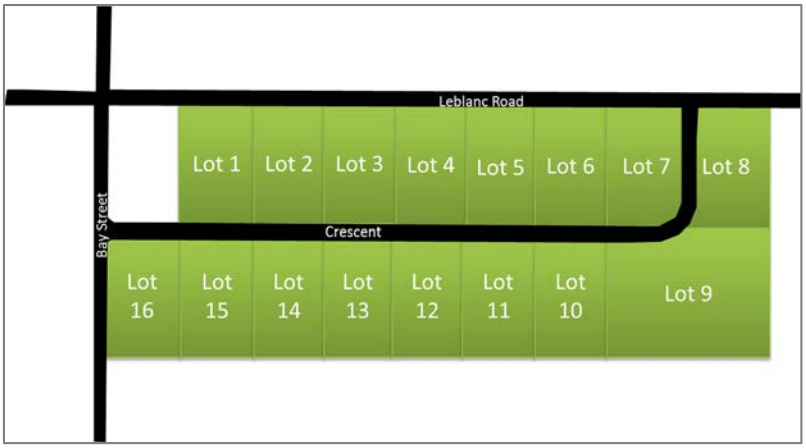
Capital Works	Alternative 1	Alternative 2	Alternative 3
Site Preparation and excavation	$ 221,000	$ 86,000	$ 180,000
Road Construction	$ 900,000	$ 466,000	$ 568,000
Sanitary Sewers	$ 859,000	$ 700,000	
Water mains	$ 550,000	$ 335,000	
Contingency (10%)	$ 253,000	$ 159,000	$ 75,000
Engineering & Design (15%)	$ 417,000	$ 262,000	$ 123,000
Sub-total	**$ 3,200,000**	**$ 2,008,000**	**$ 946,000**
Other Capital Works*			
Water main Loop to Delorme Street	$ 363,000		
Other Utilities			
Hydro One	$ 190,000	$ 130,000	$ 190,000
Communications	$ 90,000	$ 50,000	$ 60,000
Union Gas	$ 125,000	$ 75,000	$ 125,000
Sub-total	**$ 405,000**	**$ 255,000**	**$ 375,000**
Overall Total	**$3,968,000**	**$ 2,263,000**	**$ 1,321,000**

3.2 Description of Alternatives

This section presents the particularities for each identified option or alternative for the Leblanc Road Industrial Park Development.

▶ Alternative 1: Full Park Servicing in Year 1

This alternative proposes extending all services and infrastructure to the 75-acre property designated for the Industrial Park. The plan allows for 16 individual lots, each approximately 4.6 acres (2 hectares) with the exception of Lot 9 (11.8 acres) in size with 360 feet (110 metres) of road frontage. All development would be undertaken in Year 1. To date, approximately 500 metres of roughly graded roadway has been partially constructed. The roadwork undertaken as part of the park development will serve to upgrade and extend the previously constructed road way.



This development is greatly helped by the potential for government funding and programs supporting municipalities in infrastructure development and capacity building. This funding would potentially cover two thirds of the development cost, leaving the Municipality to cover the final third ($1.32 M).

The key options associated with this alternative include:

- 16 lots developed in Year 1
- Water mains including a loop to Delorme to maintain pressure
- Sanitary sewers including a pumping station on the north limit
- Utilities (hydro and natural gas would be available)
- Communications (Bell Canada does not currently have fiber optic cable in this area)
- Road construction and drainage ditching

Potential Barriers

The following factors were considered in the evaluation of the Park development alternative as being potential barriers for its viability or success.

- The existing 250 mm force main transporting effluent from the Community of Cache Bay to the west, to the Sturgeon Falls sewage treatment plant is near capacity at this time. Alternative 1 sewage system design and build is highly dependent on this issue being rectified.
- Funding support is critical to the viability of this project, demonstrated further in Section 3.3.
- The Leblanc Road capacity to handle increased heavy truck traffic for the 0.7 km stretch. Upgrading of the road could be required as traffic is expected to increase, however this is not part of the study.
- 6 of the 16 lots have been sold below market value therefore setting a precedent and generating significantly less revenue on sales than with sales at market value or serviced lots
- Several lots have been sold un-serviced with no requirement to connect to services once in place. As a result, businesses that establish in the park in the future may opt to put in their own water/wastewater systems as opposed to connecting to town services unless stipulated in the purchase agreement. Should the infrastructure be in place, and services extended to all lots, there may be value in obligating new purchasers to connect. This could potentially increase their market value over the long term, and subsequently the possible tax levy.
- Condition on sale for development within a certain time frame – currently 3-4 of the sold lots may not develop in the short to medium term.

▶ Alternative 2: Phasing the Servicing over Several Years

This alternative consists of phasing infrastructure construction (road, water, sewer and utilities) in two stages. This option has the potential for lessening the initial financial impact by lowering capital expenditure on the Municipality in Year 1 and allowing the sale of lots in Phase 1, prior to deciding on the right time to develop the second Phase of the park. This can be considered once demand increases and sales have been fully realized for Phase 1. Phasing would however delay the proposed water main loop to Delorme Road (impacting water flow).

The proposed first phase would include a temporary cul-de-sac allowing for the development of nine (9) lots. Additional costs relating to phasing are limited to the cost of construction and removal of the temporary cul-de-sac. There may also be a requirement to increase the water main within the first phase from 200mm to 300mm diameter to reduce friction and allow for fire flows. Some development costs such as offsite and partial onsite servicing with gas, hydro and communications, are included in cost estimates.

The phasing of the infrastructure development would reduce the initial development costs and would allow for calculated and strategic growth and controlled infrastructure investment. This infrastructure phasing would involve the development of infrastructure up to the limit of lot 4 and 12, but as more information has come to light, it has been confirmed that several more lots have been pre-sold. Lots 1, 2, 3, 16, 14 and 15 have been sold with a lot on the corner of Leblanc Road and Bay Street (not part of this study) also currently developed by a local business.

Available infrastructure development funding programs for municipalities which would potentially be providing the Municipality with up to two thirds of the funding required for the infrastructure development through provincial and federal grants, would be reduced to reflect project costs associated to phasing. The overall costs when phasing does however lessen some of the initial financial burden and risk to the Municipality.

They key options associated with this alternative include:

- 9 lots developed in Phase 1 (Year 1), followed by 7 lots including Lot 9, developed in Phase 2
- Water main does not extend past the Phase 1 line, at lot 4 and lot 12. Once phase 2 would be implemented the water main loop could be constructed.
- Sanitary sewers up to limit of Phase 1 including a pumping station on the north limit completed in Phase 1, with the balance completed in Phase 2.
- Utilities (hydro and natural gas would be available)
- Communications (Bell Canada does not currently have fiber optic cable in this area)
- Road construction and drainage ditching (only to Phase 1 limit)

Potential Barriers

The following factors impact the viability of the second alternative of phasing the development:

- Delays to putting in the proposed water main loop to Delorme Road could impact water pressure
- 6 of the 16 lots have been pre-sold, therefore the phasing would potentially only impact three more lots: 4, 12, and 13, in Year 1
- Additionally, the lots have been sold as “un-serviced” and for below market value, therefore resulting in limited revenue from sales, and no guarantee that these current land owners will want to connect to municipal services (i.e. water and sewer) once available, as they will likely have already drilled wells and septic. On the other hand, a tax levy will be collected once they develop.

- The upfront development costs such as the pumping station, the cul-de-sac construction as well as the water main sizing adjustment that might be necessary to maintain water flow, significantly reduce any potential financial advantage of phasing the development.
- Phasing does not take full advantage of funding potential that are currently available.
- This alternative does not position the community or Industrial Park as being shovel ready which may hinder efforts to attract a larger scale development as much of the unoccupied park would be left un-serviced.

▶ Alternative 3: Partially Serviced Park in Year 1

This alternative would consist of constructing the road and bringing in utilities to the Park. This may include the road (crescent) connecting Bay Street to Leblanc Road, improvements to Leblanc Road for increased load bearing and the addition of a turning lane to accommodate traffic and vehicular turning radius.

To be noted that 6 of the 16 lots have been pre-sold, for a very low value of $1,000/acre. This is well below market value and should be updated to reflect the current state of the market, which, as per our updated realtor opinion, brings this number to approximately $6,000 per acre for un-serviced land. Once the re-evaluation has been completed, all subsequent sales should be subject to this new price and development timeline/conditions should be considered and adhered to. With road and utilities coming into the park, this evaluation might go up, but to remain conservative, $6,000 per acre has been considered in the financial assessment.

They key options associated with this alternative include:

- **Site preparation and excavation**
- **Road Construction in entire park looping to Leblanc Road**
- **Utilities (Hydro One, Union Gas and Communications**

Potential Barriers

The following factors are potential barriers to the success of this alternative and are considered:

- A larger industrial tenant will likely be seeking fully serviced property, including water and sewer;
- This does not provide additional inventory of fully serviced industrial land for promotion for investment from within and outside the community (e.g. expansions, relocations, new investment)

It is important to mention that there could be an Alternative 4, which would be the Status Quo. This is briefly considered below, but has not been considered in the final evaluation as it is a pretty straightforward analysis, some data will however be provided to compare.

▶ Alternative 4: Status Quo – No Services

The Status Quo would consist of continuing to fill the Industrial Park under current conditions. The exception to this may include the road (crescent) connecting Bay Street to Leblanc Road, improvements to Leblanc Road for increased load bearing and the addition of a turning lane to accommodate traffic and vehicular turning radius.

As with Alternative 3, 6 of the 16 lots have been pre-sold, for a very low value of $1,000/acre, the updated realtor opinion of value brings this number to approximately $6,000 per acre. Once the re-evaluation has been

completed, all subsequent sales should be subject to this new price and development timeline/conditions should be considered and adhered to. Although no infrastructure development is projected at the Park location, a turning lane might be deemed a requirement by MTO in the future.

Potential Barriers

As with Alternative 3, this alternative, does not position the community or Industrial Park as being shovel ready which may hinder efforts to attract a larger scale development that requires services as the park would be left un-serviced.

3.3 Financial Assessment

This section attempts to measure or estimate the change in economic activity in West Nipissing caused by the establishment of the Leblanc Road Industrial Park. The direct economic impact of the Industrial Park equals the value of the output, employment, and earnings annually. Indirect impacts result when: a) firms at the Industrial Park buy goods, services, supplies and materials from regional suppliers; and, b) when employees of the Industrial Park make purchases of consumer goods and services. These indirect impacts create additional revenues, jobs and earnings which result in spending that circulates through the regional economy. The total economic impact is the sum of the combined direct and indirect impacts.

First, we look at the economic feasibility of the Industrial Park - that is the cost and logistical outlook for the Park to determine whether the cost of the prospective new venture will ultimately be profitable to the Municipality. The results of this section provide the Municipality with a numerical representation of direct financial impacts on the Municipality. Further to this, we will look at direct and indirect economic impacts on the community, local businesses, residents, and the environment as a result of the establishment of the Industrial Park.

▶ Financial Feasibility Analysis

The financial feasibility of the Leblanc Road Industrial Park development was conducted on two of the four presented alternatives. Alternative 2 has been ruled out and Alternative 4 basically represented the Status Quo with an updated recommended sale price for lots, therefore this has not been analyzed further as data is already known.

The financial analysis will consider Alternative 1 (development of all park infrastructure and serviced lots) and Alternative 3 (development of all park infrastructure and partially serviced lots). Both Alternatives 1 and 3 have been evaluated over a horizon of 5 years, representing the first 5 years of Industrial Park development, including Year 1 which is the year where any associated servicing and infrastructure to the development would occur. All numbers are rounded to the nearest dollar.

The financial feasibility was achieved through cash flow calculations. The detailed cash flow worksheets have been provided in Appendix A for reference purposes. The following information summarizes and compares the results from these worksheets.

Inputs and Assumptions

General Information			
Date:	2016	**Projects analyzed:**	Alternative 1
Exp. beginning of project:	Year 1 – 2017		Alternative 3

The following assumptions for each alternative have been applied to the Revenue and Expense items in the financial feasibility analysis.

ALTERNATIVE 1 - FULLY SERVICED INDUSTRIAL PARK

List of Assumptions	
Revenue	**Allocation Assumption**
Sale of Lots	In **Alternative 1** the Fair Market Value has been estimated at $15,000 per acre and sale is adjusted to exact acreage of each lot. **Scenario 1 –** All lots sold in Year 1 (of development) **Scenario 2 –** All lots sold by Year 3* **Scenario 3 –** All lots sold by Year 5* ** Timing for the sale of indivudal lots in Scenario 2 and 3 are shown in the following section.*
Lots Pre-sold	In all scenarios, the lots which have been pre-sold have been accounted for in Year 1 at their selling price of $5,000 per lot, totalling $30,000 of positive opening cash flow (6 lots pre-sold).
Tax Levies	1. Taxes are collected for year of sale – on 3 months only assuming construction, etc. a. Rate used for Occupied Industrial Land (2016) 1.431119% b. Rate used for Industrial Vacant or Excess Land (2016) 0.930227% 2. Assessed Market Value for each sold lot is based on the average of all industrial land in West Nipissing, removing anything below $80,000 and removing DSI (Jenmar) as this amount is much higher that balance, impacting average. This Average Market Value assumption is used for each future lot. a. Occupied Industrial Land portion market value used $250,840 b. Industrial Excess Land portion market value used $31,700 3. The first 9 months of the year of sale, the tax levy will be based on vacant land and the last 3 months will be based on (post construction market evaluation) and will be levied at the Occupied Industrial Land Rate. 4. Excess land is adjusted in Year 2, reducing the tax levy to the Vacant and Excess Land Rate. 5. On the currently sold lots (6), taxes are based on current or estimated market value of their property.
Capital Funding (Grants)	1. Federal Funding – FedNor, accounted for 1/3 of capital costs 2. Provincial Funding – accounted for 1/3 of capital costs
Municipal Contribution	Municipal contribution in Year 1 also represents 1/3 of capital costs.
Utilities Revenue	No Water and Sewer revenues for the Municipality have been accounted for as profit is negligible.

List of Assumptions	
Expenses	
Servicing Infrastructure Development Costs	Total Overall Development Costs are $3,968,000 representing $248,000 per lot. 1. Total Capital Works totals $3,563,000 (includes Loop to Delorme Street water main of $363,000 2. Other utilities totals $405,000 See schedule in Appendix N for details.
Hwy 17 Turning Lane and Taper (East and Westbound)	Estimated from experience with DSI (Jenmar) project at $500,000
Ratios	
Net Present Value	The discount rate utilized in this calculation was 3.45% which represents the Municipal borrowing rate of prime (2.7%) plus 0.75%. Net present value was calculated after a 5 year period.
Breakeven Point	Breakeven point is calculated as the point where the year-end cash flow has reached a positive cash level.

ALTERNATIVE 3 - PARTIALLY SERVICED INDUSTRIAL PARK

Alternative 3 has its own set of assumptions which were used in the financial feasibility analysis. The following table details the complete list of assumptions used. Although Alternative 3 is different, some of the assumptions are constant in both Alternative 1 and Alternative 3.

List of Assumptions	
Revenues	**Allocation Assumption**
Sale of Lots	In **Alternative 3** the Fair Market Value has been estimated at **$6,000** per acre and sale is adjusted to exact acreage of each lot. **Scenario 1 –** All lots sold in Year 1 (of development) **Scenario 2 –** All lots sold by Year 3* **Scenario 3 –** All lots sold by Year 5* ** Timing for the sale of indivudal lots in Scenario 2 and 3 are shown in the following section.*
Pre-sold Lots	In all scenarios, the lots which have been pre-sold have been accounted for in Year 1 at their selling price of $5,000 per lot, totalling $30,000 of positive opening cash flow (6 lots pre-sold).
Tax Levies	1. Taxes are collected for year of sale – on 3 months only assuming construction. a. Rate used for Occupied Industrial Land (2016) 1.431119% b. Rate used for Industrial Vacant or Excess Land (2016) 0.930227% 2. Assessed Market Value for each sold lot is based on the average of all industrial land in West Nipissing, removing anything below $80,000 and removing DSI (Jenmar) as this amount is much higher that balance, impacting average. For analysis simplicity the average market value in Alternative 1 and 3 remains constant. This Average Market Value assumption is used for each future lot. a. Occupied Industrial Land portion market value used $250,840 b. Industrial Excess Land portion market value used $31,700

List of Assumptions	
	3. Excess land is adjusted in Year 2, reducing the tax levy to the Vacant and Excess Land Rate. 4. On the currently sold (6) lots, taxes are based on current or estimated market value of their property.
Capital Funding (Grants)	1. Federal Funding – FedNor, accounted for 1/3 of capital costs 2. Provincial Funding – accounted for 1/3 of capital costs
Municipal Contribution	Municipal contribution in Year 1 also represents 1/3 of capital costs.
Utilities Revenue	No Water and Sewer revenues for the Municipality have been accounted for as profit is negligible.
Expenses	
Capital Works Development Costs	Total Overall Development Costs are $1,321,000 representing $82,500 per lot. 1. Total Capital Works totals $946,000 2. Other utilities totals $375,000 See schedule in Appendix N for details.
Hwy 17 Turning Lane and Taper (East and Westbound)	Estimated from experience with DSI (Jenmar) project at $500,000, this remains in the assumptions with this Alternative, regardless of servicing or not, traffic increase could be the same.
Ratios	
Net Present Value	The discount rate utilized in this calculation was 3.45% which represents the Municipal borrowing rate of prime (2.7%) plus 0.75%. Net present value was calculated after a 5 year period.
Breakeven Point	Breakeven point is calculated as the point where the year-end cash flow has reached a positive cash level.

Cash Flow Analysis

The following section highlights the results of the cash flow analysis, comparing Alternative 1 and Alternative 3 under 3 scenarios. The scenarios are as follows:

1. **Scenario 1 – Lots sold entirely in Year 1** – this is an improbable scenario but was used as our best case scenario for comparison purposes.
2. **Scenario 2 – Lots are sold by Year 3** – again an ambitious scenario, but pushes sales revenue a bit further in time, testing results.
3. **Scenario 3 – Lost are sold by Year 5** – this gives an idea of what could happen with concentrated effort on developing the park.

The sales of the individual lots per each scenario are as follows:

- **Scenario 1:** All lots sold in Year 1 and developed that first year.
- **Scenario 2:** Lots sold by Year 3 in the following sequence
  - **Year 1:** Lot 4, Lot 5, Lot 6
  - **Year 2:** Lot 7, Lot 8, Lot 10
  - **Year 3:** Lot 9, Lot 11, Lot 12, Lot 13

- **Scenario 3:** Lots sold by Year 5 in the following sequence –
  - **Year 1:** Lot 4, Lot 5
  - **Year 2:** Lot 6, Lot 7
  - **Year 3:** Lot 8, Lot 10
  - **Year 4:** Lot 11, Lot 12
  - **Year 5:** Lot 9, Lot 13

LOT SALES AND TAX LEVY REVENUE

From these scenarios with varying sequences of lot sales, also taking into account the true lot sales to date, the following revenue streams have been projected, comparing Alternative 1 and Alternative3 for each scenario.

Alternative 1 - Fully Serviced Park

Sale Price $15,000

	Scenario 1	Scenario 2	Scenario 3
Revenue from Sale of lots	**Total**	**Total**	**Total**
2016	825,000.00	198,000.00	132,000.00
2017	-	227,250.00	139,500.00
2018	-	399,750.00	153,750.00
2019	-	-	148,500.00
2020	-	-	251,250.00
	-	-	-
total	**825,000.00**	**825,000.00**	**825,000.00**
Tax revenue	**Total**	**Total**	**Total**
2016	21,683.00	13,850.00	12,731.00
2017	66,707.00	48,280.00	43,969.00
2018	70,046.00	61,810.00	52,756.00
2019	73,551.00	73,551.00	62,311.00
2020	77,228.00	77,228.00	72,688.00
total	**309,215.00**	**274,719.00**	**244,455.00**
Tax on excess land	**Total**	**Total**	**Total**
2016	-	-	-
2017	3,835.00	1,770.00	1,475.00
2018	4,030.00	2,790.00	2,170.00
2019	4,238.00	4,238.00	2,934.00
2020	4,446.00	4,446.00	3,762.00
total	**16,549.00**	**13,244.00**	**10,341.00**

Alternative 3 - Partially-Serviced Park

Sale Price $6,000

	Scenario 1	Scenario 2	Scenario 3
Revenue from Sale of lots	**Total**	**Total**	**Total**
2016	330,000.00	79,200.00	79,200.00
2017	-	90,900.00	90,900.00
2018	-	159,900.00	159,900.00
2019	-	-	-
2020	-	-	-
	-	-	-
total	**330,000.00**	**330,000.00**	**330,000.00**
Tax revenue	**Total**	**Total**	**Total**
2016	21,683.00	13,850.00	13,850.00
2017	66,707.00	48,280.00	48,280.00
2018	70,046.00	61,810.00	61,810.00
2019	73,551.00	73,551.00	73,551.00
2020	77,228.00	77,228.00	77,228.00
total	**309,215.00**	**274,719.00**	**274,719.00**
Tax on excess land	**Total**	**Total**	**Total**
2016	-	-	-
2017	3,835.00	1,770.00	1,770.00
2018	4,030.00	2,790.00	2,790.00
2019	4,238.00	4,238.00	4,238.00
2020	4,446.00	4,446.00	4,446.00
total	**16,549.00**	**13,244.00**	**13,244.00**

A fully populated park would potentially generate <u>$77,000</u> on Industrial Land and <u>$4,500</u> on Excess Land annually (without accounting for any change in the tax rate), for <u>a total of $81,500</u>. This is based on an Average Market Value assumption 1) Occupied Industrial Land portion market value used $250,840 and 2) Industrial Excess Land portion market value used $31,700.

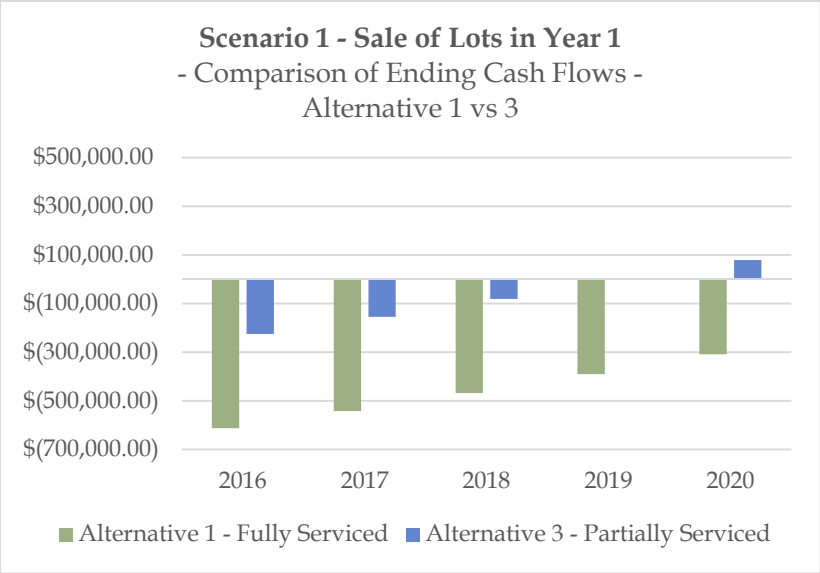
FUNDING REVENUE

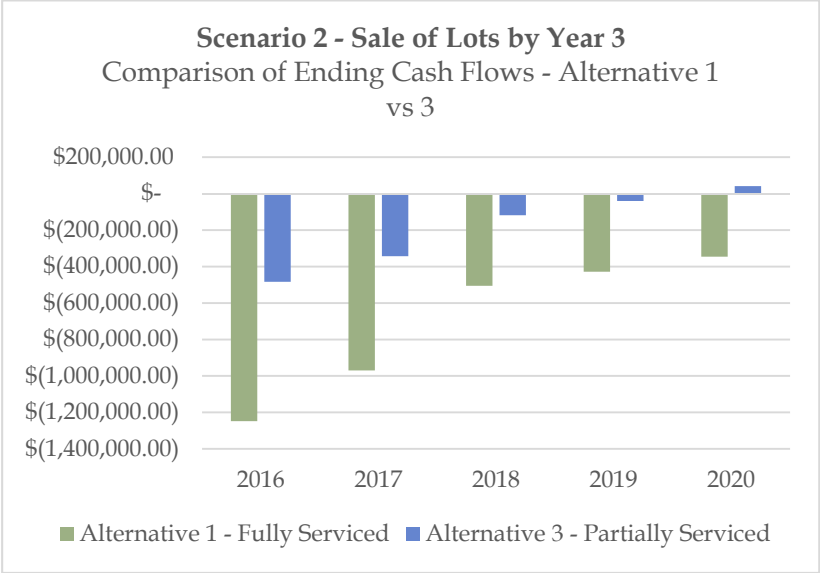
In Year 1 of Alternative 1, there are also additional revenues in the form of capital contributions that represent $2,978,666 from provincial and federal sources and a Capital Contribution from the Municipality of $1,489,333. Year 1 also includes an opening cash balance of $30,000 representing currently sold lots.

