



Fisgard Lighthouse in Colwood

City of Colwood Economic Development Strategy

September 2014





The Lagoon neighbourhood in Colwood.

Table of Contents

Introduction	
Sustainable Economic Development	4
Objectives & Outcomes	6
Approach & Methodology	8
Financial & Budgetary Implications	9
Strategic Planning Process	10
Situational Analysis	12
Stakeholder Consultation	14
PEST Analysis	16
SWOC Analysis	18
Alignment with other plans	20
Best Practice Review	22
The Context for Economic Development	24
Strategic Priorities	26
A formula for success	32
3 Strategic Actions to Stimulate Change	34
An Economic Development Strategic Plan for Colwood	36
A vision for success	37
Goals, Objectives & Actions	38
Implementation	46

City of Colwood
Economic Development Strategy
September 2014

Prepared by Millier Dickinson Blais
for the City of Colwood

Sustainable Economic Development



Royal Roads University in Colwood

**Colwood population
projected to grow 108%
by 2038**

**2011: 16,093
2038: 33,553**

The City of Colwood is forecasted to grow from an estimated 16,093 people in 2011 to 33,553 people by 2038. In fact, Colwood is anticipated to absorb approximately 31% of the projected population and account for 26.6% of employment growth directed at the Capital Region's West Shore over the next 25 years. There are a number of considerations for the City in managing this growth, not the least of which is how it will leverage an expanding regional economy for its growing population, while at the same time attracting high-value, knowledge-intensive jobs, investment and related activities within the City itself.

An Economic Development Strategic Plan provides the City with an opportunity to define the character and trajectory of this growth, as opposed to letting the growth define what the City will become. As such, the approach to economic development for Colwood is premised on respect for and protection of the City's history and heritage, as well as recognition of the City's future. Colwood is in a fortunate position at this time of being able to define its growth as a community based on the principles of environmental stewardship and quality of place. This idea is premised on the notion that high-value business and jobs will follow

where people want to live, and that the City has a unique opportunity to differentiate itself from its regional neighbours and partners by focusing on the elements that will attract these newcomers.

Indeed, considering both the current context and the growth that the City will be facing, economic development for the City will have to be premised on strategic planning (in a broad sense), asset management and sustainability of its existing resources – financial, social, cultural, and environmental. By acting strategically at this juncture, there is an opportunity to take a comprehensive and integrated approach to growth that will avoid the ‘we wish we had done...’ question many municipalities are now faced with.

Colwood’s unique natural setting and range of cultural assets has long been a draw for residents and visitors alike, and a contributing factor to the quality of life that Colwood offers. But past success may no longer be an indicator of future performance. With a highly integrated regional economy, growing levels of commuter traffic congestion, and the absence of a vibrant waterfront or a downtown that function as centerpieces for the City’s cultural, commercial, educational, recreational and residential growth agenda, Colwood is at a crossroads. Bold and strategic decisions are needed to secure the future of both the community and the local economy.

Bold and strategic decisions are needed about the future of both the community and the local economy.



Japanese gardens at Hatley Castle, Royal Roads University

Objectives & Outcomes



The Colwood Transportation Master Plan will create vibrant walkable neighbourhoods

Capitalize on emerging opportunities, while at the same time developing customized solutions to tackle the larger issues.

As anyone who is knowledgeable about economic development will appreciate, sustainable economic development is a complex undertaking. Building a successful strategic plan requires understanding how different parts of the regional economy can interact to generate new local economic development opportunities, identifying the tools to leverage opportunities, and having the resources and commitment to make it happen. This includes first and foremost, building and leveraging local capacity – economic, social, technological and political capacity and resources that include location, labour, capital, entrepreneurs and business composition.

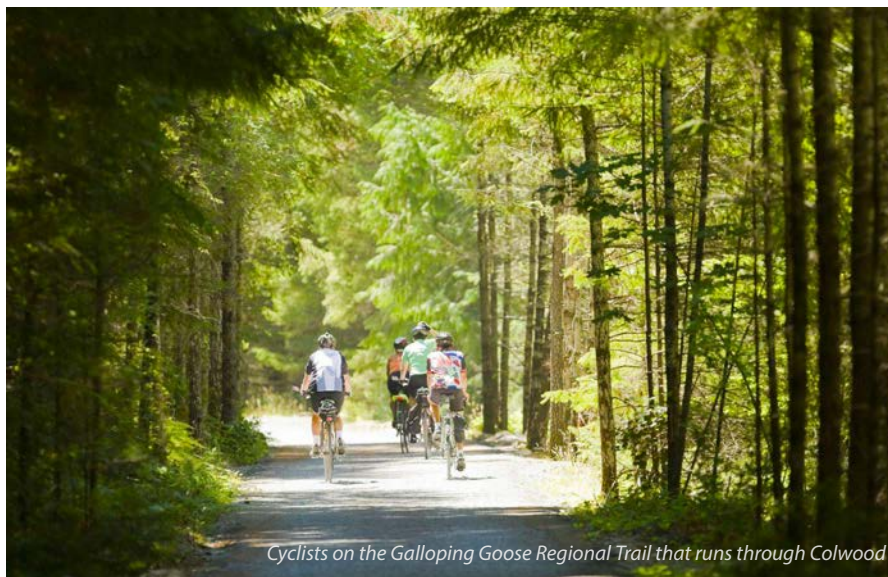
The City of Colwood Official Community Plan recognizes the importance of better positioning the community to capitalize on emerging opportunities, while at the same time developing customized solutions to tackle the larger issues that are impacting economic growth, both locally and in the region. Through the creation of this economic development strategic plan Colwood has expressed its commitment to address the implications of a shifting workforce, to bring better balance to the City's residential and business tax base and to spur the redevelopment of its City Centre, all the while promoting itself as a sustainable community by effectively leveraging its natural, social and economic assets.

The preparation of a five year Economic Development Strategic Plan for the City is the first step towards:

- Developing sustainable jobs well matched to local employment needs and opportunities;
- Supporting Colwood’s profile as a community with an attractive economic climate welcoming to new business opportunities;
- Building on local assets, resources, heritage and innovation; and
- Increasing the municipal tax base.

The primary outcome of this strategic planning process is to provide the City of Colwood with a forward-looking Strategic Plan for economic development with immediate, medium and long term actions that build on the vision of the City articulated in the Official Community Plan. The Strategic Plan also reflects the overall direction and intent of Colwood’s Transportation Master Plan, and provides solutions to Colwood’s economic challenges within the context of sustainable economic development and change management.

Immediate, medium and long term actions will build upon the vision articulated in the Official Community Plan.



Cyclists on the Galloping Goose Regional Trail that runs through Colwood

Approach & Methodology

Kayaking on Vancouver Island.

Understand current economic performance and leverage quality of place for future economic growth.

A critical component to the development of any sustainable economic development strategic plan, regardless of the size of the community, is an understanding of a community's performance against a range of local and regional socio-economic indicators. Combined with an analysis of current and emerging business investment trends, this information is used to inform a discussion of the city's current economic performance and quality of place experience and the degree to which this can be leveraged for future economic growth.

These results, together with stakeholder consultation efforts conducted in the spring of 2014 and a PESTLED (political, economic, social, technological, legal, environmental and demographic) and SWOC assessment (strengths, weaknesses, opportunities, challenges) were then prepared to provide further indication of Colwood's ability and capacity to support business investment and the city's value proposition for the attraction of business, investment and residents to the community.

Section 2 of this report summarizes some of the key findings derived from this process. The appendices to this report contain a more detailed understanding of the issues and forces that are shaping economic growth in Colwood.

Financial & Budgetary Implications

The Colwood Economic Development Strategic Plan is intended as a high level plan focused on the growth and diversification of the local economy over the long term. It does not include specific financial cost estimates for individual projects or actions. Costing will be done through the development of an overarching Implementation Plan and annual business plans that articulate the resources required to move the plan forward.

Direct investments in economic development will be the foundation to long term sustainability and resilience.

It must be noted that while direct investments in economic development may create fiscal pressures for the City in the short term, it will be the foundation to long term sustainability and resilience in the local economy.

Figure 1 illustrates the Strategic Planning Process for the Economic Development Strategic Plan.

FIGURE 1: STRATEGIC PLANNING PROCESS



Notes about data

In completing this report, Millier Dickinson Blais has made use of available 2006 and 2011 population Census and National Household Survey information for City of Colwood and the Province of British Columbia, as well as 2008 and 2013 business pattern data obtained from Statistics Canada.



Strategic Planning Process

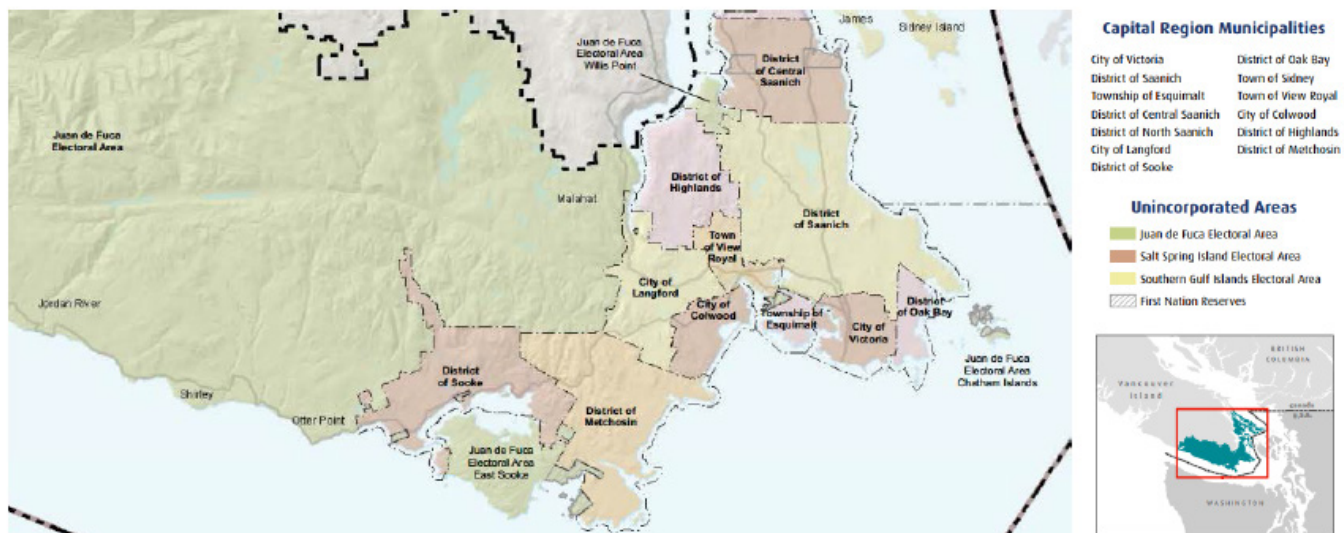
Sailboat heading out in the Strait of Juan de Fuca

The strategy development process began in March of 2014 with a review of background documents to establish the policy and planning context in which the economic development strategic plan is created and implemented. This included a review of such documents as the City’s Official Community Plan, the Capital Region District Strategic Plan 2012-2014, Capital Region District’s Regional Growth Strategy and Transportation Plan and the Greater Victoria Development Authority’s 2014 Business Plan, as well as other relevant staff reports and other economic development programming and initiatives underway in the region.

Colwood’s Economic Development Strategic Plan has also been informed by a comprehensive analysis of the local and broader regional economy – Figure 2 illustrates the location context for this analysis. Consideration has been given to current and emerging business and industry sector trends and relevant background studies and reports that have a direct impact on the city’s current and future economic development activities.

Plans must be informed by a comprehensive analysis of the local and broader regional economy.

FIGURE 2: CITY OF COLWOOD AND THE SURROUNDING REGION



Situational Analysis



Mother's Day Paint In at Hatley Castle

Colwood's employment levels will increase by 83.7% by 2038.

Population growth

Situational analysis of Colwood highlights the rapid rate of growth that has been experienced across the West Shore communities, including Colwood, over the past decade. From 2006 to 2011 Colwood attracted over 2,000 new residents to the community. The Capital Regional District projects continued growth across the West Shore, particularly for the communities of Colwood and Langford. By 2038, Colwood is projected to see an additional 17,460 new residents in the community.

Employment Levels

The Capital Regional District also projects that Colwood's employment levels will increase by 83.7%. The City is projected to absorb approximately a quarter of the total available jobs in the West Shore region by 2038. In total, both Colwood and Langford will comprise 80% of the projected population growth in the West Shore and 75% of the total employment growth.

Workforce

Despite the small size of the community, Colwood's workforce is growing due in part to the city's location in the West Shore and proximity to

the Capital. The workforce is also highly educated with the majority of workers holding management occupations in sales and service; business and finance and education, law and social, community and government services. This has resulted in Colwood's residents having a higher median household income than neighbouring communities.

Local Business

The situational analysis has also revealed that the City is home to more than 800 local and home based businesses. While many of these businesses have followed the population growth that has occurred in the West Shore in recent years, there are positive signs that Colwood is also attracting a greater number of professional, scientific and technical service firms including a growing number of knowledge based businesses.

Tax Rates

Despite the opportunities to attract more business growth and investment to Colwood, the City is at a competitive disadvantage when it comes to property tax rates for both residential and light industry/business categories and this has had the effect of deterring or stalling needed investment. The situation is further complicated by the fact that there is a limited inventory of land available for both commercial/office and industrial purposes.

Redevelopment

This suggests that the City will have to rely in large part on the redevelopment of its City Centre and Neighbourhood Centres and Mixed Employment areas along Island Highway and Sooke Road in order to achieve the employment levels (and associated densities) established in the Regional Growth Plan. A more detailed summary of the Situational Analysis and Commercial and Industrial Land Analysis can be found in Appendix B and C.

The findings from the situational analysis, stakeholder consultation process and PESTLED/SWOC are the basis for the goals, objectives and actions contained in the Economic Development Strategic Plan. The plan also assumes that Colwood will play a more positive role in developing the local and regional economy and provide the fiscal stability to support a vibrant sustainable lifestyle for all its residents.

Colwood is attracting a greater number of professional, scientific and technical service firms including a growing number of knowledge based businesses.

Stakeholder Consultation



Public workshop : Creating Vibrant Colwood Neighbourhoods

A comprehensive consultation and stakeholder engagement process was conducted.

The opinions of residents, local and regional community leaders, and members of Colwood’s business community help to ground the data and findings that underpin the Strategic Plan in the local reality of living and operating in the community. For this reason a comprehensive consultation and stakeholder engagement process was conducted. This effort has included internal strategic planning and visioning discussions, as well as one-on-one interviews, with City Council, senior municipal staff, key business representatives, First Nations representatives and economic development stakeholders.

This process was overseen by a Strategic Plan Working Group comprised of members of Council and senior staff from the City of Colwood and West Shore Chamber of Commerce. This effort has been further complemented by a broader public outreach effort, consisting of an online community survey. At each stage in the process primary consideration was given to identifying the City’s key opportunities for growth, as well as ideas for the implementation and execution of these opportunities.

In addition, the consulting team engaged grade ten business students at Belmont High School in a youth focus group; conducted an

economic development themed university-led student workshop that discussed economic development opportunities across the region; and participated in a joint community forum with the Transportation Master Plan. The findings from these efforts have been used to formulate the Economic Development Strategic Plan as it pursues an aggressive and sustainable economic growth agenda.

Key priorities that emerged from the consultation process include:

- Strong civic and community leadership is required to build the relationships with economic development partners, the business community and area municipalities.
- Economic development needs to be positioned as a core service for the City if Colwood is to capitalize on its economic growth potential.
- More effort needs to be directed at investment readiness including a vision and plan for the 'core' as the focus for future investment.
- A strong planning framework and fiscal plan is essential to gaining the confidence of the local and regional business community.
- Improved and increased programming for business recruitment and expansion is required including greater support for small business and entrepreneurs.
- Further enhancements to Colwood's quality of place are needed.
- Marketing and investment attraction efforts must improve and dovetail with West Shore Chamber of Commerce and Greater Victoria Development Agency initiatives.

A detailed Consultation Summary can be found in Appendix D.

The findings from these efforts have been used to formulate an aggressive and sustainable plan.

PEST Analysis



Aerial view of Colwood's Esquimalt Lagoon and surrounding neighbourhoods

Defining the PEST(LED)

A PEST (Political, Economic, Social, and Technical) analysis gives an overview of the external macro environmental factors that Colwood needs to take into consideration as part of the economic development strategic planning process. This analysis has been expanded further to include Legal, Environmental and Demographic (LED) factors.

For the purposes of this report the PEST(LED) is characterized as:

- **Political:** what are the key political drivers?
- **Economic:** what are the most important economic factors?
- **Social:** what are the main societal and cultural aspects?
- **Technological:** what are the current technology imperatives, changes and innovations?
- **Legal:** what current and impending legislation may affect the city?
- **Environmental:** what are the ecological and environmental considerations locally and further afield?
- **Demographic:** what primary demographic issues impact growth?

The following highlights the elements considered most relevant in the context of an economic development strategy:

Clearly defining all the factors that may influence Colwood's economic development.

Political Factors

- Province expanding BC Trade and Investment Offices
- Greater Victoria Development Agency to enhance region's foreign direct investment programming

Economic Factors

- Federal funding for west coast shipping and marine operations will expand Seaspan operations on Vancouver Island
- A stronger economic outlook predicted for the region
- Entrepreneurs and small-medium based enterprises will be key considerations in the region's future growth
- Post-secondary institutions contribute to a dynamic learning and business environment
- Niche resort development identified as a significant investment opportunity for British Columbia's tourism sector

A stronger economic outlook is predicted for the region.

Social Factors

- Workforce attraction efforts to offset skilled worker shortages
- Place-making is widely recognized as a key economic driver
- Diminishing investments in social infrastructure hamper access to economic opportunities for many residents of the Island

Technological Factors

- A strong innovation agenda contributes to a region's competitiveness

Legal Factors

- Better deployment of existing planning tools – Business Revitalization Zones, Business Improvement Areas and Inter-municipal Coordination of Regulations

Environmental Factors

- Sustainable growth and development a growing imperative

Demographic Factors

- Province's Labour Market Strategy reveals an aging workforce
- Positive rates of employment growth predicted for the region
- Lack of affordable housing limits the ability of younger families to live in Colwood

SWOC Analysis



Families enjoy the Colwood waterfront at Esquimalt Lagoon

The SWOC (Strengths, Weaknesses, Opportunities, and Challenges) analysis reflects on the information and insight that has been gathered and provides further indication of Colwood's ability and capacity to support the attraction, retention and expansion of business investment.

Strengths
Weaknesses
Opportunities
Challenges

Defining the SWOC

For the purposes of this report a SWOC is characterized as:

- **Strengths** (Positive, Internal): Positive attributes or assets currently present in Colwood, particularly in comparison to the CRD
- **Weaknesses** (Negative, Internal): Local issues or characteristics that limit the current or future growth opportunities for the City
- **Opportunities** (Positive, Internal and External): Areas where the City can remedy its weaknesses (e.g. learning from others, provincial / regional assistance, strategic initiatives, aggressive marketing or promotion, targeted investment, etc.)
- **Challenges** (Negative, Internal and External): trends that threaten Colwood's future and attractiveness to new residents and investment, from local weaknesses, global changes or shifts in consumer demand.

Strengths

- A diverse and growing regional economy
- Partners and resources to support economic development
- A planned regional transportation hub
- A growing post-secondary presence
- Unique natural setting and cultural assets
- Development of Royal Bay is a strong market indicator for investors
- A commitment to sustainability

Weaknesses

- Lack of profile for the Capital Region and West Shore
- Infrastructure improvements lagging growth
- Lack of investment readiness at the local level
- Vacant land and building availability limits growth potential
- Uncertainty created by local development approvals process
- High property tax rates eroding investment opportunities
- Small base of employment results in high levels of commuting
- Under-investment in the public realm undermines quality of place
- Lack of downtown contributes to lack of identity
- Housing options not reflective of needs of broader demographic
- Lack of community vision deterring investment

Opportunities

- Greater collaboration to resolve growth challenges
- Expanding supply chain resulting from investment in region's shipbuilding industries
- A growing technology sector bringing profile to the Capital Region
- A master plan for the City Centre and gateways
- Revitalization tax exemption programs to support development
- Increasing support for arts and cultural amenities
- Outreach with Royal Roads University, Camosun College and University of Victoria to support local business and education

Challenges

- Changes to planning framework will take time
- Costs associated with sustainability policies concern for business
- Stalled Capital City development gives a negative impression
- Ongoing budgetary and fiscal constraints at the local level

**Greater collaboration
to resolve growth
challenges.**

Alignment with other plans



Victoria Inner Harbour

In preparing the Economic Development Strategic Plan for Colwood, consideration has been given to a range of municipally and regionally-led plans that will have a direct bearing on the implementation of the plan and the overall development of the city in the coming years.

CRD Transportation Plan (2013)

The Capital Region has signalled the need to make significant improvements to transportation over the next 25 years which will greatly assist in enhancing the quality of life that residents currently experience. Technical data and transportation projections have shown that the region needs to address transportation issues as the region grows in the coming years. Not doing so will result in increased congestion, reduced economic activity, increased greenhouse gas emissions and a reduced quality of life for residents.

Seven principles were developed as a result of the transportation plan. These principles range from coordinated approaches to planning, reducing greenhouse gas emissions to enhancing the role for public transit. In Colwood's context the plan speaks to securing the development of Colwood's regional transportation hub and highlighting the hub as a key transportation node for travel between the West Shore communities and the Capital.

Regional plans will have a direct bearing on development of the city in the coming years.

Colwood Official Community Plan

The Official Community Plan provides the rationale and logic for how and where development and land use changes occur in the city of Colwood. It also embraces sustainability as a framework for community planning and development.

To make progress on community sustainability, the Official Community Plan applied eight fundamental sustainable goals that are to be applied to all aspects of community planning and development. These goals are:

1. Maximize the ecological value of natural areas. Where development occurs, maintain ecosystem values.
2. Develop or enhance environments that enable healthy choices in all areas of living that are safe, secure and welcoming for all.
3. Ensure healthy housing and food is available for all.
4. Ensure healthy recreational, educational, emotional, spiritual, artistic and cultural opportunities for all.
5. Ensure community planning and design celebrates the community's unique history and natural setting and embraces diversity.
6. Enhance economic vitality and opportunity. Ensure local employment and business opportunities.
7. Promote energy-use choices that reduce greenhouse gas emissions and contribute to clean air. Plan for climate change adaptation.
8. Promote efficient use and re-use of water and other resources. Reduce the consumption of non-renewable resources in favour of renewable resources.

The OCP provides the rationale for development and land use changes.

Colwood Transportation Master Plan (2014)

Coinciding with the development of the City's Economic Development Strategic Plan is development of Colwood's Transportation Master Plan. The Master Plan looks to improve how community members and visitors travel in and through the city using all modes of transportation. Colwood's transportation networks are intended to become a platform for building vibrant neighbourhoods, creating enjoyable streetscapes and trails, and that support the economic development of Colwood. A full review of these and other plans can be found in Appendix A.

Best Practice Review



Waterfront park in Edmonds, Washington

A high level scan of actions taken in other jurisdictions.

The best practice review is a high level scan of actions undertaken in other jurisdictions that address issues raised in the situational analysis, stakeholder engagement and assessment of strengths, weaknesses, opportunities and threats. Communities were selected based on size and growth patterns, access to a larger metropolitan area, high quality of life experience and similar regulatory environment.

Consideration has been given to the framework of their economic development strategies or programming as well as local land use policy.

The topics researched in the review were:

- Business retention and attraction
- Place-making
- Waterfront and Downtown development
- Revitalization zones
- Regional economic development

The communities considered for a best practice review included: City of Vernon, BC; District of Squamish, BC; and the City of Port Moody, BC.

Vernon

Vernon's Economic Development Strategy stresses the need to build firm relationships with existing businesses and employers, and to establish mechanisms to 'feel the pulse' of business and to improved business practices.

Networking opportunities are being enhanced and the City is partnering with other organizations in order to deliver on them. Initiatives include the development of an Investment Guide, and a Business Visitation program where established business leaders spend time with new business owners to share ideas and provide support.

Squamish

Squamish has appointed an Economic Development Officer and charged that position with developing a range programs and services. The City has conducted a Business Retention and Expansion survey, established regular networking events, promoted a Buy Local program and a Business Incubator program.

In addition, they support a youth entrepreneur program that encourages young people to stay in Squamish and develop their ideas into businesses. Squamish city hall has reviewed and improved their Development Approvals processes, and created a development incentives program involving tax advantages.

Port Moody

Port Moody is also undertaking many of the initiatives noted in Vernon and Squamish. In particular they have reviewed their bylaws to ensure that they are supportive of small, home-based businesses and reviewed available lands to ensure there is sufficient property available for both internal growth and new development.

A complete review of best practices can be found in Appendix F.



Context for Economic Development

Hatley Castle, home to Royal Roads University in Colwood

Without question, the City of Colwood has benefited from a strong regional economy, its proximity to the Capital and its unparalleled oceanfront location. These attributes will continue to afford positive benefits for residents of the community including access to employment, cultural amenities, and a wide range of recreational pursuits.

The City's efforts to advance community sustainability have also garnered the community with a strong reputation in the region that should be more effectively leveraged to attract like-minded residents and businesses.

Municipal initiatives such as Solar Colwood; the stewardship of the city's public parks; and the recent decision regarding Colwood's proposal to build an innovative sewer treatment facility using leading edge technology that will minimize the impact on the environment underpin this reputation. As the City moves forward with its sustainability agenda, it must proceed carefully and collaboratively with the business community, as many businesses continue to perceive there to be a high financial cost to going 'green'.

Colwood's success as a community however, has not resulted in a strong local economy. A high level of taxation coupled with the availability of vacant employment land has created an imbalance in property assessment ratios and led many to describe Colwood as a bedroom community. Many of those consulted throughout the development of the Economic Development Strategic Plan recognize the need to take bold steps to address the redevelopment of Colwood's City Centre and its major corridors, and to capitalize on the potential offered by the City's waterfront area if the city is develop as a complete community.

Improvements to local and regional transportation infrastructure is also essential including increased walkability, the need for local trails that integrate with the regional trail system and the planned investment in regional transit.

The discussion that follows summarizes the major themes and strategic priorities that emerged from the strategic planning process.

Many of those consulted throughout the development of the plan recognize the need to take bold steps.

Strategic Priorities



Colwood middle school students and local First Nations celebrate Royal Bay Secondary School groundbreaking

Collaborate to develop ideas and actions that capitalize on investment and economic development potential

Strong civic and community leadership is required to build the relationships with economic development partners, business community area municipalities and First Nations. The West Shore municipalities including Colwood have a role to play in the management of long term growth across the region and the advancement of shared economic development opportunities.

Issues identified earlier, such as infrastructure limitations, workforce sustainability, investment readiness, economic sustainability and land availability are common across the region. While the Capital Regional District is tasked with tackling the larger growth management challenges, greater impact may be achieved if the municipalities, business community and regional economic development partners within the region collaborate to develop ideas and actions that capitalize on the investment and economic development potential.

Colwood's Official Community Plan review provides an opportunity to re-emphasize the need for regional collaboration around issues such as transportation and sustainable development (e.g. shared service agreements which would assist in reducing costs and improving

efficiencies) but there are a wide range of local issues that require leadership and vision to move forward. Relationships need to be fostered at both the political and staff level to ensure effective solutions to the region's growth challenges.

Economic development needs to be a core service for the City of Colwood if Colwood is to capitalize on the economic growth potential in the region.

At present, Colwood does not have an Economic Development Officer to support its investment attraction and business retention efforts and has not allocated resources for any related programming or activities. In economic development as in business, an unknown opportunity is a missed opportunity.

With an increasingly competitive and rapidly evolving regional business environment, current information on business and industry trends and strong relationships with local businesses and regional economic development partners can inform investment attraction and business recruitment efforts. An economic developer officer, particularly in smaller communities can also be expected to champion a wide array of community based initiatives that go to support a community's long term sustainability (e.g. local food initiatives, farmers markets, community improvement programming, festivals and event planning, cultural planning etc.)

There are a range of stakeholders in the region already delivering economic development and related services across the region. As well, several of the local municipalities have either dedicated economic development staff, or staff in other departments with economic development functions. Where possible the city needs to identify and clarify where it can add value to local initiatives, but also where a broader more regional approach to an economic development opportunity or issue is required (e.g. investment attraction). Many of the stakeholders expressed a desire for collaboration and cooperation if it enabled them to leverage the knowledge and experience of the larger economic development community.

Colwood is attracting a greater number of professional, scientific and technical service firms including a growing number of knowledge based businesses.

More effort needs to be directed at investment readiness, including a vision and plan for the 'core' as the focus for future investment.

Investment readiness is the ability or capacity of a community to support projects and activities that would attract or grow new business investment or jobs in a city. Businesses relocate, or open a new location when business needs or conditions motivate a change in location or expansion; for example, when a business expands beyond the capacity of a particular site or market. How a community responds to these opportunities often determines the success of attracting this investment.

How a community responds to opportunities often determines the success of attracting investment.

To be investment ready a municipality must first understand its competitive position (costs, land, buildings, workforce and land use and zoning,) and the investment or businesses that it is looking to attract. This informs the development of a strong value proposition that is then reflected in website content, key messaging, marketing material etc. Often this includes business and lifestyle factors and financial incentives that will appeal to prospective investors or businesses.