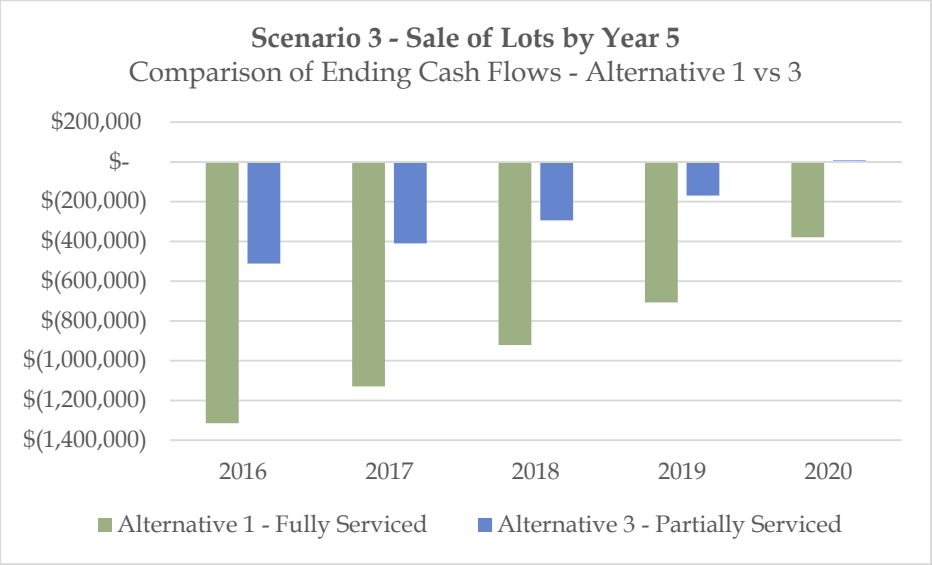
In Alternative 3, since capital costs differ with this option, revenues from capital contributions represent $900,667 from provincial and federal sources and a Capital Contribution from the Municipality of $450,333.

CASH FLOW RESULTS

From these revenue assumptions and with the development costs, cash flow results have been calculated. For ease of comparison each alternative considered is compared on a scenario-by-scenario basis. As previously mentioned the detailed Cash Flow Worksheets can be found in Appendix A.







As can be seen in the charts above, Alternative 1 does not reach a positive cash flow within the first 5 years, however, this could potentially be attained in years 9 or 10.

BREAKEVEN ANALYSIS

The following table gives the results of a breakeven analysis using the ending cash flow balance.

	Scenario 1 Sold in Year 1	**Scenario 2** Sold in 3 years	**Scenario 3** Sold in 5 years
Alternative 1 Fully Serviced	9 years	9 years	10 years
Alternative 3 Partially-serviced	5 years	5 years	5 years

NET PRESENT VALUE

Net Present Value (NPV) is the difference between the present value of cash inflows and the present value of cash outflows, where present value (PV) is the current value of a future sum of money or stream of cash flows given a specified rate of return. The discount rate utilized in this calculation was 3.45% which represents: prime (2.7%) plus 0.75%, and was calculated after a 5-year period. NPV is an important calculation used in capital budgeting to analyze the profitability of a projected investment or project. The following table shows the Net Present Value results for each alternative under each of the 3 scenarios.

	Scenario 1 Sold in Year 1	**Scenario 2** Sold in 3 years	**Scenario 3** Sold in 5 years
Alternative 1 Fully Serviced	$ (357,552.91)	$ (426,663.90)	$ (483,379.37)
Alternative 3 Partially-serviced	$ 23,267	$ (25,907)	$ (66,587)

▶ Summary of Financial Assessment

Two alternatives have been analyzed further in this financial assessment, under the three different sales scenarios. Alternative 3 is the only one that reached the breakeven point within 5 years. Net Present Value after 5 years demonstrates the gap that is left to recover from this investment for each alternative. It is also important to note here that funding potential follows capital costs (two thirds or 66%), therefore, this possibility of revenue is increased as the costs of development increases. The financial impact is significant to the Municipality and this will probably become the focus of the decision-making discussion.

3.4 Evaluation of Alternatives

As this is a risk-based decision, it is not the intent of the Project Team to recommend one alternative over another, rather to determine the feasibility of each option based on the financial, economic impact and market assessments and to present said facts to the Municipality so as to make an informed decision regarding the development of the proposed Park. Only Council is in a position to decide on the amount of risk they are willing and able to take in order to develop this Industrial Park.

Based on our analysis, we can confidently state that Alternatives 1 and 3 have been deemed feasible and merit further consideration. However, Alternative 2 has been deemed unfeasible and should be declared a non-option

moving forward. As for Alternative 4, since it represents the Status Quo, with no additional development costs for the park itself, this option has not been analyzed further.

As such, a synopsis of the Alternatives 1 and 3 is provided below, including a summary of the advantages and disadvantages associated to each option.

▶ Alternative 1 – Fully Serviced Park

This option consists of fully developing the industrial park including the extension of all infrastructure and services.

The key capital costs associated with this alternative include:

- Road construction and drainage ditching
- Water mains including a loop to Delorme to maintain pressure
- Sanitary sewers including a pumping station on the north limit
- Utilities (hydro and natural gas would be available)
- Communications (Bell Canada does not currently have fiber optic cable in this area)
- Construction of a turning lane on HWY 17
- Possible upgrading of Leblanc Road (not included in this analysis)

ALTERNATIVE 1 – FULLY DEVELOPED AND SERVICED	
PROS	**CONS**
➢ Easier to promote for external investment and it is more economical than regional industrial land supply ➢ Shovel ready ➢ Can sell for more per acre ➢ Ability to generate revenue through provision of additional services (e.g. water) ➢ Could increase land assessment values and associated tax revenues ➢ Federal and provincial funding is available now to cover up to 2/3 of eligible costs	➢ Cost to develop is significant and will require substantial investment from the Municipality ➢ Upgrades to Leblanc Road over the short term may be required (not included in capital costs) ➢ A turning lane on HWY 17 may be required, presenting additional immediate costs (included in capital costs) ➢ May be difficult to sell to local businesses for relocation/expansions due to precedent set from previous land sales within park ➢ Potential resistance from local private land owners ➢ Financial and human resources will need to be allocated to actively promote the park to ensure timely ROI

▶ Alternative 3 – Partially-Serviced Park

Developing the part with partial services, road construction and servicing for utilities (hydro, gas, and communications) is a conservative approach to developing the park.

Key capital costs associated to this alternative include:

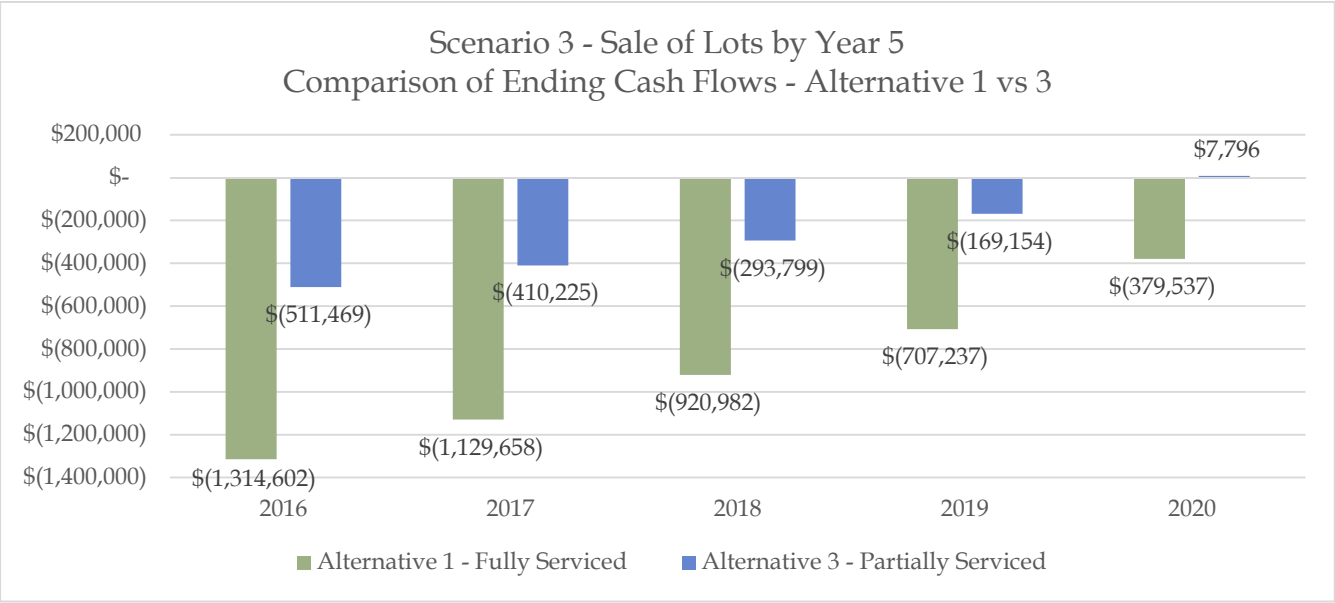
- Road construction and drainage ditching
- Utilities (hydro and natural gas would be available)
- Communications (Bell Canada does not currently have fiber optic cable in this area)
- Construction of a turning lane on Highway 17
- Possible upgrading of Leblanc Road (not included in this analysis)

ALTERNATIVE 3 - PARTIALLY-SERVICED	
PROS	**CONS**
➢ Low list price may be attractive to start-ups ➢ Low list price may be attractive to local businesses looking to expand/relocate (promote via BR&E) ➢ Lower upfront development costs to municipality ➢ Leblanc Road upgrades can be deferred and incorporated into capital plan in a more strategic manner ➢ Potential to build on momentum of lots that have already been sold ➢ Onus on land owner to put in septic and well which poses no cost to the municipality and provides opportunity for area businesses to supply said services	➢ More difficult to attract outside investment ➢ Not shovel ready ➢ Potential that buyers seeking cheap land will purchase at going rate with no intention to develop over the short term ➢ A turning lane on HWY 17 may be required, presenting additional immediate costs (included in capital costs)

▶ Financial Comparative of Alternative 1 and Alternative 3

As detailed in the Financial Assessment certain key results were compared, the Ending Cash Balances, the Breakeven Point and the Net Present Value for each of these alternatives under the three scenarios. The following is a quick recap of these results. Scenario 3 has been retained here for this purpose, as it is more realistic to think that it would take some time to sell the remaining lots, with 5 years still being ambitious, requiring an aggressive strategy.

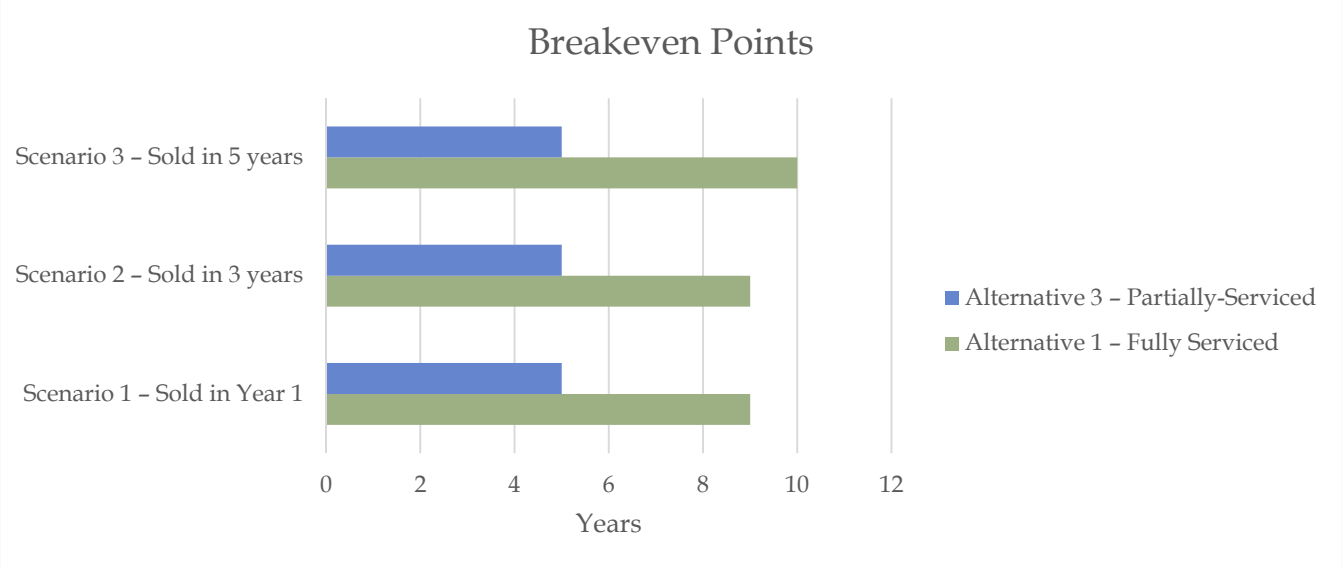
Ending Cash Balance Comparison



The ending cash balance comparison gives us a good visual of the result of the cash flow analysis, showing us the first 5 years of debt repayment.

Breakeven Analysis Comparison

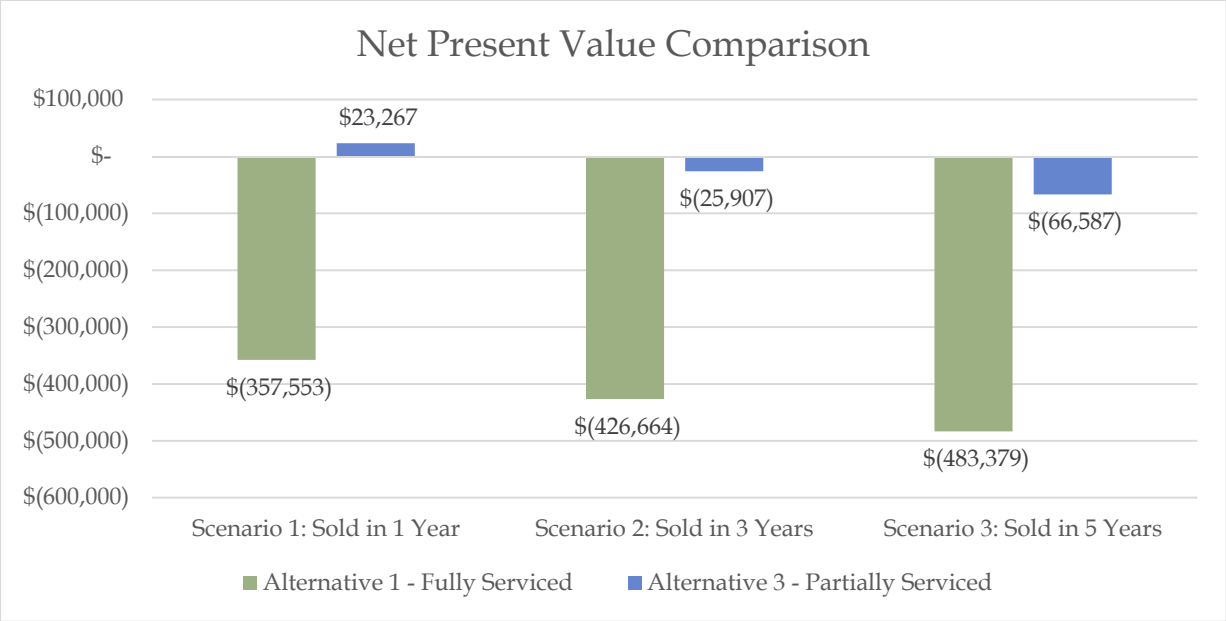
From the Cash Flow analysis, and the ending cash balances, if we project the tax levies into the future we come up with the number of years it would take to reach the breakeven point. From this point on the Municipality would be generating revenues from the Industrial Park.



When comparing both Alternative 1 and Alternative 3, we can see that in Scenario 3, where lots would be sold over the next 5 years, that there is a 4-year gap at reaching the breakeven point.

Net Present Value Comparison (at Year 5)

Finally, the Net Present Value, providing us with a comparable number for each alternative under each scenario, considering future revenues up to Year 5 as well as the discount rate of return based on average expected lending rate for the Municipality.



It is clear to see that Alternative 1 brings a significant debt burden to the Municipality. Since capital expenditures are significantly higher in Year 1, recovery is much slower and the risk level is higher.

Conclusion of Financial Assessment

Since Alternative 1 deals with significantly higher capital investments, and no difference in projected tax levy revenues (only varying sales prices - $15,000 per acre and $6,000 per acre), Alternative 3 has a significantly quicker recovery, and break-even point. What has to be considered at this point is the fact that these scenarios presume that all lots will be sold by Year 5. It is unknown how many lots the Municipality will be able to sell and in what period of time. We have assumed 5 years to limit scenarios, but the more time it takes to sell the lots, the longer it takes to reach a positive Net Present Value and therefore breakeven point.

3.5 Economic Impact Assessment

The financial assessment completed for the proposed Leblanc Road Industrial Park provides the Municipality with a clear picture of the potential financial benefits an industrial park in West Nipissing can have for the Municipality. However, it is important to consider other economic impacts which will result from the development and operation of an industrial park (i.e. the impacts of a new industrial park on local businesses, job creation, etc.).

Direct impacts represent the sum of Industrial Park revenues, earnings and employment due to the presence of the park. As was determined in 3.3 Financial Assessment the potential direct economic output (revenues) from the Leblanc Road Industrial Park once fully occupied is $81,500 per annum from industrial land taxes.

In contrast to direct impacts, the indirect impacts measure the magnitude of successive rounds of re-spending (i.e. business at the Industrial Park purchase from other business in the region, and when employees buy consumer goods and services in the region). For example, when a worker from an industrial park firm spends on food, clothing and other services, the wages he or she received at the industrial park support additional jobs and spending in the general economy.

▶ Impact on Employment & Job Creation

Industrial jobs pay living wages to people with modest levels of education, while incomes at comparable positions in many retail and service industries are below a living wage. Industrial employment (or secondary industry employment) in West Nipissing has remained low (<15% of total workforce), as was seen in section 2.3 Comparative Analysis.

Permanent net new jobs are those that are directly created by a new business that will establish or relocate to the Leblanc Road Industrial Park, or which is indirectly created by other local businesses as a result of the new business. It is assumed that only new created jobs, those that are not a result of normal growth and development, can be seen as job creation for the industrial park. For instance, if an existing local business simply relocates to the industrial park, these jobs cannot be counted for job creation, unless there is an expansion aspect to their relocation that creates additional employment.

Temporary employment opportunities are also created from the development of the Industrial Park. This includes jobs for developing (i.e. infrastructure) and setting up the Industrial Park. These jobs include those related to consulting, engineering, building/construction and development.

Therefore, in order to determine the true economic impact, assumptions are made, based on industry standards. The following assumptions are used in calculating direct and indirect jobs being created (either permanent or temporary), which are also detailed in Appendix O:

- 10 lots (unsold, 6 lots sold but not included in this employment impact consideration) with an average size of 5.5 acres each
- An estimated 1.5 acres per lot will actually be developed as occupied industrial land providing employment opportunities
- Occupied industrial land has a density of 6 jobs per developed acre, and a 2x employment multiplier is used for indirect labour

- $3.968 million industrial park development costs, with wages calculated at 30% of costs
- Average building construction cost of $250,840 per unsold lot, with 1 building per lot, and wages being 30% of costs
- Average individual salary of $34,120 [28]
- 75% of direct employment is retained by community, with 25% being sourced from outside of the area
- 40% of indirect employment is retained by community, with 60% being sourced from outside the area

The following provides the estimated job creation potential for West Nipissing based on a fully developed industrial park and the aforementioned assumptions. These figures are estimates, and can vary significantly depending on the building construction costs, types of businesses established in the park and required employees, whether the tenants are new or existing businesses in West Nipissing, etc.

	Direct Jobs	Indirect Jobs	Total FTE jobs
Permanent*	74.3	39.6	**113.9**
Temporary**	42.7	22.8	**65.5**
Total	**117.0**	**62.4**	**179.3**

*Permanent: Represents jobs created by the businesses established in the industrial park

**Temporary: Represents jobs created as a result of construction and infrastructure development

The temporary jobs represent about 65.5 direct and indirect construction jobs created in the first year for new construction activities associated with infrastructure development and building and site improvements for the tenants. This level of construction activity would result in one-time economic impact of $6.47 million (development and infrastructure costs + building costs), and one-time $2.2 million in annual personal income from temporary jobs.

These construction impacts are in addition to the operational impacts of the industrial park. The operational impacts of the Industrial Park include directly and indirectly supporting an estimated 114 total permanent jobs, resulting in $3.88 million in annual personal income, assuming the average individual income in West Nipissing is $34,120.

It is most likely that employed individuals in West Nipissing will not benefit, but the unemployed, especially low skilled workers will. However, it is possible that employed individuals will benefit as a result of an increase in demand for both employees in West Nipissing. These individuals can now be employed in West Nipissing, rather than commuting to neighbouring cities for employment in their field. The labour flow analysis provided earlier (also available in Appendix K) showed that almost 2000 West Nipissing residents commute outside of West Nipissing to work. Specifically, for secondary industry jobs (i.e. Construction and Manufacturing) 175 individuals commute outside of West Nipissing for work. This could be reduced significantly, both on a permanent and temporary basis.

▶ Impact of Increased Spending

When Industrial Park tenants make direct expenditures these amounts enter the general economy, with each dollar being available for additional spending. This creates a “multiplier effect” that increases employment,

[28] West Nipissing Community Profile / Statistics Canada 2011 Census

income and total economic activity in the region. Since tenants are not secured at this stage of the project, it is hard to estimate these figures, as expenses can vary significantly from industry to industry and business to business. However, if the Municipality focusses on attracting those identified as target markets (i.e. value added manufacturers and processers), who source their materials from the primary sector businesses in the region (i.e. agriculture and forestry industries), then the economy will be impacted directly by the additional spending staying within the region.

As is the case with most economic development efforts, the strategies rely on retention and expansion of existing companies or attracting new industrial investment. By doing so, the Industrial Park will support existing businesses in the region by providing opportunities for growing sales regionally through the newly established businesses in the Industrial Park as well as the opportunity for local businesses to expand into the Park. More information on the impacts on local businesses is discussed in the following section.

Increased spending will also result from the jobs being created through the establishment of businesses in the industrial park. More employees in the region, means more spending, as was discussed in the leakage analysis. As well, if fewer employees are travelling outside of the region for work, leakage as a result of these individuals shopping in the cities in which they work in (i.e. North Bay or Sudbury) would be reduced. If jobs are generated through the industrial park, which attract workers from outside of the region, then there will be an additional positive impact on the economy. With lower than average residential housing costs ($215,149) in West Nipissing than in neighbouring communities, workers may be enticed to purchase homes in West Nipissing, stimulating the economy further.

▶ Impact on Local Businesses

Factors related to the establishment of the Industrial park are assessed on local businesses as either having a negative or positive impact. Overall, results are provided in the table below, however, these impacts will vary depending on the type of local business and the products/services they offer.

POSITIVE	NEGATIVE
Direct	
➢ New businesses in the industrial park, could mean more sales for local business owners ➢ Supplier businesses will have the potential to grow their businesses at above average growth rates ➢ Secondary suppliers will be closer to their customers ➢ Create business opportunities and business retention ➢ Relocation of existing businesses could open up the inventory of available lots in desirable/visible areas of the community	➢ Possible increase in competition, however target markets should not create direct competition for existing businesses, this should be part of a long-term economic development vision and plan ➢ Increased competition for industrial land with these potential new properties on the market, having a negative impact on owners of industrial land currently available in the Municipality ➢ An already limited workforce resulting in the possibility of employee poaching

POSITIVE	NEGATIVE
➢ Relocation of existing industrial businesses to the park may allow for rezoning of previous property to be better suited to the surroundings (e.g. residential)	
Indirect	
➢ Higher sales could translate to higher profits, which could be reinvested into the regional economy, distributed to employees, leading to increased consumer spending ➢ Creation of new skills and skills retention ➢ Relocation of families in the area, cost of living remaining under North Bay and Sudbury, this bedroom community would be ideal for businesses and employees relocating to the area.	➢ Per capita income will increase, which may result in increased wages to retain employees ➢ With increased business, companies may need to hire higher skilled resources ➢ Increased transport traffic coming off of Highway 17 onto Leblanc Road. ➢ Current infrastructure of Leblanc Road might need upgrading, turning lane might be a requirement. ➢ Industrial park, located on way to museum and KOA, could possibly make areas less attractive for tourists ➢ Increases truck traffic in residential area along Bay street

▶ Impact Analysis Summary

Overall, the Leblanc Road Industrial Park would stimulate important economic and social development essential for the area. The Park could help to diversify the economy by adding high quality primary jobs in manufacturing, warehousing and construction. In addition, a significant portion of the jobs created by the Industrial Park tenants would potentially be net new jobs thereby growing the economy both locally and regionally. The attraction of new businesses and new job creation to West Nipissing would also support significant additional indirect economic activity (i.e. increased spending, and increased jobs and payroll as a result of increased sales for local supplier and consumer businesses.)

These direct and indirect impacts reveal the *overall impact* of the Leblanc Road Industrial Park to the West Nipissing region. By 2025 the employment in West Nipissing is estimated to be about 4304. Using the job creation assumptions, the Industrial Park would account for 1% of this workforce, given that 75 direct permanent jobs will be created. In addition to the permanent direct and indirect job creation, temporary jobs will be created for the development of the Park (i.e. construction and servicing work).

Overall, the following are the potential positive economic and social impacts of the development (sale and development of remaining lots) of the Leblanc Road Industrial Park, which could be achieved whether the park is serviced or not:

- It would ensure jobs and stability by providing a competitive environment.
- It would create additional skills and retain skills currently being exported (i.e. see Labour Flow Analysis)
- It would provide companies the opportunity to develop and grow

- It would provide a competitive environment to attract new investments
- It would result in increased spending within the region
- It would create additional serviced industrial land for private investment
- It would create indirect temporary jobs for the building and infrastructure development
- It would attract new business due to synergies within industry-related businesses

It should be noted that additional industrial economic development could be accommodated in other locations, and could result in similar impacts on the West Nipissing economy and community. However, impacts were only assessed based on the development of the Leblanc Road Industrial Park. Also, due to data limitations, it was not always possible to quantify all of the impacts listed above.