Colwood has a limited inventory of vacant commercial and industrial lands with which to attract investors, suggesting that much of the business recruitment and investment attraction will rely on redevelopment potential. Though there are some infill opportunities, particularly in the commercial land supply, there are limited designated and zoned properties available over the shorter term. This limits the types of commercial/industrial activity that the City can accommodate.

The City's focus on community sustainability also implies the desire for higher employment densities (high value, knowledge based jobs) that could reduce the amount of commuting currently taking place. Given these factors Colwood's 'City Centre' needs to be more effectively positioned as a regional commercial core for knowledge, education and creative-based industries. A bolder vision of an urban core that includes strong public realm elements, housing, entertainment, live-work opportunities and mixed use development is essential.

The Official Community Plan's policies are intended to ensure that the 'core' is planned for sufficient and appropriate floor space capacity to meet local and regional demands, includes and identifies sites for office development, works with development proponents to attract 'anchor' office/business tenants through proactive development partnerships, and supports those businesses whose needs cannot be met within the 'core' area in other locations in the city.

A downtown revitalization strategy (with flexible zoning - e.g. 'Kings Regeneration' Toronto) is required to ensure that this key area of the community develops as envisioned in the Official Community Plan. This includes the integration of a regional transit hub, an appropriate road and trail network, as well as the use of revitalization tax incentives to attract needed investment to the area. A key element in the revitalization planning should be the relocation of the Colwood's City Hall to the downtown as part of a new mixed use development. This could be accomplished in conjunction with a development partner thus providing the needed kick start to investment in the 'core'.

A strong planning framework and fiscal plan is essential to instill confidence in the local and regional business community.

Many of the businesses consulted as part of the strategic planning process expressed a lack of confidence in Colwood's development approvals process and a belief that historically, the City has not been supportive of or responsive to the needs of business. Input suggests that Colwood's development approvals process has impeded rather than enabled good development with the most prevalent concerns being the lack of integration between the Planning Department and other city departments, the timeliness with which applications were processed and the perceived 'eleventh hour' requests for changes to development plans. The complicated nature of the City's zoning bylaw was also seen as hampering development in the City Centre, as was the City's property tax levels for commercial/office development. The lack of consistency on the part of Council in its handling of development applications was also thought to be impacting Colwood's competitiveness relative to other communities in the West Shore.

Weaknesses related to bureaucracy and city policy, whether real or perceived, need to be addressed to ensure that Colwood can continue to attract new investment and support and enable the development of existing businesses. Colwood must also address the property tax burden for non-residential properties and businesses. Consideration should be given to an examination of the financial tools available to the community including a property tax freeze for non-residential development, pre-zoning of land, revitalization tax exemptions or the waiving of development fees. It should be noted that the City's current efforts have been recognized and applauded by the development community.

Develop a strong planning framework and fiscal plan to instill confidence.

Programming for business development expansion is required including greater support for small business and entrepreneurs.

Business retention and expansion programming (BR+E) is a valuable tool that provides information about emerging strengths and challenges facing the local economy and more specifically, the local business community. Given the economic impact and job creation attributed to existing business, this type of economic development programming must be factored into a city's economic development effort.

In Colwood, significant changes in the business community have been observed in recent years, including a growing number of professional service firms and an increasing number of sole proprietor or home based businesses. In this regard, BR+E surveys can help to inform the City's understanding and response to the needs of a particular sector or sub-sector, and in some instances it may also help to retain business investment and employment in the area. Participants in the consultation phase of this project have suggested that not enough is being done to retain and grow the businesses already present in the city.

An effective BR+E program however, is not a one-off exercise. Municipal and economic development staff must ensure that regular and thorough interviews are conducted with the local business community (e.g. top 25 businesses/enterprises), in order to be properly informed as the needs of those businesses or sectors and to provide relevant business support services. Further, data gathered through BR+E programs can inform the success of larger regional economic development programming (e.g. workforce attraction initiatives) and support investment attraction activities by identifying local supply chain opportunities.

Enhancements to Colwood's quality of place experience are needed

The need for focused attention on enhancing the quality of place, vibrancy and aesthetic appeal of Colwood was a common theme in the consultation process and a key consideration in the attraction of residents, visitors and business investment. There was general consensus that the city needs to do more to foster and promote high quality development in key areas of the city that combines commercial, residential, and cultural development opportunities. This includes providing a stronger public realm environment that is more pedestrian oriented (e.g. trails, bike paths, sidewalks, plantings, and parks), as well as enhanced streetscaping along the City's key corridors.

Support for small businesses to retain and attract new business activity.

Particular attention also needs to be directed at creating a City Centre that accommodates retail, office, recreation, residential and arts and cultural activities etc. It was suggested that a more holistic approach to land use and infrastructure planning in the downtown was necessary rather than the piecemeal approach that is currently underway. In this regard it would be appropriate to include the Mixed Use Employment Area along Island Highway as part of the City Centre discussion.

The City's Transportation Master Plan places an emphasis on building strong neighbourhoods through the creation of vibrant streets and trails, while the Official Community Plan promotes thoughtful urban design as one of the community's most powerful tools to advance quality of place.

Successful 'placemaking' brings partners from the public, private, non-profit, and community sectors together to strategically shape the physical and social character of a neighbourhood, core or city. Placemaking can be used to enhance a community's quality of place by animating public and private spaces (e.g. public art, festivals and events programming, community gardens and local food initiatives), rejuvenating structures and streetscapes (e.g. façade improvements and streetscaping), improving local business viability (e.g. business recruitment, upper storey housing) and public safety (e.g. increased pedestrian activity).

Marketing and investment attraction efforts must improve and dovetail with West Shore Chamber and GVDA initiatives There is a growing trend towards branding of a community's economic development effort to more effectively market the City to business, industry or future residents/employees. The City needs to devise an economic development marketing strategy that more effectively engages and informs business and industry on local economic development activities and programming, and profiling the current range of business and investment activity in the City. Colwood has some excellent local business stories to tell, together with the economic opportunities associated with Royal Roads University, Department of National Defence, and the investment underway by Seaspans Marine Corporation. To do this effectively at the provincial or national level, the City will need to work with organizations like the West Shore Chamber of Commerce, the Greater Victoria Development Agency and the Victoria Advanced Technology Council (VIATeC). If Colwood is to attract the residents, visitors and business investment it wants and needs, it must embrace more comprehensive communication techniques and technologies that will resonate with this larger audience.

**Engage and inform
business and industry
on local economic
development activities.**

A formula for success



Royal Bay Development site in Colwood

The degree to which communities can work together increasingly determines the degree of their success.

The Economic Development Strategic Plan and actions contained in this report represents the first step in the business planning process that that will establish the economic development priorities for the City, articulate the resources required to move forward with the plan's implementation and foster a collaborative and cooperative approach to sustainable growth.

The creation and implementation of the Strategic Plan however, cannot be done in a vacuum. It is not possible for one municipality, region, province or country to make a decision regarding its economic fate that does not impact (or get impacted by) the decisions of its neighbours.

While "innovate or die" is a common mantra of both corporations and communities seeking to get an edge in the global economy, municipalities today are better served under the principle of "cooperate or die". Indeed, the degree to which communities can work together and leverage their economies of scale in the attraction of investment – either through formal organizations or informal mechanisms – increasingly determines the degree of their success.

Regional cooperation and collaboration is often seen as a sign of the growing 'sophistication' of economic development programming both by senior levels of government and private sector investors.

As a city of 16,093, Colwood has a limited asset base in terms of clusters of employment or industrial activity; similarly there is a limited concentration of cultural activity aside from notable 'flagship' heritage sites such as Hatley Castle and Fort Rodd Hill. By population, Colwood comprises only 10.3% of Greater Victoria region and 27% of the population of the West Shore. Though the City has many advantages inherent in its natural heritage and proximity to the Capital, the current lack of available high quality employment land and buildings or a central core or downtown means that competition with larger and better-resourced neighbours will rarely be in its favour.

As such, the City needs to determine opportunities for regional collaboration and cooperation that show a high likelihood of return and reward and be prepared to contribute to those efforts. There are a number of regional assets in a state of growth or change that represent a potential opportunity or 'fit' for Colwood, including Royal Roads University and the Victoria Shipyards.

In addition, many of the 'high-priority' or 'high-value' initiatives that are, or have been, in the City's crosshairs – such as the creation of a regional transportation hub at Colwood Corners and the resolution of the City's sewage treatment needs – while largely dependent on the support, advocacy and/or decisions of the regional and provincial governments represent a significant step forward in the community's desire for sustainability.

A strong relationship with regional economic development partners such as the Greater Victoria Development Agency, the Victoria Advanced Technology Council (VIATech) and the West Shore Chamber of Commerce will also better enable the City to market to and attract national and international investors, secure economic development funding from upper levels of government and draw attention to the city's desire to create a sustainable and vibrant community. This regional collaboration, when done as a complement to local economic development efforts, can direct new opportunities to the City that would otherwise be unavailable.

3 strategic actions to stimulate change



Latoria Walk development in Colwood

Ongoing change is a positive sign of a healthy community.

Ongoing change is a positive sign of a healthy community. In order for Colwood to be successful - economically, aesthetically and in terms of its quality of life - it must promote itself as, and become, a community that includes and supports businesses, culture, social activities and community events, with a focus on new residential and commercial development opportunities.

Experience in other jurisdictions across Canada suggests that the successful implementation of an economic development strategy requires that the municipality focus their activities into three basic categories. In a general sense, starting and sustaining the successful evolution of Colwood will require that public sector partners lead the way. The private sector will respond only when a clear and substantial level of commitment is established by the public sector.

1. Establish the environment for change

Establishing the environment for change begins by having a clearly stated and supported “vision” for the future. Public sector investment in streetscapes, water’s edge promenades, new park space and trails, as well as the downtown sends an important message of commitment to the development industry. A supportive administrative structure including appropriate land use policies and zoning helps remove confusion, and establishes the environment for change.

2. Reduce the risk of development

Reducing the inherent risks of the planning approvals process is also necessary because the development industry is typically conservative, and averse to risk. The public sector needs to promote and champion private sector investment and redevelopment (both residential and commercial) that achieves the vision established for the community.

As-of-right planning approvals, created and promoted by the public sector (including the preparation of sub area plans, introduction of revitalization zones or the pre-zoning of development sites), will reduce the time and risk of the planning approvals process, and will be seen as a key redevelopment incentive. The municipality must ensure political will and administrative support for this effort (e.g. MOU’s with the landowners).

3. Reduce the costs of private sector development

Reducing the costs of private development is required because in many instances, existing planning and fiscal policy makes redevelopment too costly. Indirect cost savings should be promoted within some areas of the City of Colwood including reduced parking and parkland standards, as appropriate. More direct financial incentives can include tax exemptions, direct grants or loans for appropriate forms of development, as well as façade and landscape improvement grant programs.



An Economic Development Strategic Plan for Colwood

Vision

Vision statements present an image of future success, based on what is attainable in reality – it should also be built on the strengths, opportunities and capacity of a community. The City of Colwood Official Community Plan established a vision for the community:

“Our sustainable community, nestled in a rich network of hills, creeks, lakes and the sea, is defined by attractive, compact and complete centres connected by multi-modal transportation corridors.

Our sustainable community is welcoming and inclusive for all and is planned and designed to support the needs of a diverse and changing population.”¹

Building on this vision and the input received throughout the strategic plan development process, the following vision statement has emerged to inform the development of the Economic Development Strategic plan.

“Our sustainable community is innovative and forward thinking in its approach to economic development reflecting both the needs of our business community and our desire for a balanced and sustainable approach to growth.”

A vision statement presents an image of future success.

Setting out goals

The City of Colwood Economic Development Strategic Plan is underpinned by three high level goals, intended to anchor and qualify all strategic initiatives or ensuing actions on the part of the City over the next five years. The goals support the City’s overarching vision as stated in the Community Official Plan as well as the desired outcomes of the economic development planning process.

It should be noted that the list of actions is a prioritized starting point based on community input and research at a point in time. It is by no means an exhaustive or comprehensive list of all the potential actions for the City of Colwood. New actions will emerge throughout the lifespan of the Strategic Plan. It will be critical for effective implementation to continually assess how these new actions contribute to overall success.

Goals, Objectives & Actions

Perimeter Park in Colwood

For the purposes of the Colwood Economic Development Strategic Plan the **goals, objectives** and **actions** are defined as follows:

- **goals:** the vision and desired outcomes that emerged from the strategic planning process and a view of the aspirations of the City's citizens and stakeholders
- **objectives:** how these goals are to be achieved and what must be accomplished in the next five years
- **actions:** direct the City and its stakeholders to those essential issues or opportunities that must be addressed over the length of the plan.

Goal One:

Foster partnerships that advance economic sustainability

Objective: to demonstrate leadership in advocating for and support collaborative economic development as a way to advance local priorities

Actions:

1. Position economic development as a core service for Colwood through the hiring of a full time economic development manager to oversee the implementation of the Economic Development Strategic Plan.

- The economic development manager will build the necessary relationships with economic development partners, the regional business community and area municipalities.
 - The economic development manager will prepare an annual business plan that details all actions planned for the fiscal year (with relevant performance metrics) and provide an annual report on the achievements in implementing the efforts of the previous year. The economic development manager will provide bi-annual progress updates to both municipal council and the community at large.
 - The economic development manager will engage economic development partners (GVDA, Industry Associations, Chamber of Commerce, RRU, DND, First Nations, Coastal Collective, border municipalities etc.) on a consistent and ongoing basis to gain an understanding of programming and partnership opportunities available to Colwood.
 - The economic development manager will assist with the creation of working groups around specific projects or initiatives, when required.
 - The economic development manager should take the lead on assisting potential investors and area businesses to navigate the development approval process and assist in navigating the programming and funding offered by the City, province or the federal government.
2. Prepare and maintain a Community Profile and Business Investment Profile (e.g. www.airdrie.ca) that can be leveraged by GVDA and the West Shore Chamber of Commerce in their efforts to attract future residents and workers, businesses and prospective regional, national and international investors to the region.
 3. Initiate a crowdsourcing initiative for the City of Colwood to raise money for small businesses and solicit input on community development projects. Work with Royal Roads University, Camosun College, VIATeC, UVic and area high schools to identify projects that will facilitate economic activity, social innovation, support local entrepreneurs and start-ups and foster community pride.

4. Give consideration to the creation of a Community Investment Fund that will foster partnerships with not for profit organizations and neighbourhood associations in nurturing, enhancing and celebrating Colwood's unique cultural, artistic and recreational attributes.
 - The policy should apply to eligible not for profit organizations requesting monies from the city to host festivals and events and/ or eligible neighbourhood associations requesting funds for neighbourhood capacity building initiatives;
 - The policy should build local capacity in the community by enhancing the unique arts, cultural and recreational aspects of Colwood through events, festivals and neighbourhood projects; and
 - The policy should enable social connections between various groups in the community and contribute to Colwood's sense of identity, place and community.
5. Work with the West Shore Chamber of Commerce, the Coastal Collective and surrounding municipalities to complete a West Shore Cultural Asset Mapping exercise that will further nurture the development of the region's cultural and cultural tourism sectors and increase public awareness and participation in available programming and activities and improve the long term sustainability of the assets themselves. This includes improving upon Colwood's current community green map.
6. Develop a Sustainability Roundtable Series with Royal Roads University that invites local residents and the businesses to participate in conversations about sustainability, community-minded commerce, place-making, local food, creativity and education⁴.
7. Engage VIATeC and Royal Roads University in discussions around the opportunity and feasibility of locating a satellite business incubator that would serve business start-ups and provide entrepreneurial programming for the West Shore communities.
 - Revisit and revise the Memorandum of Understanding between Royal Roads University and the City to confirm opportunities for ongoing collaboration and cooperation.

8. Partner with First Nations in discussions on economic development opportunities, such as the opportunity to locate a Cultural Centre in the City of Colwood.
9. Engage the Department of National Defence in a discussion of the forthcoming Master Plan for the DND lands within Colwood.
 - Pursue opportunities for the divesture of lands along Sooke Road as part of the City's efforts to draw investment to the corridor.
 - Determine the recreational needs of DND's service personnel in Colwood and Esquimalt and the opportunities for a shared use arrangement as a way to ensure the long term viability of the Juan De Fuca Recreation Centre.

Objective: to balance the need for growth with the community's unique cultural, heritage and environmental values

Actions

10. Prepare a Downtown Revitalization Plan for the City of Colwood that will foster the development of a well-functioning and vibrant commercial area and residential neighbourhood. The plan should implement a simplified planning policy regime (OCP and Zoning) that outlines the desire for a compatible mix of uses, building heights, urban form, street network, open spaces, parking and parkland requirements and potential revitalization incentives. The City Centre land use policies and zoning should be expanded to include the Mixed Use Employment Area along Island Highway given its premier gateway location in the City.
 - Confirm the feasibility of relocating Colwood's City Hall to the City Centre as part of a larger mixed used development opportunity that would kick-start investment in the area.
 - Issue a formal Expression of Interest to solicit partners in the development of a mixed used building that incorporates City Hall in conjunction with retail and additional office space.

Goal Two:

Create an attractive and liveable oceanfront community

11. Secure the commitment and financing for the construction of a Regional Transit Hub in Colwood's City Centre as part of the City's efforts to establish a downtown that functions as a civic, recreational and employment centre for the City and region.
 - Give consideration to pre-zoning for the desired types/forms of development in the City Centre in advance of development applications. Zoning should be inclusive and simple based on the desire to regenerate/revitalize the area.
 - Introduce a revitalization tax exemption policy geared to the attraction of mixed use development in the City Centre.
12. Undertake public realm improvements to Sooke Road between Goldstream and Veterans Memorial Parkway commensurate with its role as a major urban corridor for Colwood:
 - Street edge improvements (e.g. landscaped strips with trees, shrubs, planters, street furniture) that reinforce it as pedestrian space; and
 - Traffic calming through the introduction of sidewalks and bike lanes.
13. Complete a comprehensive Waterfront Plan (and proforma) that articulates the community's vision for all the lands within its jurisdiction. This would include the lands owned by DND, those managed by RRU, and those currently under development planning in Royal Bay. As the last stretch of undeveloped and under-developed waterfront in the region, the Plan should outline the planned roles and functions of this 'Waterfront Precinct', how it will be connected to the City's neighbourhoods, how it will be accessed and used by residents and visitors and how it will contribute to the City's sustainability goals. This land has great economic potential to add to the City's public realm, and to showcase its environmental, recreation and tourism values and opportunities. Specific actions would include:
 - Pursue opportunities to strengthen the post-secondary presence.
 - Pursue opportunities to secure a performing arts centre/cultural centre to the waterfront area.
 - Work with the Coast Cultural Cooperative to enhance the opportunities for cultural tourism

- Having completed the Waterfront Plan, initiate discussions with area MLAs and MPs to secure financial support for the redevelopment of Colwood’s waterfront and proposed public realm improvements.

14. Provide further enhancements to Colwood’s quality of place experience as a means to differentiate the community in its efforts to attract future residents, visitors and investment to the City. Specific actions should include:

- Gateway and way finder signage.
- Improved public access to the water’s edge and public use of waterfront amenities. Provide gathering spaces that will draw residents and tourists, host community events and support festivals and events in the community.
- Improvements to the City’s trail system and bike paths as a way of enhancing mobility in Colwood and strengthen the relationship between residents of all ages and the city they live in. Identify opportunities to provide connections to regional trail and a bike path through Royal Roads University/DND lands.
- Identify opportunities to more effectively link the City’s waterfront with the City Centre by supporting improved access to the waterfront areas (e.g. trails, bike paths, public transit).

15. Advocate for the development of a regional Cultural Plan and Cultural Asset Inventory to support the further development of the arts, culture, recreation and place based cultural tourism.

- Create a searchable database and asset map of tourism and cultural resources in the West Shore.

16. Provide a continuum of housing options to accommodate the broadest demographic and improve overall levels of affordability including opportunities for live-work and senior housing.



Coast Collective Art Centre at Pendray House in Colwood

Goal Three:

Provide a supportive environment for business and investment

Objective: To enhance the City's competitive advantage for attracting and retaining local jobs and business investment opportunities

Actions

17. Add a state of the art and innovative economic development component to the City's website (e.g. <http://www.squamish.ca/business-and-development/economic-development>) as a way to distinguish Colwood from other west shore communities and highlight the City's vision for economic development.
 - Prepare a community investment profile that illustrates the characteristics of the City as it relates to key socio economic indicators, community sustainability initiatives, planned investment and key employment sectors in the region. Include profiles of innovative local companies in each sector.
 - Leverage the site to communicate accurate and up to date information to residents and the development/investment community on the progress or status of major development initiatives (e.g. Royal Bay development, City Centre development, downtown revitalizations efforts etc.)
18. Maintain an inventory of available serviced and un-serviced commercial and industrial land and buildings, and make the information available on the City's website. The following information should be included at a minimum:
 - parcel size
 - privately or municipally owned
 - contact information
 - zoning and servicing information
19. Facilitate regular meetings between the City's Economic Development and the city's development/investment community, as a way to ensure an understanding of issues and challenges facing developers/investors in the City and discuss opportunities to improve the overall investment climate.
20. Consider the introduction of a Development Review Team approach modeled by other high functioning communities as a

way to expedite the development approvals process. As part of this effort the City should communicate its intent to the development community.

21. Introduce revitalization tax exemptions for Colwood's City Centre and Neighbourhood Centres as a way to increase commercial/office investment in these areas.
22. Launch a Business Retention and Expansion Program with local businesses and the area Chamber of Commerce, (including home-based businesses) to determine the ongoing needs of businesses and build a network of stakeholders in the community that can assist in the implementation of the short-term actions in the strategy.
 - Work with the West Shore Chamber of Commerce to promote and deliver small business seminars geared to e-marketing, website development, business networking, workforce planning and marketing and succession planning. Connect small businesses with senior business leaders in the region who can act as mentors and coaches.
23. Develop a Business Guide to Planning and Building Services that outlines services and processes of the city departments to assist with new investment and business expansion opportunities.
24. Work with Royal Roads University to leverage and promote their entrepreneurship oriented applied research programs and initiatives for local businesses.
25. Foster an entrepreneurial spirit among students and youth (18-30 years) in Colwood.
 - Examine and catalog existing programs and opportunities that currently support youth entrepreneurship in the region. Promote existing services.
 - In partnership with RRU, develop/expand youth entrepreneurship opportunities to identify and

Implementation



Royal Bay Secondary School under construction in Colwood

Commitment is required to ensure the effective implementation of the plan.

At present there is no budget for the delivery of Colwood's Economic Development Strategic Plan. We anticipate that the implementation of this plan will require the services of a full time senior economic development manager together with administrative support. The City has already created a marketing and communications position which should work closely with the economic development manager.

The recommended actions also suggest that additional expenditures beyond salaries and benefits will be required to implement proposed actions in the coming years. Given the time lines required to achieve successful outcomes in economic development, consideration should begin as to the necessary financial commitment to ensure the effective implementation of the Strategic Plan. This should include the availability and sustainability of external funding/grants derived from other government sources.

Given the ongoing efforts of the Greater Victoria Development Agency, VIATeC, Tourism Victoria, Victoria Arts Council etc. as it relates to a number of action plan recommendations – tourism, marketing, investment attraction, and sector development, it will be essential that Colwood look to capitalize and leverage the larger regional efforts to drive economic growth and investment.

A detailed implementation plan is available in Appendix G.

Appendix Report Colwood Economic Development Strategy

September 2014

Contents

APPENDIX A: CITY FRAMEWORK REVIEW	1
REGIONAL CONTEXT	1
COLWOOD CONTEXT	5
APPENDIX B: ECONOMIC BASE ANALYSIS	12
DEMOGRAPHIC PROFILE	12
OCCUPATIONAL PROFILE	21
LABOUR FLOW CHARACTERISTICS	26
BUSINESS PROFILE	27
APPENDIX C: COMMERCIAL AND INDUSTRIAL LAND ANALYSIS	32
OFFICIAL COMMUNITY PLAN POLICIES	32
LAND USE BYLAW POLICIES	33
LAND BASE OBSERVATIONS	35
APPENDIX D: CONSULTATION SUMMARY	37
SUMMARY OF COMMUNITY ENGAGEMENT	37
SURVEY RESULTS	43
APPENDIX E: PEST(LED) AND SWOC ANALYSIS	62
PESTLED ANALYSIS	62
SWOC ANALYSIS	68
APPENDIX F: BEST PRACTICE REVIEW	77
APPENDIX G: DETAILED IMPLEMENTATION PLAN	85

Appendix A: City Framework Review

Regional Context

Capital Regional Strategic Plan (2012-2014)

The 2012-2014 Strategic Plan builds on the 2009-2011 Plan by taking into account broader global trends. It reiterates a pragmatic view that considers social, economic, environmental costs and benefits in all decisions.

- **Regional Cooperation:** To achieve greater confidence in regional governance, the plan looks to arrive at an understanding of shared interests, increase engagement with First Nations communities, and better communicate with citizens, agencies, and governments.
- **Regional Transportation and Planning:** The goal is to increase the quality of life while decreasing greenhouse gas emissions. A regional system making better use of integrated land-use systems means developing mostly in urban areas with access to multiple modes of transportation.
- **Regional Housing:** Housing must support the population, especially vulnerable and aging households: meaning accessible, diverse and affordable.
- **Healthy Region:** Increase collaboration among all levels of government to ensure regional support for healthy communities. Increase access to the nature, open space, shorelines. Support regional arts and culture, and invest in healthcare infrastructure. There is a strong desire for healthier, more livable communities.
- **Regional Infrastructure:** Responding to global climate change by investing in water, waste and resource management infrastructure.
- **Regional Environmental Stewardship:** Inclusive and engaging all residents in the development and delivery of environmental policies, programs, and initiatives. As well as promoting land-use that supports healthy and productive ecosystems.

CRD Industrial Land Use Inventory and Assessment (2009)

In 2008, the CRD Regional Planning Division initiated an Industrial Land Study to examine the supply and demand characteristics of industrial land in the region.

- **Supply:** Colwood has 28.3 acres of Total Industrial Land.
- **West Shore Region:** Colwood, Highlands, Juan de Fuca, Langford, Metchosin and Sooke contain 34% of the regional industrial land (685 acres); with 83% of the region's vacant industrial land.
- **Type:** Vast majority of industrial land in Colwood is General Industrial (27.1 of 28.3 acres). Colwood has no Heavy Industrial, Extraction Industrial, or Marine Industrial, with little Light Industrial.
- **Demand:** Additional 79 acres of land is needed over the next 30 years, but no additional industrial expansion has been designated except for a gravel pit in Central Saanich.

- **Area Concerns:**

- Lack of storage or warehouse space to support higher populations.
- Quality of existing, available land industrial supply is low.
- OCP commitment to industrial intensification may not be appropriate.
- A shift in industrial land perception is needed: transition to more high-tech. manufacturing with minimal off-site effects.

A Context for Change Management in the Capital Region District Future Population, Labour Force, Employment and Housing in the Capital Regional District (2009)

- **Population Change:** Projected increase in population from 364,000 in 2008 to 390,000 in 2016 to 475,000 by 2038. In the past three decades the CRD grew by 54%; future growth will be much slower. CRD has an older population than Canada's average. Aging presents many challenges and opportunities.
- **Labour Force Change:** Prime working age group will see very slow growth over the next three decades, growing at an average annual growth rate of just 0.3%.
- **Employment Change:** Projection shows economic growth in the province slowing toward 1.5% by 2020, and 1% by 2038. Total employment in the region would grow from 198,452 jobs in 2009 to 238,000 in 2038.
- **Housing Change:** While the region's housing stock will remain predominantly ground oriented over the coming years, continued population growth and change will support shifts towards other forms of housing. An expected 62,836 new housing units are expected to accommodate the region's future population. The apartment segment will see growth of 50%, and ground oriented accommodation will grow at 34%. Even by 2038, ground oriented accommodation will continue to outweigh apartments 66% to 33%.
- **Sub-Area [West Shore] Projections:** West Shore sub-area will see the most significant change over the course of the projection period. West Shore is expected to grow by 88% (adding 57,000 new residents) compared with the CRD growing 33%.
- **Strategic Considerations:** West Shore's age group is between 42 to 46 compared with 55 to 59 in the Peninsula sub-area. The West Shore has effectively become a place to put down roots and build a family. Many new households are beginning in the West Shore, while the Peninsula area of the CRD is experiencing a household size decline.

CRD Regional Transportation Plan (2013)

The Capital Region has an opportunity to make significant improvements to transportation over the next 25 years which will greatly assist in maintaining the high quality of life that residents currently experience. Technical data and transportation projections show that we need to effectively address transportation issues as our region grows in the coming years. Not doing so will result in increased congestion, reduced economic activity, increased greenhouse gas emissions and a reduced quality of life.

- **Principle 1: Take Coordinated and engaged approach to planning**

- Formation of a Transportation Advisory Committee (TAC) which will be made up of representatives from all municipalities, EAs, Ministry of Transportation and Infrastructure, and BC Transit.

- **Principle 2: Prioritize strategic investments that serve regional mobility needs**
 - Continuation of the regional gas tax funding program, and can provide funds for significant transportation projects based on recommendations from the TAC.
- **Principle 3: Reduce greenhouse gas emissions and prepare for changes**
 - All long term transportation planning efforts help to reduce GHG emissions. Focusing on land use and transportation planning will aid in sustainable transport choices, reduce trip distances, improve efficiency and mobility, reduce congestion, and support active transportation.
- **Principle 4: Integrate transportation and land use planning**
 - By directing growth towards existing urban areas, these areas will realize sufficient trip densities to warrant more efficient transit service. Higher density and mixed-use developments also reduce trip lengths and, in turn, promote walking and cycling. Integrated planning also helps introduce pedestrian and active transportation elements into communities.
- **Principle 5: Capitalize on the potential for alternatives to driving alone**
 - Active transportation has a high comparative rank in the CRD, however, there remains potential to shift auto trips to other modes. In 2011 61% of weekday trips in the CRD which were shorter than 5km were taken by automobile.
- **Principle 6: Enhance role for public transit**
 - Currently transit trips account for 6% of total travel market in the CRD, however a target of 12% has been set by 2030. This target was established by the Provincial Transit Plan, and adopted by the CRD and BC Transit.
 - Proposed rapid and frequent transit networks will make transit more efficient and provide additional capacity.
- **Principle 7: Maximize efficiency of existing transportation corridors for multiple modes**
 - Population and employment growth throughout the region will largely have to make do with existing roadway capacity.
 - Strategic investment in capacity improvement and travel demand management will be fundamental to accommodating future demand.

Greater Victoria Development Authority Business Plan (2014)

The following key business plan items will guide the Greater Victoria Development Authority's actions for the upcoming year. They recognize these items as key regional actions that will impact the development of the regional economy.

- **Business Retention and Expansion:** Discover key determinants of retention for 40 export-oriented companies in the Greater Victoria region. 20 of which are foreign-owned/high-risk.
- **In-Bound & Out-bound trade:** Work with 80 in-bound investors per year to facilitate opportunities and transactions. Work with 45 small export companies over three years to expand international market reach.

- **Business Creation:** Work with 30 start-up & small-business entrepreneurs per year to ensure that they have the information, connections, and resources with which to start, expand, or fail fast and try again.
- **Regional Competitiveness:** Ensure that the region is constantly moving towards meeting the needs of economy (capital markets, innovation programs, infrastructure, business climate, Human Resources system, access to markets, quality of life).
- **Regional Communications and Stakeholder Engagement:** GVDA is a leader in the region in monitoring and reporting on the state of the economy, the importance of the economy, and how interventions in the local economy will create resiliency and jobs. Appear in media 40 times per year, host two large events per year, produce 6 published articles per year in Business Matters magazine, produce & publish Major Infrastructure List, present to Mayors/Councils as required, and advise the CRD Regional Sustainability Strategy.

Greater Victoria Development Agency Foreign Direct Investment Program (2014)

The program valued at \$1,558,500 was designed by the GVDA Board with input from stakeholders with the intent of both strengthening the local inputs that serve as the foundation to FDI attraction and retention, and also initiating and improving FDI attraction and retention activities over a three-year time period.

The program contains five (5) key components:

- | | |
|---|-------------------------------|
| 1. Internationalization of Small & Medium-Sized Enterprises (SMEs) | \$93,000 over 3 years |
| 2. Air Route Development | \$375,000 over 3 years |
| 3. International Education Partnerships | \$200,000 over 3 years |
| 4. In-Bound and Out-Bound Trade Activities | \$97,500 over 3 years |
| 5. Marketing and FDI Attraction | \$638,000 over 3 years |

Each component will be delivered in partnerships with local stakeholders and businesses and matching funding contributions totaling \$898,000 (over three years) from Western Economic Diversification Canada (WD) an agency of the Government of Canada. Local partners will contribute up to \$660,000 towards the project over three years.

■ **Internationalization of Small & Medium-Sized Enterprises (SMEs)**

The Greater Victoria region has hundreds of SMEs that export products and services abroad. Many are in the US market aggressively and/or have traction in Asia, South America, and other areas. However, as a region, Greater Victoria stakeholders do not clearly understand who these companies are, where they are currently exporting, and what needs these companies have to growth. A three-year plan will be initiated to assess capacity, determine gaps, and implement specific actions to fill those gaps which will leads to millions of dollars in increased export activities in the Capital Region.

■ **Air Route Development**

As an island with many economic sectors that rely on international connectivity (high-tech, film, tourism, advanced manufacturing, agribusiness, aviation, ocean-sciences, education, etc.), establishment and expansion of key air routes are essential. The direct daily flight to San Francisco established several years ago is now paramount to the burgeoning tech-sector. Now it is time to expand US connections into Los Angeles and explore future scenarios that will enable the region’s long-term goal of establishing US-Customs Pre-Clearance at Victoria International Airport. This three-year plan will result in a direct connection to Los Angeles, and better understanding of future market potential.

■ **International Education Partnerships**

Greater Victoria has significant potential not only as an international education destination, but also a provider of highly competent strategic educational programming within overseas markets. The region also boasts many world-class research initiatives that have potential to attract international talent, investment, and private-sector commercialization opportunities. The three-year plan will involve packaging these opportunities into a cohesive marketing collateral as well as designing an effective plan to communicate the opportunity to markets abroad. Growth in international student numbers, international education contracts, and linkages to private investment are expected.

■ **In-bound and Out-bound Trade Activities**

Each year, there exists potential for hundreds of in-bound trade groups that could be aligned to opportunities in Greater Victoria market. Attracting these groups and effectively hosting them once they arrive can have high return on investment. Additionally, international trade relationships can be fostered by local stakeholders partaking in international trade conferences and trade missions abroad.

■ **Marketing and FDI Attraction**

Designing a cohesive opportunity story for Greater Victoria is essential to the future ability of the region to attract investment, business interest, and talented workforce. The region battles perceptions of being a “government-town” or a “tourism-town” and only through effective marketing will the region overcome these perceptions to the advantage of local municipalities, tax payers, and businesses. The three-year plan will inventory the local assets (opportunities) and determine how best to communicate these through effective mediums and within a set budget. Significant increases in in-bound investment is expected from these activities.

Colwood Context

Official Community Plan

Community Sustainability Goals:

- Maximize the ecological value of natural areas. Where development occurs, maintain ecosystem values.
- Develop or enhance environments that enable healthy choices in all areas of living that are safe, secure and welcoming for all.
- Ensure healthy housing and food is available for all.
- Ensure healthy recreational, educational, emotional, spiritual, artistic and cultural opportunities for all.
- Ensure community planning and design celebrates the community’s unique history and natural setting and embraces diversity.
- Enhance economic vitality and opportunity. Ensure local employment and business opportunities.
- Promote energy-use choices that reduce greenhouse gas emissions and contribute to clean air. Plan for climate change adaptation.

- Promote efficient use and re-use of water and other resources. Reduce the consumption of non-renewable resources in favour of renewable resources.
- **Sustainable City Vision: Our sustainable community, nestled in a rich network of hills, creeks, lakes and the sea, is defined by attractive, compact and complete centres connected by multi-modal transportation corridors. Our sustainable community is welcoming and inclusive for all and is planned and designed to support the needs of a diverse and changing population.**

Community Objectives:

- Our Natural Setting and Open Spaces
 - Develop an interconnected network of parks and open spaces that support biodiversity and recreational uses that promote healthier lifestyles.
- Our Built Environment
 - Create dense, compact, and complete centres that are walkable at all scales.
- Our Healthy Community
 - We will account for the needs of all members of the community with emphasis on children, youth, seniors and low income families.
- Our Housing
 - A range of housing choices along the housing continuum accommodate the needs of all incomes and ages in all parts of the community.
- Our Multi-Modal Transportation System
 - The transportation strategies are closely bound with the growth management and land use strategies. The transportation system needs will be closely allied with the achievement of:
 - Economic Development: Good quality high paying jobs in Colwood will tend to reduce the need to commute to areas east of the Colwood interchange (downtown Victoria and the Saanich Peninsula);
 - Compact Complete Centres: Dense mixed use (residential, office, light industrial, retail, recreation, entertainment) nodes which promote the use of transit (bus, commuter rail, light rail), cycling and walking;
 - Integrated Transportation Systems: A transportation system that is integrated into the community in an aesthetically pleasing and complementary manner.
- Our Sustainable Buildings
 - We must require improved energy efficiency and/or use of renewable energy in buildings as a minimum due to commitments to climate protection (BC Climate Action Charter).
- Our Local Economy and Jobs
 - Encourage existing businesses to stay and grow in and welcome new businesses into the community.
- Our Food System

- Making progress on a vibrant and robust food system will require a vigilant focus on localizing all aspects of the food production, processing and distribution system.
- Our Community Infrastructure
 - Integrated, green infrastructure systems will address community sustainability goals when and where feasible.
- Regional and Inter-Jurisdictional Cooperation
 - Work proactively with other jurisdictions to ensure the long term prosperity of the community.

This OCP elevates the importance and need for supporting expanded local economic development as a critical component for creating a sustainable community. Creating jobs locally is part of the solution to current and future transportation challenges in the West Shore in that it will reduce commuting trips. Creating local jobs is therefore a key strategy for reducing common air contaminants and greenhouse gas emissions that result from transportation activities. Recent economic development trends and positive market conditions for additional commercial and industrial development are creating the supportive conditions for achieving municipal economic development objectives.

Economic Development Challenges and Opportunities

- Further development of the city’s jobs-labour force ratio through encouragement of new jobs and businesses in the community
- Quality of life in a community attracts new businesses.
- Strong demand exists for commercial, industrial, and office land with diminishing land resources and designated areas for these uses in the region
- Increased property tax revenues and more local jobs are much needed to make progress towards sustainability
- In the last few decades, the community has been a bedroom community for Victoria. However, the City is maturing and has the opportunity to be seen as a more complete community with important regional employment centres

Economic Development Objectives

- Objective 10.1 Retain and encourage the growth of existing businesses and attract targeted new businesses to locate in the planning area.
 - Policy 10.1.1 Work with local business associations to support expansion of local and regional serving businesses located in the community.
 - Policy 10.1.2 Periodically review the business enabling environment to ensure the city remains a regionally (and provincially) competitive, attractive business destination.
 - Policy 10.1.3 Permit home-based business in all parts of the community in all dwelling units.
 - Policy 10.1.4 Explore or encourage the development of a home-based business support centre to support of promote home-based businesses.
 - Policy 10.1.5 Develop a West Shore Economic Development Strategy with local business associations and other communities in the West Shore.

- Objective 10.2 Promote the City Centre as a regional growth area for knowledge, education and creative-based industries.
 - Policy 10.2.1 Ensure sufficient and appropriate floor space capacity to meet local and regional demands for the planning period.
 - Policy 10.2.2 Direct new office development to the city centre where practical and feasible.
 - Policy 10.2.3 Expand existing live-work zoning in areas in and around centres.
 - Policy 10.2.4 Identify sites for office development and work with development proponents to attract ‘anchor’ office/business tenants through proactive development partnerships.
 - Policy 10.2.5 Support those businesses whose needs cannot be met within the city centre in other locations in the city.

- Objective 10.3 Improve the ratio between the resident labour force and jobs
 - Policy 10.3.1 Establish a progressive jobs-labour force target and reevaluate floor area capacities based on this target to ensure an adequate, long-term supply of employment lands.
 - Policy 10.3.2 Prioritize and lobby for job-rich industry types such as government or business office uses.
 - Policy 10.3.3 Work with and support West Shore Economic Development Association and other community stakeholders in the Learning Commons initiative – an innovative education initiative with potential community economic benefits, including new business attraction and clustering possibilities.

- Objective 10.4 Work closely with other communities in the West Shore to promote economic development
 - Policy 10.4.1 Work with local business groups such as West Shore Economic Development Association and West Shore Chamber of Commerce and other West Shore communities (Metchosin, View Royal, Highlands, Langford) to develop a powerful brand strategy that defines a strong vision for the western communities that clearly defines or describes ‘who we are’, ‘where we are going’, and ‘what we want’.
 - Policy 10.4.2 Work cooperatively with other communities in the West Shore to jointly develop land use and economic development strategies that are synergistic and complementary.
 - Policy 10.4.3 Work with other communities and community partners to continue promoting and developing the West Shore as a regional sport tourism, tourism and recreation destination.

- Objective 10.5 Promote economic activity in all sectors of the community.
 - Policy 10.5.1 Support and strengthen arts and cultural activities such as festivals and performances that support economic development objectives.
 - Policy 10.5.2 Increase the contribution of the arts to economic development (e.g. support for proposed Robert Bateman Centre at RRU) by developing an arts tourism strategy, arts education and training, arts exports, new media and other digital technologies, and creative services.
 - Policy 10.5.3 Support the development of non-profit organizations in the community recognizing they are employers and have access to funding (e.g. from senior governments) that bring new resources to the community.

Royal Bay Development (2014)

Approved in 1998, the Royal Bay Development represents the largest development application in Colwood's history. The approved development plan is set to bring forth homes to 7000 residents living in 2800 units. In addition to the housing units, there will be a 7.5 km path and a 1.8 km waterfront park.

Approved and adopted by the City of Colwood.

- Single Family 945 Units
- Townhomes/Duplexes 553 Units
- Apartments 808 Units
- Retail +/- 800,000 sq.ft
- Royal Bay Secondary School

As of 2014 grading on the site is now complete and the first phase of building is underway with just over 90 residential lots planned for the area along Ryder Hesjedal Way, which will be the road leading to the new Royal Bay Secondary School (also under development).

West Shore Centre for the Performing Arts and Royal Bay Theatre Development Study (2013)

The Schick Shiner report paints a detailed picture of the business case in support of a \$35 million theatre and mixed-use arts, education and wellness complex that would serve the cultural needs of a growing community and diversify sustainable economic development within the region.

Core facilities would include:

- 650 seat theatre, with seating on two levels, and fully equipped with state-of-the-art technical equipment;
- 240 seat black box theatre/multi-purpose space, equipped with lighting grid and other facilities required to support small performances;
- Dance/theatre studios with high ceilings, natural light, sprung floors and the appropriate acoustics and acoustical separation between spaces;
- The potential for boutique retail and office spaces;
- Restaurant and event catering operation;
- Coffee house;
- Gallery/gift shop;
- Community house/resource information centre; and
- Exhibition space for community heritage/archive displays.

Capital costs and projected economic impact

- Est. \$35 million - Capital cost in today's dollars (excluding the cost of land).
- Est. \$16 million - Construction job creation.
- Est. \$3.2 million - Annual economic spin-offs.

The report recommends that the City of Colwood take the following next strategic steps toward making this community infrastructure project a reality:

- **Formally establish the project among the municipal strategic planning priorities and determine the scope of work required for the project Start Up Year 1 (including fundraising milestones required to trigger architectural, engineering and other professional services);**
- **Provide sufficient seed funding in the 2013 budget year to enable the establishment of a Colwood Legacy Fund via the Victoria Foundation, thereby empowering the capital project with charitable tax status.**
- **Provide sufficient seed funding in the 2013 budget year to contract consulting services required to fully engage other West Shore municipal and First Nations governments, further develop the building plan, enable grant-writing, community fundraising and volunteer development.**

To date no action has been taken forward regarding the development of a West Shore Performing Arts Centre, however ongoing communications and dialogue continue to support the report recommendations.

Colwood’s Amendment to the Capital Regional District Core Area Liquid Waste Management Plan (2014)

The City of Colwood is asking the Capital Regional District for support to request an amendment to the CRD Core Area Liquid Waste Management Plan (CALWMP) that will allow for the construction of a resource recovery and sewage treatment facility in Colwood earlier than identified in the CRD plan (currently about 2030) to the financial benefit of the other CALWMP members.

Colwood understands that treatment of sewage in the region is important for the environment, and that the current system (primary only) is inadequate. It supports sewage treatment that maximizes recovery of resources, ensures no harmful materials are discharged into the ocean (preferably no discharge at all), and minimizes environmental impacts including carbon emissions.

In pursuit of these goals, Colwood aims to construct a resource recovery and sewage treatment facility that will treat all of Colwood’s sewage to tertiary standards (or better) and recover both energy and water.

The tertiary treatment will remove more of every class and type of pollutant than secondary treatment does. Colwood is planning for a facility that will treat water to near potable standard and eliminate the need for ocean discharge. Colwood’s facility would be targeted to begin treating sewage and selling recovered resources by 2016, treating sewage in an environmentally responsible way 2–4 years before the main plant will be in operation.

The proposed location in Colwood’s town centre will maximize recovery and reuse of energy and water to supply nearby facilities. Recycled water from wastewater treatment could be used for toilet flushing, irrigation and other low public contact uses, reducing the need for potable water by up to 40% in buildings that use it. Recycled heat from the treatment process will be provided to buildings through a district energy sharing system in Colwood’s business core. This will reduce energy requirements by up to 60% in buildings that use it. Particular targets are the Juan de Fuca Recreation Centre and Royal Roads University.

Only about 25% of Colwood’s existing residents are on sewers. As the community grows and additional sewers are constructed, the energy sharing benefits can be extended to more businesses and residences.

The City of Colwood will assume all costs and revenues associated with the finance, design, construction, operation, maintenance, and future upgrading of the wastewater treatment plant in Colwood. Colwood will use its own resources to prepare the amendment and undertake public consultation including all supporting documents, consultants’ reports, environmental studies etc. as required to obtain the Minister’s approval. Colwood will, through a legal agreement, guarantee complete control of the quality of the facility outputs, relieving the CRD of

any risk or responsibility. It should be noted that the facility will, after a proving period, be owned by Colwood and all operations and maintenance work will be done by municipal employees.

Upon review of the proposed amendment the Capital Regional District Core Area Liquid Waste Management Committee gave unanimous approval in principle for the City of Colwood to further investigate building a tertiary sewage treatment facility in Colwood.

Property Tax Comparisons

In 2013, Colwood had the highest tax rates among West Shore communities for all property types. On average Colwood was approximately \$2 per \$1000 more expensive than neighbouring communities. They have the highest light industry taxes doubling tax rates set in Langford and View Royal. Colwood’s business taxes were also approximately \$5 per \$1000 more expensive than Langford’s business tax rate.

FIGURE 1 – PROPERTY TAX COMPARISONS, DOLLARS OF TAX PER \$1000 TAXABLE VALUE, 2013 TAX YEAR

	Colwood	Langford	Metchosin	View Royal	West Shore ⁺	Victoria	Esquimalt
Residential	\$6.1674	\$5.6751	\$2.9233	\$ 5.3836 / \$ 5.5919*	\$4.2992	\$6.8790	\$4.9503
Major Industry	-	\$18.9830	\$13.8154	-	\$16.3992	\$23.2940	\$32.0732
Light Industry	\$47.5134	\$23.2428	\$14.4752	\$23.6843	\$20.4674	\$27.5538	\$16.8473
Business / Other	\$22.0895	\$17.3206	\$10.8268	\$18.3320	\$15.4931	\$22.6671	\$13.0015

Source: City of Colwood Finance Department, City of Langford Finance Department, District Municipality of Metchosin Finance Department, Town of View Royal Finance Department, City of Victoria Finance Department, Township of Esquimalt Finance Department.

Notes: * Residential rate in View Royal depends on which school district property belongs to. ⁺West Shore averages exclude Colwood figures.

Appendix B: Economic Base Analysis

Demographic Profile

Population Characteristics

Population Growth

In 2011, Colwood recorded a total population of 16,093. From 2001-2006, the City’s population increased by 6.9%. Between 2006-2011 the City’s population continued to increase by 9.6% for a total increase of 17% from 2001-2011. British Columbia illustrated a 13% population increase in the same period.

Remaining West Shore communities (defined as Colwood, Langford, Metchosin, and View Royal) showed varying growth patterns; Colwood fell below Langford and View Royal which had a net percentage increase respectively of 55% and 29% from 2001-2011, and was above Metchosin who illustrated a decrease of 1% over the same period. Colwood also had greater percentage increases than surrounding neighbours Victoria and Esquimalt who illustrated an 8% and a 1% increase respectively from 2001-2011.

As a total region, the West Shore communities had a net increase of 33% from 2001-2011 adding 14,792 people to the area.

FIGURE 2 - POPULATION CHANGE 2001-2011

	2001	2006	Absolute Δ 2001-06	% Δ 2001-06	2006	2011	Absolute Δ 2006-11	% Δ 2006-11	% Δ 2001-11	Absolute Δ 2001-11
Colwood	13,745	14,687	942	6.9%	14,687	16,093	1406	9.6%	17%	2348
Langford	18,840	22,459	3619	19%	22,459	29,228	6769	30.1%	55%	10,388
Metchosin	4857	4795	-62	-1%	4795	4803	8	0.2%	-1%	-54
View Royal	7271	8768	1497	21%	8768	9381	613	7.0%	29%	2110
West Shore	44,713	50,709	5996	13%	50,709	59,505	8796	17.3%	33%	14,792
Victoria	74,125	78,057	3932	5%	78,057	80,017	1960	2.5%	8%	5892
Esquimalt	16,127	16,840	713	4%	16,840	16,209	-631	-3.7%	1%	82
BC	3,907,738	4,113,487	205,749	5%	4,113,487	4,400,057	286570	7.0%	13%	492,319

Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE, and 2006 Community Profiles, 2006 Census, Statistics Canada Catalogue no. 92-591-XWE.

Population Projections

In 2038, Colwood is projected to have a total population of 33,553 - an increase of 108% from 2011. West Shore communities Langford, Metchosin, and View Royal are also expecting large net increases during the same period with Langford’s population projected to increase by 90%.

Colwood (31.4%) and Langford (51.9%) make up over 80% of the total West Shore projected population growth. In comparison, neighbouring communities Victoria and Esquimalt are expected to see increases of 21% and 40% respectively.

FIGURE 3 - POPULATION PROJECTIONS 2011-2038

	2011	Projected2038	Absolute Δ 2011-38	% Δ 2011-38	Share of Sub-Area
Colwood	16,093	33,553	17,460	108%	31.4%
Langford	29,228	55,554	26,326	90%	51.9%
Metchosin	4803	5993	1190	25%	5.6%
View Royal	9381	11853	2472	26%	11.1%
West Shore	59,505	106,953	47,448	80%	
Victoria	80,017	96,816	16,799	21%	
Esquimalt	16,209	22,671	6462	40%	

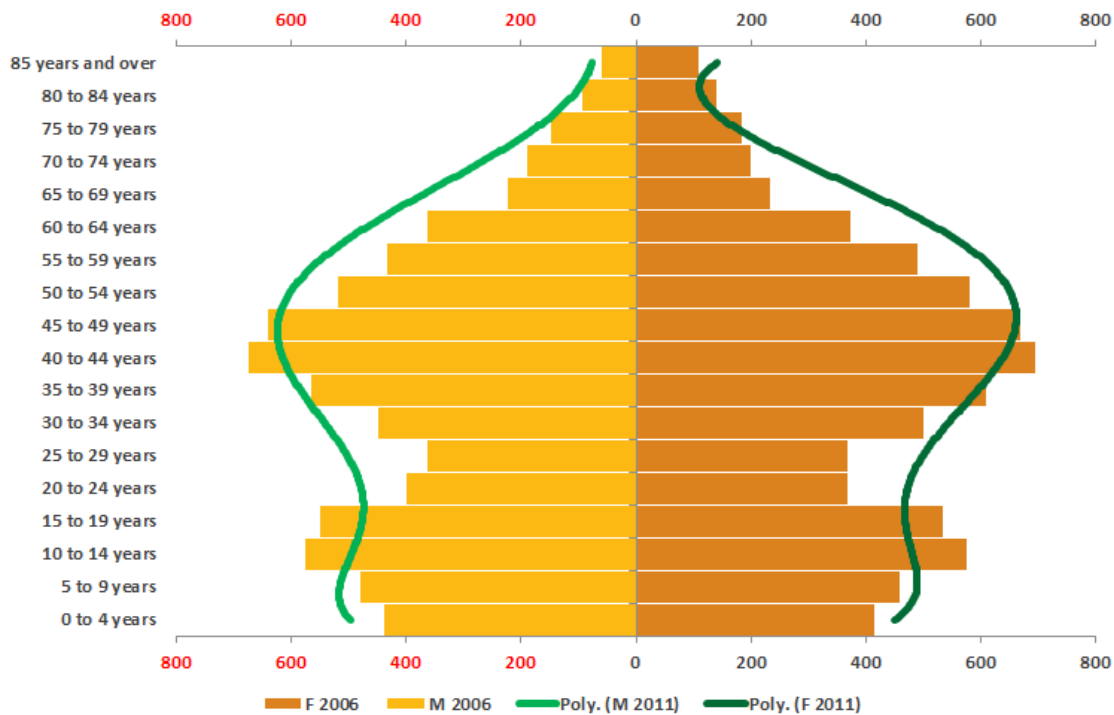
Source: Capital Regional District, Changing People in a Changing Region, 2009, adapted with Statistics Canada, National Household Survey (NHS) Profile, 2011 Census, Statistics Canada Catalogue no. 99-004-XWE.

Population by Age

In 2011, Colwood’s largest age cohorts were 35 to 39 years, 40 to 44, 45 to 49, and 50 to 54, accounting for 35.9% of the city’s population.

As of 2011, the median age in Colwood was 40.1 years, which was on par with the median age in British Columbia and Victoria. In contrast, it was higher than Langford (37.5 years) and lower than Metchosin (48.5%), View Royal (44.1 years) and Esquimalt (41.9 years).

FIGURE 4 - POPULATION PYRAMID COLWOOD, 2006-2011



Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE, and 2006 Community Profiles, 2006 Census, Statistics Canada Catalogue no. 92-591-XWE.

From 2010-2011, Colwood welcomed 695 new migrants into its borders. This accounted for approximately 25% of the total new migrant population into West Shore communities. Similar percentages were captured when mobility status was examined from 2006-2011 with Colwood accounting for a slightly larger percentage (approximately 29%) of the total new migrants to West Shore communities. The total migrant population during the five year period is greater than natural population growth suggesting that these migrants live in Colwood only for a period of time. Also noteworthy is the amount of external migrants (immigrants) that have moved into Colwood. While the number is generally low for West Shore and non-existent in the British Columbia outlook, immigrants that do choose to settle in the West Shore prefer Langford over Colwood.

FIGURE 5 – MOBILITY STATUS 1 YEAR AGO

	Non-movers	Non-Migrants	Total Migrants	Intraprovincial migrants	Interprovincial migrants	External migrants
Colwood	13,845	1,275	695	390	245	60
Langford	23,255	3,535	1,785	1,095	500	190
Metchosin	4,030	315	110	35	60	15
View Royal	8,125	765	260	160	80	20
West Shore	49,255	5,890	2,850	1,680	885	285
Victoria	58,055	10,800	6,430	3,500	1,865	1,065
Esquimalt	12,820	1,895	1,035	430	480	125
BC	3,665,455	347,840	268,810	167,280	45,105	56,425

Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

Note: Refers to the status of a person with regard to the place of residence on the reference day, May 10, 2011, in relation to the place of residence on the same date one year earlier.

FIGURE 6 – MOBILITY STATUS 5 YEARS AGO

	Non-movers	Non-Migrants	Total Migrants	Intraprovincial migrants	Interprovincial migrants	External migrants
Colwood	8,635	3,475	2,920	1,540	1,220	160
Langford	11,930	9,645	5,455	3,050	1,850	555
Metchosin	2,905	875	545	360	125	60
View Royal	4,905	2,505	1,330	730	440	160
West Shore	28,375	16,500	10,250	5,680	3,635	935
Victoria	31,640	22,900	18,560	8,530	6,430	3,600
Esquimalt	7,395	4,630	3,200	1,405	1,440	355
BC	2,349,525	888,335	866,335	486,835	166,450	213,050

Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

Note: Refers to the status of a person with regard to the place of residence on the reference day, May 10, 2011, in relation to the place of residence on the same date five years earlier.