3.6 Evaluation Matrix

▶ Methodology and Purpose of the Evaluation Criteria

The purpose of developing criteria was to provide an unbiased tool and a documented process for evaluating the Industrial Park development alternatives for this specific project. Evaluation criteria were derived from the project goals, objectives and principles identified previously by the Municipality as well as through best practice research.

▶ Determining Evaluation Criteria

The existing Municipal vision and policies formed the basis to develop a series of evaluation criteria and provide guidance to the project team and for the future development of the park. They included the following documents:

- Corporate Affairs International, West Nipissing Positioning Plan (May 2003)
- Precision Management Catalysts, West Nipissing Labour Market Study (November 21, 2003)
- Mid-North Appraisals Ltd., Land Value Assessment (December 13, 2010)
- West Nipissing Chamber of Commerce, West Nipissing Market Feasibility Study (2015)
- West Nipissing Chamber of Commerce, West Nipissing Leakage Analysis (2015)
- Municipality of West Nipissing Official Plan (Approved with Modifications, December 7, 2011)
- Municipality of West Nipissing Comprehensive Zoning By-Law 2014-45 (July 8, 2014)

The following principles were recommended by the Project Team and the Steering Committee for review and discussion. The order of presentation for each specific evaluation criteria has no bearing on the relative importance of each criterion to one another.

- **Net Present Value of revenue stream**: A positive net present value indicates that the projected earnings generated by a project or investment (in present dollars) exceed the anticipated costs (also in present dollars). Generally, an investment with a positive NPV will be a profitable one and one with a negative NPV will result in a net loss.
- **Market Driven Development**: Is it responsive to the projected market demands determined in the market research, for various industrial activities? Is there demonstrated interest from potential anchor tenants? Do sales prices create competitive positioning?
- **Business Retention & Expansion**: It will be a key factor impacting business retention and expansion, providing local businesses affordable industrial land.

- **Support of Overall Municipal Vision:** Contributes to the overall municipal vision and to achieving a sustainable community.
- **Potential of Direct and Indirect Job Creation – Tenant Based:** Creates the potential for direct and indirect permanent job creation through the new tenants that will establish themselves in the park.
- **Potential of Direct and Indirect Job Creation – Park Development:** Creates the potential for direct and indirect temporary job creation through the Park construction and development phase
- **Increased Pressures on Overall Infrastructure:** Several impacts on infrastructure can be anticipated, will this alternative bring undo pressure onto the existing infrastructure systems of the Municipality such as the water pressure, sewer system, Leblanc and Bay road increased traffic and weight, the highway traffic at the intersection of Hwy 17, etc.?
- **Resident Attraction**: The potential to attract new residents into the area, from inward investments and job creation.
- **Investment Attraction – Inward**: Helps to position West Nipissing for inward investment. The development plan should be attractive to private and public investors and tenants.
- **Adaptability for Future Change or Opportunity:** Flexibility to accommodate changing conditions and new opportunities. It is very important that each of the alternatives be flexible enough to accommodate varying needs (size / type) and industries.

▶ Weighting and Scoring of the Evaluation Criteria

A relative weight for each evaluation criteria was then assigned by the project team, based on Municipal priorities and best practices. The following table identifies the ten evaluation criteria and their associated weights. With the weights established, the team evaluated the two alternative development options and ranked each option against the same weighted criteria.

The evaluation criteria were used to quantify the Industrial Park Development alternatives and identify a highest and best case alternative.

The **highest weights** were attributed to:

- Net Return on Investment – NPV of Revenue Stream
- Market Driven Development
- Potential for direct and indirect job creation – Tenant Based

The **lowest weighted** criteria were attributed to:

- Potential for direct and indirect job creation – park development since temporary and might require outside contractors.
- Adaptability for future change or opportunity

▶ Evaluation Scoring of Alternatives

No.	**Evaluation Criteria** (Combined Average Weight Factors Determined by CB Team with validation at the Municipal Project Committee)	Weight	**Leblanc Road Industrial Park Development Alternatives** (Evaluation by CB Team) (Raw Performance Score, Scale 1 to 10) Alternative 1	Alternative 3
1	Net Return on Investment (NPV of Revenue Stream)	10.0	3	7
2	Market Driven Development	8.0	3	6
3	Business Retention and Expansion	7.0	6	9
4	Support of the Overall Municipal Vision	6.0	8	8
5	Potential for direct and indirect job creation - tenant based	8.0	7	7
6	Potential for direct and indirect job creation - park development	5.0	6	3
7	Increased pressures on overall infrastructure	7.0	3	8
8	New Resident Attraction	6.0	7	7
9	Investment Attraction - Inward	7.0	7	5
10	Adaptability for Future Change or Opportunity	5.0	4	8
	Maximum Possible Score	690.0		
	Alternative Raw Performance Score (Sum of All Raw Scores)		54	68
	Weighted Score (Individual Criteria Weight x Raw Score)		362	473
	Percent of Maximum Possible Score		52.46%	68.55%

Alternative 3 scored the highest on the evaluation. This option provides future flexibility and opportunity for economic development in West Nipissing yet does not have the same level of financial risk as the Alternative 1.

▶ Summary

These various comparisons provide Council and Management with two different options to develop the Park. Because the element of risk is the most important factor in this decision-making process, the final decision on how, if or when to pursue the Industrial Park development rests with them. Alternatives have been compared based on physical attributes, financial impact or feasibility and finally on qualitative factors summarized in the Evaluation Matrix.

Conditional Factors

Some of the following conditional factors are significant and deserve to be given due consideration:

- As previously mentioned, the sewage system capacity, regardless of the alternative selected, could be a critical issue, affecting the go ahead of the Park's development.
- Funding support is critical to the viability of servicing the Park, if for some reason the funding programs would change or be reduced, this could impede capacity to opt for Alternative 1.
- The most crucial conditional factor for Alternative 1 is whether there is potential to sell all lots within the next 5 years, if demand is present in certain sectors, will the advantages of establishing operations in West Nipissing be strong or important enough to attract outside investment or even to encourage regional businesses to choose the Leblanc Road Industrial Park for their expansion projects.

The following section provides additional critical success factors pre or post implementation.

Part 4. Implementation Recommendations

Regardless of whether the Municipality opts to develop the Park as serviced or un-serviced, there are a number of fundamental factors and gaps which should be addressed to ensure their success. Best practices as they related to economic development and investment attraction and which address some of the gaps and challenges that have come to light as a result of this study form the basis of the implementation recommendations.

Intended to support council, administration and staff who will be responsible for the development of the Industrial Park, recommendations to address each of the key fundamental factors / gaps have been provided. This can be used as a guide for change at the broader system level or at the specific service-delivery level.

4.1 Fundamental Success Factors and Gaps

▶ Economic Development

In its truest form, economic development is acting to ensure that the economy of your community (your income or savings) grows faster than your population (your expenses) so you have the extra resources in the future to finance improvement.

This is achieved when public, business and non-governmental sector partners work collectively to create better conditions for economic growth and employment generation. Local economic development (LED) is thus about communities continually improving their investment climate and business enabling environment to enhance their competitiveness, retain jobs and improve income.

Properly structured economic development efforts are about more than just waiting for something to happen and not simply reacting when something does. Rather successful LED efforts are proactive and deliberate. Success in LED depends highly on the adequacy and commitment of local leadership. Although there may be a wealth of opportunities, they remain relatively unimportant if there is an absence of leadership and the commitment to move forward.

Based on the stakeholder engagement process, there is a strong perception within the community that economic development is not a priority for council. Limited budget dollars have been allocated to this portfolio for some time and there is no designated staff person with this responsibility. Currently the role of EDO is essentially shared between various staff members and the Mayor and LED efforts are mainly reactive in nature.

Recommendations

- **Increase Economic Development budget and secure additional qualified staffing resources**
  The economic development structure within a community plays a strong role in its ability to seek and capture investment. The level and capacity of the economic development office along with community infrastructure and market conditions all play a vital role in attraction. Designated and sufficient resources are required for a pro-active approach and significant efforts will be required to establish positive relationships with the business community and to effectively position the Industrial Park for both local

and external investment. A targeted approach focusing on investment attraction will be key and this will take financial and human resources.

- **Implement an Ongoing Business Retention & Expansion (BR+E) Program**

  West Nipissing already features a wide array of businesses, from small private firms to medium-scale enterprises. Yet all too often the rush to promote or attract something new ignores the "best" growth potential in the local business sector, which frequently comes from those businesses already located and invested in the region. A proper LED effort should be premised on an improved understanding of the needs and perspectives of local businesses along with an emphasis on making the local business environment more productive, supportive and attractive for these entrepreneurs and enterprises. This can be achieved through the implementation and prioritization of a customized and ongoing BR+E program.

  A Business Retention and Expansion program should be revisited and maintained over the long term. This will result in building relationships with the local business community, encouraging growth and expansions from within and potentially identifying follow-on investment opportunities. The process will also help the Municipality to identify gaps and opportunities for improvement which may lead to the creation of new programs and services that would be attractive to businesses looking to relocate or to new entrepreneur.

- **Undertake an Investment Readiness Assessment**

  Each community has its own unique characteristics and own reasons for actively engaging in investment attraction activities. Generally, communities engage in investment attraction activities to:

  - Increase economic opportunities
  - Increase opportunities for growth
  - Enhance the job market
  - Increase competitive advantage
  - Build a diversified and sustainable community

  Regardless of a community's reason to engage in investment attraction activities, it is evident that investment within the community is essential to secure sustainability and future growth. This supports the importance for communities to work towards becoming "investment ready".

  There are a number of "self-assessment" guidelines and tools available through various government websites and from private sector firms. These are typically based on the investor point of view and asses the experience the investor/site selector would have in a community. The completion of an investment readiness self-assessment will provide West Nipissing with a better understanding of its readiness level for inward investment. This will also assist the Municipality in identifying investment readiness gaps and to determine the effectiveness of existing planning and development processes. Areas which are typically reviewed as part of the assessment process include: expertise, internal capacity, resources, relationship/communication with business community, land use planning, land inventories, community profile, marketing strategies and after care.

The Ministry of Northern Development and Mines offers a free Investment Readiness Test which the Municipality of West Nipissing should consider undertaking as part of their investment attraction strategy process.

- **Develop a GIS based Industrial and Commercial Land Inventory**

A well-organized and current land inventory is extremely beneficial and shows the community's level of preparedness. It provides an easily accessible tool for EDOs and other Municipal staff to respond to inquiries from potential inward investors, local business and realtors with relevant information about available land. Some common characteristics to include in a land inventory are:

- Municipal Services (water, sewer, power, gas, telecom, etc…)
- Potential natural environmental issues / challenges (e.g. PSW)
- Potential man-made environmental issues (e.g. brownfields)
- Zoning
- Legal description
- Lot size
- Owner information
- Assessed values
- Building specs if there is a building on site
- Taxes

- **Collect and Document Site Selection Data Standards**

Documenting all data and relevant information regarding West Nipissing should be undertaken as part of the effort to promote the Industrial Park as well as other investment opportunities within the Municipality. The collection and compilation of a comprehensive data set will not only facilitate the site selection process but will also help the community to better understand the local economy. If updated annually, the data will chart economic and industrial changes, map emerging jobs – and the training and education needs for them – and provide information for strategic planning, program evaluation, marketing, retention, and advocacy to local, provincial and federal officials and other relevant parties.

Having comparable statistics makes this process even more useful, and it is therefore recommended that the Municipality utilize the data standards spreadsheet (Appendix P) developed by the International Economic Development Council (IEDC) as a benchmark. Recognizing the fact that not all data is readily available for smaller and rural communities, the IEDC commissioned the services of the Business Location Strategies Group at Price Waterhouse Coopers - working with DevelopmentAlliance.com to identify the following key data elements a community should begin with:

- Leading Employers
- New Companies in the Area
- Average Salary by Occupation
- Worker's Compensation and Unemployment Insurance
- Percent of Workforce organized
- Real and personal property tax
- Average costs of sites

- Utilities
- Quality of life data for the central city and selected suburban school districts

All of this information can be compiled not only as part of the standards spreadsheet, but should also be readily available on the Municipal website and incorporated into a comprehensive investment focused Community Profile.

▶ Municipal Processes Permitting Policies and Approvals

When business owners speak of how "business friendly" a community is, often times they are referring to how easy or difficult it is to start up or expand a business. The biggest factors are how long it takes and how much it costs. In some cases, businesses are willing to pay higher fees for a faster permitting process, but not all businesses are able to do this, especially new and small businesses. Because local governments are the intersection through which most business creation must flow, this regulatory and administrative gateway needs to be supportive and transparent and local governments need to create an environment conducive to businesses.

Creating and maintaining an efficient, simple, and streamlined regulatory and permitting system that makes it easier to start, expand, and operate businesses while protecting public regulatory goals should be a short term priority for the Municipality. Fair, predictable, timely, and transparent regulatory and permitting processes are needed to provide businesses and investors with the certainty they need to make decisions about where to invest and grow in a competitive marketplace. As was mentioned in the Best Practices section, best practices in municipal processes for permitting policies and approvals can be found in Appendix Q.

By standardizing the permitting process, permit applicants are afforded a reasonable degree of comfort and certainty that, while variations exist, the timing and expenses associated with the local permitting processes will be predictable. Having consistent and integrated forms and procedures can save costs, promote understanding for neighbors and advocates, and allow applicants to focus on substantive matters rather than deciphering disparate procedures.

Local Economic Development promotes a strong enabling environment. Inefficient or weak business environments impede businesses from starting up, expanding, modernizing or surviving. Implementing best practices in municipal permitting processes will increase the attractiveness of the industrial park with efficient, effective and transparent processes which implies the following:

1. Clear rules and procedures exist, including those that promote long-term plans rather than politically expedient, short-term decisions; and
2. Easy business entry and efficient regulation-enforcement.

Recommendations

The recommendations provided in this section, related to municipal processes, permitting, and approvals, and are based on best practices. Further details on these recommendations can be found in Appendix Q.

- Implement a single point of contact
- Create a user's guide to local permitting

- Create a uniform and transparent process through the development of permitting flow charts and checklists
- Have clear submittal requirements
- Develop and implement a pre-application process
- Project Technical Review Team
- Hold regularly scheduled inter-departmental meetings
- Utilize technology to streamline the permitting process

▶ Government Funding

The following table provides a high level summary of the funding available to the Municipality for the Industrial Park development. Should any of the funding bodies change their funding programs or eligibility criteria, this could impact the Industrial Park development project. The funding amounts used in the 5-year financial cash flow analysis from FedNor and the Northern Ontario Heritage Funding Corporation is different for each Alternative as capital costs vary. For Alternative 1 funding totals $2,978,667 and for Alternative 3 funding totals $1,234,000.

Alternative 1 – Funding Potential

Area of Project	Estimated Cost	Potential Funding Program	Potential Funding Amount	Funding Amount (Limitation)
Infrastructure Capital Costs • Includes site servicing, roads and Loop in water main to Delorme etc.	$3.968 million	Northern Ontario Heritage Fund (NOHFC)	$1,489,333	33% - Capital costs
• Turning lane	$500,000	FedNor	$1,489,333	33% - Capital costs
Total Infrastructure Capital Costs including Turning Lane	**$4,468,000**	NOHFC, FedNor	**$2,978,667**	66% - Capital costs

Alternative 3 – Funding Potential

Area of Project	Estimated Cost	Potential Funding Program	Potential Funding Amount	Funding Amount (Limitation)
Infrastructure Capital Costs • Includes road and utilities	$1.321 million	Northern Ontario Heritage Fund (NOHFC)	$607,000	33% - Capital costs
• Turning lane	$500,000	FedNor	$607,000	33% - Capital costs
Total Infrastructure Capital Costs including Turning Lane	**$1,821,000**	NOHFC, FedNor	**$1,214,000**	66% - Capital costs

Funding for Park Tenants

Financial support could be available to potential tenants looking to grow or expand their businesses as well. Funding could cover infrastructure costs, new equipment and technology costs, etc. and is provided under

programs offered by various government organizations, such as FedNor, Northern Ontario Heritage Fund, and other ministry and sector agencies.

4.2 Marketing & Communications Plan

The marketing plan needs to be initiated as soon as pre-development is underway and a development concept plan, with schedules and costs, can be shown to prospective tenants.

▶ Marketing & Communication Objective

As per the Chartered Institute of Marketing, "Marketing is the management process responsible for identifying and satisfying customer requirements profitably".

The Municipality of West Nipissing's Marketing and Communication objective is to promote the Leblanc Road Industrial Park and overall community as a desirable location in which to invest via either business establishment or relocation. The marketing efforts should include a comprehensive, cohesive and cooperative external and internal marketing and communications program along with the enhancement of the existing economic development team. This marketing and communications targets both inward investment from business prospects outside the region, and internal investment from existing businesses, stakeholders and allies within the community.

Toward this end, the marketing and communication plan focuses on the key messaging, approaches and tactics recommended to capture the attention of these target audiences. As a result, the Municipality of West Nipissing's comprehensive investment attraction marketing and communication plan will consider the following:

- **Positioning:** competitive advantages and features of both the community and industrial park;
- **Pricing:** the cost of doing business in the community, financing options, incentives, etc.;
- **Place**: why the location of the industrial park and community are attractive to target investors, logistics considerations;
- **Promotions:** campaigns, tools and vehicles that can be used to communicate the offer;
- **Budgetary considerations** related to the implementation of the marketing and communications plan; and
- Realistic **measures and KPIs** to facilitate monitoring and evaluation of efforts.

▶ Marketing Environment

Investment Attraction is an extremely competitive marketplace. According to the Economic Developers Council of Ontario, there are an estimated 200 economic development organizations in the Province, 600 in Canada and thousands throughout North America, not to mention other parts of the world.

The approach to investment attraction has become increasingly sophisticated. Often with the support of provincial and federal levels of government, communities across the country are gaining a better understanding of what competitive advantages and disadvantages they have, which markets hold their best opportunities and are becoming much more prepared to respond to investment inquiries.

A number of marketing efforts are occurring in the region. First, marketing occurs on the Provincial and Pan Northern Ontario levels – through the Ministry of Economic Development, Employment and Infrastructure, and

various entities that are dedicated to business recruitment and retention (e.g. MNDM; CFDCs). Second, within the Province, most cities and towns have an ongoing economic development and marketing effort. In addition, organizations such as Chambers of Commerce all engage in marketing efforts. Further, certain cities have established collaborative marketing efforts (e.g. ONEDC).

Each of these entities is working hard to attract new businesses and industries into their catchment area, which represents a highly active and competitive marketing environment. Marketing can be a costly endeavour and as such efforts should be made by the Municipality to coordinate and take advantage of partnerships and alliances with regional partners to communicate its key advantages as an attractive location for development.

▶ Key Competitive Advantages

Competitive Advantages

West Nipissing's competitive advantage is what sets it apart from the competition and highlights the benefits to an investor or business when locating in the community, and the Industrial Park itself. Identifying the community's competitive advantage begins by determining its major strengths as they specifically relate to the development of an IA marketing strategy for the Industrial Park.

STRENGTHS

- **Cost of Land:** With industrial land within the park being offered at less than half the average price per acre of neighbouring communities, there is a real opportunity to position it as the most affordable option in the region.
- **Site Preparation:** The cost of site preparation depends on a number of factors including the condition and topography of the land, the density of trees and other vegetation and soil and ground conditions. The proposed Leblanc Road Industrial Park consists mostly of a grassed farmland field, is relatively flat and does not have rocky soil or dense vegetation which is quite the opposite of most industrial land options in competing communities. Site prep in both North Bay and Sudbury can be quite onerous and require significant blasting, filling and other high cost activities.
- **Location:** The proposed site provides direct access to Highway 17. Access to transportation routes is one of the most important factors affecting the business location decision-making process. Location in terms of highway access and proximity to Sudbury and North Bay, their businesses, educational institutions, healthcare and industry leaders are strong assets for the community and Industrial Park.
- **Labour Pool:** Although not all highly skilled, there is a large available bilingual labor pool within the community which may appeal to certain businesses.
- **Deep Ties:** The community has a group of business owners who have deep personal ties to the community and form a solid and stable base of potential tenants for the park. There is a real opportunity to work with said owners to encourage relocation and expansion of their operations to newer facilities within the Industrial Park.
- **Quality of Life**: Quality of life is a key factor when attracting new investment as business owners recognize that this is key to attracting and retaining employees. West Nipissing has specific advantages namely the natural beauty of the environment (proximity to / views of the Lake and River), cost of housing within the

community, access to health care, recreational programs and services, as well as the community's proximity to Sudbury and North Bay.

- **Funding availability:** Having access to various funding programs to support the development of the park, investment attraction efforts, training, business start-ups and expansions is a significant advantage for all communities in Northern Ontario.

Based on the strengths outlined above, the most significant competitive advantages for the Leblanc Road Industrial Park are the low costs of land and site preparation. While elements which impact on quality of life such as access to year-round outdoor recreation, as well as proximity to the HWY and major regional centres are a benefit, these amenities can be found throughout Northern Ontario. No other community in the immediate vicinity can however boast of having industrial land that requires fairly straightforward site prep at an affordable cost.

▶ Proposed Target Audiences

Based on input provided by various community members, stakeholders, businesses, municipal staff and administration as well as the comparative analysis, best practice research and overall community goals, we have identified a number of key target groups for the Leblanc Road Industrial Park. The following consist of the best audiences based on West Nipissing's characteristics and competitive advantages.

- Existing Businesses within the Community (expansions/relocations)
- New Business Start-ups / Local Entrepreneurs
- Inward Investment - Regional
- Inward Investment - External

▶ Messaging

Overall the general message for both internal and inward investors should focus on affordable cost of land, streamlined site prep and proximity to North Bay and Sudbury.

Although all of the marketing campaigns should contain a recurring theme based on these key advantages, internal and inward markets have specific and particular influential factors or "unique selling proposition" which speaks to them. These should be considered and reflected in the tactics which are directed at the given audience.

In the most traditional marketing sense, unique selling propositions – otherwise known as marketing messages are made to the customer to help them see how the product being sold is differentiated from other similar objects. The messages often promise a buyer that that buyer will get a specific result in return for buying this product. In this situation, the product is the business climate. The unique selling proposition or the marketing message needs to be tailored to help businesses see how West Nipissing is differentiated from other locations, and what specific value they will receive from being located in the Leblanc Road Industrial Park.

▶ Implementation

The next step in the process is to put the pieces of the puzzle together and develop the marketing & communications plan and proposed tactics to reach the intended audiences. Once again looking at the research and resulting proposed approach and rationale for each of the target markets and focusing on the benefits and

perceived value of the Leblanc Road Industrial Park which resonates for each of the respective groups, we have devised a plan which includes a variety of promotional tactics. Businesses generally conduct their initial screening of a community through internet research, databases, personal knowledge, filtering through GIS systems, or a combination of all. It is typical that 90% of the information requires if acquired through databases and websites. The remaining information comes from the community later in the location selection process. This makes it crucial for a community to have as much information as possible readily available and easy to find.

When determining how to reach the target audiences, it is often about how to put together the right mix of methods, including Internet based as well as traditional, to get the "biggest bang for the marketing buck". Cognisant of the limited financial resources faced by the Municipality, we have attempted to exercise as much marketing creativity as possible to enable West Nipissing to leverage even a modest budget allocation.

The following outlines specific initiatives and steps to be taken for successful implementation of the marketing and communications plan.

Coordinated Marketing Effort

The first step is to agree on how the different marketing efforts undertaken within the region will be coordinated and can be used to complement – rather than contradict – the other ongoing efforts. This includes coordination of print material, websites, working together to retain existing businesses, and coordinating approaches to leads. It is recommended that the Municipality take advantage of the resources and expertise of the North Bay Economic Development Department and the Greater Sudbury Development Corporation (GSDC) to the maximum extent possible to support their marketing efforts.

Develop an Independent Web Presence

When contemplating a location for their business, site selectors, developers and entrepreneurs seek information in a variety of ways, however their primary source for researching information about potential locations is through community and/or EDC web sites and other Internet based venues. Past research tells us that potential businesses, regardless of their sector or size, use the web as a tool to search out new locations. They often use the community web site as a quick filtering tool - if the website looks good and it has the information they want and need, they will spend more time checking out the site and are more likely to make direct contact. The reverse also holds true – if the site looks old and outdated or is cumbersome and difficult to navigate, people are quick to move on to the next site and community. Another advantage to using a focused web site as a major attraction tool is that it is available 24/7/365 to those in other jurisdictions and time zones. Making it easy for this to take place just makes good sense. However, web sites are just one e-tool with Facebook, Twitter, and other social media avenues the list seems almost endless in how potential new businesses can connect with a community.

Develop Collateral Material

Before any conversations occur with potential businesses, marketing material is needed to provide key information about the community and Industrial Park. The collateral material should include a community profile which outlines local and regional demographics, business statistics, and information about vibrant/growing sectors, testimonials from existing tenants or other local businesses and specific advantages to locating in the business park. The collateral should be professionally designed and printed. It should include the key marketing messages to resonate with the different target markets and be business / investment focused.

Focus on Business Retention and Expansion

Existing businesses are important to the community and its economy. Not only do existing businesses generate job growth (an estimated 60% to 80% of net job growth in localities across the country are estimated to come from existing local businesses), but these businesses make investments into the community already. They invest in facilities, train labor, pay taxes, contribute to social activities, and generate demand for their suppliers and service providers. Further, existing businesses are some of the best ambassadors for recruiting new firms to the area. Finally, if a business is growing, it may be targeted by another community's recruitment effort. For business retention, public relations, and strong relationship marketing are essential. Ongoing business visitation and other forms of one-on-one conversations to gauge satisfaction and learn about the business' needs is essential. Following up with specific actions to meet their needs – including advocating for local businesses and forming partnerships – is vital to produce concrete results for the existing business base.

Create a Buzz around the Industrial Park and Business Successes

Supporting businesses that are growing is an essential retention strategy and building the sense that businesses *can* be successful in this community is a vital part of this effort. Ideas for creating this buzz include:

- Host a ground breaking event, including ribbon cutting, speeches from the Mayor, funding partners etc. Invite media, municipal, provincial & federal government representatives, potential tenants, business organizations, realtors and other relevant guests to participate.
- Invite key realtors and developers on familiarization tour of Industrial Park.
- Create a "Growth Flash" email news brief that provides regular updates about business successes – whether its honors, major contract awards, expansion plans, new partnerships. The news briefs would heighten the visibility of businesses that are doing well, create a buzz around success stories in the community, and make these success stories available to everyone who is involved in marketing within the region.
- Develop a list of business successes on the Municipal website and Economic Development site in order to showcase concrete examples of business success.
- Develop relationship with the media (Tribune; North Bay Nugget; Bay Today; Sudbury Star; Northern Ontario Business; MCTV) and create periodic stories about growth and success in the industrial park.
- Honor businesses that are successful.

Follow up on Every Lead to Recruit a Business

Business recruitment is a highly opportunistic event. The businesses that are considering a move provide the absolute richest opportunities, and marketing efforts focused in this way have a much, much higher probability of generating impact than a cold-call to a business that is not considering relocation at all. Leads will generally come from a direct inquiry, information from a partner, or through interviews and one-on-one conversations with existing businesses in the area. Following up on every single opportunity is crucial. Follow-up can be an in-person meeting, a telephone call or email, sharing information with the partner to distribute to the lead, or sending information directly to the lead about the community and offering to be of assistance in connecting them with the right portion of the region and with partners that fit their needs.

Educate Growing Businesses Not Currently Located in the Region about the Industrial Park

Identifying and contacting businesses that are growing and may benefit from a location in the region is a common component of any economic development marketing effort. The challenge is that while this is the most difficult, most expensive, and most time-intensive component of an Investment Attraction marketing effort, it is also likely to yield the fewest results. However, it presents opportunities to speak with growing businesses in growing sectors, promote the region, and will ripple into "word of mouth" marketing for the area.

Establish a Local Business Ambassador Program

Designed to start positive conversations about a community, business ambassador programs are an affordable means of attracting new business investment. The intent of developing an Ambassador program would be to utilize local business leaders to promote West Nipissing as a great place to do business to their business partners, suppliers, clients and contractors. The West Nipissing Business Ambassador program could be developed in partnership with other organizations such as the Chamber of Commerce in an effort to encourage local business leaders to act as West Nipissing's Ambassadors in their daily business interactions, and identify opportunities to attract new investment to the community.

▶ Communications

There are many different communication vehicles available today that you can use to get your message out to your target audience. These include traditional approaches such as brochures, trade show banners and profile sheets along with web based methods which include things such as social media and web applications as well as hosting special events.

In essence, a community is a business park and its land is a "product" to developers and businesses, therefore successful recruitment can be best accomplished with a consumer based model. The following encompasses key recommendations for tools to be developed for media relation and tenant promotion purposes. Said tools will be utilized to promote West Nipissing and the Leblanc Road Industrial Park to all target markets. Note that a breakdown of recommended tactics for the dissemination of these tools by target market is provided within the Communication Plan.

Media Relations

- Editorials
- Fact sheets
- News releases
- Backgrounder
- Image & Video Bank
- Website
- Site Visits
- Ribbon Cuttings / Press Conferences

Traditional

- Ad templates (print)
- Brochure
- Image & Video Bank
- Billboards
- Vehicle Wraps
- Posters
- Profile Sheets
- Power Point Presentation
- Community Profile

Web based

- CMS based website
- LinkedIn
- YouTube
- Facebook
- Search Engine Optimization (SEO)
- Case Studies
- Testimonials
- Image / Video Gallery
- Community Profile

Communications Plan

The chart below outlines recommendations for approaches to be implemented during the first two years of the project. It identifies, for each of the proposed major target audiences the rationale, key messaging and tactic that are most likely to resonate with the particular audience. Understanding what motivates each of the target markets and what is likely to pull them to West Nipissing is essential and will enable the community to develop focus their efforts based on anticipated effectiveness and the resources necessary to implement them.

While the identified target markets, messages and tactics are intended to inform and guide marketing efforts, they are not a replacement for good judgment, particularly in circumstances in which a business may fit more than one target category or may have a unique situation.

Target Audience	Rationale	Key Messaging / Focus	Tactic
Existing Businesses currently operating in West Nipissing	• Personal tie to the community • Want to see project succeed / champions • Provides opportunity to expand services locally • "Low hanging fruit" • Familiar with local politics • Relocation within existing community easier and less expensive • Less risk of losing employees when relocation is local	• Affordable land • Large lots • Availability of Funding • Opportunity to demonstrate innovativeness and leadership • Low risk • Support services for expansion	• BR+E • Direct contact • Website • Information Sheet / Quick Facts
Existing Businesses / Inward Investment (regional)	• Already operational in region and may be seeking affordable location for expansion • Eligible for funding (depending on sector) • May be easier to draw in due to competitive rates • Have existing knowledge of community • May have employees currently residing in West Nipissing • Less risk of losing employees when relocation is regional	• Support services for expansion • New facility • Availability of workforce • Proximity to transportation routes • Affordable housing nearby • Proximity to Sudbury and North Bay – with lower land cost but same services • Streamlined site prep • Availability of Funding	• Direct contact • Community Profile • Website • Post Card • Information Sheet / Quick Facts • Ambassador Program • Billboard • Grand Opening

Target Audience	Rationale	Key Messaging / Focus	Tactic
Inward Investment (External)	• Eligible for funding (depending on sector) • May be able to draw in due to competitive costs • Brings new ideas, people, innovation and net job growth • May result in resident attraction	• Affordable land • Streamlined site prep • Support services for establishment in Park • Availability of bilingual workforce • Proximity to transportation routes • Affordable housing nearby • Proximity to Sudbury and North Bay – with lower land cost but same services • Availability of Funding	• Direct contact • Community Profile • Website • Post Card • Information Sheet / Quick Facts Direct contact • Billboard • Trade Shows / Conferences • FAM Tours • Partner communication (e.g. GSDC; MNDM) • Ambassador Program
New Business / Entrepreneurs (local)	• Personal tie to the community • Familiar with local politics • Location within existing community easier and less expensive	• Business support services • Availability of Funding • Proximity to transportation routes • Proximity to Sudbury and North Bay– with lower land cost but same services	• Direct Contact • Information Sheet / Quick Facts • Website • Postcard • Community Event on Entrepreneurship • Collaboration with EPSEWN, SBEC

▶ Collaboration and Linkages

Collaboration and linkages refers to the external organizations, groups or individuals the community needs to collaborate with in order to be successful in its efforts to develop and grow the business park. The following table outlines said proposed collaborators, including their role and responsibility as it relates to the Leblanc Road Industrial Park project.

Collaborator	Role
FedNor	Funding for park development
Northern Ontario Heritage Fund Corporation (NOHFC)	Funding for park development Funding for tenants
Ministry of Northern Development and Mines (MNDM)	Promote park to businesses seeking location to establish and /or expand operations
Chamber of Commerce	Provide networking opportunities and events; support development and sustainability of programs (e.g. ambassador program; BR+E; CIP etc.)

Greater Sudbury Development Corporation (GSDC)	Cross promotion; lead generation; business support
City of North Bay – Ec. Dev.	Cross promotion; lead generation; business support
Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA)	Funding for programs such as BR&E
Ministry of Economic Development, Employment and Infrastructure	Lead generation; promotion

▶ Priority Tactics

The priority tactics consist of recommendations for expenditures and activities to be undertaken during the first two years of the project. These tactics result in creating awareness about the Park, luring potential tenants and providing details on advantages and benefits.

1. Web

Website

Online marketing has become the primary and most effective means of marketing for investment attraction, resident attraction and tourism. While West Nipissing already has a municipal website dedicated primarily on residents, the development of an investment attraction specific website should be deemed a priority. Regular maintenance and upkeep of the website will be important to ensure information remains relevant and up to date.

A study by Development Counsellors International (2011) asked site selection professionals to indicate the features most important to the usefulness of an economic development focused website. The survey results indicated that the following 15 features are key (listed in order of importance):

- Incentives information
- Workforce statistics
- Demographic information
- Database of available buildings / sites
- Comparisons to competitor locations
- List of leading local employers
- Target industry information
- Staff contact information
- Quality of life information
- Local schools' information
- Testimonials from local companies
- User-generate content/blog

Social Media

The steps of developing a social media strategy (which is recommended prior to becoming active on social media outlets) include:

- Identification of target audiences: Identification of current target audiences with highest potential to be reached through social media

- Key messaging: Refinement of current messaging for social media and for the specific target audiences identified.
- Strategy and tactics: Strategy that ties together audiences and messaging and lays out actionable tactics such as social media platforms, types and examples of updates, etc.
- Launch plan and a sustainability guide: Organization of strategy and tactics into launch and implementation plan integrated with key milestones; development of guide for sustainable ongoing social media utilization.

2. Print Collateral

Print collateral will be an important marketing tactic for West Nipissing and should be used to promote the Industrial Park for business attraction, retention and expansion opportunities. West Nipissing should develop a few different pieces of collateral that can be given out during events, provided at partner locations, uploaded to the website and provided when requested directly. The print collateral should provide contact information and direct readers to the website for more information.

Information Sheet – Quick Facts / Lure Piece

The information sheet will be a quick synopsis of the Leblanc Road Industrial Park including acreage, available services, location etc. This tool can be handed out during tradeshows and conferences; emailed or mailed out to specific targets. These can also be given to realtors and partners who can then distribute it in their own office or when they go to tradeshows etc. This tool should include a call to action to lead prospective tenants to the website.

Bill Board/Signage

The development and strategic location of billboards and signs as a primary marketing tactic is recommended as they will provide not only a large visual means of promoting the park development to passing traffic but also acts as a way finding mechanism for tenants.

Updated Community Profile

Although West Nipissing has an existing community profile, it should be updated to include specific information sought by site selectors, as well as details about available employment lands. The revised profile should be a user friendly resource which serves as the key reference tool for potential investors seeking information about opportunities within the community.

Postcard/Ad Template

A postcard can be developed which can be handed out during tradeshows and conferences; or be mailed out to certain areas. Additionally, postcards can be given to partners who can then distribute them in their own office or when they go to tradeshows etc. The postcard template can also be used as an ad template for placement in magazines, and certain print pieces. Both of these can be completed simultaneously.

▶ Marketing Budget

The proposed budget to implement the priority tactics is as follows:

Tactic	Channel	Cost
1. Web	IA Dedicated Website	$ 4,000.00
	Social Media	$ 1,500.00
2. Print Collateral	Bill Boards	$ 5,000.00
	Information Sheets	$ 750.00
	Community Profile	$ 7,500.00
	Postcards	$ 500.00
	Printing	$ 8,000.00
	Total	**$ 27,250.00**

Part 5. Conclusion

The Municipality of West Nipissing is looking at developing a fully serviced industrial park on Leblanc Road. There are few locations remaining that are zoned industrial and the Municipality has undertaken a feasibility study to determine if there is a potential to strategically position itself and to maximize ROI as well as appeal to potential private sector investors. The feasibility study was focused on the potential for investment attraction for the 75 acres of land (out of 85 acres) currently set aside by the Municipality for its industrial park.

The objectives of this study were:

- To determine the feasibility of developing an industrial park for West Nipissing by looking at various key aspects: market demand including a competitive analysis, the creation of a detailed pre-engineering plan which then allowed for a financial assessment;
- To conduct an assessment of the impacts that a new industrial park would have on local businesses as well as a gap analysis of the area on what businesses would be the best fit for the region, therefore the park;
- To determine the economic impact, by calculating the potential for new jobs and expected municipal revenues that could potentially result from a fully populated industrial park; and
- To develop a detailed investment attraction strategy and marketing program for the industrial park.

The three key components of the overall feasibility study are:

- The site assessment and servicing report;
- The market and operational assessment; and,
- The financial and economic assessment.

Summaries of each section of this report facilitate the analysis and help to provide a clear overall picture of the current situation, and the possibilities that exist for the development of the Industrial Park. From the data and the results presented in this report, Council and Administration will be able to make an informed decision, guided by their vision and their tolerance to the levels of risk involved in the alternatives presented.

Success will be dependent upon the Municipality's ability to obtain appropriate financing, achieve market penetration through an aggressive marketing program, and create an efficient business-like operation intended to increase service levels and long-term growth potential.

Whether Council decides to go ahead with the development of the Leblanc Road Industrial Park will be highly dependent on the following key factors:

- The level of risk they are able and willing to take
- The capacity and resources to develop and promote the Industrial Park
- Funding support from Provincial and Federal government bodies
- Their priorities in the next few years for economic development and infrastructure investments

▶ Risk Management

Ultimately the decision as to which alternative best suits the Municipality's vision, goals and capacity and whether to proceed to the business planning stage rests with Council and Administration. The Project Team cannot recommend the level and types of risk the Municipality can or will assume with this development. However, Council and Administration must make decisions regarding the level of risk and the management of the risk (or in other words, the risk aversion elements). There are a few key elements to consider:

- Determining the level of capital contribution the Municipality is able and willing to make;
- Determining the extent the Municipality will be required to develop the infrastructure in the Industrial Park to be able to attract investments vs having individual developers be responsible to install these services on a site by site basis. There could be less risk to the Municipality if lots are developed one by one, but economies of scale might not be achieved. This may also result in a longer build-out horizon.
- Seeking out anchor tenants and interested investors for the park.
- Determining the timing of the development given the potential for filling the park within the next few years, being conscious of the financial burden.

▶ Overall Conclusion

Our research has identified a range of factors, some of which are in support of fully servicing the Industrial Park, some that indicate an element of risk to this project. In light of these factors, our recommendation is to consider the two alternatives presented as well as the status quo. Recognizing the fact that there is some serviced industrial land available in the Municipality, as well as there being a fair amount of serviced industrial land in Sudbury and in North Bay, demand might still be on the low side, and until this supply is reduced, the competition for investment attraction remains a factor. The lots are selling at this time which we feel would still be the case if the sale price per acre were adjusted to today's market. The businesses that are currently establishing themselves within the park are local businesses that are expanding operations. This will create new jobs and it allows these businesses the opportunity to pursue their growth strategies.

Strategic investment attraction is a continuous and systematic process and its success greatly depends on gaining buy-in at every level. It is essential that the various stakeholders come together to make decisions about a desired outcome in order to ensure complete brand adoption. Such decisions, whenever possible, should be made by consensus and all factors should be considered. Towards this end, this strategy will not only include a visual brand to effectively promote the community to potential new businesses but will also include recommendations on best bet markets and tactics as well as the guiding principles that will help the community in implementing the overall plan.

Ultimately, if the Municipality of West Nipissing is to succeed in establishing itself as a desirable location to do business, it must reposition itself not only in the eyes of its target market but also be consistent with the desires and aspirations of its residents. Such a vision needs to be shared and based on a collaborative model that has as its core a solid formula for local decision making.

Next Steps

With the completion of the feasibility study and the identification and assessment of various alternatives for the development of the Industrial Park, Council and Administration are now armed with the information they require to make an educated decision on how to move forward with the development of the Park.

Should the Municipality opt to proceed with servicing the park, the next logical step in the process would be the development of a formal business plan in order to secure government funding.

Regardless of the Municipality's decision and timeline for development, it is highly recommended that the following critical success factors be considered and adopted over the short term:

- **Economic Development**
  - To Increase the economic development budget and secure additional qualified staffing resources
  - To implement ongoing business retention & expansion (BR+E) Program
  - To undertake an investment readiness assessment
  - To develop a GIS based Industrial and Commercial land inventory
  - To collect and document site selection data standards
- **Standardizing Municipal Processes** Permitting Policies and Approvals

In the event that the Municipality does decide to proceed with the development of the Industrial Park and furthermore a business plan, we have developed an implementation strategy for the Municipality's consideration. The following chart presents our proposed next steps.

Proposed Implementation Timeline

Component	Implementation Action	Year 1 - 2016												Year 2 - 2017							
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Industrial Park development strategy	Review of Feasibility Study results																				
	Council decision on how to pursue development of Park																				
	Allocation of budget to this project and identify timeline																				
Economic Development	Allocating resources to the economic development																				
	Allocating resources to the Industrial park development																				
Municipal Processes Permitting Policies and Approvals	Implementing a single point of contact																				
	Creating a user's guide to local permitting and standardizing processes																				
Marketing & Communication	Implement the marketing program																				
	Coordination and collaboration with neighbouring cities																				
	Business retention & expansion project																				
	Establish a local Business Ambassador program																				
Business Planning	Confirm project timeline and milestones																				
	Identify anchor tenants and assess interest																				
	Refine capital cost estimates																				
	Finalize business plan																				
Funding - Infrastructure	Complete financing application with NOHFC																				
	Complete financing application with FedNor																				
Infrastructure construction	Depending on the Alternative chosen, to pursue development of the Industrial Park, to complete construction of services, road, etc.																				

Appendix

Appendix A: Alternative Cash Flow Worksheets
Appendix B: Local and Regional Business and Economic Partner Interview
Appendix C: Other Municipal Business Park Interview Summarized Results
Appendix D: Extract from Municipality of West Nipissing Zoning By-Law
Appendix E: North Bay Official Plan Schedule 1 Settlement Area
Appendix F: City of Greater Sudbury Land Supply and Residential Development Activity Maps
Appendix G: Nipissing District Agriculture Statistics
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Appendix K: Labour Flow Analysis
Appendix L: Land Availability Comparison
Appendix M: Example of Agriculture Incubators
Appendix N: Preliminary Site-Servicing Report
Appendix O: Economic Impact – Job Creation
Appendix P: Data Standards Spreadsheet (IEDC)
Appendix Q: Best Practices on Municipal Permitting Processes
Appendix R: Opinion of Value – Marleau Real Estate Ltd., Brokerage

Appendix A: Alternative Cash Flow Worksheets

Leblanc Road Industrial Park
Financial Viability Assessment

Alternative 1 - Fully Serviced

Scenario 1 - All Lots Sold in Year 1	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Revenue					
Sale of lots	$ 825,000	$ -	$ -	$ -	$ -
Tax levies	21,683	70,542	74,076	77,789	81,674
Grants - capital in nature					
Corporation of the Municipality of West Nipissing	1,489,333				
FedNor	1,489,333				
Northern Ontario Heritage Fund Corporation	1,489,333				
	5,314,682	70,542	74,076	77,789	81,674
Expenses					
Development Costs	3,968,000				
Turning lane and lights	500,000				
	4,468,000	0	0	0	0
Surplus	846,682	70,542	74,076	77,789	81,674
Cash flow, beginning balance (sale of 6 lots in prior years)	30,000	(612,651)	(542,109)	(468,033)	(390,244)
Funds advanced by the municipality	(1,489,333)				
Cash flow, ending	**$ (612,651)**	**$ (542,109)**	**$ (468,033)**	**$ (390,244)**	**$ (308,570)**
Net Present Value					
Cash inflow	846,683	70,542	74,076	77,789	81,674
Cash outflow	(1,489,333)	0	0	0	0
Net cash flow	(642,650)	70,542	74,076	77,789	81,674
Net present value of cash flow for today	**(357,553)**				

Leblanc Road Industrial Park
Financial Viability Assessment

Alternative 1 - Fully Serviced

Scenario 2 - All Lots Sold by Year 3	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Revenue					
Sale of lots	$ 198,000	$ 227,250	$ 399,750	$ -	$ -
Tax levies	13,850	50,050	64,600	77,789	81,674
Grants - capital in nature					
Corporation of the Municipality of West Nipissing	1,489,333				
FedNor	1,489,333				
Northern Ontario Heritage Fund Corporation	1,489,333				
	4,679,849	277,300	464,350	77,789	81,674
Expenses					
Development Costs	3,968,000				
Turning lane and lights	500,000				
	4,468,000	0	0	0	0
Surplus	211,849	277,300	464,350	77,789	81,674
Cash flow, beginning balance (sale of 6 lots in prior years)	30,000	(1,247,484)	(970,184)	(505,834)	(428,045)
Funds advanced by the municipality	(1,489,333)				
Cash flow, ending	**$ (1,247,484)**	**$ (970,184)**	**$ (505,834)**	**$ (428,045)**	**$ (346,371)**
Net Present Value					
Cash inflow	211,850	277,300	464,350	77,789	81,674
Cash outflow	(1,489,333)	0	0	0	0
Net cash flow	(1,277,483)	277,300	464,350	77,789	81,674

Net present value of cash flow for today **(426,664)**

Leblanc Road Industrial Park
Financial Viability Assessment
Alternative 1 - Fully Serviced

Scenario 3 - All Lots Sold by Year 5	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Revenue					
Sale of lots	$ 132,000	$ 139,500	$ 153,750	$ 148,500	$ 251,250
Tax levies	12,731	45,444	54,926	65,245	76,450
Grants - capital in nature					
Corporation of the Municipality of West Nipissing	1,489,333				
FedNor	1,489,333				
Northern Ontario Heritage Fund Corporation	1,489,333				
	4,612,730	184,944	208,676	213,745	327,700
Expenses					
Development Costs	3,968,000				
Turning lane and lights	500,000				
	4,468,000	0	0	0	0
Surplus	144,730	184,944	208,676	213,745	327,700
Cash flow, beginning balance (sale of 6 lots in prior years)	30,000	(1,314,603)	(1,129,659)	(920,983)	(707,238)
Funds advanced by the municipality	(1,489,333)				
Cash flow, ending	**$ (1,314,603)**	**$ (1,129,659)**	**$ (920,983)**	**$ (707,238)**	**$ (379,538)**
Net Present Value					
Cash inflow	144,731	184,944	208,676	213,745	327,700
Cash outflow	(1,489,333)	0	0	0	0
Net cash flow	(1,344,602)	184,944	208,676	213,745	327,700
Net present value of cash flow for today	**(483,379)**				

Leblanc Road Industrial Park
Financial Viability Assessment

Alternative 3 - Partially-serviced

Scenario 1 - All Lots Sold in Year 1	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Revenue					
Sale of lots	$ 330,000	$ -	$ -	$ -	$ -
Tax levies	21,683	70,542	74,076	77,789	81,674
	351,683	70,542	74,076	77,789	81,674
Grants - capital in nature					
Corporation of the Municipality of West Nipissing	607,000				
FedNor	607,000				
Northern Ontario Heritage Fund Corporation	607,000				
	1,821,000	0	0	0	0
Total Revenue	2,172,683	70,542	74,076	77,789	81,674
Expenses					
Development Costs	1,321,000				
Turning lane and lights	500,000				
	1,821,000	0	0	0	0
Surplus	**351,683**	**70,542**	**74,076**	**77,789**	**81,674**
Cash flow, beginning balance (sale of 6 lots in prior years)	30,000	(225,317)	(154,775)	(80,699)	(2,910)
Funds advanced by the municipality	(607,000)				
Cash flow, ending	**$ (225,317)**	**$ (154,775)**	**$ (80,699)**	**$ (2,910)**	**$ 78,764**
Net Present Value					
Cash inflow	351,683	70,542	74,076	77,789	81,674
Cash outflow	(607,000)	0	0	0	0
Net cash flow	(255,317)	70,542	74,076	77,789	81,674
Net present value of cash flow for today	**23,267**				

Leblanc Road Industrial Park
Financial Viability Assessment
Alternative 3 - Partially-serviced

Scenario 2 - All Lots Sold by Year 3	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Revenue					
Sale of lots	$ 79,200	$ 90,900	$ 159,900	$ -	$ -
Tax levies	13,850	50,050	64,600	77,789	81,674
	93,050	140,950	224,500	77,789	81,674
Grants - capital in nature					
Corporation of the Municipality of West Nipissing	607,000				
FedNor	607,000				
Northern Ontario Heritage Fund Corporation	607,000				
	1,821,000	0	0	0	0
Total Revenue	1,914,050	140,950	224,500	77,789	81,674
Expenses					
Development Costs	1,321,000				
Turning lane and lights	500,000				
	1,821,000	0	0	0	0
Surplus	**93,050**	**140,950**	**224,500**	**77,789**	**81,674**
Cash flow, beginning balance (sale of 6 lots in prior years)	30,000	(483,950)	(343,000)	(118,500)	(40,711)
Funds advanced by the municipality	(607,000)				
Cash flow, ending	**$ (483,950)**	**$ (343,000)**	**$ (118,500)**	**$ (40,711)**	**$ 40,963**
Net Present Value					
Cash inflow	93,050	140,950	224,500	77,789	81,674
Cash outflow	(607,000)	0	0	0	0
Net cash flow	(513,950)	140,950	224,500	77,789	81,674

Net present value of cash flow for today **(25,907)**

Leblanc Road Industrial Park
Financial Viability Assessment
Alternative 3 - Partially-serviced

Scenario 3 - All Lots Sold by Year 5	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Revenue					
Sale of lots	$ 52,800	$ 55,800	$ 61,500	$ 59,400	$ 100,500
Tax levies	12,731	45,444	54,926	65,245	76,450
	65,531	101,244	116,426	124,645	176,950
Grants - capital in nature					
Corporation of the Municipality of West Nipissing	607,000				
FedNor	607,000				
Northern Ontario Heritage Fund Corporation	607,000				
	1,821,000	0	0	0	0
Total Revenue	1,886,531	101,244	116,426	124,645	176,950
Expenses					
Development Costs	1,321,000				
Turning lane and lights	500,000				
	1,821,000	0	0	0	0
Surplus	**65,531**	**101,244**	**116,426**	**124,645**	**176,950**
Cash flow, beginning balance (sale of 6 lots in prior years)	30,000	(511,469)	(410,225)	(293,799)	(169,154)
Funds advanced by the municipality	(607,000)				
Cash flow, ending	**$ (511,469)**	**$ (410,225)**	**$ (293,799)**	**$ (169,154)**	**$ 7,796**
Net Present Value					
Cash inflow	65,531	101,244	116,426	124,645	176,950
Cash outflow	(607,000)	0	0	0	0
Net cash flow	(541,469)	101,244	116,426	124,645	176,950

Net present value of cash flow for today **(66,587)**

▶ Appendix B: Local and Regional Business and Economic Partner Interview

Questionnaires provided separately

West Nipissing Industrial Park Study - Local Businesses

Welcome

The Municipality of West Nipissing in partnership with the Province of Ontario have come together to complete an Industrial Park Feasibility Study, to be conducted over the next few months.