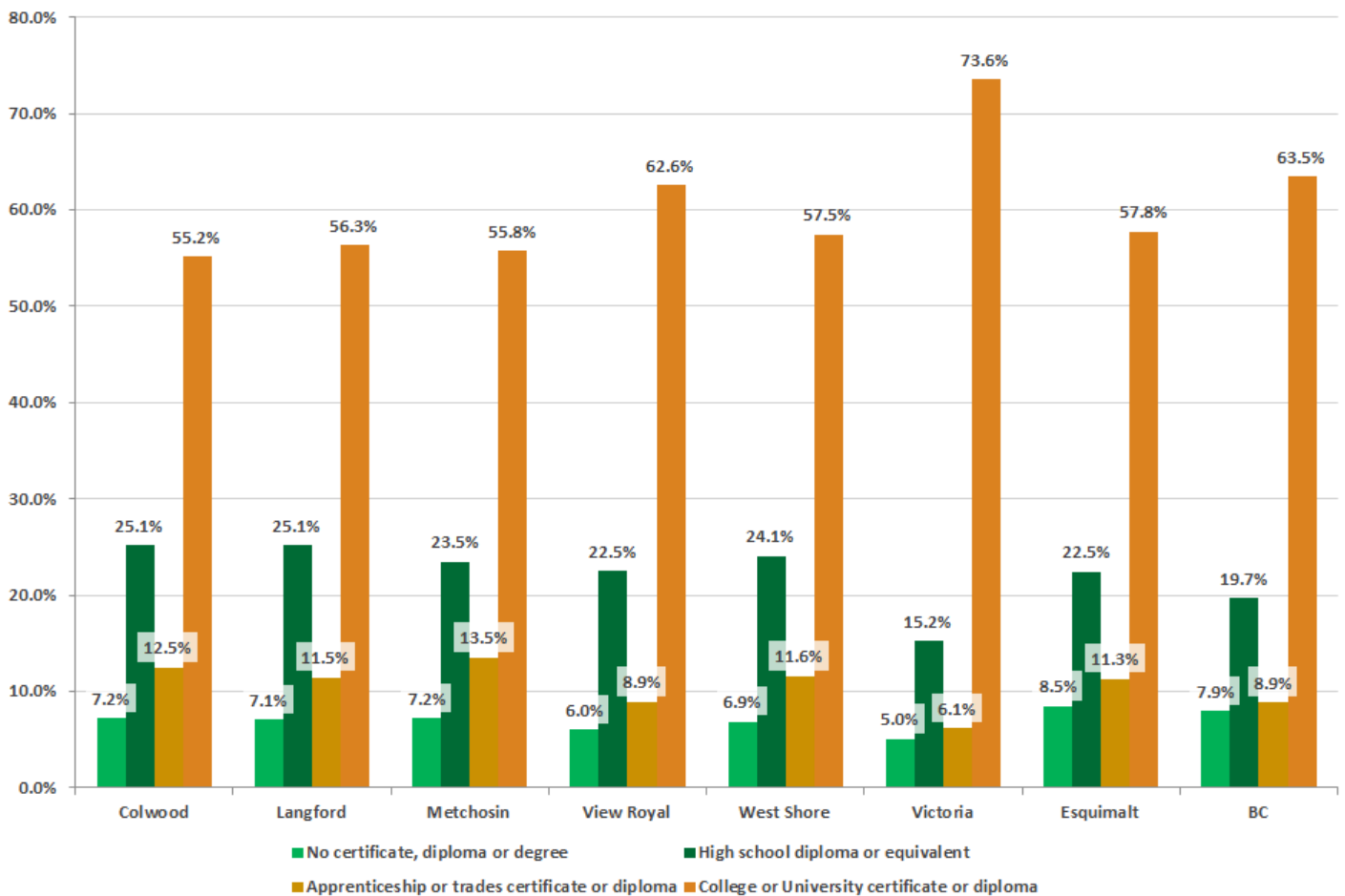
Note for Figure 5 and Figure 6. Persons who have not moved are referred to as non-movers and persons who have moved from one residence to another are referred to as movers. Movers include non-migrants and migrants. Non-migrants are persons who did move but remained in the same city, town, township, village or Indian reserve. Migrants include internal migrants who moved to a different city, town, township, village or Indian reserve within Canada. External migrants include persons who lived outside Canada at the earlier reference date.

Education Characteristics

Educational Attainment

As of 2011, Colwood has the lowest proportion of its population with a university certificate; diploma or degree (55.2%) when compared to the province (63.5%) and West Shore communities (62.6%). However, while Colwood was significantly lower than Victoria (73.6%), it was only slightly lower than both Esquimalt (57.8%) and the West Shore communities of Langford (56.3%), Metchosin (55.8%), and View Royal (62.6%).

FIGURE 7 – TOTAL POPULATION AGED 25-64 YEARS BY HIGHEST CERTIFICATE, DIPLOMA OR DEGREE, 2011



Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

Field of Study

As of 2011, Colwood’s population was predominantly educated in three major fields of study; Architecture, Engineering and Related Technologies (22.9% of the total population with a higher certificate, diploma or degree above the high school or secondary school diploma), Business, Management and Public Administration (18.8%) and Health and Related Fields (18.2%). These trends are similar to the totals representing the province and West

Shore communities. However, unlike Langford and Victoria, Colwood has a lower representation of population with diplomas in the Social and Behavioural Sciences and Law (Legal studies, Cultural studies, Cognitive studies); Physical and Life Sciences and Technologies (Biomedical sciences, Nutrition sciences, Physical sciences, Science technology) and Humanities (Liberal Arts, History, Languages) based programs.

FIGURE 8 – TOTAL POPULATION AGED 15 YEARS AND OVER BY MAJOR FIELD OF STUDY, 2011

	Colwood	Langford	Metchosin	View Royal	West Shore	Victoria	Esquimalt	BC
Education	7.4%	5.5%	7.1%	9.5%	6.8%	7.4%	5.9%	7.4%
Visual and performing arts, and communications technologies	3.3%	2.9%	4.4%	3.7%	3.3%	7.1%	5.0%	4.4%
Humanities	3.7%	4.7%	5.7%	6.1%	4.8%	8.8%	6.3%	5.9%
Social and behavioural sciences and law	8.5%	11.4%	11.0%	11.6%	10.6%	15.0%	11.3%	10.3%
Business, management and public administration	18.8%	19.8%	15.2%	19.3%	19.0%	18.5%	19.6%	20.3%
Physical and life sciences and technologies	3.3%	3.4%	4.9%	4.2%	3.7%	4.4%	3.1%	3.9%
Mathematics, computer and information sciences	3.6%	4.3%	2.6%	3.7%	3.8%	4.5%	3.7%	3.6%
Architecture, engineering, and related technologies	22.9%	20.9%	22.3%	18.9%	21.2%	13.3%	19.9%	20.7%
Agriculture, natural resources and conservation	2.0%	1.5%	4.6%	2.2%	2.0%	2.2%	1.6%	2.4%
Health and related fields	18.2%	17.0%	15.0%	15.0%	16.8%	14.2%	16.6%	15.2%
Personal, protective and transportation services	8.4%	8.5%	7.1%	5.7%	7.9%	4.7%	6.9%	5.7%

Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

Note: 'Major field of study' is defined as the main discipline or subject of learning. It is collected for the highest certificate, diploma or degree above the high school or secondary school level and classified according to the Classification of Instructional Programs (CIP) Canada 2011. This variable shows the 'primary groupings,' a CIP variant. For more information on the CIP classification, see the Classification of Instructional Programs, Canada 2011, Catalogue no. 12-590-X available from: www.statcan.gc.ca/concepts/classification-eng.htm.

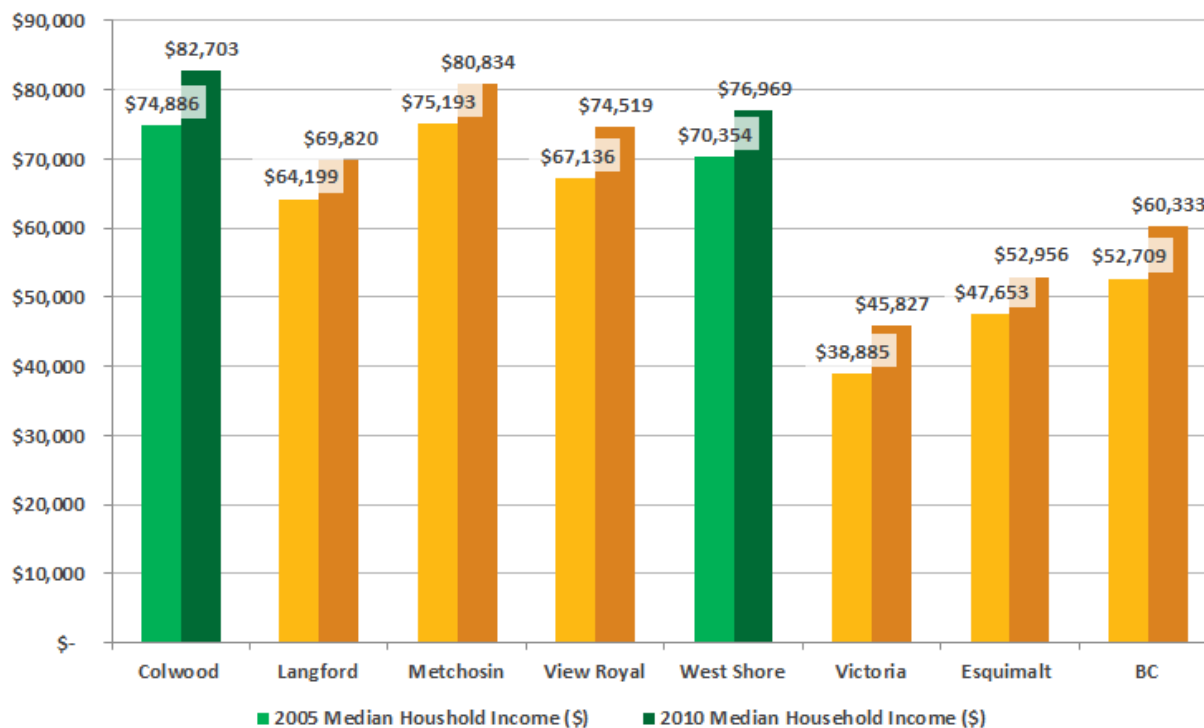
Dwelling Characteristics

Income

In 2010, the median household income in Colwood was higher than any of its neighbouring communities. At \$82,703 it also represents a 9% increase from the median price of \$74,886 in 2006. This is on par with the percentage increase in income for Langford; however, the median income in Langford is lower, sitting at \$69,820. Although British Columbia (14%), Victoria (18%), and Esquimalt (11%) all showed higher percentage increase in income from 2006-2011, they illustrated lower median income values overall in 2011.

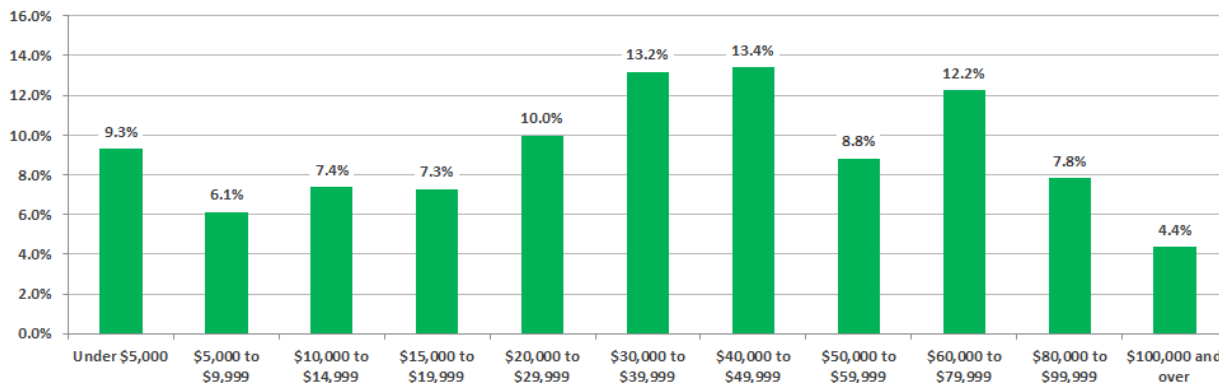
2010 Personal Income levels in Colwood illustrate that the city's residents on average make between \$30,000 – 79,999. Interestingly, there is a large proportion (9.3% of the Colwood's total population) that reported a personal income of less than \$5000 in 2010. By comparison both Langford and Victoria had lower proportions (8.7% and 8.1% respectively).

FIGURE 9 – MEDIUM HOUSEHOLD INCOME LEVELS 2005, 2010



Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE, and 2006 Community Profiles, 2006 Census, Statistics Canada Catalogue no. 92-591-XWE.

FIGURE 10 – PERSONAL INCOME LEVELS, COLWOOD, 2010



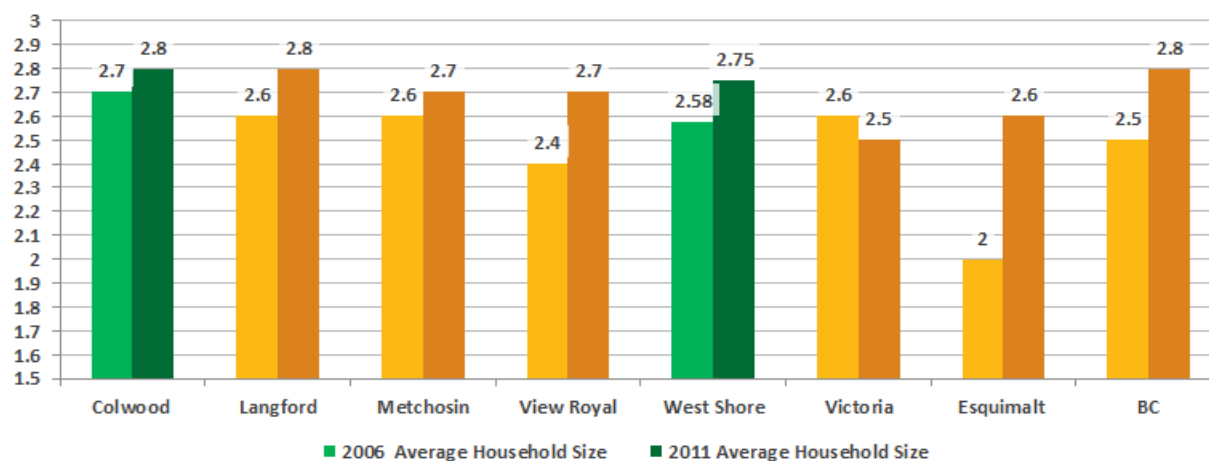
Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

Household Sizes

With respect to household size, as measured by average number of persons in census family, Colwood has larger families than its surrounding regions, but is on par with the province and Langford. Colwood has an average number of 2.8 persons per census family, representing a 4% increase from 2006-2011.

In contrast, Victoria has seen a decrease of 4% from 2006-2011 with the average number of persons per census family decreasing from 2.6 to 2.5 persons. Additionally, Esquimalt has seen a 30% increase during this time period, with the average number of persons per census family increasing from 2 to 2.6 persons. Langford has seen an 8% increase between this time period, doubling Colwood’s increase. This data is consistent with the trends observed in the review of background reports.

FIGURE 11 – AVERAGE HOUSEHOLD SIZE 2006 AND 2011



Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE, and 2006 Community Profiles, 2006 Census, Statistics Canada Catalogue no. 92-591-XWE.

Colwood has a higher number of households containing a couple (with and without children) than its neighboring regions and the province. At 31%, Colwood also has a significantly larger number of households containing a couple without children; compared with Victoria (10%), British Columbia (25%), and Langford (27%). However, Colwood has a lower number of one-person households, occupying 19% of all household types compared to Langford (24%), Victoria (49%), and British Columbia (28%).

Dwelling Values

In 2011, the average value of dwellings in Colwood was \$520,875, representing a 20.2% increase in value from the 2006 average of \$415,643. Overall, the percentage change across all regions ranged from a 19-23% increase in average value of dwellings. Esquimalt had the lowest housing values, sitting at an average value of \$473,389, representing an 18.5% increase. While Victoria and Langford saw very similar increases in housing values with a percentage change of 19.9%, average prices were lower than Colwood’s at \$508,533 and \$480,495 respectively.

FIGURE 12 – AVERAGE VALUE OF OWNED DWELLINGS (\$), 2006, 2011

	Colwood	Langford	Metchosin	View Royal	West Shore	Victoria	Esquimalt	BC
2006	\$415,643	\$384,938	\$629,368	\$460,288	\$472,559	\$407,131	\$385,806	\$418,703
2011	\$520,875	\$480,495	\$733,885	\$543,820	\$569,769	\$508,533	\$473,389	\$543,635
% Δ 2006-11	20.2%	19.9%	14.2%	15.4%	17.1%	19.9%	18.5%	23.0%

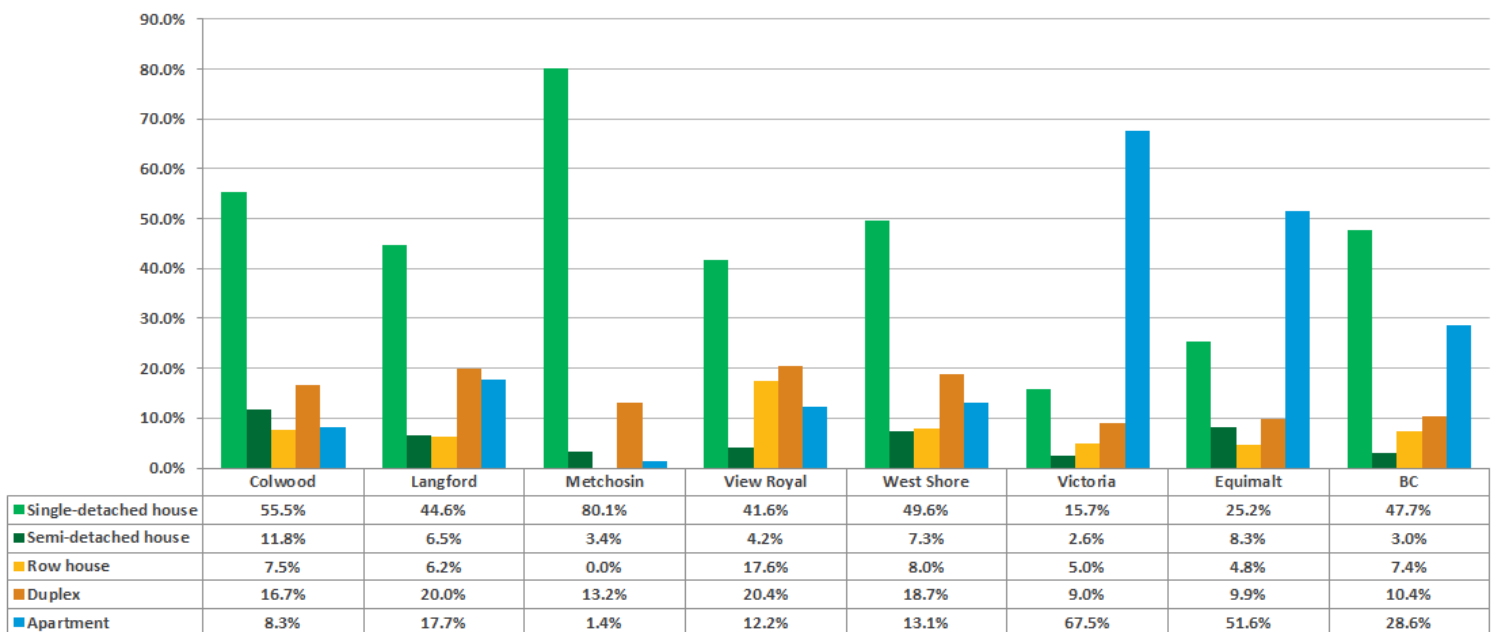
Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE, and 2006 Community Profiles, 2006 Census, Statistics Canada Catalogue no. 92-591-XWE.

Note: Value of dwelling - Refers to the dollar amount expected by the owner if the dwelling were to be sold.

Dwelling Types and Starts

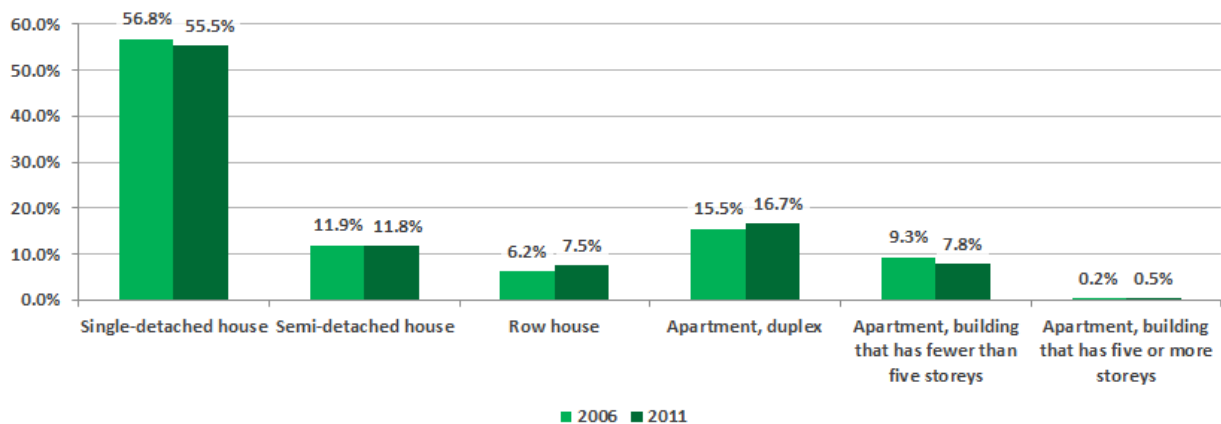
Colwood has higher rates of single detached homes than compared to its neighboring regions and the province, accounting for 55.5% of all dwellings. In contrast, it has the second lowest percentage of apartment buildings (8.3%), when compared to neighbouring West Shore communities Langford (17.7%) and View Royal (12.2%). However, from 2006-2011 Colwood did increase its stock in Apartment buildings that have five or more storeys, along with Apartment Duplexes.

FIGURE 13 – PROPORTION OF DWELLING TYPES, 2011



Source: Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

FIGURE 14 – PROPORTION OF DWELLING TYPES IN COLWOOD, 2006, 2011



Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE, and 2006 Community Profiles, 2006 Census, Statistics Canada Catalogue no. 92-591-XWE.

Canada Mortgage and Housing Corporation's latest release (January 2014) on the housing market overview for the Victoria CMA illustrated that Colwood had a total of 118 units under construction as of December 2013 (~75% of these are condominium based units). In 2012, Colwood had 36 units under construction. Comparatively, Langford had a total of 278 units (down from 206 in 2012) under construction. Approximately, 40% of the 2013 Langford units are single family homes.

FIGURE 15 – HOUSING ACTIVITY SUMMARY VICTORIA CMA, UNDER CONSTRUCTION, DECEMBER 2012, 2013

	Ownership						Rental		Total
	Freehold			Condominium			Single, Semi, and Row	Apt. and Other	
	Single	Semi	Row, Apt. Other	Single	Row and Semi	Apt. and Other			
Colwood									
December 2013	20	2	0	1	6	88	0	1	118
December 2012	11	2	0	0	6	12	0	5	36
Langford									
December 2013	104	14	0	1	25	29	3	102	278
December 2012	97	2	4	0	6	151	11	35	306
Metchosin									
December 2013	6	0	0	0	0	0	0	1	7
December 2012	9	0	0	0	0	0	0	1	10
View Royal									
December 2013	22	0	0	0	8	0	0	0	30
December 2012	29	0	0	0	10	48	0	0	87
West Shore									
December 2013	152	16	4	2	39	117	3	104	437
December 2012	146	4	4	0	22	211	11	41	439
Victoria City									
December 2013	24	18	0	0	19	684	5	210	960
December 2012	15	44	0	1	19	496	4	190	769

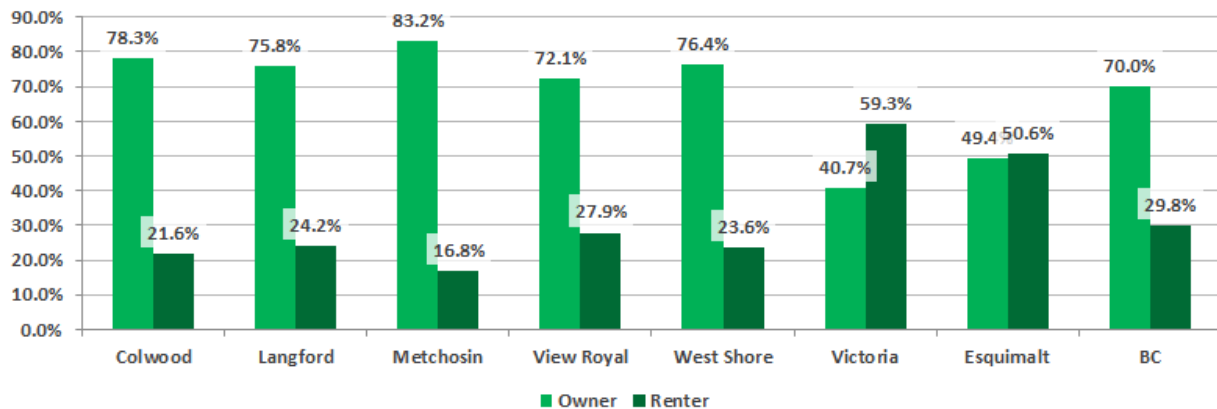
Source: CMHC, Starts and Completions Survey, Market Absorption Survey, Housing Now Victoria CMA, January 2014.

Ownership Characteristics

In 2011, 78.3% of the total private households owned their homes. This is comparable to other West Shore communities who all had over 70% ownership proportions. The closer the community to Victoria the higher their renter proportion rates became (Esquimalt showcased a 50.6% rental rate while Victoria's private households were predominantly under rental ownership).

In 2006, Colwood's proportion of rental households to the total dwellings was at 24% - a total lower than 2011 rates.

FIGURE 16 – TOTAL PERCENTAGE OF PRIVATE HOUSEHOLDS BY TENURE, 2011



Source: Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

Occupational Profile

Labour Force Characteristics

Regional Labour Force by Industry

With respect to labour force by industry, Colwood’s labour force is for the most part reflective of its west shore neighbours. Its Public Administration sector occupied the largest proportion of labour force by industry (21.4%), followed by Health Care and Social Assistance (14.5%), and Retail Trade (13%).

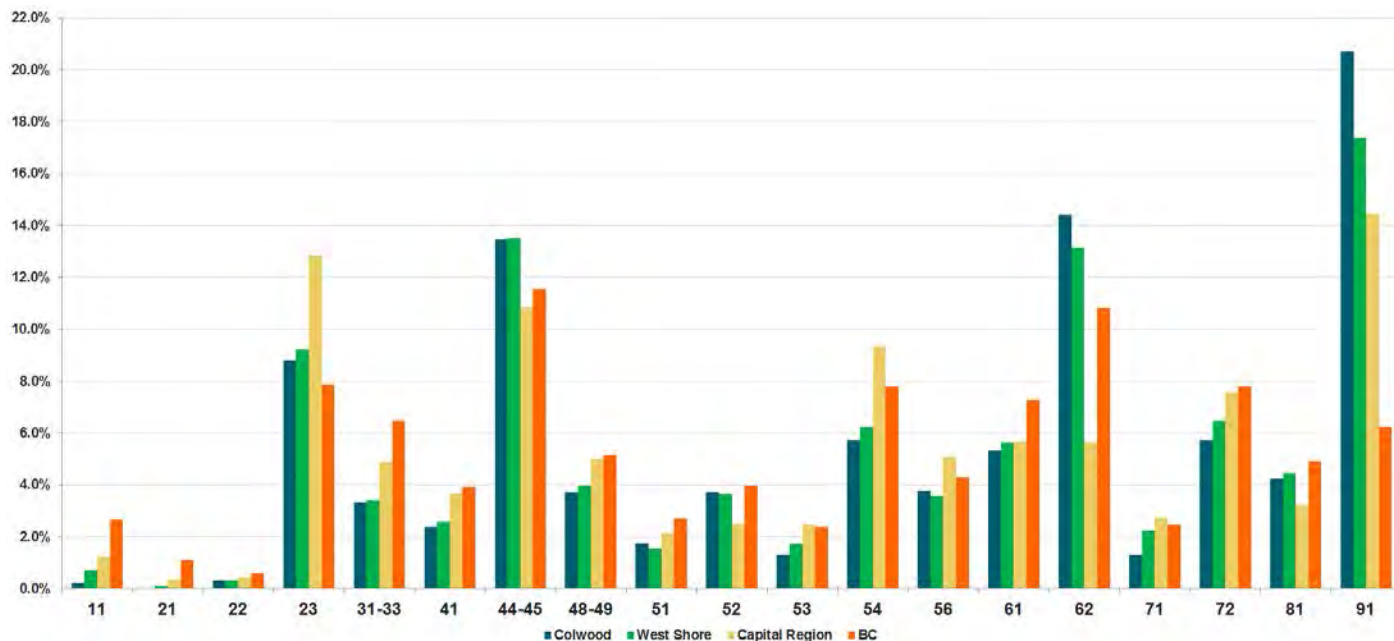
Colwood has seen a few significant shifts in labor force composition from 2006-2011. The most notable has been a 41.1% increase in the total labour force within the Health Care and Social Assistance industry (an added 360 total workers). The largest significant decreases came in the Information and Cultural Industries sector - with a total decrease of 40 workers from 2006 levels (-20.5% growth rate) - and the Other Services sector¹ – with a total decrease of 45 workers from 2006 levels (-12.9%). Overall, six industries in Colwood have grown – four of which represent more than 55% of the total labour force share (a total of 4915 workers) while nine industries presented a decrease in labour force growth with two industries showing no growth during the 2006-2011 period.

The regional labour force share while similar to Colwood and the West Shore community has a significant increase in representation of workers from the Professional, Scientific and Technical Services industries. This suggests that communities outside of the West Shore but within the Capital Regional District has a greater representation of labourers in the Professional, Scientific and Technical Services industry. Interestingly, the Province also represents a greater share of Professional, Scientific and Technical Services labourers when compared to the West Shore region. The West Shore region has a larger Health Care and Social Assistance industry representation of labourers largely contributed to the presence of the View Royal Hospital adjacent to the Colwood community and within the West Shore region.

¹ Other Services includes Repair and Maintenance industries (i.e. Automotive, Electrical), Personal and Laundry Services, Religious, Grant-Making, Civic, and Professional and Similar Organizations, and Private Household services.

Figure 17 illustrates the share of labour force by industry for Colwood, the West Shore community, Capital Regional District and the province.

FIGURE 17 –SHARE OF LABOUR FORCE BY INDUSTRY, 2011



Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE, and 2006 Community Profiles, 2006 Census, Statistics Canada Catalogue no. 92-591-XWE.