As a part of the project, we are targeting key local businesses in the area to complete a web-based survey to assist in identifying potential opportunities for investment attraction and business expansions in the area.

Thank you for participating in our survey. Your feedback is important.

Privacy and Confidentiality
Personal and business information provided in this Survey will be treated as confidential. Responses will be combined with information gathered from other survey participants, and reported in aggregate. In some cases, survey responses may be tied to other business information that is provided by the client sponsoring the survey, and used for segmentation or analytical model building, but in no case will responses be used for individual marketing efforts, and no action will be taken toward an individual respondent simply because of his or her participation in the survey, unless otherwise provided permission to do so.

If you have any questions concerning this survey, please contact Stephan Poulin, Director of Economic Development and Community Services at spoulin@westnipissing.ca

We thank you again for your time.

BUSINESS INTERVIEWS COMPILED RESULTS

Leblanc Road Industrial Park Feasibility Study

Abstract

12 business interviews were conducted with local and external businesses that operate in West Nipissing. This has contributed to our knowledge of the business climate and provided feedback from the business community on opportunities and challenges for businesses and the future of the Leblanc Road Industrial Park. All interviewees will remain anonymous and results have been compiled in a random way to protect their confidentiality.

Jovette M. Gaudette

jogaudette@cbsn.ca

Leblanc Road Industrial Park Feasibility Study – Business Interviews

Summary of Business Interviews	**In total over 12 interviews were conducted**				
	Sectors of businesses interviewed: • Mining services • Construction • Real Estate • Funeral Services • Agriculture • Food services • Automotive Retail				
West Nipissing Business Climate (i.e. (disadvantages, workforce)	• Proximity to Sudbury and north Bay, hard for retail, competing with these centers as consumers go regularly • Not much change • Building codes and regulations were not as strict, they are getting more • No communication – who does what, in business development at the municipality, they should facilitate economic development • Nothing concrete in business development and attraction seems to come out of the Municipality • Support for business development and growth of current businesses in the community	• Business support is fair-to weak. They claim they are interested then nothing concrete happens. • Business attraction requires solid, aggressive people • Need a strategy, to send delegations to other regions, countries, etc. • Funding support might encourage business growth • There are lots available already in better areas, serviced. • Very poor, not because of the community, very good involvement from residents. It's the administration of the municipality – very poor connection with businesses and little support to private	• Good • Municipality has been very supportive and helpful • Encourage businesses • Generous • Workforce is an issue in the sector – need to train – through Boréal and Rosemont • Economy has slowed down. • This would drive down the seller's market for property • Building codes are complex, should just follow the Ontario Building Code why re-write it all • BIA should be brought back • Special Events?? who will manage	• The proposed park location is not good, the timing is also not good • Would compete against private business owners that are selling industrial lots at this time • Would be a good place if municipality supported the businesses within • Expansion is not the way to go, already available property to be developed, should concentrate on consolidating and optimizing what we have or we will lose businesses • Subdivision rules have increased the $ of lots • Property taxes cheaper than Markstay Warren	• Challenging for businesses – infrastructure not always available, internet, cable, water • Community is great – sense of culture • Development is not smooth – business owners have to persevere • There is a disconnect from the people trying to do business here and the Municipality – they don't understand business • The BIA should come back, with new boundaries, including all businesses in West Nipissing • No more owner/tenant pride – sweeping the sidewalk… •
Advantages	• Community support • Community Support	• Farming sector • Good economy	• Location – close to everything • North Bay and Sudbury are so	• Traffic going thru town • Tourism while the dollar is	• Location – close to rails and hwy

	• Hwy 17 exposure – visibility along the corridor – 6000 to 7000 cars per day • Proximity to larger consumer markets	• Affordable living • Open-mindedness • Infrastructure	difficult for development that makes us look attractive	down	• Proximity to Sudbury and North Bay • Natural resources
Disadvantages	• Location – proximity to centers • Higher transport costs - +$1,000 because detour from North Bay (hwy 11), Sudbury is served by hwy 69 • Having to deal with the municipal office – there is no vision for the future • No alignment of initiatives – flavor of the month • Municipality is non-responsive	• Mining sector – distance to Sudbury – still lots of room in Sudbury for businesses – more expensive but less shipping costs • No communication – should converse with Chamber of Commerce regularly • Municipal staff doesn't return calls	• If we don't have it we have access to it • Takes risks – Minnehaha – Vision of the future – which is a good thing but what does it tie into.	• No support from the Municipality for businesses • Downtown is for sale or not thriving (Foodland, …) • How much does Minnehaha, Tourism centre and Museum cost each year to keep open • Permits are given to competing businesses without a thought for future impact no growth strategy	• Poor customer service from Municipal staff • Municipal staff unprofessional (swearing at meetings etc..)
Future Outlook (i.e. sector, local suppliers, future plans) Opportunities	• Municipality should get more manufacturers • Develop the East Side • Opportunity to become a suburb of North Bay, less expensive to live here • Retail will change • Mill is declining – larger National and International companies will purchase all the limits; Quality of the wood is not there • Agriculture- • Incubator Centres - Transformation plants – they are gaining in popularity • Wine producers in Warren – want to process wine bi-products and were looking for land to develop their business	• Farming/agriculture related transformation – Cold Press with Canola, they had come looking for a spot. • Blue Goose, raising fish like on Manitoulin • Forestry is part of history • Food processing : honey, blueberries, cranberry farming • Distillery • Tourism related development • Organic products • Food has a high price – commodity • Growing trees, tomatoes, neutrino – Québec has really developed it. • Dairy producers have access to incentives through Dairy Farmer of Ontario to develop	• Aging population – money • Immigrants are also changing cultural habits • Diversification in this sector will be key, linear (vertical) integration • Example – sends remains to Haileybury for cremation • Ice cream or Cheese Factory • The key is to produce something	• Need to be strategic, to have a vision • New council members, new leadership • For half the cost they could buy the commercial property on East side and develop it. • Need a strong council that leads administration not the other way around	• Look for a solution, collaboration and support – Municipality for community and businesses • To become a destination – business would follow • Need to work together on development • Need new blood

	further. They are in a hurry so will probably develop at their residence/farm • It is becoming more and more important for farmers to pass to the value add phase, they need a test kitchen (Motley Kitchen) to be able to test and produce in small but sufficient batches to go to market.	their business further – cheese, etc. It is hard for producers right now as stores need samples to create their market – small production to start			
Industrial Park (i.e. comments related to the park)	• Truss manufacturing • Bi-product of wood – nano technology – to have a campus	• Rail is close • This would only be viable if all the possibilities that exist now were sold. • This should be sold – on the market at a fair price – as un-serviced industrial land. • They could push the road in.	• Wants isolation – which is why this spot is a good area for him.	• Never mind the infrastructure development, just road • Could divide the lots, 5 acres is a lot. • Max: 20K per acre as you increase acreage, the $ per acre goes down. 45K is totally unrealistic.	• Jenmar- has established here because it was 1M$ less than Sudbury, tax break, development costs, etc. • Could pay for well and septic • It is developing as is, why change it. Already 7 out of 16 lots sold.
Other Comments	• There is a strategic planning process happening in Northern Ontario with the Dairy Farmers – with the eventual closure of Parmalat, what will this market look like and what needs to happen to sustain it. • There is no economic development	• Would need to give incentives, otherwise would not come to West Nipissing – Property taxes (first 5 years), and reduced water or hydro rates… • Need to be unique – to find their niche • Hits : printing company	• To follow their 5 year plan – to continue • Taking control of what you can • Customer service – public sector should be high • Need an Economic Development officer and a Tourism Officer	• The town has been overwhelmed with the growth – processes being put into place are an extreme compared to what they had • Common sense needs to come back • Need to get back on the map.	• To obtain a sample subdivision agreement – all private developers have to adhere, the Municipality can't develop without it and then compete with them • BIA • What businesses are operating – what is the strategy for economic development

▶ Appendix C: Other Municipal Business Park Interview Summarized Results

Interviews: 7 Interviews with representatives from the Municipalities (i.e. EDOs)

- **Park Size:** Ranged from 15 acres to over 200 acres
- **Lot Size:** Ranged from 0.5 acres up to one 27-acre parcel
    - Temiskaming Shores: Average 2-3 acres, with a few larger ones (still yet to be sold)
    - Kapuskasing: Land is not severed, and is done so based on interested tenants' needs
    - Orillia: 5-acre lots (with the ability to split to minimum of 1-1.5 acres)
- **Tenants**
    - Only a couple had anchor tenants (i.e. Kapuskasing was a medical marijuana farm, and in Kenora, one parcel of 27 acres was sold to a contractor after plans fell through with a large forestry company)
    - Parks were said to be diverse, with a range of light industrial, contractors, trucking and warehousing. It was also seen that the land was used for ground mount solar panels and solar farm companies.
    - **Caution** - Don't invest based on one sector, ensure the anchor tenant is fully invested.
- **Phasing**
    - *Kapuskasing*: Prepare lots one at a time to promote sale (i.e. driveway, clearing, etc.). Once sold, begin prepping the next lot. Tenants are responsible for their own septic.
    - *Espanola:* Serviced 5 lots in phase 1, and phase 2 servicing the remaining 10 acres and constructing a back access road
    - *Temiskaming Shores:* Offers fully serviced lots
- **Development Charges**: A majority of municipalities do not charge development fees for industrial development. Fort Frances, one of the exceptions, charges $10,000/acre upfront, but they return this if constructions within 2 years.
- **Price**
    - *Temiskaming Shores:* $30,000/acre with Hwy frontage, $20,000/acre without Hwy frontage
    - *For Frances*: $3,500/acre as is, used to sell for $18,000, but wasn't selling
    - *Kapuskasing:* Negotiated on a per project basis – appraised at $20,000/acre
    - *Espanola:* $25,000/acre
    - *Orillia:* Varies (starting at) $115,000/acre, dependent on distance from main road, corner lot, etc.
- **Sales Strategy**
    - Half of the industrial parks interviewed were selling the land, leaving the purchaser responsible for constructing their own facilities
    - *Kenora:* Has used both methods, based on the desired needs of the potential purchaser
    - *Kapuskasing:* The EDC purchased the land from the town, will design build to suit to lease to the developer
    - Recommendation - Sell lots un-serviced because of planning – so could use/have own well and septic. Cuts costs and makes per acre cost lower
- **Sales Responsibility**
    - In most cases, the Economic Development Corporations, in the respective municipalities, are responsible for promoting and selling the land

  - *Espanola:* Clerk/Manager of Planning is responsible
  - *Orillia:* The EDO is responsible, and then Council makes the final decision
- **Marketing Message**
  - Some municipalities did not have large budgets (i.e. $5,000), where as others put a lot more effort and resources into marketing
  - Messages varied from “Cheap land” to “Flexible and willing to work with the developer to meet their needs”
  - *Espanola:* Advertisements in mining magazines and Northern Ontario Business, Billboards, attended Trade Shows, advertised on municipal website (when still had EDO), since them there was a big loss and all marketing efforts were halted
  - *Kenora:* Capital Improvement Plan (CIP) + entice with ‘step taxation’, have local developer build to suit, GDP economic profile for Municipality (showcases different growth sectors), Choose Kenora project used testimonials and pictures to attract people to come/live/visit
  - *Orillia:* Website was best tool, Site selectors $5,000-$10,000 per site, promote location (close proximity to airport, work on retaining and expending local businesses (80% of growth in the economy generally comes from local)
- **Funding**
  - *Temiskaming Shores:* Funded by NOHFC with letters from companies saying they might move there (none did), and work did not happen. Applied to NOHFC several years later to pay for the sewers and since NOHFC wanted to get the original $1M off their books they approved the new application without having anchor tenants in place
  - *Espanola:* NOHFC and FedNor funded 1/3 in Phase 1 and Phase 2

Appendix D: Extract from Municipality of West Nipissing Zoning By-Law

▶ Appendix E: North Bay Official Plan Schedule 1 Settlement Area

615000 620000 625000

5135000 5130000 5125000

Settlement Boundary - See Schedule 2

Four Mile Lake

FOUR MILE LAKE RD

CARMICHAEL DR

North Bay
Jack Garland Airport

Hillside Lake

Chinguacousy Creek

City of North Bay

Commanda Township

Lees Creek

HIGHWAY 11N / ALGONQUIN AVE

AIRPORT RD

Duchesnay Creek

GORMANVILLE RD

Dorcas Creek

Trout Lake

TROUT LAKE RD

MAIN ST W

ALGONQUIN AVE

CASSELLS ST

WALLACE RD

Camelot Lake

Circle Lake

Delaney Lake

East Ferris Township

City of North Bay

CITY OF
NORTH BAY

SEYMOUR ST

Depensiers Lake

McLean Lake

OAK ST W OAK ST E

MANTYRE STE

FISHER ST

MAIN ST E

ONR

Twin Lakes

Pt Dougas Bay

Jennings Lake

Passmore Lake

LAKESHORE DR

CPR

Settlement Boundary - See Schedule 2

Lake Nipissing

Parks Creek

Jassups Creek

La Vase River

PRIVATE

Cook Creek

PINEWOOD PARK DR

City of North Bay
Municipality of Callander

Nipissing District
Parry Sound District

GRID

N

1:42,000

Map Projection: Universal Transverse Mercator
Map Datum: North America Datum 1983 Zone 17 T (Metric)

Metres
0 250 500 1,000 1,500 2,000

0 0.1 0.2 0.4 0.6 0.8
Statute Miles

NORTH BAY
ONTARIO
Just North Enough to be PERFECT

Data Sources:
City of North Bay GIS
Municipal Property Assessment Corporation (MPAC)
Ontario Ministry of Natural Resources (OMNR)
EBA Engineering Consultants and LPS Aviation Inc

This is not a legal plan or survey and is not to be used as a navigational aid.
Published Monday, January 23, 2012
File: Schedule_1_Urban_Plan_11x17

Official Plan Schedule 1
Settlement Area

Land Use Class

- Arterial Commercial
- Central Business District
- District Commercial
- General Industry
- Hospitality Service
- Restricted Residential
- Institutional
- Open Space
- Regional Commercial
- Residential
- Waterfront

Symbols

- Municipal Boundary
- Settlement Area Boundary
- Trout Lake Watershed
- Lake
- Highway
- Major Road
- Railway
- River / Creek
- Intermittent Water

Noise Exposure Forecast (1985)

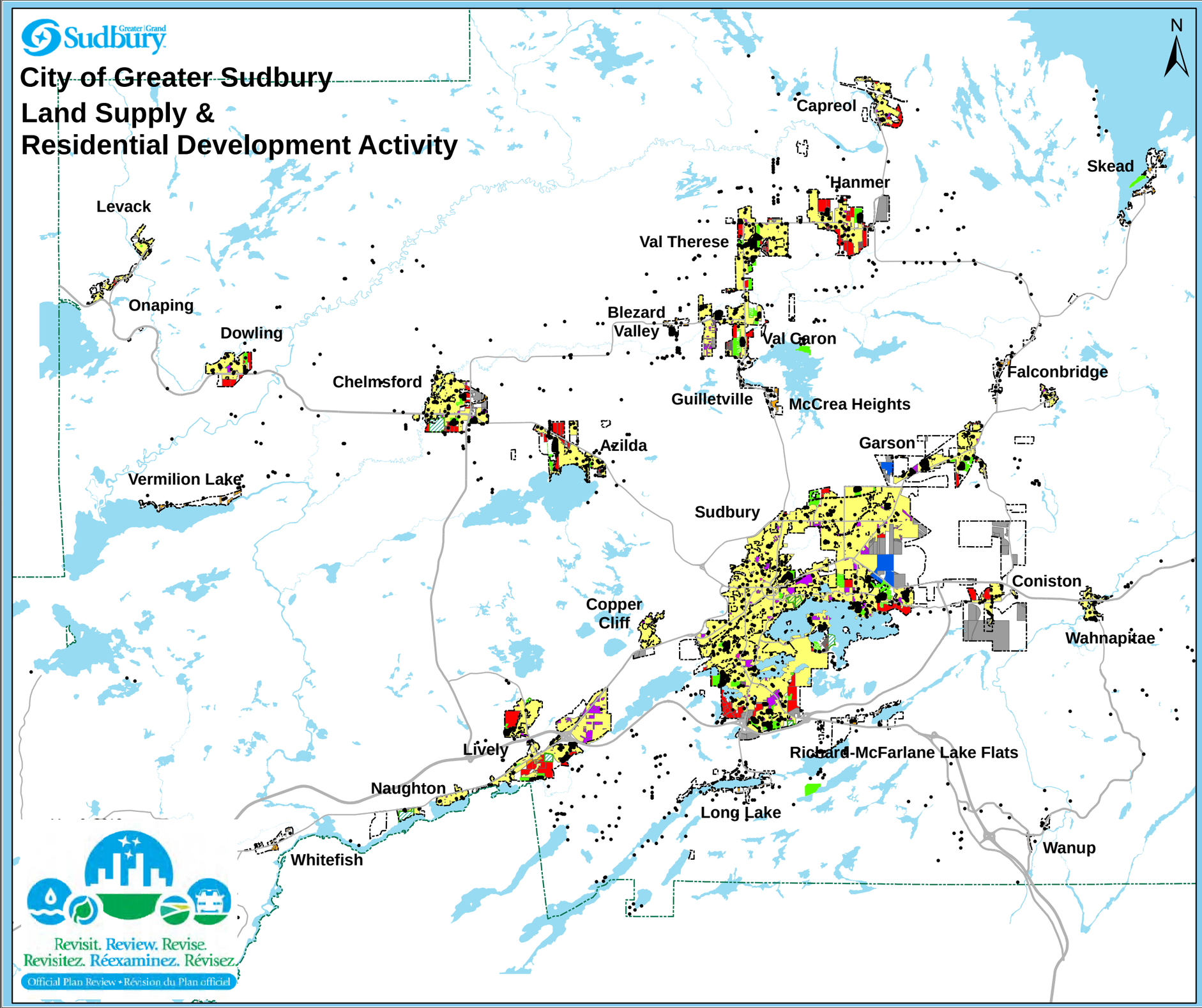
- Contour 30
- Contour 35
- Contour 40

This schedule forms part of the Official Plan of the City of North Bay.
All schedules must be read in conjunction with the text of the Official Plan.

Schedule 1

Appendix F: City of Greater Sudbury Land Supply and Residential Development Activity Maps

City of Greater Sudbury
Land Supply &
Residential Development Activity



	ha	Residential Unit Potential (12 units/ha)	ICI Job Potential (15 jobs/ha)
City of Greater Sudbury			
Designated Developable			
Industrial	795.9		11,938
Institutional	2.8		42
Living Area 1	897.6	10,771	
Commercial	108.6		1,629
Draft Approved			
Residential		6,534	
Industrial	175.1		2,626
Draft Approved Under Review		1,686	
Site Plan		704	
Legal Lots of Record		Assuming 71% usability	Assuming 71% usability
Residential	273.4	3,560	
Industrial	162.4		1730
Institutional	19.0		202
Commercial/FD/Town Centre	42.9		457
TOTAL	**2,478**	**23,255**	**18,624**
Hemson Growth Forecast			
High Growth Scenario - 2011-2036 residential household demand	12,264		
High Growth Scenario - 2011-2036 job growth	8,614		

0 2.5 5 10 km

Projection: UTM NAD 83 Zone 17

Legend

- Residential Units Created since 2006
- Municipal Boundary
- Settlement Area
- Built Boundary

Vacant Land Inventory

Status

- Designated Developable ICI
- Designated Developable Living Area 1
- Designated Developable Other
- Draft Approved - Industrial
- Site Plan
- Draft Approved - Under Review
- Draft Approved - Residential
- Legal Lot of Record

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Sudbury

Land Supply & Residential Development Activity

	ha	Residential Unit Potential (12 units/ha)	ICI Job Potential (15 jobs/ha)
Sudbury			
Designated Developable			
Industrial	213.1		3,196
Institutional	0.0		-
Living Area 1	264.3	3,172	
Commercial	60.8		912
Draft Approved			
Residential		3,870	
Industrial	147.0		2,205
Draft Approved Under Review		696	
Site Plan		704	
Legal Lots of Record		**Assuming 71% usability**	**Assuming 71% usability**
Residential	172.6	2,650	
Industrial	65.0		692
Institutional	7.5		80
Commercial/FD/Town Centre	23.4		249
TOTAL	**953.7**	**11,092**	**7,335**

Long Lake

Sudbury

Copper Cliff

Richard - McFarlane Lake Flats

Long Lake

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Legend

- Settlement Area
- Built Boundary
- Residential Units Created since 2006

Vacant Land Inventory

Status

- Designated Developable ICI
- Designated Developable Living Area 1
- Designated Developable Other
- Draft Approved - Industrial
- Site Plan
- Draft Approved - Under Review
- Draft Approved - Residential
- Legal Lot of Record

N

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Projection: UTM NAD 83 Zone 17

June 10, 2013

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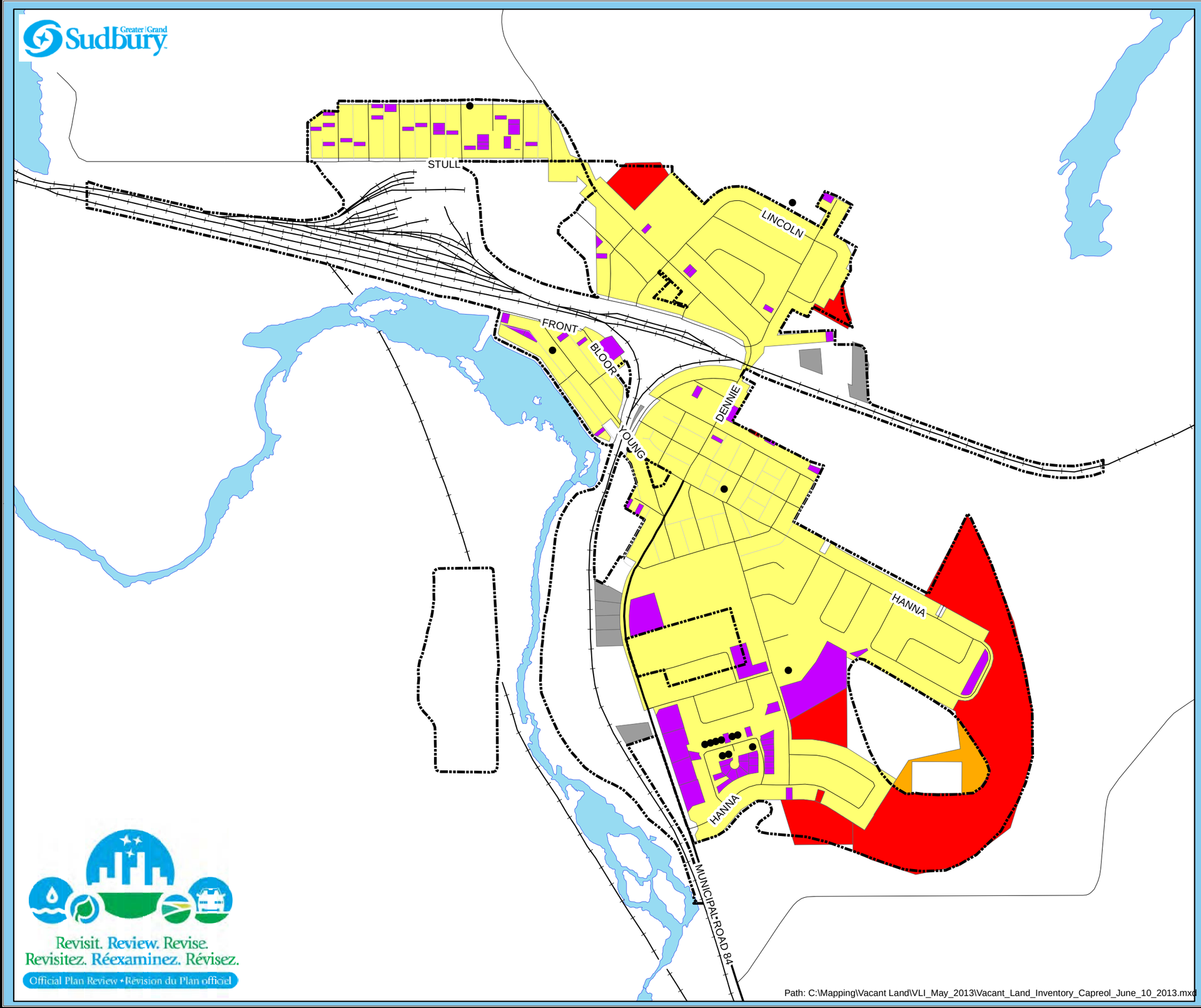
Capreol

Land Supply & Residential Development Activity

	ha	Residential Unit Potential (12 units/ha)	ICI Job Potential (15 jobs/ha)
Capreol			
Designated Developable			
Industrial	**1.4**		**20**
Institutional			
Living Area 1	**31.3**	**376**	
Commercial	**2.1**		**32**
Draft Approved			
Residential		0	
Industrial		0	
Draft Approved Under Review		**0**	
Site Plan		**0**	
Legal Lots of Record		**Assuming 71% usability**	**Assuming 71% usability**
Residential	8.4	205.2	
Industrial			
Institutional	0.4		4
Commercial/FD/Town Centre	3.2		34
TOTAL	**46.7**	**581**	**90**



Legend

- Settlement Area
- Built Boundary
- Residential Units Created since 2006

Vacant Land Inventory

Status

- Designated Developable ICI
- Designated Developable Living Area 1
- Designated Developable Other
- Legal Lot of Record

N

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Projection: UTM NAD 83 Zone 17

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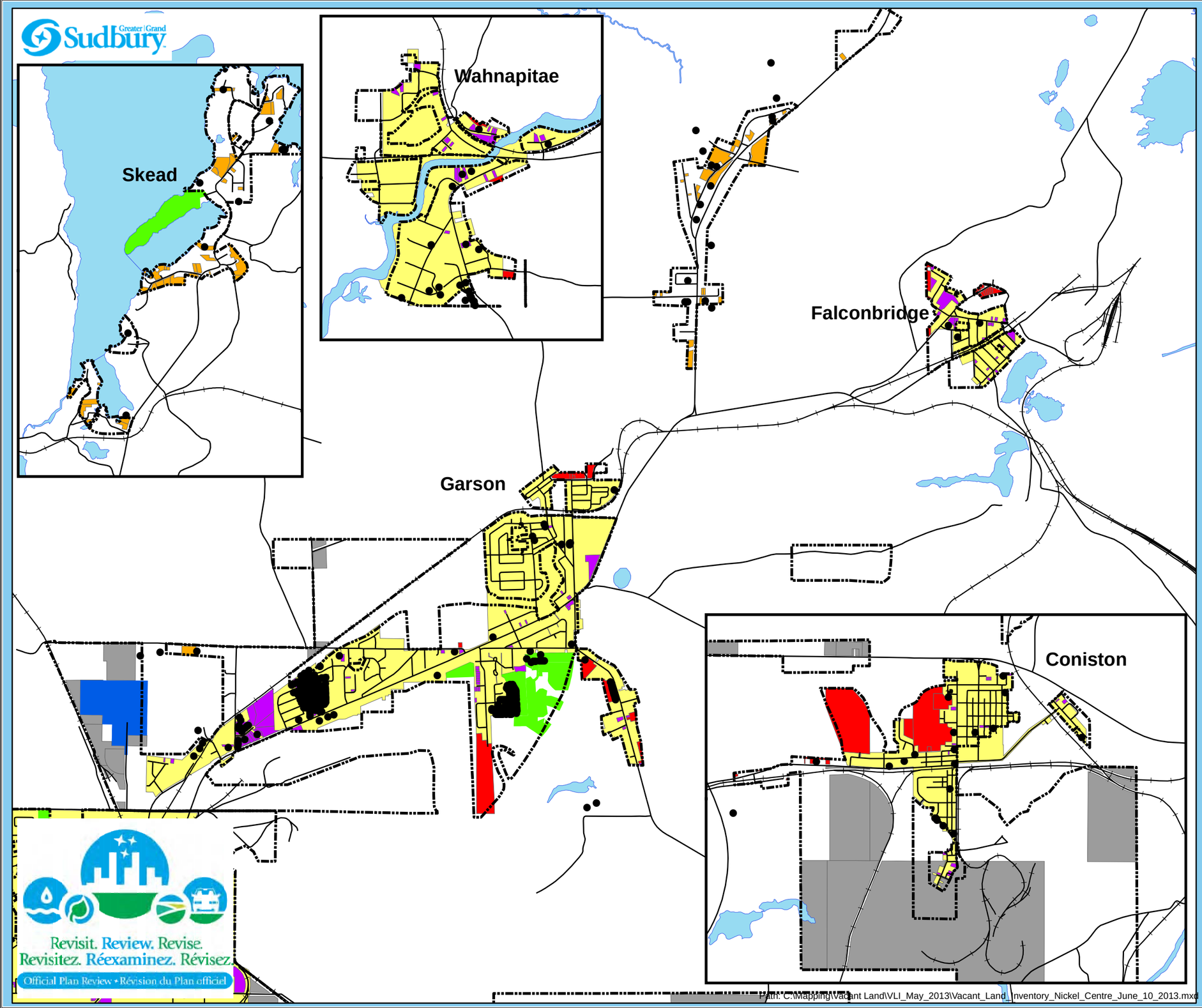
Garson, Falconbridge, Coniston, Wahnapitae & Skead

Land Supply & Residential Development Activity

	ha	Residential Unit Potential (12 units/ha)	ICI Job Potential (15 jobs/ha)
Nickel Centre			
Designated Developable			
Industrial	449.7		6,745
Institutional			0
Living Area 1	53.3	640	
Commercial	9.9		148
Draft Approved			
Residential		395	
Industrial	28.1		422
Draft Approved Under Review			
Site Plan			
Legal Lots of Record		Assuming 71% usability	Assuming 71% usability
Residential	20.0	124	
Industrial			
Institutional	3.3		35
Commercial/FD/Town Centre	0.8		9
TOTAL	**565.1**	**1,159**	**7,359**



Legend

- Settlement Area
- Built Boundary
- Residential Units Created since 2006

Vacant Land Inventory

Status

- Designated Developable ICI
- Designated Developable Living Area 1
- Designated Developable Other
- Draft Approved - Industrial
- Draft Approved - Residential
- Legal Lot of Record

N

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Projection: UTM NAD 83 Zone 17

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June 10, 2013

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Dowling, Levack & Onaping

Land Supply & Residential Development Activity

	ha	Residential Unit Potential (12 units/ha)	ICI Job Potential (15 jobs/ha)
Onaping Falls			
Designated Developable			
Industrial	1.9		28
Institutional	2.8		42
Living Area 1	45.0	540	
Commercial	0.4		6
Draft Approved			
Residential		106	
Industrial			
Draft Approved Under Review			
Site Plan			
Legal Lots of Record		Assuming 71% usability	Assuming 71% usability
Residential	13.8	46.2	
Industrial		-	
Institutional	0.5	-	5
Commercial/FD/Town Centre	1.3	-	14
Total	**65.7**	**693**	**95**

Levack

Onaping

Dowling

Legend

- Settlement Area
- Built Boundary
- Residential Units Created since 2006

Vacant Land Inventory

Status

- Designated Developable ICI
- Designated Developable Living Area 1
- Draft Approved - Residential
- Legal Lot of Record

N

0 0.5 1 2 km

Projection: UTM NAD 83 Zone 17

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June 10, 2013

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Azilda & Chelmsford

Land Supply & Residential Development Activity

	ha	Residential Unit Potential (12 units/ha)	ICI Job Potential (15 jobs/ha)
Rayside Balfour			
Designated Developable			
Industrial	47.6		714
Institutional			
Living Area 1	134.3	1,611	
Commercial			
Draft Approved			
Residential		457	
Industrial			
Draft Approved Under Review		496	
Site Plan		0	
Legal Lots of Record		**Assuming 71% usability**	**Assuming 71% usability**
Residential	22.1	171	
Industrial			
Institutional	1.6		17
Commercial/FD/Town Centre	7.8		83
Total	**213.4**	**2,735**	**814**

Legend

- Settlement Area
- Built Boundary
- Residential Units Created since 2006

Vacant Land Inventory

Status

- Designated Developable ICI
- Designated Developable Living Area 1
- Designated Developable Other
- Draft Approved - Under Review
- Draft Approved - Residential
- Legal Lot of Record

N

0 0.5 1 2 km

Projection: UTM NAD 83 Zone 17

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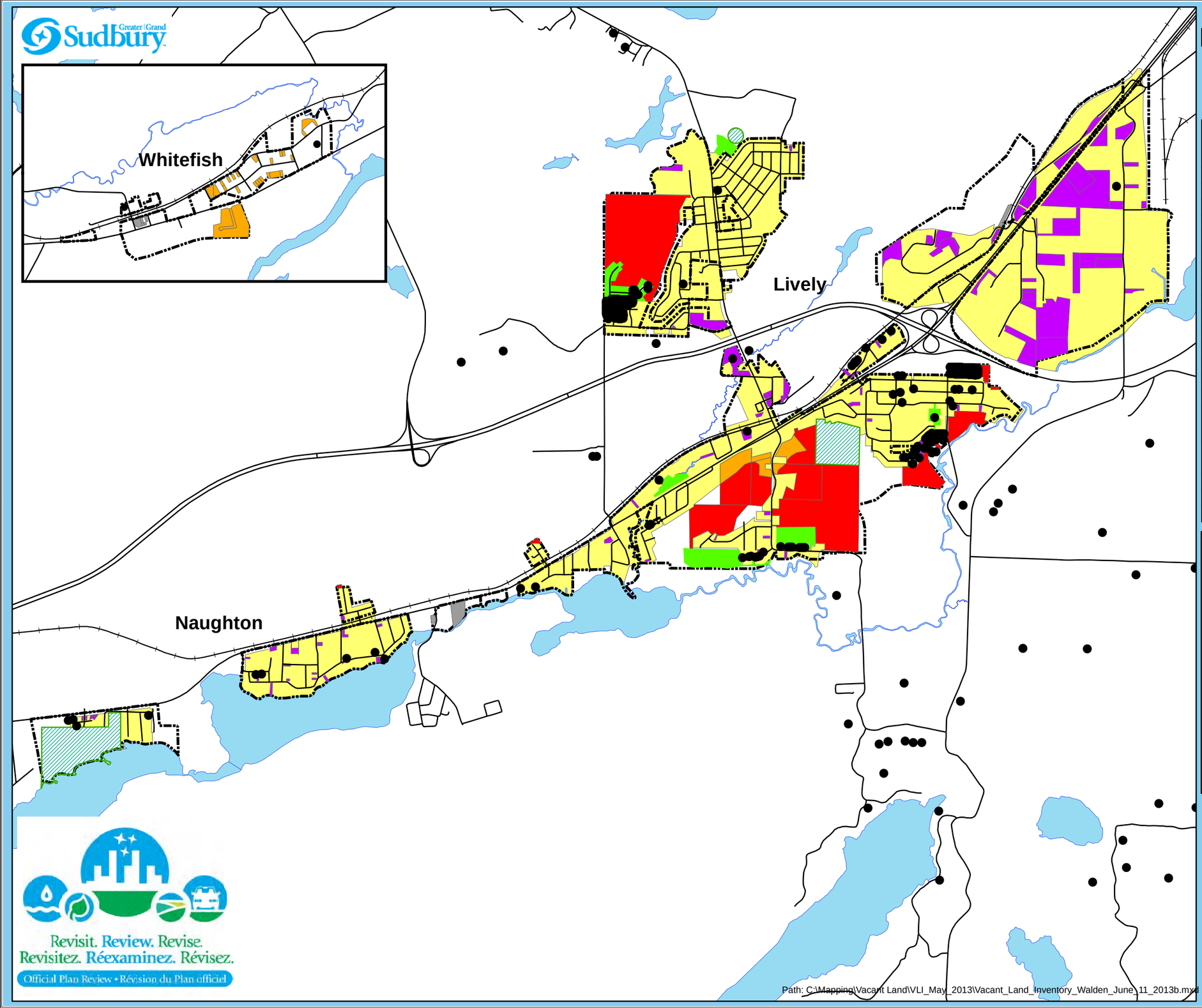

Lively, Naughton & Whitefish

Land Supply & Residential Development Activity

	ha	Residential Unit Potential (12 units/ha)	ICI Job Potential (15 jobs/ha)
Walden			
Designated Developable			
Industrial	3.2		48
Institutional			
Living Area 1	146.6	1,759	
Commercial/Town Centre	11.6		174
Draft Approved			
Residential		307	
Industrial			0
Draft Approved Under Review		494	
Site Plan		0	
Legal Lots of Record		Assuming 71% usability	Assuming 71% usability
Residential	15.0	157	
Industrial	74.4		
Institutional	1.1		12
Commercial/FD/Town Centre	1.1		11
Total	**253.0**	**2,717**	**245**

Legend

- Settlement Area
- Built Boundary
- Residential Units Created since 2006

Vacant Land Inventory

Status

- Designated Developable ICI
- Designated Developable Living Area 1
- Designated Developable Other
- Draft Approved - Under Review
- Draft Approved - Residential
- Legal Lot of Record

N

0 0.5 1 2 km

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Hanmer

Val Therese

Val Caron

Blezard Valley

Guilletville

McCrea Heights

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The Valley

Land Supply & Residential Development Activity

	ha	Residential Unit Potential (12 units/ha)	ICI Job Potential (15 jobs/ha)
Valley East			
Designated Developable			
Industrial	79.1		1,187
Institutional			
Living Area 1	222.7	2,673	
Commercial	7.8		118
Draft Approved			
Residential		1,399	
Industrial			
Draft Approved Under Review		0	
Site Plan		0	
Legal Lots of Record		Assuming 71% usability	Assuming 71% usability
Residential	21.5	207	
Industrial	23.0		245
Institutional	4.6		49
Commercial/FD/Town Centre	5.3		56
Total	**364.1**	**4,279**	**1,655**

Legend

- Settlement Area
- Built Boundary
- Residential Units Created since 2006

Vacant Land Inventory

Status

- Designated Developable ICI
- Designated Developable Living Area 1
- Designated Developable Other
- Draft Approved - Residential
- Legal Lot of Record

N

0 0.5 1 2 3 km

Projection: UTM NAD 83 Zone 17

June 10, 2013

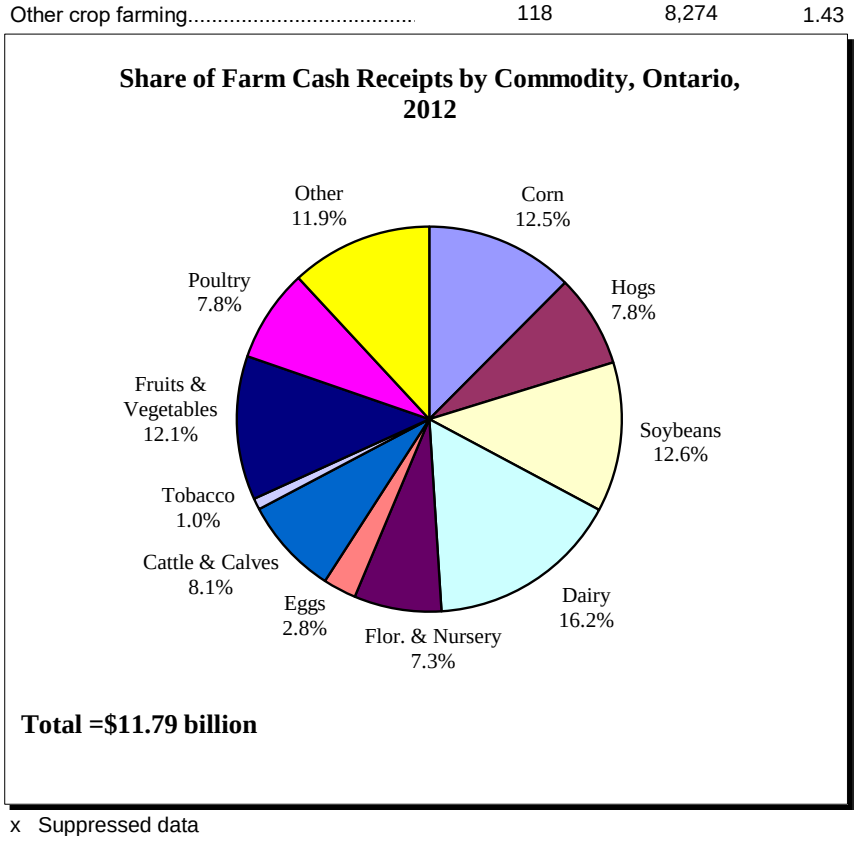
Prepaerd by the Community & Strategic Planning Section

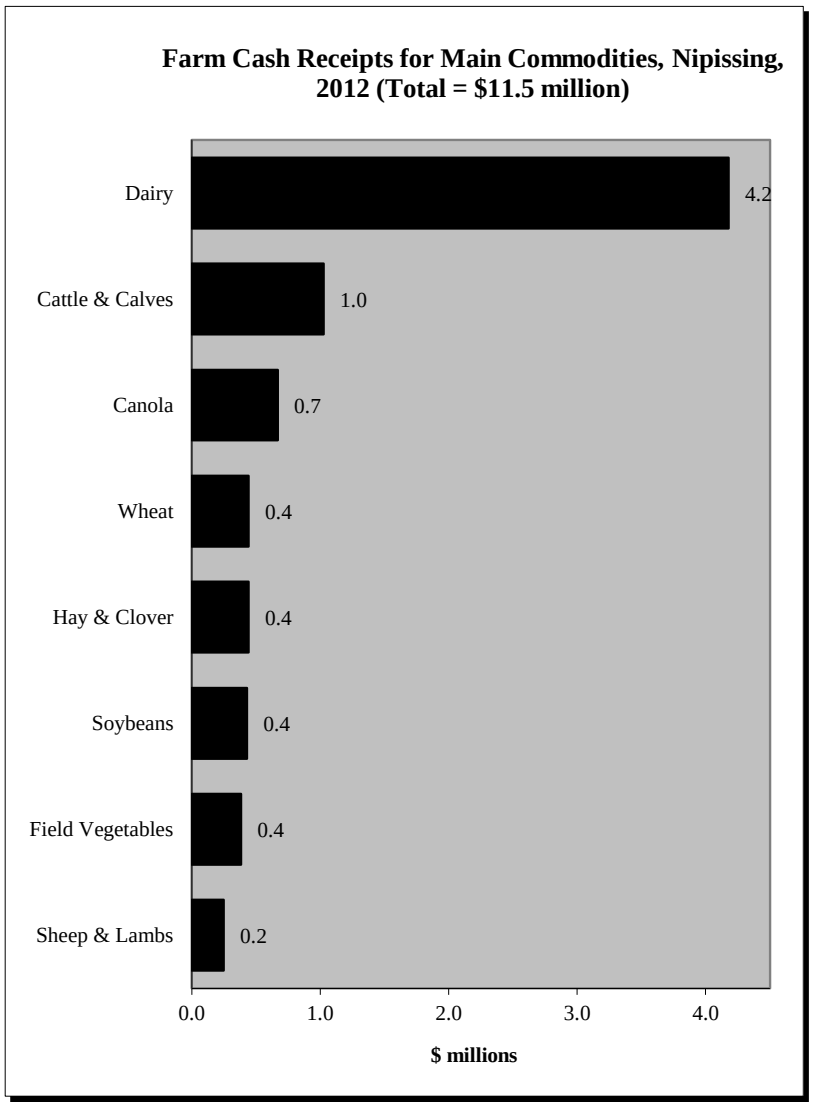
Appendix G: Nipissing District Agriculture Statistics

Nipissing District at a Glance

Item	Nipissing	Province	Percent of province
Farms, 2011 Census (number)			
Total	247	51,950	0.48
Reporting under 53 hectares	71	27,201	0.26
Reporting 53 to 161 hectares	109	16,230	0.67
Reporting 162 hectares and over	67	8,519	0.79
Land Use, 2011 Census (hectares)			
Land in crops	13,969	3,613,821	0.39
Summerfallow land	28	9,490	0.30
Tame or seeded pasture	2,095	262,543	0.80
Natural land for pasture	4,641	398,538	1.16
Christmas trees, woodland & wetland	9,620	652,533	1.47
All other land	1,664	189,728	0.88
Total area of farms	32,018	5,126,653	0.62
Greenhouse Area, 2011 Census (square metres)			
Total area under glass or plastic	X	12,549,007	-
Hired Farm Labour, 2011 Census (weeks)			
Year round	1,130	1,405,252	0.08
Seasonal	1,143	812,057	0.14
Total	2,273	2,217,309	0.10
Farm Capital Value, 2011 Census (farms reporting)			
Under $200,000	35	2,562	1.37
$200,000 to $499,999	127	12,994	0.98
$500,000 to $999,999	69	15,276	0.45
$1,000,000 and over	16	21,118	0.08
Total Gross Farm Receipts, 2011 Census (farms reporting)			
Under $10,000	99	12,263	0.81
$10,000 to $24,999	68	9,098	0.75
$25,000 to $49,999	31	6,720	0.46
$50,000 to $99,999	17	6,189	0.27
$100,000 to $249,999	16	6,985	0.23
$250,000 to $499,999	11	5,086	0.22
$500,000 to $999,999	5	3,248	0.15
$1,000,000 to $1,999,999	0	1,558	0.00
$2,000,000 and over	0	803	0.00
Farms by Industry Group, 2011 Census (number of farms)			
Dairy cattle and milk production	13	4,036	0.32
Beef cattle ranching and farming	36	7,105	0.51
Hog and pig farming	2	1,235	0.16
Sheep and goat farming	6	1,446	0.41
Poultry and egg production	1	1,619	0.06
Other animal production	36	6,966	0.52
Oilseed and grain farming	18	15,818	0.11
Vegetable and melon farming	5	1,531	0.33
Fruit and tree nut farming	3	1,548	0.19
Greenhouse, nursery and floriculture	9	2,372	0.38
Other crop farming	118	8,274	1.43

Item	Nipissing	Province	Percent of province
Major Field Crops, 2011 Census (hectares)			
Winter wheat	155	445,155	0.03
Oats for grain	1,076	28,749	3.74
Barley for grain	289	51,347	0.56
Mixed grains	92	42,962	0.21
Corn for grain	X	822,465	-
Corn for silage	X	109,953	-
Hay	9,774	840,901	1.16
Soybeans	796	997,497	0.08
Dry white beans	0	16,283	0.00
Other dry beans	X	21,194	-
Potatoes	15	15,129	0.10
Major Fruit Crops, 2011 Census (hectares)			
Apples	X	6,406	-
Peaches	0	2,612	0.00
Sour Cherries	0	948	0.00
Raspberries	X	365	-
Strawberries	X	1,329	-
Grapes	0	7,439	0.00
Total fruit crops	X	21,343	-
Major Vegetable Crops, 2011 Census (hectares)			
Sweet corn	18	10,336	0.17
Tomatoes	1	6,701	0.01
Green peas	X	6,119	-
Green or wax beans	2	3,717	0.05
Total vegetables	51	52,445	0.10
Livestock Inventories, 2011 Census (number)			
Dairy cows	720	318,158	0.23
Beef cows	1,925	282,062	0.68
Steers	171	291,263	0.06
Total cattle and calves	5,363	1,741,381	0.31
Total pigs	192	3,088,646	0.01
Total sheep and lambs	1,712	352,807	0.49
Poultry Inventories, 2011 Census (number)			
Total hens and chickens	2,275	46,902,316	-
Total turkeys	181	3,483,828	0.01





x Suppressed data

Sources: 2011 Census of Agriculture and Strategic Policy Branch, OMAF/MRA

08/09/2013

Appendix H: Best Practices in Local Food

Provided Electronically.

▶ Appendix I: Agriculture Value Added Opportunities

The following chart was obtained from the West Nipissing Positioning Plan (2003). This was then validated with a representative from OMAFRA to determine the relevance of the opportunities given today's agricultural environment.

The required updates to these opportunities are for various reasons (i.e. changing trends, implemented since 2003, etc.). Specific reasons include:

- New land drainage: There is a possibility of about 4,000 acres more developed land in the region (Sudbury, Nipissing and Algoma) that can produce crops often routed by Verner
- Currently the volume at the elevator is not high enough to support a full-time engineer (which is required on site at all times).
- Large livestock producers still selling in the South
- New program through Chicken Farmers of Ontario to support new entrant farmers and lower-quota chicken farms this will have a positive impact on the number of chicken farmers.