NAIC Categories: 11 - Agriculture, Forestry, Fishing and Hunting, 21 - Mining, Quarrying, and Oil and Gas Extraction, 22 – Utilities, 23 – Construction, 31-33 – Manufacturing, 41 - Wholesale Trade, 44-45 - Retail Trade, 48-49 - Transportation and Warehousing, 51 - Information and Cultural Industries, 52 - Finance and Insurance, 53- Real Estate and Rental and Leasing, 54 - Professional, Scientific and Technical Services, 56 - Administrative and Support, Waste Management and Remediation Services, 61 - Educational Services, 62 - Health Care and Social Assistance, 71 - Arts, Entertainment and Recreation, 72 - Accommodation and Food Services, 81 - Other Services (except Public Administration), 91 - Public Administration

In order to determine the level and degree of industrial specialization that has developed in Colwood, the West Shore and the Capital Region, location quotients (LQs) have been calculated to measure the relative concentration of labour force activity by major industry sector.

Location Quotients are a commonly used tool in regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. Understanding that Colwood is within a highly competitive regional economy, LQs have been calculated to compare Colwood and West Shore’s labour force concentrations relative to the Capital Region, to provide an understanding of the areas in which Colwood and West Shore imposes a competitive advantage over the rest of the region. Similarly, LQs have also been calculated to compare Capital Region and the province to understand which of the areas in which the Capital Region specializes in.

A location quotient greater than 1.0 for a given sector indicates a local concentration of economic activity as compared to the overarching region and may be an indication of competitive advantage with respect to the attraction of that industry sector. Location Quotients equal to 1.0 for a given sector suggest that the study area has the same concentration of economic activity as the overarching comparator. Finally, a location quotient of less than 1.0 suggests that the place in question does not have a strong competitive advantage in that sector.

The analysis (Figure 18) has concluded that the Capital Region does not represent a high concentration of Manufacturing, Utilities, Agricultural and Mining labourers when compared to the province. It does however, have a larger concentration of Health Care and Public Administration labourers largely due to the presence of provincial administrations and departments surrounding the capital city of British Columbia, Victoria.

When comparing the West Shore labour force concentration against the Capital Region, it can be seen that the West Shore has a high concentration of construction and utilities labourers. West Shore’s lowest concentration of labourers when compared to the Capital Region is within the Educational Services industry.

Colwood’s highest concentration of labour force when compared to the Capital Region lies in its Utilities and Construction industries. The Public Administration industry also has a high concentration of labour force when compared to the region. Colwood has a low concentration of labourers in the Educational Services and Arts, Entertainment and Recreation industries despite the presence of recreational amenities and educational institutions such as Royal Roads University.

FIGURE 18 – LABOUR FORCE BY INDUSTRY, LOCATION QUOTIENTS, 2011, RANKED FROM HIGHEST TO LOWEST LQ

Industry	VS CAPITAL REGION					VS BC
	Colwood	Metchosin	Langford	View Royal	West Shore	Capital Region
91 – Public Administration	1.46	1.34	1.12	1.14	1.23	2.34
62 – Health Care and Social Assistance	1.06	0.88	0.96	0.87	0.97	1.26
61 – Educational Services	0.66	1.03	0.58	0.92	0.69	1.12
54 – Professional, Scientific and Technical Services	0.70	0.84	0.71	0.96	0.76	1.07
72 – Accommodation and Food Services	0.70	0.57	0.84	0.89	0.79	1.02
44-45 – Retail Trade	1.13	0.76	1.24	1.04	1.14	1.01
71 – Arts, Entertainment and Recreation	0.54	1.39	0.94	0.79	0.84	1.01
53 – Real Estate and Rental and Leasing	0.58	0.26	0.91	0.72	0.75	0.98
56 – Administrative and Support, Waste Management and Remediation Services	0.91	0.88	0.84	1.05	0.89	0.92
23 - Construction	1.27	1.89	1.36	1.08	1.33	0.87
81 – Other Services	0.99	1.01	1.12	0.95	1.05	0.87
52 – Finance and Insurance	1.13	0.62	1.15	1.13	1.10	0.83
51 – Information and Cultural Industries	0.93	0.31	0.77	0.91	0.80	0.72
48-49 – Transportation and Warehousing	1.02	1.21	1.18	1.05	1.12	0.69
41 – Wholesale Trade	0.88	0.80	1.11	1.01	1.01	0.65
31-33 - Manufacturing	1.05	0.97	1.00	1.31	1.06	0.49
22 - Utilities	1.41	0.00	1.22	1.98	1.29	0.43
11 – Agriculture, Forestry, Fishing and Hunting	0.23	3.50	0.84	0.78	0.87	0.29
21 – Mining, Quarrying and Oil and Gas Extraction	0.00	0.00	1.32	0.00	0.67	0.15

Source: Statistics Canada. National Household Survey, Catalogue Number 99-012-X2011052, 2011.

Note: **Over 1.25** = High Concentration; **Under 0.75** = Low Concentration

When compared to its West Shore neighbours (Figure 19), Colwood’s labour force does not presently have any significant concentrations of labourers. Interestingly, the three neighbours each have their own specialized trait. Metchosin has a higher concentration of Agricultural labourers, Langford has a higher concentration of Arts, Entertainment and Recreation labourers, and View Royal has a higher concentration of Manufacturing labourers.

FIGURE 19 - LABOUR FORCE BY INDUSTRY, LOCATION QUOTIENTS, 2011, COLWOOD VS WEST SHORE COMMUNITIES, RANKED FROM HIGHEST TO LOWEST LQ

	Colwood	Metchosin	Langford	View Royal
91 Public administration	1.19	1.09	0.91	0.93
51 Information and cultural industries	1.16	0.39	0.97	1.13
22 Utilities	1.09	0.00	0.94	1.53
62 Health care and social assistance	1.09	0.91	1.00	0.90
52 Finance and insurance	1.03	0.56	1.04	1.03
56 Administrative and support, waste management and remediation services	1.02	0.99	0.94	1.18
31-33 Manufacturing	0.99	0.91	0.95	1.23
44-45 Retail trade	0.98	0.66	1.09	0.91
61 Educational services	0.96	1.50	0.84	1.35
23 Construction	0.95	1.41	1.02	0.81
81 Other services (except public administration)	0.94	0.96	1.07	0.90
54 Professional, scientific and technical services	0.93	1.10	0.94	1.27
48-49 Transportation and warehousing	0.91	1.08	1.05	0.94
72 Accommodation and food services	0.89	0.72	1.06	1.13
41 Wholesale trade	0.87	0.80	1.10	1.00
53 Real estate and rental and leasing	0.78	0.35	1.22	0.97
71 Arts, entertainment and recreation	0.64	1.65	1.11	0.94
11 Agriculture, forestry, fishing and hunting	0.27	4.03	0.96	0.90
21 Mining, quarrying, and oil and gas extraction	0.00	0.00	1.97	0.00

Source: Statistics Canada. National Household Survey, Catalogue Number 99-012-X2011052, 2011.

Note: **Over 1.25** = High Concentration; **Under 0.75** = Low Concentration

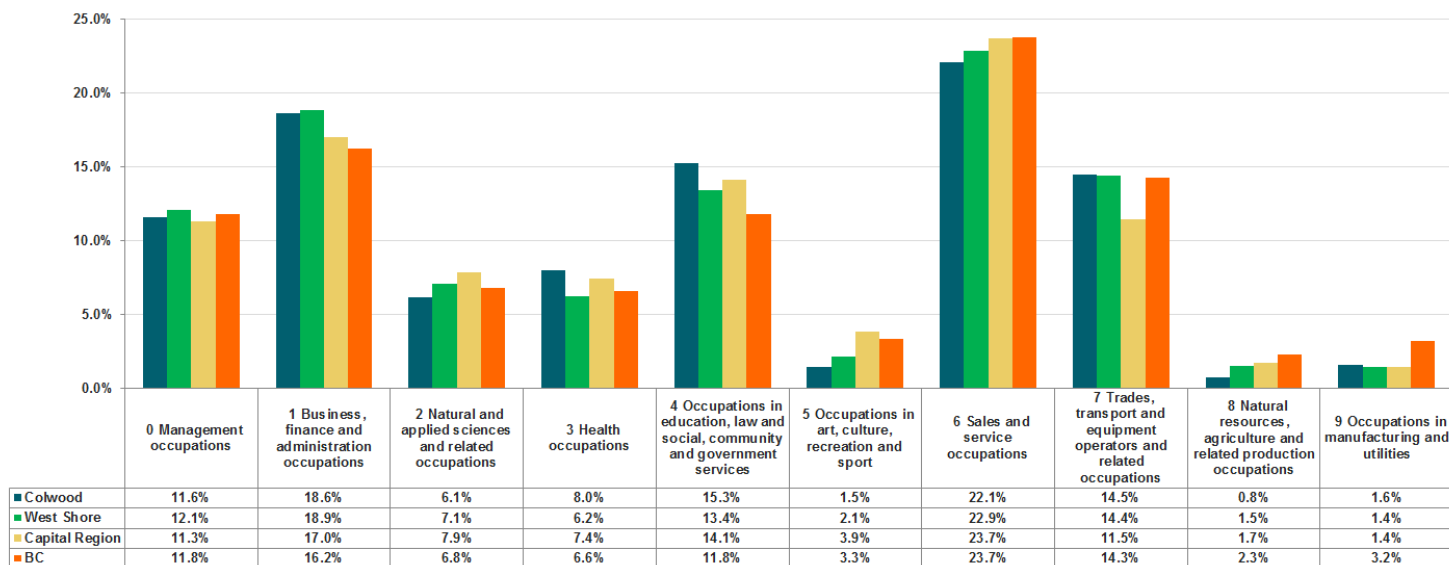
Labour Force by Occupation

As of 2011, the largest occupational category, as measured by employed workers over the age of 15 in Colwood was sales and service occupations (22.1%). This was followed by Business, Finance and Administration occupations. Occupations in Education, Law and Social, Community and Government Services were the third largest. Both the remaining West Shore communities and Capital Region had a similar outlook to Colwood's occupational breakdown.

From 2006-2011, Colwood's employed labor force in occupations in Education, Law and Social, Community and Government Services increased by over 200%, while Health occupations have grown by 35.6%, and Management occupations have grown by nearly 20.7% respectively.

However, occupations in Trades, Transport and Equipment Operators and Related occupations declined by 58%. Similarly, occupations in Art, Culture, Recreation and Sport have declined by 43%, and occupations in Processing, Manufacturing and Utilities have declined by 18%.

FIGURE 20 – LABOUR FORCE BY OCCUPATION, 2011



Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

Note: West Shore calculations exclude Colwood results.

Unemployment Rates

As of 2011, Colwood’s total labor force was 8980, of which 8540 were employed. Since 2006, the City’s total labor force has expanded by 745 or by 9%. In 2011, Colwood’s unemployment rate was at 4.9%, which was below the provincial rate of 7.8%, and all but one of its West Shore community neighbours. Victoria and Esquimalt had unemployment rates of 7.3% and 6.7% respectively.

FIGURE 21 – UNEMPLOYMENT RATES, 2011

	Colwood	Langford	Metchosin	View Royal	West Shore	Victoria	Esquimalt	BC
2011	4.9%	5.8%	6.3%	4.5%	5.4%	7.3%	6.7%	7.8%

Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

Employment Projections

In 2038, Colwood is projected to have a total employment level of 9556 - an increase of 83.7% during the period of 2008-2038. West Shore communities Langford, Metchosin, and View Royal are also expecting net increases during the same period with Langford’s employment levels projected to increase by 66.5%.

Both Colwood (26.6%) and Langford (52.6%) make up over 75% of the total West Shore projected employment growth. In comparison, neighbouring communities Victoria and Esquimalt are expected to see increases of 5.7% and 24% respectively.

FIGURE 22 – EMPLOYMENT PROJECTIONS 2008-2038

	2008	Projected 2038	Absolute Δ 2008-38	% Δ 2008-38	Share of Sub-Area
Colwood	5201	9556	4355	83.7%	26.6%
Langford	11,325	18,858	7533	66.5%	52.6%
Metchosin	1087	1384	297	27.3%	3.9%
View Royal	4742	6076	1334	28.1%	16.9%
West Shore	22355	35874	13519	60.5%	
Victoria	86,721	91,652	4931	5.7%	
Esquimalt	12,681	15,722	3041	24.0%	

Source: Capital Regional District, Changing People in a Changing Region, 2009.

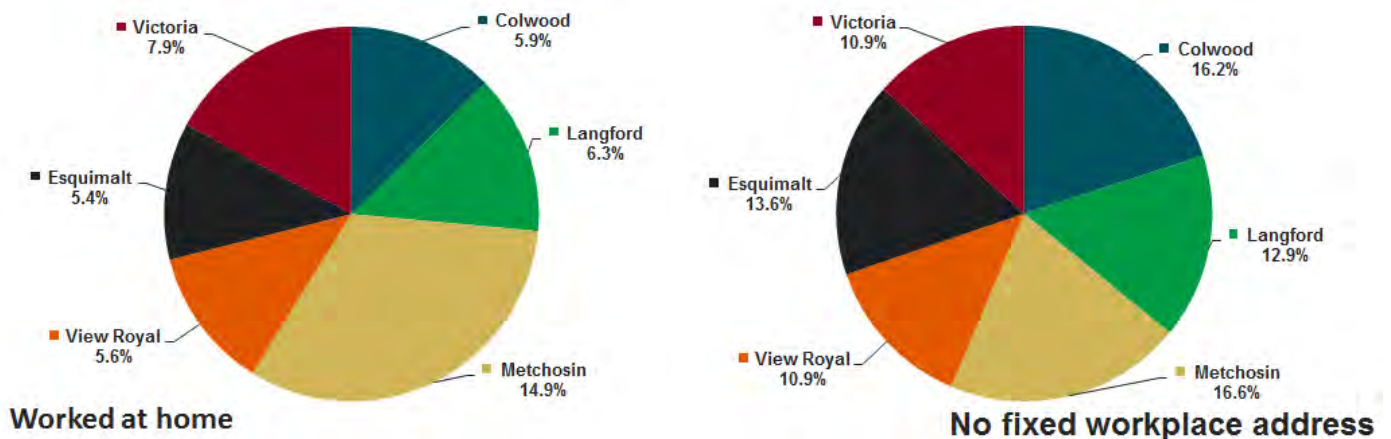
Labour Flow Characteristics

Place of Work

In 2011, 5.9% of the total employed population in Colwood aged 15 years and over worked at home. This is comparable to surrounding cities whose proportion of population working at home averaged between 5.4%-7.9% - with the exception of Metchosin which represents 14.9%.

16.2% of the total employed population in Colwood had no fixed workplace address reflective of the large concentration of construction labourers. Next to Metchosin, Colwood had the highest proportion when compared to its neighbouring communities.

FIGURE 23 – PLACE OF WORK, WORKED AT HOME VS NO FIXED WORKPLACE ADDRESS, 2011

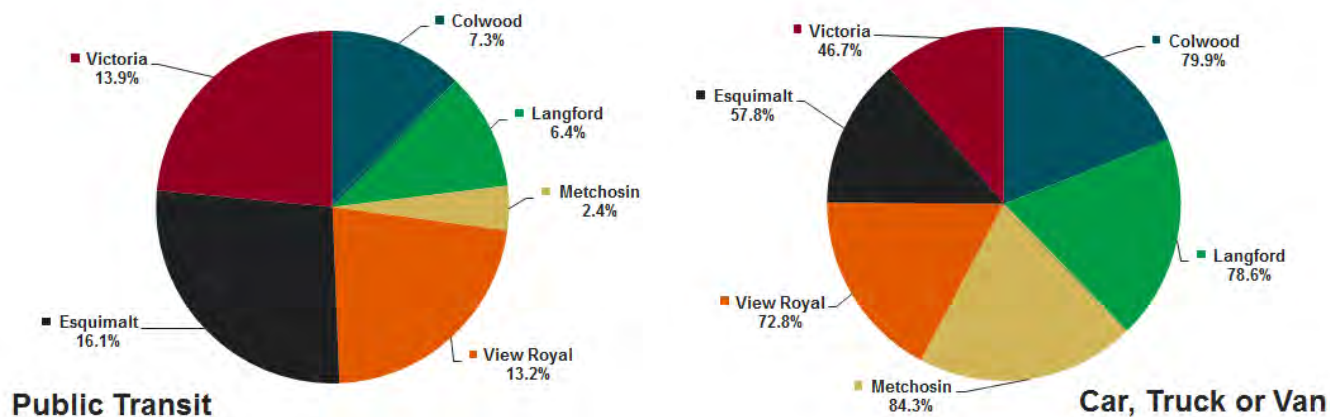


Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

Mode of Transportation to Work

In 2011, 7.3% of the total employed population aged 15 years and over travelled to work using Public Transit. This is comparable to Langford (6.4%). Figure 24 illustrated a trend that the closer a community was to Victoria the higher their proportion of people travelled by public transit to work. The trend stood true when the opposite – people who travelled to work by Car, Truck or Van – was higher in communities furthest away from Victoria.

FIGURE 24 – MODE OF TRANSPORTATION, PUBLIC TRANSIT VS CAR, TRUCK OR VAN AS A DRIVER, 2011



Source: Statistics Canada, National Household Survey (NHS) Profile, 2011 National Household Survey, Statistics Canada Catalogue no. 99-004-XWE.

Business Profile

Business Characteristics

As of March 2014, the City of Colwood had 449 business licenses with 10 licenses awaiting the approval process².

Businesses Patterns Assessment

The business patterns assessment revealed that as of December 2013, Colwood had a total of 807 businesses. Of these businesses, the following industries illustrated the highest proportion of business establishments in Colwood:

- Construction (186 businesses, 23% of total)
- Professional, Scientific, and Technical Services (121 businesses, 15% of total)
- Real Estate and Rental and Leasing (84 businesses, 10.4% of total)
- Other Services – except public administration (63 businesses, 7.8% of total)

Notably, when the indeterminate category (self-employed) is removed, the four sectors with the highest business establishment proportions remain consistent with only Real Estate and Rental and Leasing falling off the list, replaced by Health Care and Social Assistance.

- Construction (89 businesses, 25.1% of total)

² City of Colwood Planning Department, March 2014

- Professional, Scientific, and Technical Services (46 businesses, 13.4% of total)
- Other services – except public administration (36 businesses, 10.5% of total)
- Health Care and Social Assistance (33 businesses, 9.6%)

When compared to neighbouring community Langford, Colwood illustrates a larger portion of Professional, Scientific, and Technical Services establishments. However, Langford has a greater portion of Retail Trade establishments limiting Colwood’s Retail Trade industry to 54 establishments as of December 2013.

FIGURE 25 – BUSINESS ESTABLISHMENTS BY INDUSTRY, DECEMBER 2008, DECEMBER 2013

	Colwood				Langford		Victoria	
	2008	2013	% Δ	Share	2013	Share	2013	Share
11 Agriculture, Forestry, Fishing and Hunting	11	14	27.3%	1.7%	27	1.3%	82	0.7%
21 Mining, Quarrying, and Oil and Gas Extraction	2	2	0.0%	0.2%	1	0.0%	19	0.2%
22 Utilities	0	1	100.0%	0.1%	4	0.2%	7	0.1%
23 Construction	143	186	30.1%	23.0%	447	21.2%	870	7.8%
31-33 Manufacturing	13	13	0.0%	1.6%	58	2.8%	240	2.2%
41 Wholesale Trade	18	21	16.7%	2.6%	70	3.3%	258	2.3%
44-45 Retail Trade	46	54	17.4%	6.7%	222	10.6%	1194	10.7%
48-49 Transportation and Warehousing	42	31	-26.2%	3.8%	91	4.3%	202	1.8%
51 Information and Cultural Industries	11	11	0.0%	1.4%	22	1.0%	187	1.7%
52 Finance and Insurance	25	34	36.0%	4.2%	83	3.9%	756	6.8%
53 Real Estate and Rental and Leasing	64	84	31.3%	10.4%	233	11.1%	1484	13.4%
54 Professional, Scientific and Technical Services	92	121	31.5%	15.0%	248	11.8%	1848	16.6%
55 Management of Companies and Enterprises	30	27	-10.0%	3.3%	40	1.9%	354	3.2%
56 Administrative and Support, Waste Management and Remediation Services	43	44	2.3%	5.5%	114	5.4%	378	3.4%
61 Educational Services	15	19	26.7%	2.4%	27	1.3%	166	1.5%
62 Health Care and Social Assistance	41	48	17.1%	5.9%	111	5.3%	1180	10.6%
71 Arts, Entertainment and Recreation	7	14	100.0%	1.7%	32	1.5%	204	1.8%
72 Accommodation and Food Services	19	18	-5.3%	2.2%	74	3.5%	626	5.6%
81 Other Services (except Public Administration)	52	63	21.2%	7.8%	198	9.4%	987	8.9%
91 Public Administration	2	2	0.0%	0.2%	2	0.1%	66	0.6%
Total Businesses	676	807	19.4%		2104		11,108	

Source: Business Patterns Data, December 2008 and December 2013.

The sectors that have experienced the highest rate of growth (exclusive of the self-employed, and those industries with 25 or fewer establishments) include:

- Professional, Scientific, and Technical Services (31.5%)
- Real Estate and Rental and Leasing (31.3%)
- Construction (30.1%)
- Other Services – except public administration (21.2%)
- Overall between 2008 and 2013, Colwood added 131 firms.

Overall, business establishments in Colwood are characterized by small companies and enterprises that employ less than 10 people. In 2013, excluding the businesses consisting of the self-employed, there were 343 businesses or 27.1% of the subtotal that employ 1-4 people. An additional 62 businesses, or 7.7% of the subtotal, employ 5-9 people. The four industries with the highest number of establishments employing fewer than 10 people were:

- Construction (63 businesses)
- Professional, Scientific, and Technical Services (42 businesses)
- Other services – except public administration (33 businesses)
- Health Care and Social Assistance (24 businesses)

FIGURE 26 – BUSINESS ESTABLISHMENT SIZE BY INDUSTRY, DECEMBER 2013. COLWOOD

Industry (NAICS)	Total	Ind.	Sub.	1 - 4	5 - 9	10 - 19	20- 49	50- 99	100- 199	200- 499	500 +
11 Agriculture, Forestry, Fishing	14	11	3	3	0	0	0	0	0	0	0
21 Mining, Quarrying, and Oil and Gas	2	1	1	1	0	0	0	0	0	0	0
22 Utilities	1	1	0	0	0	0	0	0	0	0	0
23 Construction	186	100	86	54	19	9	1	2	1	0	0
31-33 Manufacturing	13	9	4	3	0	1	0	0	0	0	0
41 Wholesale Trade	21	11	10	7	2	1	0	0	0	0	0
44-45 Retail Trade	54	27	27	10	6	6	4	1	0	0	0
48-49 Transportation and Warehousing	31	23	8	6	1	0	1	0	0	0	0
51 Information and Cultural Industries	11	9	2	2	0	0	0	0	0	0	0
52 Finance and Insurance	34	21	13	6	3	2	2	0	0	0	0
53 Real Estate and Rental and Leasing	84	70	14	12	1	1	0	0	0	0	0
54 Professional, Scientific and Tech	121	75	46	38	4	1	3	0	0	0	0
55 Management of Companies	27	24	3	3	0	0	0	0	0	0	0
56 Administrative and Support	44	22	22	16	5	1	0	0	0	0	0
61 Educational Services	19	10	9	6	1	0	1	0	0	1	0
62 Health Care and Social Assistance	48	15	33	17	7	5	3	1	0	0	0
71 Arts, Entertainment and Recreation	14	5	9	4	4	0	0	1	0	0	0
72 Accommodation and Food Services	18	3	15	3	3	7	2	0	0	0	0
81 Other Services	63	27	36	28	5	3	0	0	0	0	0
91 Public Administration	2	0	2	0	1	0	0	0	1	0	0
Total Economy	807	464	343	219	62	37	17	5	2	1	0

Source: Business Patterns Data, December 2013.

Businesses Patterns Location Quotients

Business Patterns data analyzed through Location Quotient (LQs) in theory represents the export base of the participating city and or region (both in terms of products or services). Businesses that make up this export base may have chosen to locate in the community due to certain local or regional competitive advantage. These competitive advantages can be used to attract additional investment, in the same or complimentary industries.

The LQs measure the concentration of business activity within a smaller area relative to the overarching region in which it resides. Once again, understanding that Colwood is within a highly competitive regional economy, LQs have been calculated to compare Colwood’s business concentrations relative to the Capital Region, to provide an understanding of the areas in which Colwood imposes a competitive advantage over the rest of the region. Similarly, LQs have also been calculated to compare the Capital Region and the province to understand which of the areas are most advantageous to pursue.

The analysis has concluded that Colwood in the Capital Region economy does include significant concentrations in a few industries. Colwood’s Construction, Utilities and Educational Services industries represent the greatest concentration of business activity when compared to the remainder of the region. However, when comparing other business activity in other industries, Colwood has a low concentration of businesses participating in key knowledge based industries (Professional, Scientific and Technical Services, Finance and Insurance, Health Care and Social Assistance), Manufacturing industries and Accommodation and Food Services industry. Despite Colwood having a large number of Professional, Scientific and Technical Service businesses in its community, the city is still quite away from reaching an average number of firms compared to the remainder of the region.

FIGURE 27 – BUSINESS PATTERNS BY INDUSTRY, LOCATION QUOTIENTS, 2013

Industry	VS CAPITAL REGION					VS BC
	Colwood	Metchosin	Langford	View Royal	West Shore	Capital Region
91 – Public Administration	0.29	0.34	0.11	0.18	0.18	3.70
62 – Health Care and Social Assistance	0.69	0.58	0.61	1.03	0.69	1.45
54 – Professional, Scientific and Technical Services	0.89	0.89	0.70	0.96	0.80	1.26
61 – Educational Services	1.58	1.59	0.86	1.03	1.10	1.25
53 – Real Estate and Rental and Leasing	0.79	0.81	0.84	0.83	0.82	1.08
81 – Other Services	0.98	0.74	1.18	0.98	1.07	1.08
44-45 – Retail Trade	0.82	0.50	1.29	1.54	1.17	1.05
71 – Arts, Entertainment and Recreation	1.00	1.53	0.88	0.71	0.93	1.05
52 – Finance and Insurance	0.71	0.20	0.67	0.60	0.62	1.04
56 – Administrative Support and Waste Management and Remediation	1.36	1.54	1.35	1.15	1.34	0.94
72 – Accommodation and Food Services	0.56	0.52	0.89	1.36	0.87	0.94
23 - Construction	1.85	2.15	1.70	1.09	1.67	0.91
51 – Information and Cultural Industries	0.96	0.62	0.73	0.65	0.76	0.85
31-33 - Manufacturing	0.69	1.52	1.19	0.93	1.07	0.78
22 - Utilities	1.52	0.00	2.33	1.88	1.88	0.77
41 – Wholesale Trade	1.01	0.69	1.29	1.13	1.15	0.66
48-49 – Transportation and Warehousing	1.30	0.90	1.46	1.25	1.34	0.57
11 - Agriculture, Forestry, Fishing and Hunting	0.98	3.66	0.72	0.87	1.06	0.43
21- Mining, Quarrying, and Oil and Gas Extraction	1.32	0.00	0.25	0.82	0.55	0.24

Source: Business Patterns Data, December 2013.

Note: **Over 1.25** = High Concentration; **Under 0.75** = Low Concentration

When compared to its West Shore neighbours, Colwood’s business representation is strong in a few industries. Interestingly, Colwood has the highest concentration of business activity involved in Information and Cultural Industries – even though it has a low concentration of labourers within that industry. Similar to its concentration strength against the region, Colwood has a healthy business concentration of Educational Services, Mining, and

Public Administration businesses when compared to its neighbours. Colwood has one of the lowest concentration of retail trade activity when compared to its neighbours. Limitations on zoning and land availability can be a direct cause to the lower activity. Overall, Colwood has a healthy representation of most industries.

Notable concentration spreads elsewhere in the West Shore include Langford’s seemingly balanced representation of each industry type, Metchosin’s dominant Agricultural industry strength (including Manufacturing as well as Arts, Entertainment and Recreation), and View Royal’s Health Care and Social Assistance sector which is a likely strong sector due to the presence of the Hospital.

FIGURE 28 – BUSINESS PATTERNS BY INDUSTRY, LOCATION QUOTIENTS, 2013, WEST SHORE VS COLWOOD

	Colwood	Metchosin	Langford	View Royal
21 Mining, quarrying, and oil and gas extraction	2.42	0.00	0.46	1.50
91 Public administration	1.61	1.92	0.62	1.00
61 Educational services	1.43	1.44	0.78	0.94
51 Information and cultural industries	1.27	0.82	0.97	0.86
52 Finance and insurance	1.14	0.32	1.07	0.96
23 Construction	1.11	1.29	1.02	0.65
54 Professional, scientific and technical services	1.11	1.12	0.88	1.20
71 Arts, entertainment and recreation	1.07	1.64	0.94	0.76
56 Administrative and support, waste management and remediation services	1.02	1.16	1.01	0.86
62 Health care and social assistance	0.99	0.84	0.88	1.50
48-49 Transportation and warehousing	0.97	0.67	1.09	0.93
53 Real estate and rental and leasing	0.96	0.98	1.02	1.00
11 Agriculture, forestry, fishing and hunting	0.93	3.47	0.69	0.82
81 Other services (except public administration)	0.92	0.69	1.11	0.92
41 Wholesale trade	0.87	0.60	1.12	0.98
22 Utilities	0.81	0.00	1.24	1.00
44-45 Retail trade	0.70	0.43	1.11	1.32
31-33 Manufacturing	0.65	1.42	1.11	0.87
72 Accommodation and food services	0.65	0.60	1.02	1.57

Source: Business Patterns Data, December 2013.