Agriculture
Opportunities and Initiatives

Crop Storage/Processing
- Roaster
- Crusher
- Extractor
- Pelletizer mill for feed and/ or wood heating
- Additional bins at dryer/ elevator facility (condo - bins)

Livestock Processing
- Multi-purpose abattoir facility
- Exotics
- Lamb processing
- Tanning
- Hog
- Cattle

Marketing and Education
- Vegetable/ farmer's market
- Goat meat marketing
- Vertically integrated systems (new age co-operatives)
- Branding
- Consumer education
- Identity preserved crop co-operative
- Marketing partnership with Sudbury Farmer's Market
- Forward contracting to packers
- Marketing agent
- Reindeer moss co-operative

Milk Processing
- Pasteurized goat milk cheese factory
- Goat milk co-operative/company for production of milk
- Sheep's milk

Organic Farming
- Crop diversification
- Crop isolation
- Processing of organic vegtable products including juices
- Production and processincg of organic beef and grains
- Organic milk products

Research
- Oil Seeds

Specialty Products and Industrial Crops
- Switchgrass for fuel production
- Hemp production and development of markets
- Identity preserved crops
- Crop isolation
- Seed production
- Horseradish
- Garlic
- Kale
- Tree farming
- Maple syrup
- Cranberries
- Berry production
- Kindey/navy and canato beans
- Sunflower seed; bird seed
- Goat milk based cosmetics (soap, body lotion)
- Value added sheep /goat products
- Mint sauce
- Wild boar
- Hogs
- Rabbits
- Fur Farming
- Elk/deer
- Honey bees
- Ducks/ geese

Agricultural Tourism
- Eco-tourism
- Bed and breakfast
- Wild boar game farms
- Agri-tourism
- Petting farms

Herbs
- Herb production
- Herbal medicines
- Cultivated and wild

Agricultural Services
- Veterinary services e.g. University of Guelph student placement partnership

Source: East-Sudbury - West Nipissing Agricultural Diversification Symposium, March 2001

The following items require highlighting:

- **Crop Storage/Processing**
  - Roaster, Crusher, Extractor: this is a declining trend, producers are now selling more grain in bulk to breeders, smaller models potentially would work for human consumption. Also the region has less dairy herds now than in the recent past (In 2003, during the time of the study this would have been the trend).
  - Pelletizer mill for wood burning: not really relevant any more as this trend in heating is declining
  - Pelletizer mill for feed: Again impacted by the lower dairy herds in the region there is a declining need for this.
- **Livestock Processing**
  - Slaughterhouse for poultry: to serve people raising chickens as a hobby, as well as greater volumes, however their may be plans for existing slaughterhouses (Blezard Valley and Sprucedale) to install a poultry line. With Ontario Chicken creating new artisanal chicken programs this could provide opportunity for growth.
- **Marketing and Education**
  - Available in neighbouring communities, but these opportunities are still relevant for West Nipissing.
- **Milk Processing**
  - Goat Milk Processing: opportunity in partnership with Ontario Dairy Goat Cooperative (currently, a single processor comes north to get the goat milk, for processing in the south). The volume for Goat Milk products in the North is slowly growing, which is influenced by the significant growth in demand for these products in Southern Ontario. The goat milk processing plants would probably still need to process cow milk, although both products need to be completely uncontaminated by each other.
- **Organic Farming**
  - Those producers that were interested in Organic Farming, are already doing so.
  - Mostly Community Shared Agriculture (CSA) programs.
  - Popular trend among some consumers, not as obvious on the production side (especially on a large scale) cash crops, very difficult.
- **Specialty products and industrial crops**
  - Switchgrass for fuel & hemp production: Consider approaching Nipissing University, as they conduct research and development for renewable heating opportunities (i.e. study 3-4 years ago), there might be interesting opportunities for partnership there.
  - Crop isolation and seed production: This is a strength for the region, there is potential to promote this idea with speciality crops that need to be kept pure.
  - Maple syrup: Not as relevant, as you need to be where the maple trees are, which isn't necessarily West Nipissing
  - Honey bees: Opportunity for growth due to higher numbers of acreage being cultivated, but already many small and one large producer in the area, and an additional larger producer from outside the region who brings hives to West Nipissing mid-summer

- **Agricultural Tourism**
  - Still various opportunities which exist, the hurdle is finding entrepreneurs wanting to get into this type of business.
- **Herbs**
  - Opportunity for medical marijuana plant (like Cochrane or Kapuskasing).
  - There may be a need for equipment to make oils from fresh herbs (new idea), yet herb producers are presently growing micro amounts.
- **Agricultural Services**
  - Veterinary Services: Presently one large animal vet servicing a large region, located in Sturgeon Falls

Appendix J: Emsi Analyst Comparative Data and Results

Provided electronically

Appendix K: Labour Flow Analysis

Labour Flow Analysis

Labour Flow Analysis compares place of residence employment data to place of work employment data.
A positive net import indicates employees commute in to a region to work in a given industry.
A negative net import indicates employees commute out of a region to work in a given industry.

		West Nipissing			Sudbury	North Bay	Espanola	Temiskaming Shores
NAICS Code	Description	Employed in Region	Resident in Region	Net Import (+) or export (-)	Net Import (+) or export (-)	Net Import (+) or export (-)	Net Import (+) or export (-)	Net Import (+) or export (-)
11	Agriculture, forestry, fishing and hunting	175	255	-80	20	-65	5	10
21	Mining, quarrying, and oil and gas extraction	35	115	-80	-1075	220	-65	-60
22	Utilities	25	100	-75	-130	60	0	70
23	Construction	130	535	-405	-2255	-370	-45	-85
31-33	Manufacturing	140	255	-115	-190	240	75	-5
41	Wholesale trade	135	195	-60	-275	225	-5	40
44-45	Retail trade	585	715	-130	-290	595	200	285
48-49	Transportation and warehousing	120	255	-135	-1100	185	-30	30
51	Information and cultural industries	10	45	-35	-75	115	10	40
52	Finance and insurance	155	120	35	-50	70	15	45
53	Real estate and rental and leasing	85	175	-90	-80	60	-5	30
54	Professional, scientific and technical services	60	100	-40	-250	45	-15	0
56	Administrative and support, waste management and	40	165	-125	-635	-205	-10	95
61	Educational services	345	525	-180	-520	355	115	65
62	Health care and social assistance	655	950	-295	-535	1230	-10	240
71	Arts, entertainment and recreation	35	30	5	-105	10	-5	-5
72	Accommodation and food services	285	300	-15	-135	405	-35	115
81	Other services (except public administration)	180	270	-90	-255	55	5	95
91	Public administration	550	610	-60	-215	635	0	40
	Total Net Import/Export			**-1970**	**-8150**	**3865**	**200**	**1045**

Source: EMSI 2015.3 Employees + Self-employed (Based on 2011 Census Data)

▶ Appendix L: Land Availability Comparison

Appendix L: Industrtial Land for Lease and Recently Sold

Municipality	Address	Size of Lot (Acres)	Description	Cost	Price Per Acre	Status	Listing ID
Little Current	Habour Vue Road East	11	Hydro (3 phase) and telephone service available. Only industrial land available in the area. Excellent municipal road access just off Hwy 6.	$49,500	$4,500	For Sale	1028479
West Nipissing	5 Toulouse Crescent	1.4	Large industrial lot, paved road, full municipal services available at a cost	$59,000	$41,672	For Sale	201146028
West Nipissing	12425 Hwy 17 (Pedley)	44.62	838 ft of Highway frontage – zoned for construction yard, office and related industrial uses	$75,000	$1,681	For Sale	485217000101700
West Nipissing	3 Toulouse Crescent (Springer)	206.25 x IRR	Frontage on Highway 17, quick access, tons of exposure with high traffic count, full town services available at cost	$69,900		For Sale	48520400215308
West Nipissing	1 Toulouse Crescent (Springer)	0.91	New industrial park, frontage on Highway 17, quick access, tons of exposure with a very high traffic count, full town services available at a cost.	$79,900	$87,418	For Sale	485204000215306
West Nipissing	2 Toulouse Crescent	0.88	New industrial park, frontage on Highway 17, quick access, tons of exposure with a very high traffic count, full town services available at a cost.	$79,900	$90,778	For Sale	201146016
West Nipissing	9 Toulouse Crescent	1.67	New industrial park, just off of Highway 17, full town servcies available at cost (Was listed for $59,000)	$50,000	$29,906	Sold	201146023
West Nipissing	7 Toulouse Crescent	166 x 356 x 279 x 163	New industrial park, west side is all on pavement, corner lot, excellent exposure, full town services available at cost (Was listed for $69,000)	$60,000		Sold	201146022
North Bay	Progress Court	2.47	Development opportunity on approximately 2.47 acres of light industrial vacant land, M3 zoning, 361 feet frontage, city services available at road - rare find (Was listed for $199,900)	$200,000	$80,972	Sold	484405007335330
North Bay	RR 1 Booth Road	83.31	Zoned as M2, excellent location, with good visibility (Listed at Sale Price)	$350,000	$4,201	Sold	484404006310600
North Bay	Eloy Road	2.15	Ready for developlment, high traffic exposure, high sought after area, will build to suite lease for qualified tenants (Was listed for $750,000)	$560,000	$260,465	Sold	201249000
North Bay	100 Collins Drive	0.88	Flat, vacant, unserviced, light industrial lot zoned M4	$48,900	$55,720	For Sale	484405006708600
North Bay	280 Birch's Road	20	Serviced, highly visible and easily accessed. Zoned M-3 and ready to build on.	$360,000	$18,000	For Sale	484404006309400
Sudbury	2835 Lasalle Blvd	6.49	M3 industrial acreage with over 600' of frontage on Lasalle	$1,225,000	$188,752	For Sale	1029989
Sudbury	2772 Lasalle Blvd	2.9	M3 industrial acreage. Over 600' of frontage on Lasalle.	$525,000	$181,034	For Sale	1029987

Sudbury (Chelmsford)	Lot 1 Ford Drive	1.23	Prime industrial lot on Regional Rd. 15 in Chelmsford Industrial Park. Zoned M2 (Light Industrial) with all services on lot line. Lot Dimensions 315 ft on Regional Rd. 15 (Hwy Frontage) x 170 ft deep.	$139,900	$113,740	For Sale	1033562

		Calculation assumed			Not included in Average	
Average	West Nipissing, Sudbury, North Bay	12.85		$245,750	**$82,774**	Average cost per acre
Average	West Nipissing	9.9		$67,671	**$50,291**	Average cost per acre (West Nipissing)

Industrial Park Information						
Sudbury	Walden Industrial Park		Slightly older information, for shows how municipality was encouraging industrial development	$55,000 - $60,000/acre subsidized $100,000/acre unsubsidized	For Sale	N/A
Sudbury	Valley East Industrial Park		More current example	$115,000 - $125,000/acre	For Sale	N/A
Sudbury			Where City's infrastrucutre already exists	$175,000 - $225,000/acre	For Sale	N/A
Orillia	West Orillia Employment Lands - University Ave directly across from Lakehead Univserity.	42	Zoning M1-1, Fully serviced, Lots starting from 0.25 to 1.5 acres approx. (2.8 hectares).	$115,000 / acre 284,050 / hectare	For Sale	

Appendix M: Example of Agriculture Incubators

Provided electronically

▶ Appendix N: Preliminary Site-Servicing Report

Leblanc Road Industrial Park
Feasibility and Development Study

Preliminary Site Servicing Report

April, 2016

C2S Engineering Inc.

Introduction

This report has been prepared by C2S Engineering Inc. who is part of a team commissioned by the Municipality of West Nipissing to prepare an economic and feasibility study for the development of an industrial subdivision. The purpose of this report is to identify the requirements for servicing the development.

The property is located in the Town of Sturgeon Falls on approximately 39.2 ha (97 acres) of undeveloped lands on the south west corner of Bay Street and Leblanc Road. The property is accessed from Highway 17 via Leblanc Road southerly for 0.7 kilometres or through the Town of Sturgeon Falls via Bay Street on the west side of the community. See Fig 1.

Scope of Work

This scope of this report is to determine the general requirements for providing complete servicing for the 16 lots within the development based on the concept plan which was submitted to the office of C2C Engineering in Sept ember of 2015. The preparation of this report is not based on detailed design of any services, rather, on a preliminary design shown on the general arrangement of the property considering the number of proposed lots and their proposed light industrial use. It should be noted that a topographic or engineering survey of the entire property has not been undertaken as of the date of this report.

In order to complete this task, we have contacted the agencies responsible for the delivery of their service. For water and sewer services, we have discussed the project with the municipal engineering department and we have calculated the flow requirements based on the number of industrial lots and the size and type of industrial space envisioned. These assumptions must be reviewed during the preparation of the site plan agreement and detailed design and may require re-submission should significant revisions to the development be made.

Project Description

The proposed development is represented by a general arrangement conceptual drawing CP-1 prepared by C2S Engineering Inc. The plan allows for 16 individual lots, each of approximate two hectares in size with 110 metres (360 feet) of road frontage.

The entire existing property is undeveloped and is basically a grassed farmland field with heavily treed areas on the south east portion and along the east side adjacent to Leblanc Road. The land slopes very gently from north to south towards the Sturgeon River which is approximately one kilometre south of the property.

A roughly graded roadway of imported fill has been partially constructed southerly from Bay Street for approximately 500 metres.

Sanitary Sewers

Total flows from the development are calculated at 71.7 LPs litres per second (LPS). Sewage from each lot will be collected via a gravity sewage service and collection system and will be directed northerly along the road right of way to a proposed pumping station located at the north limit of the property. Effluent must be pumped via force main to an existing Municipal force main located at the intersection of Bay Street and Leblanc Road.

The Municipality reports that the existing 250 mm force main transports effluent from the Community of Cache Bay to the west, to the Sturgeon Falls sewage treatment plant. Although the pipe is at near capacity at this time, it is reported that there is considerable inflow and infiltration occurring from the Cache Bay collection area and the Municipality is currently in the process of rectifying this issue. The Municipality engineering department has therefore confirmed that these upgrades will allow sufficient capacity in the existing force main to receive flows from the proposed development.

A cost allowance has been made for an in ground sewage pumping station. As there are no nearby streams or water bodies to receive emergency overflows, provisions have also been made for an alternate power supply.

As the subdivision roadway will be an open ditch rural cross section, it is recommended that the gravity sewers be installed in the road shoulder, 5.5 metres from road centreline to reduce maintenance costs and facilitate future repairs if required.

It is suggested that 150 diameter mm services be installed at lot centres as the locations of buildings is unknown. This location will allow the potential owners to locate a driveway to suit the building location. Because of the large lot frontages at 110 metres, maintenance structures may be located so that all lots can be connected to a structure.

The sewage system will include the installation of a force main on Bay Street from the proposed pumping station to the Bay Leblanc intersection, approximately 180 metres. These sewers may be located on the north side of Bay Street along the ditch line.

All sewer works within the development as well as off-site works are to be installed in accordance with Ministry of Environment requirements and in general conformance with current Municipality of West Nipissing standards, Ontario Provincial Standards and Specifications Municipal Standards (OPSS) and Municipal zoning by-laws. The Municipality may also wish to incorporate design standards and construction specifications from the City of Greater Sudbury which uses modified OPSS standards to be applicable to Northern Ontario conditions.

Water mains

Existing municipal water mains to accommodate flow requirements are located at the Bay Street and Leblanc Road intersection. The existing 250 mm water main services the Cache Bay community to the west and the Municipality reports that there is adequate capacity and pressures to accommodate the required flows. Prior to detailed design, it is recommended that pressure testing be conducted at the fire hydrant located closest to the proposed development to verify adequate pressures and flows.

In order to maintain adequate pressures, especially for fire flows, it is recommended that the system be looped through the development to the south east end of the property and in this regard, the Municipality has recommended continuation of a the water main southerly on Leblanc Road and then easterly to be connected to the existing 200 mm water main on Delorme Road. This will ensure adequate servicing pressures for industrial use and fire flows.

A maximum pipe size of 200 mm within the development will accommodate flows with 100 mm services to each lot. Services may be reduced to a lesser size at the lot line depending on the requirements of the lot owner.

Water mains may be installed similar to sewer mains on the opposite side of the road. Off site water mains may be installed in shoulder areas but must maintain a 2.5 metre clearance with sewer mains.

It is recommended that all water works within the development be installed in accordance with the standard described above under sewer works with the addition of the requirements of the Municipal Fire Department.

Roads

The road work for this study is limited to the onsite access road and does not include driveways since the location of the drives cannot be determined at this time. The cost of the driveway, including the driveway culvert will be the responsibility of the lot purchaser.

A rural cross section is recommended as indicated on drawing CP- 1. Because of the potential of a high volume of large vehicles, a lane width of 4.0 metres is recommended along with 0.5 metres width of paved shoulders. There is no site geotechnical information available as of the date of this report but the vegetation and general area would suggest clay type soils which will require substantial base and sub base road structure. 900 mm is estimated for cost purposes along with two layers or 90 mm of hot mix asphalt.

A geotechnical report must be obtained prior to detailed design of roads in order to obtain a recommendation for the road structure. This report will also assist in the design of the below grade infrastructure mentioned above as well as any building foundations. It would appear that all roads and infrastructure will be installed in earth trench and a geotechnical report may indicate if dewatering techniques would be required during construction.

Drainage

An open ditch rural cross section as shown on Drawing CP-1 is recommended. Therefore, storm sewers are not required. Individual lot drainage may be accomplished with open swales flowing to road ditching. The Municipality should require each lot owner to submit and adhere to a lot grading plan to ensure positive drainage to the road side ditches.

Road side ditching will drain to open ditches along Bay Streets and Leblanc Road. Cross culverts may be required.

A storm water management (SWM) report may be required by the Municipality.

Lot Grading

Costs for lot grading will not be part of the site development and will be left as a requirement for the purchaser. However, the Municipality can use the unsold lots as a receiving area for excess materials from Municipal construction projects. Dumped fill must be graded properly to improve the aesthetics for the potential purchasers.

In addition, the temporary roadway that has been previously constructer from imported fill materials should be excavated and spread in lower lots.

During the road design, a lot grading plan must be developed which will indicate positive drainage requirements from each lot and set a minimum building floor elevations.

Topsoil stripped from the road right of way may be stripped and stockpiled within the site and may be sold after sale to the lot owners,

Clearing

Clearing of heavy vegetation within the areas of lots has not been included for the purposes of this report. As previously mentioned a thick strip of trees is located along the west side of the property and should remain as a visual buffer from Leblanc Road.

Clearing of the road allowance is provided within the road right of way at the south end.

Hydro

This area of Sturgeon Falls is serviced by Hydro One. There is three phase power at the Bay Street and Leblanc Road intersection which will provide adequate power to the development but 200 metres of new line will be required to service the development,

It is recommended that all interior hydro lines for building servicing and outside lighting be installed with overhead wiring with pole mounted transformers located to service each building. Upon submission of final plans during site plan development process, Hydro One will determine the status of their plant especially with regard to providing street lighting within the development.

Hydro One may require an easement along lot frontage for maintenance of their plant.

Natural Gas

Although there is a gas line on Bay Street on the north side of the property, the line is only a single service and not sufficient for additional properties. Union Gas will provide service to the development from the Bay and Leblanc intersection which would be at the Municipalities cost. These costs could only be eliminated if there were potential customers so that Union Gas could determine a payback period. Therefore, a cost to install gas service is included.

Union Gas will require access along the proposed Municipal owned street for installation and maintenance of their below grade plant.

Communications

Bell Canada does not currently have fiber optic cable in the location of the development and an allowance has been made for this provision.

Similarly, Eastlink does not have service this area.

It is assumed that communications providers would share the use of poles with Hydro One.

Estimated Cost to Service the Development

The following opinion of servicing cost is prepared without the benefit of detailed design or without topographic surveys or geotechnical information. Costs are based on bench mark unit prices typical of the area. Cost to provide some services such as hydro and communications have been provided by the utility provider based on the conceptual design drawing CP-1.

Capital Works

Site preparation and excavation		221,000	
Road Construction		900,000	
Sanitary Sewers			
Pipe and structures and connections		447,000	
Pumping Station and forcemain		412,000	
Water mains			
Pipe work and connections		550,000	
Contingency @ 10 %		253,000	
Engineering @ 15%		417,000	
	Sub-Total		**$3,200,000**
Loop to Delorme Street (930 m)			**$363,000**

Other Utilities

Hydro One power			
To site		60,000	
On site		130,000	
Communications			
Bell (Fiberoptics cable to site)		60,000	
Eastlink		30,000	
Union Gas (Unknown)		125,000	
	Sub-Total		**$405,000**
Overall Total			**$3,968,000**
Cost per lot			**$248,000**

- The estimate includes a cost to loop the water main to Delorme Street.
- Costs for the supply of hydro from the site were obtained from estimates from Hydro one. Three phase feed along Bay Street to provide service to the development is estimated to cost $60,000. On site development costs will include approximately 18 hydro poles which along with overhead wires are estimated at $130,000. Provisions for street lighting have not been included at this time.
- A cost of $30,000 has been allocated for Bell Canada to provide fiberoptic cable along Bay Street to the property. It is assumed that Bell will supply their communications lines on the Hydro plant at minimal cost although Bell will not commit to a cost estimate at this time. An allowance of $30,000 is to install Bell plant on Hydro poles in the development.
- Similar to Bell Canada, Eastlink will provide their service but will not commit to a cost estimate until they can determine their sales potential. A cost of $30,000 has been allowed
- Union Gas will not commit to a cost estimate to supply their service until their sales potential is known. An allowance of $100,000 has been estimated by Union Gas to install a 2 inch steel pipe in an open trench. An additional $25,000 is allocated to provide the trench during road construction and installation of infrastructure services.
- An allowance of $60,000 has been made for rock excavation in trenches during installation of sewer and water services. The amount of rock, if any, is a guesstimate at best.
- Engineering fees include topographic surveys, geotechnical reports, preliminary and detailed design of services and contract inspection and administration during construction.
- All costs do not include HST.

Phasing

The Municipality may consider phasing the development in order to reduce the initial capital expenditure. The sale of lots in the first phase would also generate a cash flow which would be used for development of the remaining lots. Phasing would however delay the proposed water main loop to Delorme Road.

The proposed first phase is shown on Drawing CP-1 with a temporary cul-de-sac allowing for the development of nine (9) lots. Additional costs relating to phasing are limited to the cost of construction and removal of the temporary cul-de-sac. In addition, there may be a requirement to increase the size of the water main within the first phase from 200 mm to 300 mm diameter to reduce friction and allow for fire flows. Some development costs such as off site and partial on site servicing with gas, hydro and communications, are included in the cost estimates. The cost of the engineering design, should be completed for the entire development.

Phase 1 costs for this first option are summarized as follow:

Capital Works

Site preparation and excavation		86,000	
Road Construction		466,000	
Sanitary Sewers			
Pipe and structures and connections		288,000	
Pumping Station and forcemain		412,000	
Water mains			
Pipe work and connections		335,000	
Contingency @ 10 %		159,000	
Engineering @ 15%		262,000	
	Sub-Total		**$2,008,000**

Other Utilities

Hydro One power			
To site		60,000	
On site		70,000	
Communications			
Bell (Fiberoptics cable to site)		35,000	
Eastlink		15,000	
Union Gas (Unknown)		75,000	
	Sub-Total		**$255,000**
Overall Total			**$2,263,000**
Cost per lot - 9 lots			**$251,000**

A second option is to develop the entire subdivision without sewer and water services and construct the access road without an asphalt surface and leave the road as a gravel surface. This would allow access to each lot and services may be installed when more lots are sold. As in option 1, this option should include the partial installation of off site and on site hydro, gas and communications but engineering design and inspection costs for sewer and water work, including the pumping station, would not be required.

Option 2 costs are summarized as follow:

Capital Works

Site preparation and excavation		180,000	
Road Construction		568,000	
Contingency @ 10 %		75,000	
Engineering @ 15%		123,000	
	Sub-Total		**$ 946,000**

Other Utilities

Hydro One power			
To site		60,000	
On site		130,000	
Communications			
Bell (Fiberoptics cable to site)		60,000	
Eastlink			
Union Gas (Unknown)		125,000	
	Sub-Total		**$375,000**
	Overall Total		**$1,321,000**
	Cost per lot - 9 lots		**$82,500**

Conclusion and Summary

The Municipality has confirmed that there is adequate water supply and available at the Bay Street Leblanc Road intersection. Sewage capacity to accommodate the development is also available with the understanding that future work will be required to address the infiltration issue of the sanitary sewer system in the Cache Bay area,

In addition, the Municipality has suggested that the water main within the development is to be looped to connect to Delorme Street. This cost has been added to the development costs.

All other services such as gas, hydro, telephone and communications will be made available at the time of development.

The development servicing cost per lot is estimated at $248,000. It is noted that some cost reductions may be realized by the reduction or elimination of certain items such as hot mix paving. In addition, the construction may be phased by the building of roads and services from the north end southerly and the elimination of the watermain looping requirement.

This report is not intended to be a design document. For additional details, if required, please contact C2S Engineering Inc.

Prepared by:

R. O. Spangler, Sr. Project Engineer

Attached: Figure 1 and General Arrangement Dwg. CP-1

C2S ENGINEERING

• CIVIL INFRASTRUCTURE • LAND DEVELOPMENT •
• ROADS & BRIDGES • BUILDINGS • WATER RESOURCES •
• PROJECT MANAGEMENT •

Project: MUNICIPALITY OF WEST NIPISSING
PROPOSED INDUSTRIAL PARK

Drawing: LOCATION PLAN

Drawn by: J.D.S.
Checked by: R.O.S.
Project No.: SUD-1139

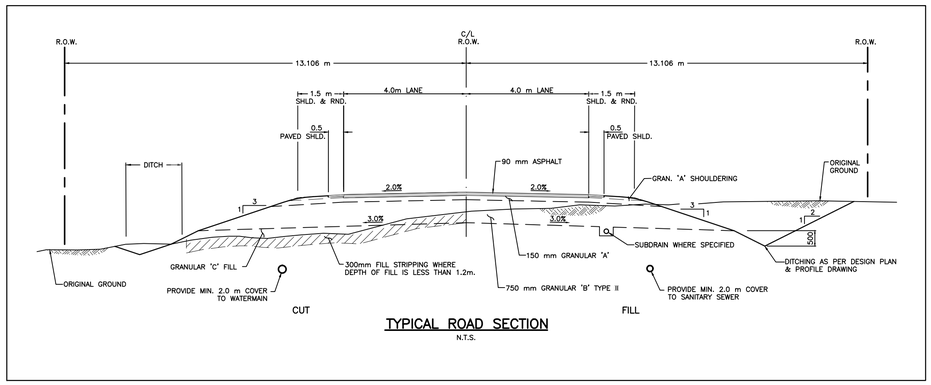
Date: FEB. 11, 2016
Scale: 1 : 50000
Drawing No.: Fig. 1

WEST NIPISSING INDUSTRIAL PARK
C2S ENGINEERING INC.