Note: **Over 1.25** = High Concentration; **Under 0.75** = Low Concentration

Appendix C: Commercial and Industrial Land Analysis

Having reviewed the City’s industry composition an assessment of the City’s commercial and industrial land base and vacant land supply can identify the issues and opportunities associated with sustainable growth of business and investment in the City. The following section provides an evaluation of developed and vacant (to the extent possible) commercial and industrial areas to determine if any changes, additions, or modifications are needed to policy or approaches to achieve the City’s economic development objectives.

Official Community Plan Policies

The Official Community Plan (OCP) sets the framework for land use and development in the community. Section Three of the OCP offers the land use framework required to create a sustainable city, including objectives and policies related to designated land uses in the City. The Mixed-use Employment Centres and the Business – Light Industrial designations have the most relevance for commercial and industrial development. From an employment land perspective, the Mixed-use Employment Centre designation includes the following policies to direct industrial and commercial land development:

- **Policy 3.7.1:** Ensure a long term supply of employment lands in centres is maintained.
- **Policy 3.7.2:** Ensure choices about land use and density do not preclude the long term role of the centre as an employment area.

The Business – Light Industrial designation of the OCP contains policies under a similar objective, namely ensuring the provision of employment lands over the longer term:

- **Policy 3.15.1:** Develop and maintain an inventory of commercial and industrial floor space and remaining capacity to ensure that an adequate supply of employment lands is maintained.
- **Policy 3.15.2:** Promote high intensity business and light industrial development.

Overall, there are approximately 183 hectares (451 acres) of land designated as Mixed-use Employment Centre or Business – Light Industrial, with the majority of that land falling into the Business – Light Industrial designation (95 hectares or 235 acres). The majority of that land falls within the CFB Esquimalt – Colwood unit area. For the Mixed-use Employment area designation, a notable portion (32 hectares or 80 acres) of land falls within the campus of Royal Roads University. Though much of this land is vacant, it is unlikely that commercial or industrial development will occur in these areas over the short or medium term. The largest vacant parcel of designated employment land is in the Veteran’s Memorial Parkway/Sooke Road area. Approximately 55 hectares of land (136 acres) are designated for Mixed-use Employment Uses, with the majority of that land vacant.

Section 10 of the OCP outlines an overall strategy of encouraging existing businesses to stay and grow in, and welcome new businesses into, the community. One of the key strategies underneath that overall land use strategy includes ensuring a short and long term supply of employment lands to accommodate that investment. Several policies influence the provision of those employment lands:

- **Policy 10.2.1:** Ensure sufficient and appropriate floor space capacity to meet local and regional demands for the planning period.
- **Policy 10.2.2:** Direct new office development to the city centre where practical and feasible.
- **Policy 10.2.4:** Identify sites for office development and work with development proponents to attract anchor office/business tenants through proactive development partnerships.
- **Policy 10.2.5:** Support those businesses whose needs cannot be met within the city centre in other locations in the city.
- **Policy 10.3.1:** Establish a progressive jobs-labour force target and reevaluate floor area capacities based on this target to ensure adequate, long-term supply of employment lands.
- **Policy 10.4.2:** Work cooperatively with other communities in the West Shore to jointly develop land use and economic development strategies that are synergistic and complementary.

From an industrial and commercial development perspective, the OCP directs the City to maintain an adequate supply of industrial and commercial lands to accommodate and encourage employment growth, as well as re-evaluate that supply on an ongoing basis and work with adjacent municipalities to ensure land use planning coordination.

Land Use Bylaw Policies

Commercial Land Supply

Division Seven of the Land Use Bylaw sets out the regulations for commercial development in the City. Commercial development is permitted within 13 specific commercial districts, ranging from locally-oriented neighbourhood commercial uses to mixed-use commercial areas:

- Neighbourhood Commercial (C1) Zone, which permits small retail and personal services establishments, offices, and restaurants.
- Community Commercial (C2) Zone, which permits a slightly wider range of commercial uses, including animal hospitals, nurseries/greenhouses, gas stations, hotels, licensed establishments, public assembly and entertainment uses, day cares, and shopping centres
- District Commercial (C3) Zone, which permits a similar range of uses as the C2 zone, but does not include provisions for as many non-commercial uses (e.g. dwelling units, daycares), while adding additional uses recognizing its function as a commercial centre (e.g. public transportation depots).
- Apartment Commercial (C4) Zone, which permits a limited range of commercial uses (e.g. offices, personal services, restaurants, retail stores) with apartment dwellings on upper floors.
- Mixed Commercial (C5) Zone, which permits a similar range of commercial uses to the District Commercial (C3) Zone, while integrating uses like automotive sales, drive-in businesses, and business colleges/trade schools.
- Commercial Tank Farm (C6) Commercial, which permits card lock fuel stations, tank farms, and commercial offices related to those uses.

- Mixed Commercial/Residential (C7) Zone, which permits a wide range of commercial, institutional, recreational, light industrial, and residential (limited to apartment dwellings) uses.
- Towncentre Mixed Use (C8) Zone, which permits a similar range of commercial, institutional, and residential uses as the C8 zone, in addition to more specific uses characteristic of a town centre (e.g. live/work studios) or higher density housing (e.g. attached housing).
- Towncentre Mixed Use A (C8A) Zone, which permits a similar range of uses to the C8 Zone, with the exception of attached housing.
- Service Commercial (CS1) Zone, which permits a wide range of commercial uses, with an emphasis on more commercial or retail service uses than other commercial districts (e.g. car washes, automobile repair, contractor offices).
- Highway Commercial (CS2) Zone, which permits a range of commercial uses focused on the regional population, which require a high level of access.
- Tourist Commercial – Motel (CT1) Zone, which primarily permits motels and camp-sites, as well as limited recreation uses and one-family dwellings/secondary suites.
- Service Commercial 3 (CS3) Zone, which permits similar commercial uses as other highway commercial districts, but a slightly wider range of retail sales stores and storage uses.

Overall, a number of these zoning districts have the potential to accommodate more export-oriented or knowledge-based employment characteristics of economic development objectives. They also accommodate a wide range of more population-oriented uses, which may in turn increase competition for existing lands.

The City has 24.4 hectares (60.3 acres) of zoned commercial land, with the majority of that inventory sitting in the Community Commercial (C2) Zone (8.9 hectares or 21.9 acres) and District Commercial (C3) Zone (6.0 hectares or 14.8 acres). Virtually all of that zoned commercial land sits within the Mixed Use Employment Centre and City Centre designations within the OCP.

The remaining commercial lands in the City are spread among six other commercial districts:

- 1.0 hectares (2.5 acres) in C1
- 3.3 hectares (8.2 acres) in C4
- 0.8 hectares (2.1 acres) in C5
- 0.9 hectares (2.3 acres) in C6
- 2.6 hectares (6.3 acres) in C7
- 0.9 hectares (2.2 acres) in C8A

The amount of vacant land within that inventory is fairly limited. The majority of parcels zoned commercial are fully absorbed, while a limited number of commercial parcels in the City Centre area appear to have vacant areas, particularly along Sooke Road and Wale Road. As such, there may be limited opportunities for infill development.

In terms of infrastructure access, the majority of sites zoned for commercial purposes reside along the Sooke Road/Island Highway Corridor. This provides the properties with high visibility, access to major inter-city thoroughfares and highways, and access to bus rapid transit (BRT) and local transit routes. Further, the majority of commercially-zoned lands have access to regional water and sanitary services.

Industrial Land Supply

Division Eight of the Land Use Bylaw sets out the regulations for industrial development in the City of Colwood. This includes provisions for industrial land and development in three specific districts:

- Light Industrial (M1) Zone, which permits coffee shops; light industrial uses that do not create nuisances (e.g. trade contractors); repair of household furnishings; sale, rental, and repair of tools and small equipment; repair of automobiles, trucks, boats, or farm machinery; and wholesale and storage buildings.
- General Industrial (M2) Zone, which permits industrial uses; gasoline service stations coffee shops; gravel processing; and sale, rental of automobiles, trucks, boats, or building supplies.
- Royal Bay Industrial (M3) Zone, which permits mining and quarrying and gravel processing.

Presently, the City has approximately 11.5 hectares (28.3 acres) of zoned industrial land (designated Mixed Use Employment Centre); a figure that is unchanged from the amount of land inventoried in the CRD Industrial Land Use Inventory and Assessment, completed by the Capital Region District in 2009. At that time, Colwood accounted for only 4% of total industrial land in the West Shore area (i.e. Colwood, Highlands, Juan de Fuca, Langford, Metchosin, and Sooke), with areas like Highlands, Juan de Fuca, Sooke, and Langford holding higher shares of the West Shore's supply. Within that inventory approximately 0.5 hectares (1.2 acres) are zoned light industrial (M1), with the balance of industrial land zoned general industrial (M2).

In terms of vacant industrial lands, the approximately 11 hectares at Veteran's Memorial Parkway and Allandale Road remains largely vacant, while the smaller light industrial parcels along Highway 1A (Island Highway) are largely absorbed (though a small inaccessible portion of those lands remains vacant). This is in contrast to the rest of the West Shore, which held the majority of vacant land across the Capital Region District based on the 2009 study. As a result of that supply, the West Shore was expected to accommodate an additional 2,144 industrial employees over the 2008 to 2038 period, translating to a land demand of roughly 116 acres (46.9 hectares). That said, the report suggested that industrial development was expected to experience slower growth rates than other sector, due to larger land requirements and constrained supply.

In terms of infrastructure, vacant industrial site at Veteran's Memorial Parkway is well serviced. The site has access to the Capital Region water system, as well as access to the regional wastewater system through secondary mains. In terms of transportation, the site is bisected by Veteran's Memorial Parkway (a limited access road), and has quick access to Sooke Road (Highway 14) and Island Highway. Further, the connections to those main transportation routes link the area to local public transit routes.

Land Base Observations

Overall, the City appears to have a limited supply of vacant commercial and industrial lands. Though there are some infill opportunities, particularly in the commercial land supply, there are limited designated and zoned properties that would be available over the shorter term. The exception to this is the large general industrial area in the Sooke Road and Veteran's Memorial Parkway area, which is designated and zoned, and has access to regional water and sewer systems. This parcel represents the most immediate supply of greenfield employment land in the municipality.

Larger scale vacant lands and infill opportunities in the community are well positioned to accommodate a range of industrial and commercial investment. However, the same qualities that make those parcels attractive for more industrial and knowledge-based employment make them attractive from a commercial and population-related

development perspective as well (e.g. retail uses, institutional uses). The limited supply of vacant lands complicates the issue further. It increases the competition for lands among sectors or uses that align with economic development objectives and more locally-oriented or non-employment projects which may provide developers or landowners with a higher or more immediate return on investment, or lower risks. A more comprehensive assessment of current and potential employment lands (i.e. industrial and commercial) is needed to ensure that the community has the land resources needed (both infill and greenfield) to support the growth of the economy, and enable higher jobs and labour force ratios.

Appendix D: Consultation Summary

Summary of Community Engagement

The opinions of residents, local and regional community leaders, and members of Colwood’s business community ground other data and findings in the local reality of economic development in the community, from the perspective of those who live it every day. To gather this information, over 50 individuals were canvassed for their view of Colwood’s economy through individual interviews. In addition, a class of Grade ten business students at Belmont High School participated in a youth focus group, and a joint forum was held, to gather the thoughts of Colwood residents on the Economic Development Strategy.

The interviews and focus groups gathered feedback on the following questions. For each question, the responses of community members have been summarized with attention to the frequency of each comment.

How would you describe the business climate in Colwood?

Community members observed that growth in Colwood is moving at a slower pace than the adjoining community of Langford, and that development in Colwood tends to be focused on residential development. The stalled development planned for Colwood Corners was described as discouraging, both to community members and to the development community. Proposals such as the Royal Bay development are good, but many are cautious about the true potential of these proposals based on past experience.

The local and regional business community feel that the demand for development has been low for multi-family, office, and retail development, causing an overall slow pace of development. However, some of these issues were associated with the broader economy and business owners expect the climate will improve, particularly with increased activity in the Greater Victoria area. Perceived inconsistencies in municipal service delivery and leadership decisions, as well as a lack of public support for development have discouraged developers from working in Colwood in the past. Other business owners identified that bylaws are not tailored to the needs of the city and fault unexpected requests for costly changes to project plans as reasons for project failure.

Several stakeholders reported that the relationship between the municipality and the business community is however improving. Colwood’s development processes were identified as better than many other communities in the region, aside from Langford. Colwood is currently not a member of the Urban Development Institute.

Please consider your long term vision for Colwood. What will Colwood be known for 5, 10 years from now?

A significant number of stakeholders expressed a desire for a more diverse economy with a better balance between commercial, industrial and residential development, and a more positive business environment, with a clear commercial core, low taxes and available land appropriately zoned for development. Employment opportunities that provide a range of options and wages that support families were also a shared vision for the community.

In the future, stakeholders would also like to see the benefit of strong relationships with post-secondary education institutions (Royal Roads University, Camosun College and University of Victoria)

Residents and business and community leaders would like to raise the profile of Colwood, through brave community leadership, showing agility, and responding proactively to emerging issues. They want to capture the beauty of Colwood's natural surroundings extending its public spaces, with vibrant central community gatherings, unique neighbourhoods and beautification initiatives. Residents would like to see the community as a tourism destination adding to current attractions such as the Hatley National Historic Site.

What do you consider to be Colwood's most important assets?

Colwood's natural amenities were frequently identified as its greatest asset, including properties with waterfront proximity, views of the ocean, Royal Bay and the Lagoon beach, Department of National Defense Lands, Royal Colwood and Olympic View golf courses, as well as its parks, playgrounds and trails more generally.

Colwood's residential development was also noted as an important asset as it benefits from the reputation of the west coast of British Columbia as a beautiful place to retire combined with its relative affordability and proximity to Victoria. The already mentioned natural amenities as well as recreational centre are also attractive to residents. Many of these residents commute to work in other communities and could be a source of workers for local companies instead.

Strong sustainability planning in Colwood is recognized as a strong asset, with the potential to attract residents and businesses with similar values. Specifically, initiatives such as Solar Colwood, natural care of public parks, and the Official Community Plan underpin the city's reputation.

Royal Roads University is a growing post-secondary institution with a focus on applied research that is already supporting the knowledge based economy and the community of Colwood in a number of ways. Noted supporting programs and initiatives by the University include its extensive international homestay program in Colwood (400 international students), entrepreneurship oriented applied research initiatives, municipal infrastructure research initiatives, and the attraction of a Canada Research Chair within the Center for Livelihood and the Economy. Graduates of Royal Roads University are perceived to be the greatest asset to the city as they are a potential source of employees and entrepreneurs for the community.

Colwood has a reputation as an artistic community with tourism potential. Some related assets include great venues for concerts and community events such as 'Rock the Shores', institutions such as the Emily Carr West Shore Community Arts Centre and the Coast Collective Arts Center, and the Fisgard lighthouse.

Colwood benefits from regional and sub-regional amenities such as transit, water supply, and sewage systems. Softer benefits such as recreational opportunities in adjacent areas also contribute to Colwood's attractiveness.

What are the primary issues impacting economic growth in the community?

Those interviewed felt that Colwood's greatest challenge is defining a clear, shared vision for the future of the community, a community brand, and a greater sense of community pride. Stakeholders described council did not have a shared agenda or vision for policies on investment attraction.

Stakeholders suggested that a sense of place is lacking in the community. This could be improved by establishing local food initiatives, integrating existing trails into a community wide trails system, greater densification, and the realization of pending hotel developments. The potential loss of the breakwater was a concern as this is an important place to many residents.

Another commonly mentioned issue was the need for greater commercial development. A number of barriers, such as a poor relationship between the municipality and the business community, the lack of a commercial core, and the lack of available lands. Some identified a disconnect between the attractiveness of Colwood's natural

areas and its commercial offerings, leading to the loss of potential visitor spending in the community. Many stores close at 5pm, for example. Colwood Corners was frequently mentioned as an area where greater commercial development activity should be encouraged. Although discussions are underway regarding potential new developments, past projects have stalled to the great discouragement of the community.

Competition from Langford is a concern due to the increasing concentration of retail big box stores, and growing commercial real estate activity with access to major transportation corridors. Stakeholders suggested that Langford is more aggressive in its development efforts, waiving building permit fees and offering ‘tax holidays’ to developers. Land in Colwood is also reported to be held by a small number of landholders, who may not be interested in putting land on the market for development.

The Coast Collective Arts Centre was identified as a key community asset, yet financial sustainability and facility/program expansion is limited by revenues. Colwood does provide a grant to support the centre, but the amount varies annually.

The small size of the community and the relative strength of its non-residential tax base create financial capacity constraints and stakeholders noted that it can be difficult for Colwood to take action on economic development initiatives. Stakeholders expressed concern that sufficient resources may not be dedicated to the implementation of recommendations arising from the study. This capacity constraint also impairs the communities’ ability to respond to investment opportunities.

With respect to the local labour force, stakeholders noted that youth were not well prepared to enter the workforce. Royal Roads University is reported to have challenges hosting students, and building residences to keep students in and around Colwood.

What are the three greatest opportunities to stimulate economic growth and business investment in Colwood in the coming 3-5 years?

- **Stakeholders identified the following areas as opportunities to attract business investment:**
 - Waterfront development
 - Technology sector, increasing connections with success in Victoria and the Victoria Advanced Technology Council
 - Green technology businesses and initiatives
 - Defense related manufacturing, housing, and warehouse space
 - Commercial development including niche retail and commercial businesses (coffee shops, boutique retail, restaurants), neighbourhood commercial development
 - Tourism asset development, including more festivals and events like “Rock the Shore” and the Fisgard lighthouse
 - BC Transit investment
 - Ship building and its spinoffs
 - Urban agriculture and local food initiatives, production of value-added agricultural products
 - Home based businesses
 - Energy sector (Liquid Natural Gas)
 - Government office development
 - Film and music industry
 - Colwood’s reputation as an artistic community

- Realize the potential development opportunities of Royal Bay, Pacific Landing and Colwood Corners
- **Infrastructure and community development initiatives that stakeholders feel will increase business investment include:**
- Public realm place making i.e. landscaping, bike lanes, streetscape in general, community signage, public square, improved walkability
 - Recreational trails systems
 - Transportation hub
 - Road capacity and quality
 - Senior's care facility
 - Municipal sewer services
 - Fibre optic cable infrastructure
 - Housing, including student residences and single family master planned communities
 - Regional transit system
 - Regional Sustainability Strategy
 - Health facilities such as hospitals and more health services such as dentists, acupuncturists, fitness centre
 - Arts and culture, including the proposed Havenwood at Pacific Landing development involving the Coast Collective Arts Center (estimated economic impact of one million dollars)
 - Training centre for glass art, or the arts in general
 - Camosun College interest in an international school for tourism including a teaching hotel
 - Proposed Royal Bay theater
- **Suggested business and labor force development projects include:**
- Joint initiatives with Royal Roads University and Camosun College, potential for increased interaction with businesses and capitalizing on focus on applied research
 - Entrepreneurial post-secondary students become Colwood business leaders through a business park or incubator located near these institutions
 - Small tax breaks or incentives to entrepreneurs, including downtown
 - Job placements, practicums and internships to support youth employment
 - Partnerships between secondary schools and post-secondary programming to allow students to start for credit programming before graduating from high school

How do you see sustainability being reflected in the economic development strategy?

Stakeholders were split in responding to this question. Most support the principle of sustainability while others were cautious about any potential to increase the costs of doing business and further slow commercial development. An approach that rewards positive action was recommended as opposed to the implementation of stringent sustainability guidelines.

Colwood's reputation as a sustainable community is seen as an asset economic development that could attract residents and businesses. Therefore, communicating Colwood's current sustainability initiatives was recommended.

The remaining comments are grouped within the related pillar of sustainability, social, cultural, environmental or economic.

- **Social sustainability:** Target population sustainability with more balanced demographic, increase the non-profit sector, address the availability of social services in the community (mental health, immigration, poverty), and establish more of a sense of community in Colwood
- **Cultural sustainability:** Engage neighbouring First Nation communities (Becher Bay, Songhees, and Esquimalt) in economic development opportunities and developments on traditional territory: The Sooke Band also has connections to the city through the Solar Colwood project
- **Environmental sustainability:** Green Sewage treatment, vehicle charging stations, control invasive species in park ecosystems, formalize current city practice of managing lands without pesticides, and support the use of alternate energy sources by businesses and residents
- **Economic sustainability:** Create ways for developers to contribute to sustainability initiatives, establish sustainable design guidelines, and reduce development charges based on sustainability measures.

Where should Colwood focus its resources in the next 18 months?

The immediate actions for business development include several high level initiatives such as a stronger vision for the community, a brand and marketing strategy for investment attraction, and a master planning exercise to identify a commercial core, an entertainment hub and overall planning strategy for the community, including transportation and servicing.

Investment attraction initiatives suggested by stakeholders include a staff position for economic development, a Development Fast Reaction Team, and more incentives for business such as financial incentives, an inventory of available properties, and the expansion of revitalization tax to other locations and research and marketing support. A number of stakeholders suggested streamlining the development process by reviewing municipal bylaws for barriers to economic development, ensuring appropriate zoning, improving consistency of the approvals process (particularly standardizing treatment between municipal departments), and targeting minimal backlog of approvals. Another suggested business development measure was to improve municipal understanding of the principles of investment readiness and increase accessibility of political leaders and staff to the development community.

Several urgent development issues that stakeholders suggested resolving quickly include communicating future plans for sewer development, including tax implications, with the development community and dealing with the incomplete Colwood Corners development.

Partnership development was suggested as a good first step, by reaching out to Langford to discuss shared service agreements and further coordinated planning in areas such as transit, adjusting shared boundaries, and/or opposing rural sprawl, developing a MOU to cover issues related to economic development with neighbouring First Nation communities, creating partnerships in the tech sector such as Victoria Advanced Technology Centre, working with Royal Roads on implementing the economic development strategy.

Economic Development and Transportation Master Plan

In small groups, and with the aid of a base map, comments were made about the business development potential of the nine transportation nodes that have been identified in the Transportation Master Plan. The nine nodes are as follows:

- Regional Centres
 - Colwood Corners
 - Allandale
 - Royal Bay

- Urban Centres
 - Kelly
 - Latoria

- Neighbourhood Centres
 - Jacklin
 - Wishart
 - Lagoon Hill
 - Waterside

Resident’s view of the needs and opportunities of each location are summarized as follows:

- Colwood Corners
 - Parks, restaurants, bookstores
 - Assisted living/retirement housing
 - Bowling alley
 - Medical services
 - Grocery shopping
 - High-tech, environmental research connected with Royal Roads University, Camosun College and/or the Department of National Defense
 - Roads improvement to encourage businesses to locate, or create secondary road system through this area
 - Pedestrian-friendly city center, perhaps moving businesses onto street frontages with parking behind
 - Inventory of facilities we have available – person to play matchmaker role such as with films and concerts – and to support transit planning
 - Commercial developments with residential on top
 - Government offices in city center, businesses, medical – but no manufacturing downtown
 - Rapid transit stop right at City Center
 - Services related to assisted living
 - City Hall relocation
- Kelly Rd/Sooke Rd node
 - Big businesses and employment areas
 - Transit access to encourage an alternative to driving
 - Local shops, cultural areas, arts centre, hotel and tourism
 - Medical facilities
 - Cultural center or arts center.

- Big box stores not welcome
- Walkability improvements
- Galloping Goose Trail extension to Royal Bay to access coffee, hotel, shops, view
- Lagoon Hill
 - Grocery needs to maintained here
 - Pub and/or social gathering place
 - Home-based businesses
 - Residential density increase to support commercial development
 - Commercial lands, increase zoned areas
 - Pedestrian crossing from Dunsmuir School across Metchosin Road.
 - Traffic calming on Metchosin Road and traffic signal at Laguna Road for pedestrians
 - Transit access to commercial area
- Waterside
 - Pub, grocery store, other commercial services
 - Mobile food vendors on ‘the spit’
 - Mixed housing for seniors
 - Transit service
 - Coffee shop
 - Sidewalks
- Royal Bay
 - Safe walking route to school
 - High density residential but not high rise developments, such as ‘Seaside Village, West Vancouver or Lonsdale Quay
 - Waterfront restaurant
 - Boardwalk/promenade tied into pedestrian commercial, bars, restaurants, etc.
- Latoria
 - Restaurant/bakery/coffee shop
 - Personal services (salon/tanning, etc)
 - Medical offices
 - Pub and liquor store

Survey Results

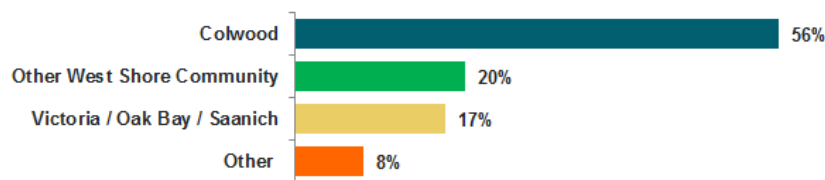
In addition to individual interviews with stakeholders, a community survey was created to capture additional opinions of residents, local and regional community leaders, and members of the business community. The survey was distributed through Colwood’s social media channels and featured on print and web news channels. In addition, Colwood’s partner associations assisted in distributing the survey broadly across the region to capture

insight from both external and internal stakeholders. The survey had a successful response rate with over 150 stakeholders providing input into the questions provided below.

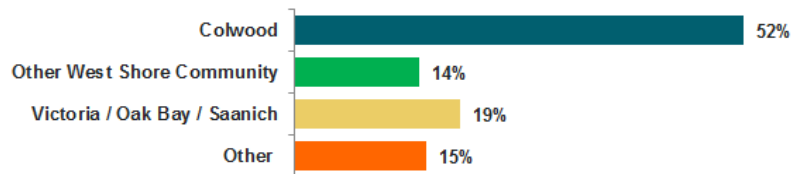
The survey was designed in three parts. Part one focused on community member responses – these questions were focused on topics such as sense of place, quality of services, advantageous assets, opportunities, sustainability and municipal roles. Part two focused on Colwood businesses – these questions were directed at Colwood businesses and were focused on topics such as sustainable business decisions, Colwood’s business climate, growth factors, satisfactory levels towards the region and Colwood. Part three focused on external businesses – these questions were directed at businesses located outside of Colwood’s borders. These questions were focused on topics such as Colwood’s perceived business climate, growth factors, and intentions for expansion.

Responses to the community survey can be found below in the appropriate sections. The responses are the aggregated views and perceptions of the respondents who filled out the community survey and not reflective of our perceptions.

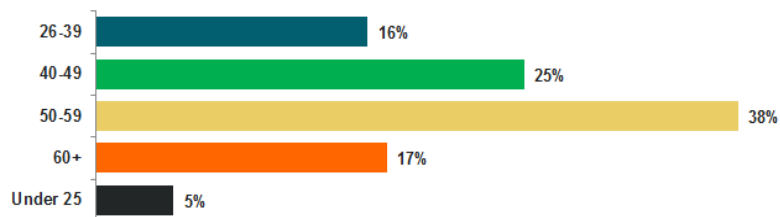
Survey Question #1 - Where do you live?



Survey Question #2 - Where do you work?

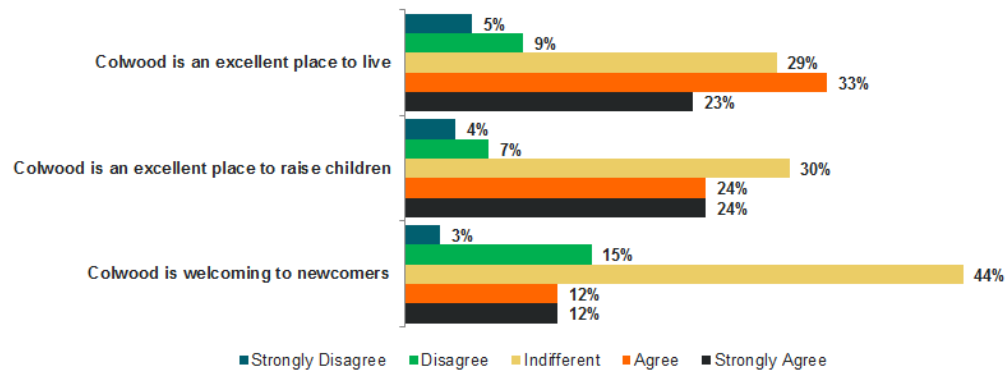


Survey Question #3 - How old are you?



Community Responses

Survey Question #4 - Please indicate to what level you agree or disagree with the following statements:



Note: the comments have been summarized and broken down by key terminology across all three questions.

1. Colwood is an excellent place to live

- Agreed said...
 - Safe
 - Natural beauty
 - Affordable
 - Larger lot sizes
 - Convenience (to Victoria)
- Disagreed said...
 - Lacks beautification of public realm
 - 'Colwood Strip' is unattractive (used car lots, stalled developments)
 - Not walkable or bikeable
 - Perception of high taxes
 - Stalled developments

2. Colwood is an excellent place to raise children

- Agreed said...
 - Family friendly
 - Good schools
 - Safe
 - Quiet
 - Recreational opportunities

3. Colwood is welcome to newcomers

- Agreed said...

- Friendly
 - Safe
 - Natural beauty and many recreation options
- Disagreed say...
- Newcomers and visitors may be unaware of all the recreational opportunities, and natural heritage the town has to offer
 - Lack of signage and way finding for residents and newcomers
 - Lack of 'downtown'
 - Not walkable
 - Lack of tourism market

Survey Question #5 - Rate the quality of services in Colwood

	Not at all Satisfied	Not Satisfied	Indifferent	Satisfied	Very Satisfied
Retail shopping environment	25.7%	36.5%	28.4%	8.1%	1.4%
Healthcare services	8.2%	21.9%	37.0%	21.9%	11.0%
Education	2.7%	12.3%	28.8%	38.4%	17.8%
Housing Choices	5.6%	22.2%	34.7%	30.6%	6.9%
Recreation facilities and services	1.4%	8.1%	16.2%	41.9%	32.4%
Public library	0.0%	5.5%	21.9%	43.8%	28.8%
Community festivals and events	5.4%	24.3%	48.6%	14.9%	6.8%
Waste management	11.4%	25.7%	38.6%	10.0%	14.3%
Transportation infrastructure	17.3%	33.3%	34.7%	8.0%	6.7%
Police services	4.1%	8.1%	47.3%	23.0%	17.6%
Planning and development	17.6%	32.4%	24.3%	18.9%	6.8%
Employment services	6.8%	39.7%	37.0%	9.6%	6.8%

Survey Question #6 - What 3 distinctive assets or advantages does Colwood have on which to build a strong sustainable economy?

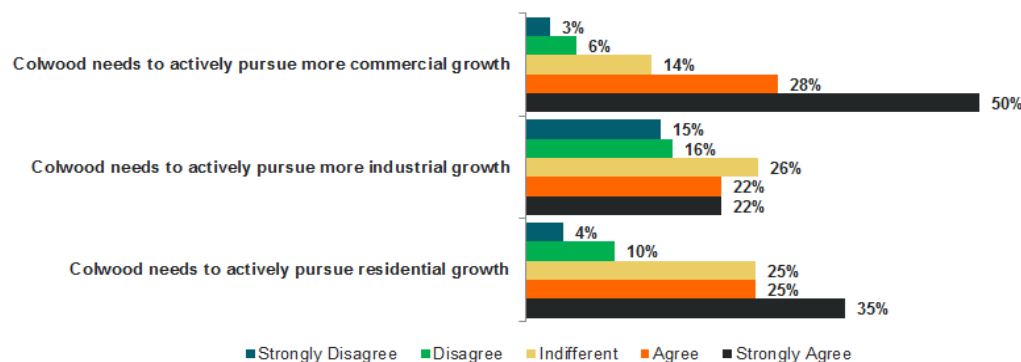
- Respondents provided a variety of examples:
- BC Transit Western Exchange
 - Cobourg Peninsula
 - Colwood Corners
 - Dedicated politicians
 - Excellent harbor potential
 - Exceptional views
 - Fort Rodd/Hill Fisgard Lighthouse and RRU
 - Geography/Climate
 - Good future high schools

- JDF Recreational Center
- Liveability
- Located in the CRD to reach markets
- Manageable size
- Nature
- Opportunity for new development to be built at high environmental standards to build the greenest city in Canada
- Opportunity to build based on local business owners (long term investment)
- Parks – space for events, exercise, general enjoyment
- Proximity to Victoria
- Relatively undeveloped – residents could influence how Colwood looks and feels
- Room for growth
- Royal Bay
- Royal Roads University
- Sense of community
- The Lagoon
- Vacant land ripe for development

Survey Question #7 - What do you consider to be Colwood’s 3 greatest opportunities for economic growth in the next 5 years?

- Respondents provided a variety of examples:
 - Capital City Centre
 - Development of a technology business hub
 - Development of festivals, concerts, cultural events that attract people
 - Colwood Corners and Wale Rd
 - Further development of recreational spaces
 - Harness population growth
 - High-density housing
 - Leverage visibility through the city’s successes to target strategic industrial investment
 - Make Colwood a place for the growing senior population and families caring for their older family members. Smaller community hubs that provides needed and comfort services
 - Mixed use, walkable neighbourhoods with a percentage of housing dedicated to low income families
 - Partnerships with RRU and DND
 - Residences for international students
 - Residential development
 - Retail stores
 - Royal Bay
 - Strong investment relationships
 - Support of small businesses

Survey Question #8 - Indicate to what level you agree or disagree with the following statements



Survey Question #9 - Factors relating to the future growth of Colwood

	Not at all Important	Not Important	Indifferent	Important	Very Important
Downtown revitalization	6.8%	1.4%	13.7%	23.3%	54.8%
Conservation of heritage buildings and historical assets	8.1%	10.8%	27.0%	27.0%	27.0%
Enhanced arts and cultural amenities	2.8%	9.7%	29.2%	25.0%	33.3%
Greater collaboration with the Capital Regional District	20.8%	11.1%	29.2%	16.7%	22.2%
Promotion and marketing of Colwood and its assets to people who would live and invest in the community	2.7%	8.1%	25.7%	25.7%	37.8%
Enhanced tourism amenities	4.1%	4.1%	17.8%	38.4%	35.6%
Support for small business	0.0%	0.0%	11.0%	26.0%	63.0%
Stronger partnerships with post-secondary institutions	0.0%	1.4%	13.9%	33.3%	51.4%
Broad range of housing options	1.4%	2.8%	26.8%	26.8%	42.3%
Quality of life	0.0%	1.4%	15.7%	27.1%	55.7%
Increased industrial land development opportunities	12.5%	19.4%	26.4%	22.2%	19.4%
Increased commercial shopping opportunities	4.1%	2.7%	27.0%	29.7%	36.5%

Survey Question #10 - In your view, what is the role of sustainability principles in the economic development strategy?

Note: Responses from this question were themed into the following categories:

- Economy/Businesses
 - An affordable commercial tax base to develop jobs and encourage growth
 - Collaboration with neighboring municipalities to ensure complementary growth
 - Creation of a living and working environment through a broad sector of employment opportunity to minimize travelling to another municipality for work
 - Jobs and business opportunities should be the underpinning of strategy
 - Smaller investments
 - Sustainable plans will need to consider industrial and retail in order to broaden the tax base to create amenities

- Encourage small business by supporting their ventures and not limiting their growth due to strict policies – we need the tax base and the atmosphere of an entrepreneurial community
- Environment
 - Become a leader in sustainable initiatives
 - Colwood has demonstrated commitment to sustainability principles and therefore should continue to emphasize this in its strategy to attract green businesses, incentivize existing green businesses to expand and invest and work within a broader regional context to position
 - Economic development needs to run parallel to environmental sustainability, addressing climate change to support social and cultural values in an economically beneficial manner
 - Full cost accounting, with an economy that includes social enterprise, wellbeing, and the production of products and services that support a low carbon economy
- Developments
 - Colwood has had little success with sustainable developments resulting in a lot of stopped residential/commercial projects while Langford continues to build and grow
 - Creation of sustainable, environmentally friendly, green developments
 - Keep projects manageable; work to better what Colwood has rather than rapid expansion

Survey Question #11 – What role and actions should the City of Colwood take to build and support a strong and sustainable economy?

- Add better and more professional looking information to the web site about starting and maintaining businesses in Colwood, e.g. land use areas, home based businesses, existing commercial centers, future commercial centers, advertising
- Advertise Colwood for industrial development, corporate offices, and tourism
- Allow robust business and planning approvals including any type of affordable housing that is compatible to the housing needs of the new employment opportunities
- Attract viable residential developers
- Branding and continue to build our brand and awareness
- By creating an environment which attracts excellent developers who in turn will attract/build for small businesses to serve the community
- City government has a lead role to play, but should also take the lead role in regional engagement with CRD and the Greater Victoria Development Agency (the stakeholder driven economic development office that advises the CRD on RSS). City government should facilitate development by working with the regional players (once the unique offering becomes clearer as a result of the economic development strategy) to attract investment and businesses that align to this. The City should also contribute on a per capita basis to regional economic development, but also attach deliverables to this contribution to achieve ROI on behalf of citizens
- Collaborate with adjoining municipalities with a common mission

- Colwood needs to articulate and promote a cohesive community vision that everyone living here (of all ages) can understand and enthusiastically embrace; a series of projects that the community can rally behind and feel pride in when they are completed
- Colwood should begin placing sewers to all areas in an effort to attract developers and business owners to the area while carefully planning out large areas of green space.
- Colwood should lead and act on developing strong partnerships with its neighboring municipalities and begin to acknowledge the interdependence with service and support
- Consider working with Royal Roads University to put welcome and trail maps signs at each gate entrance. This is an amazing highlight of our community and we should sign it and let visitors and residents know they are welcome and welcome to enjoy and explore
- Create a service hub for home based businesses, and the smaller businesses to provide support for their success
- Create an advantage to having a Colwood business licence - e.g. you get promoted on the City website ("support our local businesses")
- Ensure City Hall processes support responsible development
- Find an easily measured measure of success (e.g. # of business licences) and report on this each year
- Find champions
- Focus on our strengths and do what works for us
- Focus on what we've got. Work within the context of the region as a whole
- Hire an economic development officer
- Identify available space for light industrial, commercial, retail
- Incentives for businesses to be sustainable, or adopt sustainability principles in their operations. Everything from fair labour practices to recycling
- Make improvements in infrastructure of roads, sidewalks etc. to make a visually more appealing city to attract potential residents and businesses
- Make it very quick and simple to get a business licence (online)
- Make sure politicians and staff are on the same page. Just because Colwood politicians say they are open for business does not mean they are
- More integrated partnerships with Royal Roads University, offering up the community as an extended classroom.
- Promote zoning diversity
- Protect heritage and parks so that Colwood can become known as a tourist destination and market it as such

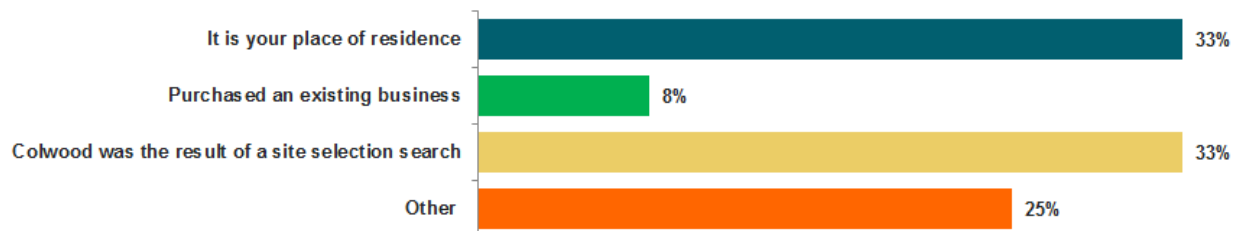
- Prudent internal financial management and operations focused on essential services, policy and vision to guide business and development, strategic partnerships with royal roads and provincial government to leverage benefits
- Reach out to community leader, builders, and influencers in our region - not just our community
- Revitalization grants. Open up secondary road network to allow traffic to flow. And obtain increases in developable lands
- Support small businesses, welcome new businesses and give them reason to come, listen to people who live in the community, better sidewalks, more streetlights, better bus service
- Take pride in the community. Spend tax dollars on making our City an attractive and beautiful place. We believe that beautification will attract more residents and commercial investment
- Welcome non-profits who support residents to live well by giving land tax breaks; don't make them prove how many Colwood residents they serve in order to get the tax break
- Work closely with the WS Chamber of Commerce, community and neighbouring municipalities.

Colwood Businesses Responses

Survey Question #CB1 How many people does your business employ from Colwood?



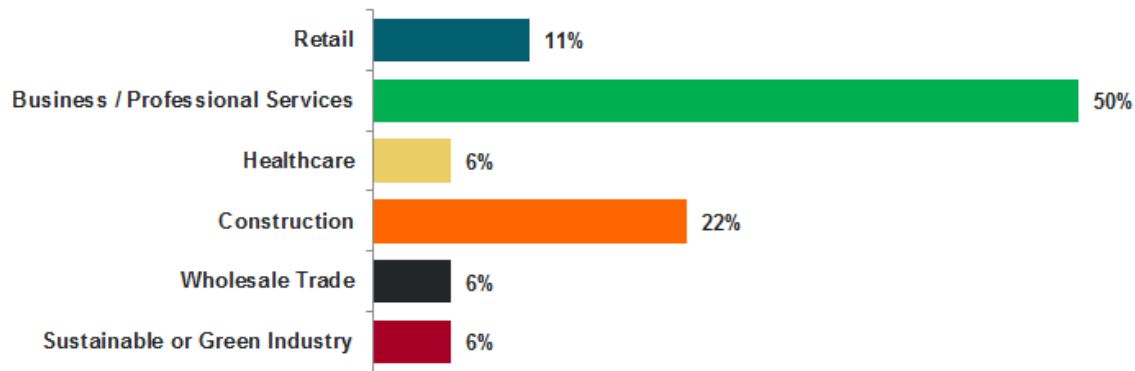
Survey Question #CB2 What is the primary reason for locating your business in Colwood?



Other responses include:

- Next to Esquimalt Harbour
- Best value at the time of decision

Survey Question #CB3 - In what industry does your business operate?



Other responses include:

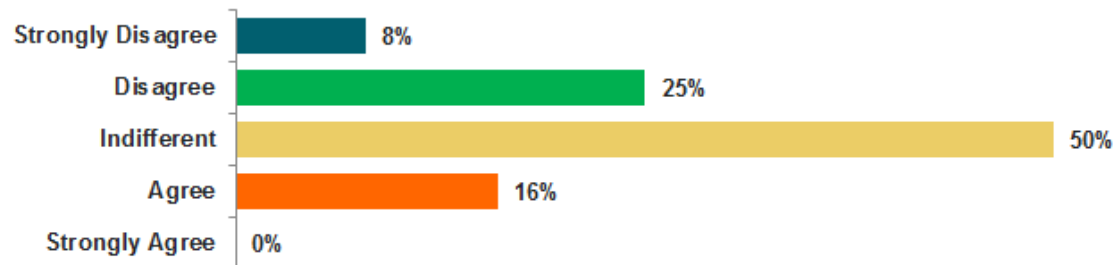
- Government – Military
- Automotive Garages / Retail

Survey Question #CB4 - Do you consider sustainability in making business decisions?



- Respondents provided the following explanations:
 - All plans are put through a rigorous sustainability testing matrix
 - Conscious of products used in construction, recycling/waste diversion from each project, how the project fits into the landscape and surrounding community
 - Energy efficiency, recycling
 - Following corporate social responsibility principles
 - Green purchasing decisions, minimizing waste, zero emissions travel
 - Investments are made following SHARE ethical investing
 - Moving to cloud computing, lean process improvement

Survey Question #CB5 - Indicate to what level you agree or disagree with the following statement:
Colwood is a good place for a business to locate.



Respondents provided the following views:

- Agreed said...
 - Abundant room for expansion
 - Access to main artery transport routes
 - Good population base for specific industries and the right type of clients (owners occupied single family dwellings)
 - Great potential
 - Location and a lot of potential due to lack of competition
 - Proximity to RRU
 - Strong support from locals
 - There is no big box stores that detract from the community

- Disagreed said...
 - Central to Western Communities, but hasn't been business-friendly in terms of taxation
 - Colwood Corners and Wale Road completely detract from any beautification works in the community
 - Commercial and residential property taxes are higher in Colwood than Langford
 - Factors in rent and disposable income and the time it takes to transport goods and services in and out are of concern
 - Issue with chief building inspector, no chain of command to deal with – lack of trust in terms of dealing with conflicts in the city
 - Lack of enterprising energy that can excite entrepreneurs
 - Look at Langford models
 - Need more population growth, and more space for businesses to locate.
 - Neighbouring market place is only 2-5 minute drive (Langford)
 - Perfect for a home-based business, not as advantageous for a business that depends on visibility and passing traffic
 - Property taxes and land value need to align with other communities to be competitive
 - Resolution on sewer issue will be paramount. Cost for services without question of their economic value or return is unacceptable

- Smaller projects could have been more successful than bigger ones, too many projects have fallen through

Survey Question #CB6 - Please rate the following criteria to indicate the level of importance each one has, in ensuring the growth of your business.

	Not at all Important	Not Important	Indifferent	Important	Very Important
Availability of land or buildings (e.g. Office, Retail, Industrial)	16.7%	8.3%	8.3%	41.7%	25.0%
Availability of labour	8.3%	16.7%	25.0%	16.7%	33.3%
Availability of skilled labour	8.3%	25.0%	16.7%	16.7%	33.3%
Access to quality post-secondary education, skills development and training	25.0%	16.7%	16.7%	16.7%	25.0%
Availability and quality of high speed telecommunications	8.3%	0.0%	0.0%	33.3%	58.3%
Affordable energy costs	9.1%	9.1%	36.4%	9.1%	36.4%
Access to business services	0.0%	8.3%	41.7%	33.3%	16.7%
Access to financing	33.3%	8.3%	8.3%	8.3%	41.7%
Efficient development environment (for expansion approvals, new development, etc.)	0.0%	8.3%	8.3%	8.3%	75.0%
Proximity to supply and / or market chains	16.7%	16.7%	16.7%	25.0%	25.0%
Access to municipal servicing and transportation infrastructure	0.0%	16.7%	8.3%	33.3%	41.7%

Survey Question #CB7 - Please rate the following criteria to indicate the level of your satisfaction with the Capital Regional District as a place to operate a business.

	Not at all Satisfied	Not Satisfied	Indifferent	Satisfied	Very Satisfied
Availability of labour	0.0%	18.2%	72.7%	9.1%	0.0%
Availability of skilled labour	0.0%	9.1%	90.9%	0.0%	0.0%
Access to quality post-secondary education, skills development and training	0.0%	0.0%	63.6%	36.4%	0.0%
Affordable energy costs	9.1%	9.1%	63.6%	18.2%	0.0%
Access to financing	9.1%	9.1%	54.5%	27.3%	0.0%
Proximity to supply and / or market chains	0.0%	9.1%	63.6%	27.3%	0.0%

Survey Question #CB8 - Please rate the following to indicate the level of your satisfaction with Colwood as a place to operate a business.

	Not at all Satisfied	Not Satisfied	Indifferent	Satisfied	Very Satisfied
Access to quality secondary education (K-12 schools)	0.0%	18.2%	54.5%	27.3%	0.0%
Availability of land or buildings (e.g. office, retail, industrial)	18.2%	27.3%	54.5%	0.0%	0.0%
Availability and quality of high speed telecommunications	0.0%	9.1%	63.6%	18.2%	9.1%
Access to business services	0.0%	18.2%	72.7%	9.1%	0.0%
Efficient development environment (for expansion approvals, new development, etc.)	27.3%	18.2%	54.5%	0.0%	0.0%
Access to municipal servicing and transportation infrastructure (water, sewer, road network, transit network)	27.3%	9.1%	54.5%	9.1%	0.0%

Survey Question #CB9 - How do you expect your company to perform in the next 2 years compared to the last 2 years?



Survey Question #CB10 - Do you have plans to upgrade/expand in Colwood. If yes, when are you planning to upgrade/expand your operation?



- When are you planning to upgrade/expand...
 - Current year
 - Feb 2019
 - Always looking for opportunities

Survey Question #CB11 - How could Colwood utilize sustainability objectives in achieving economic development goals?

- Create district energy loop from waste water treatment
- Creation of walkable / bikeable neighbourhoods with local retail opportunities
- Long term planning

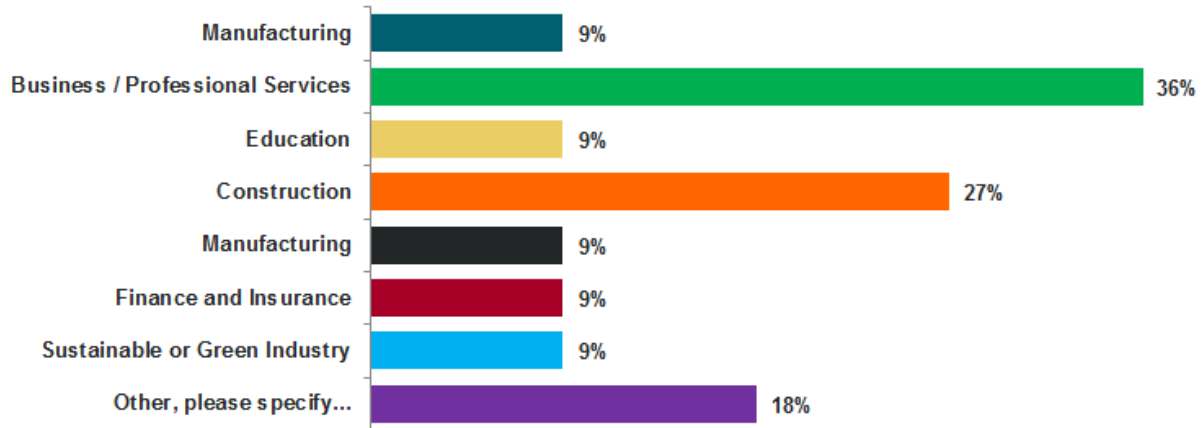
- Refer to Langford model
- Revitalization of Colwood corners
- Support high energy efficient buildings to reduce operating costs and GHG emissions
- Would like us to look at Leduc, Alberta – a community wellness index in planning and deliberations – potential approach to municipal management to attract sustainable investment that Colwood needs

Survey Question #CB12 - What do you consider to be the three greatest opportunities for Colwood to stimulate economic growth and business investment in the next 5 years?

- Colwood Corners Development
- Create a more focused core
- DND ship building
- Heavy promotion of the expansion of office and light industrial type development
- Higher density housing projects
- New secondary school attracting residents
- Revitalize downtown
- Royal Bay Residential
- Royal Roads University
- Sewers allowing greater commercial densities (more tax, no more land required)
- Support development of the hotel, work with key partners – DND, RRU, Parks Canada
- Technology park development
- Tourism
- Wale Rd Development

Other Businesses Responses

Survey Question #OB1 - In what industry does your business operate?



- Other responses include:
 - Software Development

Survey Question #OB2 - Do you consider sustainability in making business decisions?



- Respondents provided the following explanations:
 - Energy efficiency, recycling
 - Follow corporate social responsibility principles
 - Moving to cloud computing, moving toward lean process improvement which reduces inefficiencies.
 - The products used in construction, the recycling/waste diversion from each project, and how the project fits into the landscape and surrounding community.

Survey Question #OB3- Indicate to what level you agree or disagree with the following statement:
Colwood is a good place for a business to locate.



Respondents provided the following views:

- Agreed said...
 - Colwood has excellent location and potential to become a shining star Municipality in the next decade
 - Good for residential, retail.....and industry would have access to employees.
 - It's actually a very broad question that assumes all businesses are in the same category when they're not. Some really "talent-driven" companies (like gaming and iOS development companies) prefer the bustling environment of downtown Victoria (some have even said UVic's tech-park in Saanich is too far removed from all the coffee shops, restaurants, cycle lanes, transit, and other likeminded people are). That said, Colwood offers advantages that some businesses will find incredibly powerful. The access to main artery transport routes, abundant room for expansion, and while still within close proximity of the urban core will likely be apparent. Also, the proximity to RRU may be important to some businesses too.
 - No big box stores which "dumb down" the community.
 - Strong support from locals

- Disagreed said...
 - Commercial and residential property taxes are higher in Colwood than in Langford. It factors in rent and disposable income the time it takes to transport goods and services in and out is of concern. The neighbouring market place in Langford is only 2 - 5 minute drive - Convenience.
 - The mess at Colwood Corners and Wale Road completely detract from any beautification works in the community. Why on earth would I want to set up a business storefront near any of those locations? Location, location, location is always something that needs to be considered especially when trying to attract new clients.
 - Too many projects have fallen through to get a sense that it is a great place to locate a business. Smaller projects could have been more successful than always going for the biggest!

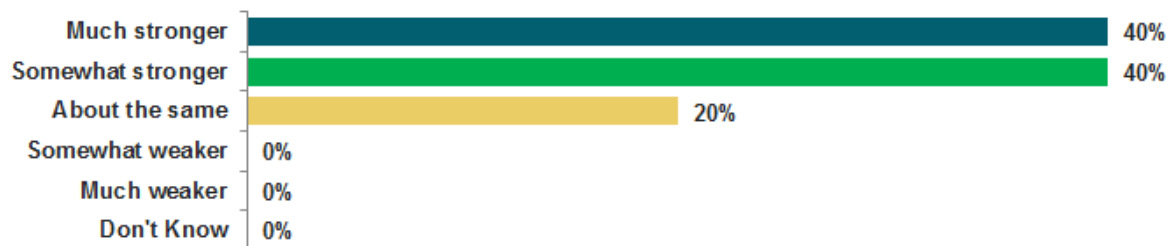
Survey Question #OB4 - Please rate the following criteria to indicate the level of importance each one has, in ensuring the growth of your business.

	Not at all Important	Not Important	Indifferent	Important	Very Important
Availability of land or buildings (e.g. Office, Retail, Industrial)	0.0%	0.0%	7.7%	38.5%	53.8%
Availability of labour	7.7%	0.0%	7.7%	61.5%	23.1%
Availability of skilled labour	8.3%	0.0%	0.0%	41.7%	50.0%
Access to quality post-secondary education, skills development and training	7.7%	15.4%	0.0%	46.2%	30.8%
Availability and quality of high speed telecommunications	0.0%	0.0%	7.7%	30.8%	61.5%
Affordable energy costs	0.0%	0.0%	46.2%	15.4%	38.5%
Access to business services	0.0%	0.0%	7.70%	53.8%	38.5%
Access to financing	0.0%	7.7%	23.1%	15.4%	53.8%
Efficient development environment (for expansion approvals, new development, etc.)	0.0%	7.7%	7.7%	30.8%	53.8%
Proximity to supply and / or market chains	7.7%	7.7%	7.7%	46.2%	30.8%
Access to municipal servicing and transportation infrastructure	0.0%	0.0%	15.4%	23.1%	61.5%

Survey Question #OB5 - Please rate the following criteria to indicate the level of your satisfaction with the Capital Regional District as a place to operate a business.

	Not at all Satisfied	Not Satisfied	Indifferent	Satisfied	Very Satisfied
Availability of labour	0.0%	9.1%	27.3%	36.4%	27.3%
Availability of skilled labour	0.0%	0.0%	27.3%	36.4%	36.4%
Access to quality post-secondary education, skills development and training	0.0%	0.0%	18.2%	45.5%	36.4%
Affordable energy costs	0.0%	10.0%	30.0%	30.0%	30.0%
Access to financing	9.1%	0.0%	9.1%	45.5%	36.4%

Survey Question #OB6 - How do you expect your company to perform in the next 2 years compared to the last 2 years?



Survey Question #OB7 - Do you have plans to upgrade/expand in Colwood. If yes, when are you planning to upgrade/expand your operation?



Survey Question #OB8 - What do you consider to be the three greatest opportunities for Colwood to stimulate economic growth and business investment in the next 5 years?

- Create a central core - re-capture Colwood Corners
- Determine Colwood's "Unique Value Proposition" within a broader regional context and then work with the region's economic development office to attract investment and businesses that align to the value proposition. Do not try to be everything to everyone. The region is not growing fast enough - either population wise or economically - to support 100's of thousands of retail space and broad infrastructure upgrades. Any quality business person will tell you: "if you have 5 different target markets, you have NO target market". You cannot be all things to all people. Determine what you are, what you offer and work within the "big picture" of BC's second largest metropolitan region--a place that can attract world-class companies and world-class talent--to achieve your goals
- Developing the waterfront and harbour potentials
- Finish the projects that have been started and do not make it so hard for developers to grow
- Get some office space tenants from the government
- There are really only two areas for commercial operations and both of them stare at unfinished development. Financially preapprove potential developers. I also see the unfairness of who pays for sewer as a real detractor to wanting to set up a business in Colwood. Many communities demand all properties to pay for sewer whether they are hooked up or not yet in Colwood there is a fear to do this. I also think that revitalization exemptions should be looked at. These encourage local development but, again, you do not need to give away revenue but maybe provide 2-3 year exemptions to persuade businesses to build in Colwood.
- Maintain consistency with council and staff, providing consistent direction on their vision for Colwood
- Open up sewer areas, open up road networks, pre zone land
- Welcoming attitude to growth at city hall
- Work with Royal Roads University, students and faculty

Survey Question #OB9 - How could Colwood utilize sustainability objectives in achieving economic development goals?

- Build green industry opportunities
- By establishing long term revenue streams through residential and business development. Once a home or business is in place that revenue stream is there as long as the building is
- Encourage, lower cost energy sources such a geothermal by encouraging that growth with reduced DCC's. Build secondary roads to reduce the travel time required to get services, products and staff to markets, and open up developable lands. pre zone lands

- Ensure planning department includes live, work, play, learn in all developments. Build communities
- Langford has emphasized big-box development - Colwood could balance that with small business development
- Make it clear that you are open for businesses that have sustainability at the core of their mission - whether that is certification, or business practices - or the old fashioned Better Business Bureau type sticker - let people know that when they do business in Colwood, they are doing business with the good guys - here for the long term and working in the community, for the community
- Resource recovery
- To complement affordable housing with economic and industry opportunities

Appendix E: PEST(LED) and SWOC Analysis

The starting point for Colwood’s Economic Development Strategy was a comprehensive analysis of the local, regional and broader provincial economy. This resulted in the preparation of a base analysis report that discussed the city’s recent performance against a select range of demographic and economic indicators considered relevant to the development of the economic development plan, combined with an analysis of current and emerging business and industry investment trends occurring at the local and regional level.