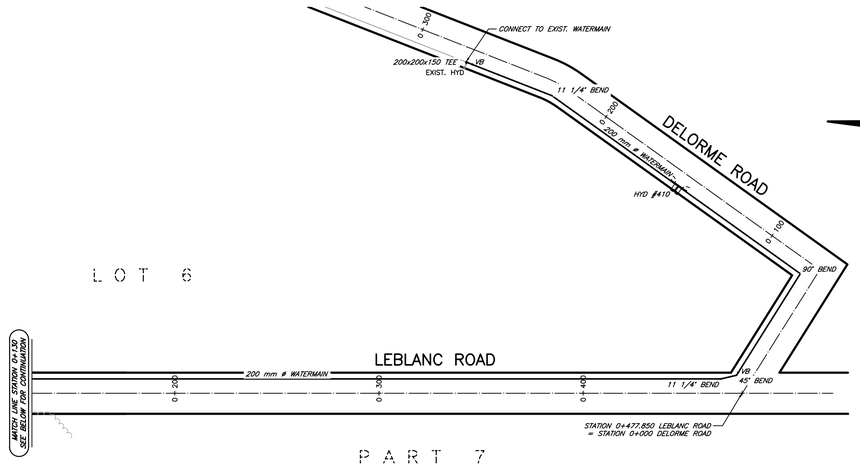
DWG NAME / FILE NO:

METRIC

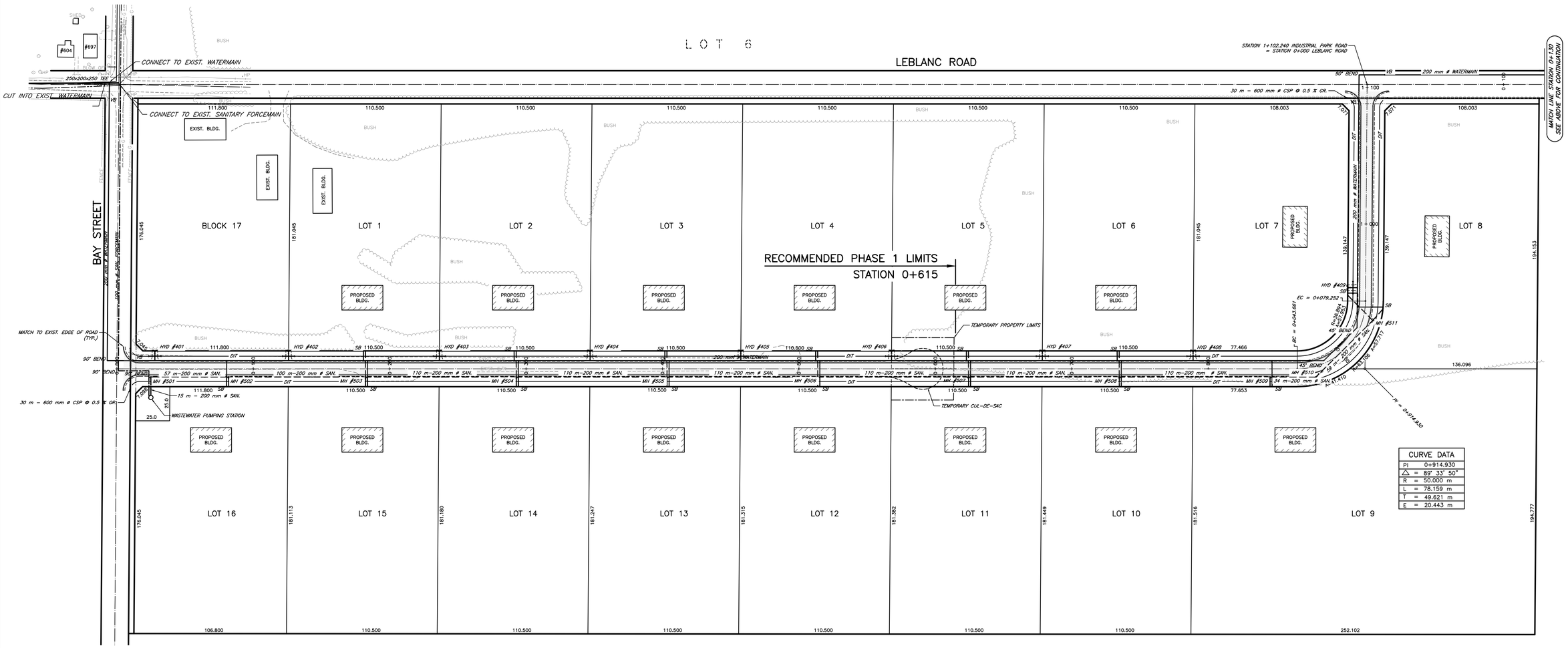
DIMENSIONS ARE IN METRES
AND/OR MILLIMETRES
UNLESS OTHERWISE SHOWN



TYPICAL ROAD SECTION
N.T.S.



PART 7



CURVE DATA	
PI	0+914.930
Δ	= 89° 33' 50"
R	= 50.000 m
L	= 78.159 m
T	= 49.621 m
E	= 20.443 m

DRAWING NOT TO BE SCALED
100 mm ON ORIGINAL DRAWING

NOTES

1. ALL DIMENSIONS ARE IN METRES UNLESS OTHERWISE INDICATED.
2. ✱ DENOTES BUILDINGS PLOTTED FROM O.L.S. PLAN.
3. ⌊⌋ DENOTES BASEMENT FLOOR ELEVATION, WITH HOUSE NUMBER.
4. ALL WATER CONNECTIONS ARE 20mm CU. UNLESS OTHERWISE NOTED.
5. ALL SAN. SEWER CONNECTIONS ARE 100mm PVC SDR28 UNLESS OTHERWISE INDICATED.

REVISIONS

DATE	DETAILS	BY

CAUTION

- ALL UTILITIES ARE NOT NECESSARILY SHOWN ON THIS DRAWING.
- WHERE UTILITIES ARE SHOWN, LOCATIONS ARE NOT GUARANTEED
- LOCATION & SIZE OF ALL UTILITIES MUST BE VERIFIED IN THE FIELD.

DATE: 2016-01-25
DRAWN: J.D.S.
DESIGNED: R.O.S.
CHECKED:
ENGINEER:
APPROVED:

C2S ENGINEERING

• CIVIL INFRASTRUCTURE • LAND DEVELOPMENT •
• ROADS & BRIDGES • BUILDINGS • WATER RESOURCES •
• PROJECT MANAGEMENT •

MUNICIPALITY OF WEST NIPISSING
PROPOSED INDUSTRIAL PARK

CONCEPT PLAN OF INDUSTRIAL SUBDIVISION

SCALE: 1:1500
CONTRACT NO.: SUD-1139
CAD/FILE NUMBER:
PAGE NO.: CP-1

Appendix O: Economic Impact – Job Creation

Leblanc Road Industrial Park Employment Opportunities

Assumptions

10	Lots unsold	**$ 34,120**	Average salary per employee	**$3,968,000**	Infrastructure Total Costs
6	Lots Sold	**2x**	indirect employment multipler	**$250,840**	Building Costs Per Unsold Lot
6	Average employees per acre			**30%**	Wages as % of Total Costs

A. Direct employment at full occupancy

99.0	direct employees		99.0	direct employees		74.3	direct jobs in the community
$ 34,120	avg. salary/employee		75%	retained by community	$	34,120	avg. salary/employee
$ 3,377,880	**annual payroll for the regional area**		**74.3**	**direct jobs in the community**	**$**	**2,533,410**	**annual payroll for the community**
			24.8	**direct jobs outside the community**			

B. Indirect spinoff employment at full occupancy

** Applying 2x employment multiplier*

99.0	indirect employees		99.0	indirect employees		39.6	indirect jobs in the community
$ 34,120	avg. salary/employee	x	40%	retained by community	$	34,120	avg. salary/employee
$ 3,377,880	**annual payroll for the regional area**		**39.6**	**indirect jobs in the community**	**$**	**1,351,152**	**annual payroll for the community**
			59.4	**indirect jobs outside the community**			

C. Direct and indirect construction/temporary employment

1. Park Infrastructure

**Assumes $3.968 million industrial park construction costs and wages 30% of costs*

Direct

$ 3,968,000	construction costs	$	1,190,400	wages in first year		34.9	direct jobs created
30%	wages	$	34,120	avg. salary/employee	x	75%	retained by community
$ 1,190,400	**wages in first year**		**34.9**	**direct jobs created**		**26.2**	**direct jobs created within community**
						8.7	**direct jobs created outside the community**

Indirect *(* Applying 2x employment multiplier)*

34.9	indirect jobs created		34.9	indirect jobs created	
$ 34,120	avg. salary/employee	x	40%	retained by community	
$ 1,190,400	**indirect wages**		**14.0**	**indirect jobs created within community**	
			20.9	**indirect jobs created outside the community**	

2. Lot Building (Tenant Infrastructure)

**Assumes $250,840 per lot per building construction costs and wages 30% of costs*

Direct

$	2,508,400	construction costs	$	752,520	wages in first year		22.1	direct jobs created
	30%	wages	$	34,120	avg. salary/employee	x	75%	retained by community
$	**752,520**	**wages in first year**		**22.1**	**direct jobs created**		**16.5**	**direct jobs created within community**
							5.5	**direct jobs created outside the community**

Indirect *(* Applying 2x employment multiplier)*

	22.1	indirect jobs created	22.1	indirect jobs created	
$	34,120	avg. salary/employee	x 40%	retained by community	
$	**752,520**	**indirect wages**	**8.8**	**indirect jobs created within community**	
			13.2	**indirect jobs created outside the community**	

D. Direct and indirect employment impact

West Nipissing Community

	Direct Jobs	Indirect Jobs	Total FTE jobs
Permanent	74.3	39.6	**113.9**
Temporary	42.7	22.8	**65.5**
	117.0	**62.4**	**179.3**

	Annual payroll for the Community
Year 1 +	**$3,884,562**
Year 1	**$2,234,358**

Combined Community and Regional Jobs

	Direct Jobs	Indirect Jobs	Total FTE jobs
Permanent	99.0	99.0	**198.0**
Temporary	56.9	56.9	**113.9**
Total	**155.9**	**155.9**	**311.9**

	Annual payroll for the Region
Year 1 +	**$6,755,760**
Year 1	**$3,885,840**

Appendix P: Data Standards Spreadsheet (IEDC)

Provided Electronically.

▶ Appendix Q: Best Practices on Municipal Permitting Processes

The following best practices can be implemented to improve communication between stakeholders about the local permitting process.

Standardize forms and procedures to provide efficiency and predictability;
Provide sufficient resources to enable swift and competent regulatory consideration; and
Utilize online technology and other available tools to streamline the permitting process.

Single Point of Contact

- A single point of contact improves clarity and productivity for both the applicant and the Municipality
- A community experiences efficient permitting when a person is put in charge of important administrative tasks, such as reviewing applications for completeness when they are received, tracking applications through the process.

User's Guide to Local Permitting

- Clearly explains what activities require permits and lists the permits issued by each permit granting authority. Describes each department, board, commission, and committee involved in permitting.
- Gives contact information for each permitting authority.
- Lists meeting schedules and timeframes so permit applicants can plan ahead.
- Presents the information in different formats (narrative, matrix, and flow chart) to meet the needs of a variety of potential users.

Permitting Flow Charts & Checklists

- Checklists and flow charts make the process transparent and demonstrate its uniformity.
- They are a valuable primer for applicants and new staff / council members with a limited knowledge of the permitting procedures and processes.

Clear Submittal Requirements

- Allows for uniformity of materials to be analyzed during the project review process.
- Minimizes conflicts and delays in application review due to misunderstanding about what materials and information must be provided.
- The applicant may better plan for the expected length of time for project review and action by the reviewing board on the application.
- Plan submittals are likely to be more complete upon application submittal, minimizing delays during review caused by requesting and waiting for additional information
- Neighbors and community leaders as well as the permit granting authorities have a clear sense of what developers must provide, and what is not required.

Pre-Application Process

- Allows for an informal review of a development in concept design stage.
- Permits identification of potential issues, both for the Municipality and the developer.
- Establishes relationships early in the process.
- Alerts developer to potential need to meet with affected community.
- Reviews all permits and permissions required.
- Reviews time schedules for permitting.
- Reviews applications for completeness before filing.
- Allows a community to coordinate its response to a development proposal.
- Helps departments to find solutions which meet the needs of multiple boards and government bodies without conflict

Project Technical Review Team

- A technical review team allows a community to coordinate a response to projects.
- Teams decrease “turf issues.”
- Staff and board time and energy is saved.
- Confusion is reduced for the applicant.
- Provides for review and comment that offers protection for the applicant and the issuing authority from complaint after a decision is rendered about issues or concerns not addressed due to lack of opportunity for input by other boards; organizations and departments.
- Identifies critical issues and/or problems early in the application process.
- Allows sharing of a site’s history and/or anecdotal information about the site.
- Enables creative solutions to design issues, perceived impacts, and community benefits.

Regularly Scheduled Inter-Departmental Meetings

- Designed to foster a collegial working environment among agencies charged with land use regulation in a community.
- Simple, direct and effective communication tool.
- Decreases “turf issues.”

Utilizing technology

The following should be readily available and easy to find on the Municipality’s website.

- Written outline / description of the development approvals and permitting processes, including costs and timelines.
- Simplified easy to understand explanation of processes.
- Current designations accommodate most developments without re-zoning.
- Development approvals / processes and timelines are illustrated on a flow chart.

▶ Appendix R: Opinion of Value – Marleau Real Estate Ltd., Brokerage

Les Immeubles
MARLEAU
Real Estate Ltd.
Brokerage

177 King Street, Unit 8
Sturgeon Falls, On.
P2B 1R6

PH:(705)753-3466
FX:(705)753-3468

April 13, 2016

RE: OPINION OF VALUE

Requested by: Markey Consulting

Owner: West Nipissing Municipality

Address: Property fronting on Leblanc Rd and Bay Rd

Lot: 5 Acre parcels in the proposed Industrial Park Serviced and Non serviced

Legal description: PT LT 7 CON A SPRINGER PT 2 & 8, 36R6022, EXCEPT PT 1 36R13099 & PTS 1,6 & 7 36R13294 & PTS 3,4 & 8 PL 36R13688, T/W PT 6 36R6022 AS IN LT223436

Proposed Industrial Park would consist of approx 5 Acres Parcels

In accordance with your request for an estimate of the market value of the subject property, I hereby certify that I have inspected the property and improvements mentioned herein and made the necessary investigation, which assisted me in arriving at my conclusion.

It is therefore my opinion as of the **20th day of April 13, 2016,** that the estimated market value for the subject property is: **Thirty Thousand Dollars($30,000.00) Non Serviced and Seventy Five to Eighty Thousand dollars ($75,000.00 to $80,000.00) Serviced**

Note: These Values are Based on 5 acre parcels only and are subject to change.

I hereby certify that to the best of my knowledge and belief, the information used to determine this valuation is true and correct.

Sincerely,

Shawn R Lavigne
Sales Representative
Marleau Real Estate Ltd, Brokerage

Les Immeubles
MARLEAU
Real Estate Ltd.
Brokerage

177 King Street, Unit 8
Sturgeon Falls, On.
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PURPOSE OF THE OPINION OF VALUE

The purpose of the opinion of value is to estimate the market value of the subject property.

MARKET VALUE DEFINED AS:

The highest price estimate in terms of money that the property will bring if exposed for sale on the open market, provided a reasonable time is given to find a purchaser who buys with the full knowledge of all uses to which the property could be adapted, or for which it is capable of being used. It is also assumed that neither vendor nor purchaser is under any pressure to either buy or sell.

EFFECTIVE DATE OF THE OPINION OF VALUE:

Fundamental to the concept of value is the idea of highest and best use, which may be defined as follows:

That use which would most likely produce the greatest net return in money or amenities over a given period of time, at the time of the opinion of value, in the case of **Industrial Lands Vacant** take the form of amenities such as pride of ownership, comfort and convenience.

Furthermore, such use should be legally permissible under the zoning ordinance and any other relative by-laws.

It is concluded that the highest and best use for the subject property would be the continuation of its present use as **Industrial Lands Vacant.**

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P2B 1R6

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CERTIFICATION

I hereby certify that I have personally inspected the within described property. That to the best of my knowledge and belief, the information and data used herein is true and correct. That I have no interest present or thereon. That neither the employment to make this estimate of value nor compensation is contingent on the amount of the value report, and that this estimate of value was prepared in conformity with the professional ethics of the Canadian Real Estate Association.

CONTINGENT AND LIMITING CONDITIONS

The legal description furnished to us is assumed to be accurate. We assume no responsibility for matters legal in character nor do we render our opinion as to the title, which is assumed to be good. We have made no survey of the property and assume no responsibility for its accuracy. We are not required to give testimony or attendance in court by reason of this estimate of value with reference to the property in question, unless arrangements have been previously made thereof.

It is assumed that there are no hidden or unapparent conditions of the property subsoil, or structures that would render it more or less valuable. No responsibility is assumed for such conditions or for engineering that might be required to discover these factors. Information identified in this report as being furnished by others is believed to be reliable although no responsibility is assumed for its accuracy.

Shawn R Lavigne
Sales Representative
Marleau Real Estate Ltd.Brokerage

TERANET

GEOWAREHOUSE® REPORT

This Report was prepared for:

Shawn Lavigne
175 Clark St
Sturgeon Falls,
P2B1A4
Phone 7054940768
Email shawnrlavigne@yahoo.ca

Property Detail Report

04/14/2016 02:03 PM

N/A

N/A

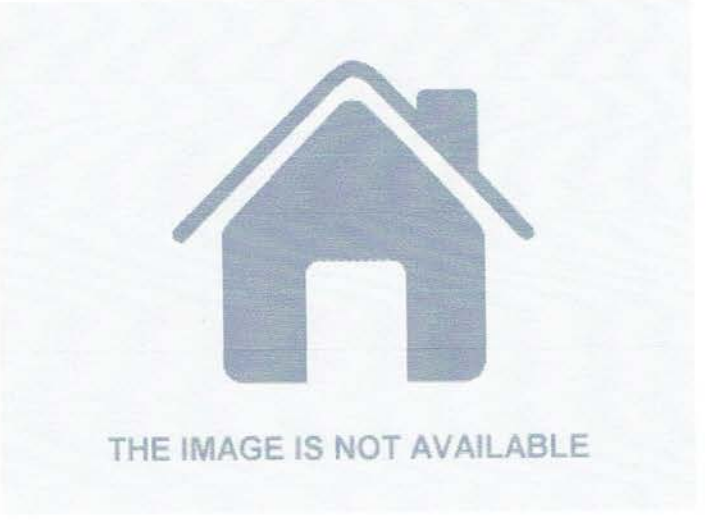
PIN 490760824

Property Details - PIN: 490760824

Address	N/A				
Municipality	N/A	LRO	36	Land Registry Status	ACTIVE
Registration Type	LT	Area	274,912 m2	Perimeter	4,445 m
Short Description	PT LT 7 CON A SPRINGER PT 2 & 8, 36R6022, EXCEPT PT 1 36R13099 & PTS 1,6 & 7 36R13294 & PTS 3,4 & 8 ...				

Aerial View of Property

Street View



Assessment Information

Not Available for this Property

Sales History

DATE	TYPE	AMOUNT
06/01/2004	T	$2

Full Property Description

PT LT 7 CON A SPRINGER PT 2 & 8, 36R6022, EXCEPT PT 1 36R13099 & PTS 1,6 & 7 36R13294 & PTS 3,4 & 8 PL 36R13688, T/W PT 6 36R6022 AS IN LT223436; WEST NIPISSING; DISTRICT OF NIPISSING

Reports Not the Official Record. Reports, other than the Parcel Register, obtained through Geowarehouse are not the official government record and will not necessarily reflect the current status of interests in land.

Currency of Information. Data contained in the Geowarehouse reports are not maintained real-time. Data contained in reports, other than the Parcel Register, may be out of date ten business days or more from data contained in POLARIS.

Coverage. Data, information and other products and services accessed through the Land Registry Information Services are limited to land registry offices in the areas identified on the coverage map.

Completeness of the Sales History Report. Some Sales History Reports may be incomplete due to the amount of data collected during POLARIS title automation. Subject properties may also show nominal consideration or sales price (e.g. $2) in cases such as transfers between spouses or in tax exempt transfers.

Demographic Information. Demographic Information is obtained from Environics Analytics. Environics Analytics acquires and distributes Statistics Canada files in accordance with the Government of Canada's Open Data Policy. No information on any individual or household was made available to Environics Analytics by Statistics Canada. PRIZM and selected PRIZMC2 nicknames are registered trademarks of The Nielsen Company (U.S.) and are used with permission.

The Property Information Services, reports and information are provided "as is" and your use is subject to the applicable Legal Terms and Conditions. Some information obtained from the Land Registry Information Services is not the official government record and will not reflect the current status of interests in land. Use of personal information contained herein shall relate directly to the purpose for which the data appears in land registry records and is subject to all applicable privacy legislation in respect of personal information. Such information shall not be used for marketing to a named individual.

Parcel Mapping shown on the site was compiled using plans and documents recorded in the Land Registry System and has been prepared for property indexing purposes only. It is not a Plan of Survey. For actual dimensions of property boundaries, see recorded plans and documents.

Price:	**$69,000**	MLS® #:	**201146022**
Status:	**Sold**		

Legal Descr.: **LT 15 36M618 EXCEPT PT 2 36R12500 T/W LT406875 S/T EASEMENT IN GROSS OVER PT 3 36R12504 AS IN BS50206**
Address: **7 TOULOUSE CRES**
City: **WEST NIPISSING, P2B 0A5**

Side of Road:		District:	**3**
Lot Size:	**166X356X279X163**	Sub-Dist:	**41**
Square FT/M:		Zoning:	**INDUSTRIAL**
Out.Dim.:			

Possession: **T.B.A.**
Closed: **08-SEP-2014**

Overview 7 TOULOUSE CRESCENT – Great opportunity to relocate your business to this new industrial park, west side of this lot is all on pavement, corner lot, excellent exposure, full town services available at a cost, lot is 166x356x279x163, frontage on two streets.

Type:	**Industrial, Vacant Land & Lots**	Heating:	**None**	Exterior:	**Other**
Sale/lease:	**For Sale Only**	Fire Protection:	**Other Fire Protection**	Driveway:	**Gravel, Paved**
Title to Land:	**Freehold**	Utilities:	**See Remarks**	Construction:	**Other**
Property Size:	**1.0 -2.99 Acres**	Rental Equipm.:	**None**	Internal Features:	**See Remarks**
Site Influence:	**Highway Access, Visual Exposure**	Documents:	**Legal Description**	Roof:	
				Floor:	

Inclusions
Exclusions

Floors:		Sign: **Yes**	UFFI:	Garage: **No**	Gar.Details:
Rental Income:	**NO**	Lockbox:	VPIS: **No**	Parking: **Yes**	Park.Dim.: **On site**
Building Age:					

Type	Net Rental Area	Rental Rate	Occupant	Lease Expiry
Industrial				

Heating:	Prop.Taxes:	Bus.Tax:
Electricity:	Water:	Insurance:
Int.Maint.:	Ext.Maint.:	Struct.Maint.:
Gross Revenue:	Total Expenses:	Net Income:
Lease Type:		

Assessment: **$** Taxes: **$ ()** Improvements:

Listing Office: **Page & Associates Realty, Brokerage** :
Sale Price: **$60,000** Sold: **19-AUG-2014**

Compliments of: **SHAWN LAVIGNE, Sales Person: 705-753-3466**
E-mail: shawnrlavigne@yahoo.ca
Company Name: **MARLEAU REAL ESTATE LTD., BROKERAGE: 705-753-3466**

Price: **$59,000** Status: **Sold**	MLS® #: **201146023**
Legal Descr.: **PCL PLAN-1 SEC 36M618 LT 16 PL36M618 SPRINGER T/W LT406875** Address: **9 TOULOUSE CRES** City: **WEST NIPISSING, P2B 0A5**	
Side of Road: Lot Size: **308X279X214** Square FT/M: Out.Dim.:	District: **3** Sub-Dist: **41** Zoning: **INDUSTRIAL**
Possession: **T.B.A.** Closed: **08-SEP-2014**	

Overview 9 TOULOUSE CRESCENT – Wonderful opportunity to relocate or establish your business in this new industrial park, just off of Highway 17, the Trans Canada Highway, tons of exposure with a 308x279x214 lot, full town services available at a cost.

Type:	**Industrial, Vacant Land & Lots**	Heating:	**None**	Exterior:	**Other**
Sale/lease:	**For Sale Only**	Fire Protection:	**Other Fire Protection**	Driveway:	**Gravel**
Title to Land:	**Freehold**	Utilities:	**See Remarks**	Construction:	**Other**
Property Size:	**1.0 -2.99 Acres**	Rental Equipm.:	**None**	Internal Features:	**See Remarks**
Site Influence:	**Highway Access, Visual Exposure**	Documents:	**Legal Description**	Roof:	
				Floor:	

Inclusions
Exclusions

Floors:		Sign:	**Yes**	UFFI:		Garage:	Gar.Details:
Rental Income:	**NO**	Lockbox:		VPIS:	**No**	Parking:	Park.Dim.:
Building Age:							

Type	Net Rental Area	Rental Rate	Occupant	Lease Expiry
Industrial				

Heating:	Prop.Taxes:	Bus.Tax:
Electricity:	Water:	Insurance:
Int.Maint.:	Ext.Maint.:	Struct.Maint.:
Gross Revenue:	Total Expenses:	Net Income:
Lease Type:		

Assessment: **$** Taxes: **$ ()** Improvements:

Listing Office: **Page & Associates Realty, Brokerage** :
Sale Price: **$50,000** Sold: **19-AUG-2014**

Compliments of: **SHAWN LAVIGNE, Sales Person: 705-753-3466**
E-mail: shawnrlavigne@yahoo.ca
Company Name: **MARLEAU REAL ESTATE LTD., BROKERAGE: 705-753-3466**