In addition this background research, over fifty one-on-one interviews and several small group discussions were conducted by Millier Dickinson Blais and Yates, Thorn & Associates between March and May 2014. An electronic survey directed to the community at large and Colwood’s business community was also administered in cooperation with the City of Colwood and several of the city’s economic development partners. As of April 2014, input and information has been obtained from more than 200 business and community leaders in the city and region. A detailed summary of the consultation program is provided in the appendices to the Final Report.

In addition to the foregoing, consideration has also been given to Colwood’s current competitive position relative to a range of internal and external factors.

PESTLED Analysis

A PEST (Political, Economic, Social, and Technical) analysis gives an overview of the different external macro environmental factors that the City of Colwood needs to take into consideration as part of the economic development strategic planning process. This analysis has been expanded further to include Legal, Environmental and Demographic factors.

Defining the PEST(LED)

For the purposes of this report the PEST(LED) can be characterized in the following manner:

- Political – what are the key political drivers?
- Economic – what are the most important economic factors?
- Social – what are the main societal and cultural aspects?
- Technological – what are the current technology imperatives, changes and innovations?
- Legal – what current and impending legislation may affect the city?
- Environmental – what are the ecological and environmental considerations locally and further afield?
- Demographic - what is the primary demographic issues impacting growth?

The following discussion highlights those elements considered most relevant in the context of an economic development strategy.

Political

- **Province expanding BC Trade and Investment offices**
 - Ministry of International Trade plans to place increased focus on attracting investment into BC as well as to help bring BC's products to the world. As part of this renewed mandate, BC is growing their "Trade and Investment" offices worldwide (they now have 11 locations in Europe, Asia, and USA). Every year the managers from these offices visit the Greater Victoria region to learn about the local economy and meet with some of the region's export firms. While historically, these meetings have been hosted in or by Victoria, greater participation by the region's area municipalities is essential to advancing the understanding of local economic development and investment opportunities.
- **GVDA to enhance region's FDI programming**
 - GVDA has launched a \$1.6-million project over the next three years that will support local business access to global markets allowing them to more sell products and services abroad. The program will support international trade that will grow the region's economy by selling more to other countries and in turn creating more local jobs. Greater Victoria's economic exporting sectors including: tourism, technology, advanced manufacturing, film production, and marine industries will benefit significantly from this work. GVDA will be actively looking to engage area businesses and municipalities in this effort.

Economic

- **Federal funding for west coast shipping and marine operations will expand Seaspan operations on Vancouver Island**
 - Victoria Shipyards Limited (VSL) currently employs more than 850 people, including a skilled workforce that is forecast to grow to 1,000 tradespeople in 2014. More than 2,000 new jobs are expected through 2020. One of the region's largest employers, VSL is investing in equipment, people and processes for the National Shipbuilding Procurement Strategy (NSPS), creating jobs and investment across the island through work with the Frigate Life Extension (FELEX) program and Victoria In-Service Support Contract (VISSC) programs. VSL also has an extensive apprenticeship training program underway and has created numerous partnerships with Vancouver Island-based educational institutions that will assist in creating a sustainable and competitive marine industry across the Greater Victoria region.
- **A stronger economic outlook predicted for Greater Victoria region in 2014**
 - After a weak 2013, the Greater Victoria region's economy is expected to be bolstered somewhat by the planned infrastructure projects at the Department of National Defence and the continued investment in the region's shipping and marine operations. While tourism in the region has yet to return to 2007-2008 levels, the sector is showing signs of recovery with an improving US economy and increasing levels of Canadian and Asian tourism, a primary market for tourism spending. The significant growth in the number of international students, new tax credits for the film industry and improved retail performance suggest that the economy will grow by 1.8 percent in 2014 compared to a contraction in the economy in 2013. Give the profile of Vancouver relative to the Island, area municipalities and the region need to be more effective in communicating the

strength of the local market to the investment community through better and more up to date community and industry profiles.

■ **Entrepreneurs and SMEs will be key consideration in the region’s future growth**

- The reality of the broader regional and provincial economy is that high-value employment in knowledge-based industries will drive greater value and economic spinoffs than another highway-adjacent warehousing operation or big box retail operation. Increasingly, these high-value jobs – and the economic growth that accompanies them – are created by entrepreneurs and fast-growing small and medium-sized enterprises (SMEs). The Organization for Economic Co-operation and Development (OECD) has noted that “entrepreneurship is important for economic growth, productivity, innovation and employment [and] is believed to offer ways to help to meet new economic, social and environmental challenges”³. Determining ways to provide support to small businesses, new companies and entrepreneurs through partnerships or collaboration or consideration of existing land use framework can be the most efficient and effective means of driving economic growth.

■ **Post-secondary institutions contribute to a dynamic learning and business environment.**

- The Greater Victoria region is home to three significant post-secondary institutions that serve to attract students, research and development activities and business investment to area communities. With more than 40,000 students (including international and Aboriginal students) and research investment that exceeds \$100 million annually, these institutions offer a unique and progressive learning experience that includes instruction at an undergraduate, graduate and doctoral degrees, certificates and diplomas and are instrumental to driving the region’s innovation and research agenda. The combined economic impact in the Greater Victoria region goes beyond just the direct and indirect spending to include opportunities to engage with local business and industry, local employment through cooperative education placements, the development of innovative technology and research that is unique to Canada and the creation of graduates with a strong connection to the region and a desire to create their own businesses and start-ups.

■ **Niche resort development identified as a significant investment opportunity for British Columbia’s tourism sector**

- Known around the world as an outstanding tourism destination, British Columbia and by extension the Greater Victoria region is renowned as an outstanding visitor destination. In this regard, the Province has identified niche resort development as one of most significant investment opportunities in British Columbia’s tourism sector. This is based on a range of competitive advantages that includes diverse landscapes and experiences, world class tourism product, accessibility to international visitors and opportunities for Aboriginal cultural tourism. While opportunities on the mainland are likely to dominate this discussion, the Island shares many of the same competitive advantages that could attract investment to the region.

³ Organization for Economic Cooperation and Development (OECD). 2009. “The Importance of Entrepreneurship”. Accessed at <www.oecd.org/dataoecd/44/50/44069838.pdf>

Social

- **Workforce attraction efforts will be needed to offset skilled worker shortages**
 - While British Columbia and Vancouver Island in particular will continue to be an attractive destination to persons from other provinces and countries, the increased competition for skilled workers suggests that skill shortages are likely given the draw of Alberta and Saskatchewan. Provincial and regional economies will continue to struggle because they will not have or be able to attract the workforce to take full advantage of economic opportunities. British Columbia's 2010 Skills for Growth Report suggests that 36 percent of job openings over the next decade will need to be filled by skilled workers from outside British Columbia including skilled immigrants. While historically, the Greater Victoria region has not been a destination for immigrants, this will need to change. Communities across the region can play an important role to play in welcoming and integrating newcomers and ensuring that the Island is an attractive location for workers, investors and entrepreneurs from across the country and around the world.

- **Place-making has grown to international movement**
 - Attracting skilled and talented people to a community is a concern for any community. Keeping those who do arrive is another. Because the demand for talented people outstrips supply, these highly skilled workers can essentially choose where to live and where to work. When it comes to choosing where to locate, knowledge workers have definite shopping lists, -- and cities and regions (and businesses) that seek to attract them do well to know what they want. Cultural and economic diversity, the thoughtful integration of economic, social and environmental considerations into mainstream policy debate, a connected and engaged business and investment community, as well as access to a high standard of living and quality of life experience are all factors in location decisions. Across the globe, communities are putting effort into leveraging arts and culture through place-making initiatives. As the Greater Victoria region competes with other cities for people, more attention needs to be directed to growing and supporting the region's arts and culture community and building communities and neighbourhoods that provide a focus (places) for social and economic activity.
 - This will involve creating squares, plazas, parks, streets and waterfronts that will attract people because they are pleasurable or interesting⁴. While communities are planned, designed and regulated for a variety of all manner of reasons – public health, safety, efficiency and economy this leaves little time for communities to evolve and even less of a margin for error. However, the opportunities associated with engaging the community in the development and use of its public spaces are significant. It helps to build civic engagement and local pride while at the same time contributes to the fostering of a vibrant local and business community.

- **Diminishing investments in social infrastructure hamper access to economic opportunities for many residents of the Island**
 - While most families in Colwood are able to find work, afford the high price of housing and raise their families in a fashion commensurate with 'the Canadian Dream', there are a number of social and economic groups locally and regionally who struggle with employment, income and

⁴ http://www.pps.org/reference/what_is_placemaking/

education. The lack of social infrastructure limits the economic opportunities that can be accessed by groups such as youth and single parent families. These trends are well documented in the annual reports of the Victoria Foundation whose most recent report notes:

- Youth unemployment has doubled since 2008 when it was 5.5%. While it peaked at 2011, in 2013 it was still at 10.9%.
- 30.8% of single parent families live below the Low Income Cut Off. This is well above the provincial average of 21.8%, and is up from 26.1% in 2007.
- The implications of these trends for the community and region are significant. For instance 37% of youth in the Victoria Vital Signs survey⁵ indicated that they don't feel connected to their community. Areas highlighted in the report for action included finding more job opportunities for new graduates, more 'teen-friendly' employers, better life skills education in high schools, and more leadership and mentoring programs.

Technological

- **A Strong innovation agenda contributes to a region's competitiveness**
 - Canada in general is seen as weak in research and development, innovation and competitiveness, especially as it relates to accessing the financing and incentives to innovate and improve, and encourage the capacity of local firms and entrepreneurs. There is a general lack of venture capital and angel financing to support business development, or at least a lack of critical mass of those resources. The sources of private equity are not being effectively leveraged, and there is a lack of well-resourced public organizations offering incentives or support to emerging and high growth areas of the economy. Part of this is attributed to an aversion to risk in the investment community, or a reluctance to invest in businesses outside of a 'comfort zone'. The lack of resources coupled with the predominance of small and medium sized businesses in many communities can make it difficult to compete and thus raise the level of prosperity. Without assisting small businesses and entrepreneurs in particular – financing, innovation, and competitiveness - the province and the Greater Victoria region will not be able to realize its full economic growth opportunities.

Legal

- **Better deployment of existing planning tools – Business Revitalization Zones**
 - The BC Community Charter offers BC municipalities a variety of ways to encourage and achieve a range of economic, social and environmental objectives. While BC Municipalities are somewhat restricted in the range of financial tools at their disposal, their ability to vary the levels of property taxation offers some fiscal flexibility that can be used to encourage economic development. While rates for various classes of property can be kept low, this generally applies across the municipality. However under section 226 of the Community Charter, Councils can adopt a Community Revitalization Bylaw which allows tax exemptions for up to 10 years for specific properties or types of properties. This exemption can only apply to the municipal portion of the tax notice, not to school or other portions.

⁵ <http://www.victoriafoundation.bc.ca/vital-signs/victoria/2013/victorias-vital-signs-2013>

■ **Better deployment of existing planning tools – Business Improvement Areas**

- For property owners and tenants, a Business Improvement Area is an effective way to increase sales and profits and to organize and finance programs that would not be available to individual businesses by any other means. For Municipal Councils, a BIA provides a highly motivated sector of the community with the means to improve their businesses and stimulate the local economy. Section 215 of the Community Charter provides municipalities the broad power to provide for business investment and promotion schemes in defined geographical areas within the municipally and recover cost based on parcel or property value tax and/or based on any parameters set out in municipal bylaw. Essentially Business Improvement Areas (BIA) support community beautification, promotion, cleanliness and safety. A BIA is a self-help tool for the business community to agree to be taxed within a particular geographic area to raise the funds to be used to promote business.

■ **Better deployment of existing planning tools – Inter-Municipal Coordination of Regulations**

- Business licence regulations are already coordinated across the region, and the potential exists for harmonization of other licences and regulations.

Environmental

■ **Sustainable growth and development a growing imperative for cities and regions**

- An agenda of sustainability and environmental responsibility is increasingly synonymous with economic opportunity for cities. Clean technologies that improve energy efficiency, conserve resources, and improve existing industrial processes are emerging as engines of innovation and wealth creation for regional economies. The implementation of these technologies within cities, in terms of sustainable construction, use of resources, and waste disposal practices are also becoming a growing imperative. Cities and regions that can differentiate on the basis of these principles can also attract workers and business investment, which increasingly cite effective environmental stewardship as a core consideration for their business. While every city is unique and operates under a different set of economic, environmental and social conditions, it is nonetheless apparent that city and community leaders will need to develop responses to these issues if they are to prosper and grow in a global economy.

Demographic

■ **Province's Labour Market Strategy reveals an aging workforce**

- Like other Canadian provinces, British Columbia's workforce is aging. The first wave of baby boomers has hit retirement age and the number of workers expected to retire each year together with the implications of a rapidly shifting knowledge and innovation economy, places pressure on the province to have the workforce with the experience and skills needed to sustain its economic growth in the coming years. Over the next decade, there will be an estimated 1.1 million job openings in the province. However, only 650,000 young people will emerge from the province's school system over the same period to fill those jobs. Given the continuing popularity of the Greater Victoria region for early retirees and seniors, coupled with the small population base,



there is even greater need to attract and retain a young and educated workforce if the region is to avoid economic stagnation.

- **Positive rate of employment growth predicted for Capital Region District**
 - Vancouver Island/Coast is forecast to have about 152,600 job openings between 2010 and 2020⁶. This accounts for approximately 15 per cent of the total job openings in the province over this 10 year period. A recent BC labour market report for the Vancouver Island Coastal region also suggests that four out of five of these openings will be due to the replacement of retiring workers or deaths. The remaining 20 per cent of the openings represent new jobs being created as a result of economic growth in the region.
 - Employment growth in the Vancouver Island/Coast region is expected to be driven by increased employment in the Utilities sector followed by Health Care and Social Assistance, Transportation and Warehousing, and Other Services industries. In contrast employment in Finance, Insurance, Real Estate and Leasing industry is expected to decline by an average rate of 0.2 per cent between 2010 and 2020. Other industries in the service-producing sector post positive employment growth ranging from 0.5 per cent to 1.5 per cent on the average. This includes Professional Scientific and Technical Service industries.
- **Lack of affordable housing limits the ability of younger families to live in Colwood**
 - Colwood is an attractive community but its high house prices, together with often high costs of commuting to work, are a challenge for young families. In 2012, the average house price according to the Victoria Real Estate Board was a little over \$480,000. The 2011 median total family income (Victoria CMA) was \$79,350. This six or seven fold ratio is clearly a challenge for many families and limits the city's ability to capitalize on the growth that is occurring across the region and West Shore in particular.

SWOC Analysis

The SWOC (Strengths, Weaknesses, Opportunities, and Challenges) analysis that follows reflects on the information and insight that has been gathered and provides further indication of Colwood's ability and capacity to support the attraction, retention and expansion of business investment.

Defining the SWOC

For the purposes of this report a SWOC is characterized in the following terms:

- **Strengths (Positive, Internal):** Positive attributes or assets currently present in Colwood, particular in comparison to the Capital Regional District
- **Weaknesses (Negative, Internal):** Local issues or characteristics that limit the current or future growth opportunities for the City

⁶ http://www.workbc.ca/WorkBC/media/WorkBC/Documents/Region_PDF/Vancouver_Island_Coast_Final.pdf



- **Opportunities (Positive, Internal and External):** Areas where the City can remedy its weaknesses (e.g. learning from others, provincial / regional assistance, strategic initiatives, aggressive marketing or promotion, targeted investment, etc.)
- **Challenges (Negative, Internal and External):** trends that threaten Colwood’s future and attractiveness to new residents and investment, from local weaknesses, global changes or shifts in consumer demand.

The SWOC analysis also provides insight into the challenges and opportunities for Colwood with an emphasis on those factors impacting the economic development of the city.

Strengths

- **A Diverse and Growing Regional Economy**
 - Located 20 minutes from Victoria, Colwood benefits from the employment growth that is occurring in the broader metropolitan region – technology, manufacturing, health care, and professional services sectors. While historically this has meant increased population growth for Colwood and not higher levels of employment, there are an increasing number of businesses, services and population based infrastructure investment that have moved out from Victoria with the population. Recent business patterns data suggests that professional, scientific and technical service firms now comprise a significant number of local businesses
 - The fluidity of Colwood’s workforce reinforces the fact that Colwood is part of a larger regional economy. The workforce is well educated and comprises a significant number of high income earners in management and senior management positions, however many of these workers are employed in other parts of the region. While it is unlikely that all of this employment could be captured or accommodated in Colwood, there are significant opportunities to attract businesses and investment based on the skills and capacity of the local workforce.
- **Partners and Resources to Support Economic Development**
 - The West Shore Chamber of Commerce provides the catalyst for local business leaders and professionals to impact dynamic, positive changes in local communities. The Chamber regularly promotes business and economic growth opportunities across the West Shore, advocates on behalf of local businesses, and actively participates in marketing of Colwood to potential investors. The chamber represents the collective voice of more than 500 businesses and is committed to collaborative economic development as a way to ensure strong economic growth across the region.
 - The Greater Victoria Development Agency (GVDA) is the capital region’s lead economic development agency. It has a mandate to market the region’s competitive advantages, positive business climate and superior lifestyle across Canada and around the world. The organization works closely with BC businesses, partner agencies like the Technology Council, educational institutions like Royal Roads University, as well as communities and all levels of government. GVRDA has recently launched a Foreign Direct Investment program that is intended to improve the region’s business attraction and retention activities over the next three years and will be actively trying to engage local communities in this effort.
 - Venture Connect began as a response to the challenge that over the next 20 years, there will be unparalleled shortfalls of both business owners and employees resulting in potential closure of large numbers of small businesses throughout the province. Currently Venture Connect is a

corporation; a subsidiary of 6 Community Futures offices and is governed by a 12 member Board of Directors. In 2013 Venture Connect established partnerships with a number of Community Futures to expand service delivery to the entire province. Venture Connect offers a full suite of services to assist businesses in succession planning and other small business needs. While they are fee for service, they none the less are a resource that can be leveraged by the municipality and its partners.

■ **An Emerging Regional Transportation Hub**

- The current Capital Region District Regional Transportation Plan supports Colwood as a Regional Transportation Hub for the West Shore communities. Transportation principles in both Colwood’s Official Community Plan and the Regional Transportation Plan support directing growth towards existing regional hubs and realizing higher trip densities to warrant more efficient transit service. This investment will in turn support higher density and mixed-use developments (e.g. office, retail and residential). The timely development of this infrastructure will provide the catalyst for the further development of Colwood’s commercial core – or downtown.

■ **A Growing Post-Secondary Presence**

- Royal Roads University is a significant asset to the city and the West Shore in a number of ways. Its focus on applied research supports the growth of the region’s knowledge based economy, while its entrepreneurship oriented applied research initiatives, and municipal infrastructure research initiatives supports both local sustainability and economic diversification efforts. The attraction of a Canada Research Chair at the Center for Livelihoods and Ecology provides further profile for the city of Colwood and the West Shore as it will lead to research investment, the attraction of national and international students as well as teaching professionals to the region. The University provides several direct benefits to the City as well - an international homestay program that integrates more than 400 students a year into the local community, venues for conferences and large events, and an extensive heritage garden and publically accessible trail system. In addition the University has expressed interest in the development of an incubator / innovation centre that will encourage entrepreneurial development and commercialization efforts, as well as opportunities to create student housing, particularly at the graduate and post doctorate level.

■ **Unique Natural Setting and Cultural Assets**

- Colwood’s unique natural setting and cultural assets is a draw for residents and visitors alike and a significant factor in the city’s overall quality of life experience. This includes oceanfront views and access, botanical gardens, national historic sites, an extensive trail system, a well-developed public park system, several high quality golf courses and the Juan de Fuca Recreation Centre.
- Colwood also has a strong reputation as an artistic community that attracts a significant number of visitors and tourists to the community. The city has great venues for concerts and community events such as ‘Rock the Shores’, and institutions such as the Coast Collective Arts Center and the proposed Emily Carr West Shore Community Arts Centre will support the growth of the West Shore’s arts and cultural community through programming.

■ **Royal Bay Development is a Strong Market Indicator for Investors and Businesses**

- Royal Bay is Colwood’s largest development application to date. The development approvals that are underway will have the impact of transforming the residential landscape and shoreline of Colwood, as well as people’s perception of the local business climate. While predominantly residential, there is a new high school currently being constructed, retail and commercial activity, public spaces and improved access to the City’s waterfront.

■ **A Commitment to Sustainability**

- Colwood’s Official Community Plan policies reflect Colwood’s commitment to develop complete neighbourhoods as part of a sustainable future. Colwood’s Sustainable City Vision expresses its desire to be a welcoming and inclusive community that is planned and designed to support the needs of a diverse and changing population. This includes the development of complete and compact centres served by multi-modal transportation corridors.
- Colwood has successfully implemented a number of sustainable community initiatives that contribute to the city’s profile as a ‘green’ community. The Solar Colwood initiative is helping local residents and businesses save energy and reduce greenhouse gasses through solar energy and energy efficient upgrades such as solar hot water systems, electric vehicle charging stations, and energy assessments. Colwood’s recent proposal for an innovative, green sewage treatment system as a response to regional plant requirements further demonstrates Colwood’s desire to be both fiscally and environmentally responsible for its economic growth.

Weaknesses

■ **Lack of Profile for the Capital Region and West Shore**

- While several of the West Shore communities have developed local profiles, the capital region requires a strong regional marketing effort, backed up by comprehensive local profiles that showcase local investment opportunities. Current marketing efforts are hampered by a lack of appreciation for the dynamics of a regional economy (e.g. investment and labour flows) at the local level, and the heightened level of competition between the area municipalities.
- Colwood is not seen as having a compelling vision for the community that can be leveraged by the region’s marketing and promotion efforts. The city has not actively participated in the regional dialogue to attract investment and investors to the region and the absence of a compelling case for investors to consider Colwood has contributed to a reactive rather than proactive economic development effort on the part of the municipality.

■ **Infrastructure Improvements Lagging Growth**

- Colwood and the West Shore are projected to grow significantly in the next 20 years. This growth is expected to have impacts on local and regional infrastructure, not the least of which will be the level of traffic congestion on local and regional roads. Several of Colwood’s roads are already perceived to be at the tipping point based on the level of commuter traffic that originates with and passes through Colwood. Investment in regional transportation infrastructure including public transit is required, but consideration must also be given to attracting businesses and employment in proximity to where people live.

■ **Lack of Investment Readiness at the Local Level**

- While the size of a community is not necessarily a limiting factor in investment attraction, Colwood’s lack of serviced employment land coupled with the perceived challenges associated with city’s zoning provisions may limit the municipality’s ability to attract higher order employment or office-oriented employment uses. The absence of a comprehensive community investment profile and the lack of political and business leaders to champion Colwood are also impacting the city’s ability to attract business investment. Colwood currently does not have an Economic Development Officer to engage the business community and regional economic development partners on a regular basis and has not allocated resources to the attraction and retention of business investment.

■ **Vacant Land Availability Limits Growth Potential**

- In order to remain competitive, a community must maintain an inventory of available development sites across a range of zoning classifications, including different parcel sizes and configurations. The City has a limited supply of vacant commercial and industrial lands. Though there are some infill opportunities, particularly in the commercial land supply, there are limited designated and zoned properties that would be available over the shorter term. Larger scale vacant lands and infill opportunities in the community are well positioned to accommodate a range of industrial and commercial investment. However, the same qualities that make those parcels attractive for more industrial and knowledge-based employment make them attractive from a commercial and population-related development perspective as well (e.g. retail uses, institutional uses). The limited supply of vacant lands increases the competition for lands among sectors or uses that align with economic development objectives and more locally-oriented or non-employment projects which may provide developers or landowners with a higher or more immediate return on investment, or lower risks.

■ **Uncertainty Created by Local Development Approvals Process**

- Stakeholder input suggests that Colwood’s development approvals process is impeding rather than enabling good development. The most prevalent issues were the lack of integration between the Planning Department and other city departments, the timeliness with which applications were dealt with, the perceived 11th hour requests for changes to development plans, the complicated nature of the City’s zoning bylaw requiring more amendments than necessary, and the lack of consistency on the part of Council in its handling of development approvals.
- Colwood needs to address the perception that the development approvals process moves too slowly if it is to have a competitive business climate to attract new business investment. This is especially critical in an economy that moves quickly and where investors may have location options other than Colwood.

■ **High Property Tax Rates Eroding Investment Opportunities**

- Colwood, like many small communities in the shadow of a larger metropolitan area faces challenges in providing for the upfront investment necessary to accommodate future population and employment growth. The community is relatively small, with a base population of approximately 17,000 people and infrastructure development costs spread over a small number

of households, business and enterprises. This has contributed to tax rates that are seen as uncompetitive by comparison to surrounding municipalities, particularly as it relates to the attraction and retention of business investment.

- Colwood has the highest property tax rates among all of the West Shore communities across all property types. This fact significantly limits investment attraction opportunities and impacts the city's ability to retain existing businesses. With a limited inventory of available properties coupled with the higher tax rate, Colwood is at a significant competitive disadvantage compared to other communities in the West Shore. This is particularly problematic given the city's desire to bring better balance to its ratio of residential/non-residential tax assessment.

■ **Small Base of Employment**

- There are 807 firms in the township with over 57 percent of these businesses home based or sole proprietor enterprises. Of those businesses with employees, almost 64 percent employ less than 5 people. In the absence of large scale business and industrial development opportunities, these findings suggest that the city will continue to be dependent on small business and entrepreneurs to create employment opportunities in the community. Without the proactive targeting of business investment opportunities, the nature of local businesses may also limit Colwood's economic growth potential, as there are a significant number of firms concentrated in sectors like construction, other services, and health care.

■ **Under-investment in the Public Realm Undermining the City's Quality of Place**

- While Colwood has a significant number of assets contributing to its unique quality of place experience and tourism potential (Esquimalt Lagoon and Beach, Fort Rodd Hill and Fisguard Lighthouse National Historic Park, Hatley Castle, Royal Colwood Golf Course, Galloping Goose Trail, etc.) there is a prevailing opinion that the city has under-invested in the public realm elements of the community and that this has created a negative impression of the community. More needs to be done to link the local trail network to the regional trail system, provide a pedestrian friendly environment and improved streetscaping along main roads such as Sooke Road, provide dedicated bicycle lanes and ensure public access is retained along the oceanfront. The lack of a compelling vision for Colwood Corners (Colwood's downtown) that includes a focal point for the community, such as a public square that could host festivals and major community events was also seen as undermining the city's quality of place and may be deterring visitors, new residents and business investment.

■ **Lack of Downtown Contributes to Lack of Identity**

- A downtown or traditional central core area is the most visible indicator of community pride, along with its economic and social health. It is either an asset or a liability in the effort to recruit new residents, new business investment, retirees, tourists, and others to the community and to keep them in a community over time. While there are a variety of factors contributing to the lack of a defined downtown or central core area in Colwood, it is nonetheless a significant factor in the lack of civic identity that many participants cited during the consultation.

■ **Housing Options Not Reflective of Needs of Broader Demographic**

- The city's housing inventory is dominated by single family homes; many of them classified as large lot homes. Limited new development and the appeal of these larger homes have combined

to increase the cost of housing in the city relative to surrounding communities. If the City's intent is to appeal to a broad demographic (e.g. younger families and young professionals), then more must be done to provide for an adequate choice of housing options at various price points in proximity to community services and amenities. It is worth noting that the younger age cohorts (18-35), most commonly referred to as Gen Y are also more likely to consider rental accommodation instead of single family homes.

■ **Lack of Community Vision Deterring Investment**

- Many respondents that participated in the community consultation felt that the council and administration at the City of Colwood had until recently been largely unresponsive to the needs of the business and investment community. Stakeholders commented that the City had lost focus in recent years, lacked strategic vision and leadership for how the community should develop, had taken too narrow an approach on development opportunities and implemented development policies that limited the city's affordability and overall competitiveness.

Opportunities

■ **Collaborating to Resolve Growth Challenges**

- The West Shore municipalities including Colwood have a role to play in the management of long term growth across the region. Issues identified earlier, such as infrastructure limitations, financial sustainability, investment readiness, economic sustainability and land availability are common across the region. While the Capital Regional District is tasked with tackling these growth management challenges, greater impact may be achieved if the municipalities within the region collaborate to develop ideas and actions related to resolving long term growth issues. Colwood's Official Community Plan review provides an opportunity to re-emphasize the need for regional collaboration around issues such as transportation and sustainable development (e.g. shared service agreements could assist in reducing costs and improving efficiencies). Collaboration needs to be fostered at both the political and staff level to ensure effective solutions to the region's growth challenges.

■ **Expanding Supply Chain Resulting from Investment in Region's Shipbuilding Industries**

- The National Shipbuilding Procurement Strategy (NSPS) is a Government of Canada program operated by the Department of Public Works and Government Services. The NSPS program was charged with selecting two Canadian shipyards to rebuild the fleets of the Royal Canadian Navy and the Canadian Coast Guard through two separate packages of work (the projects), valued at \$33 billion. On October 19, 2011 Seaspan Marine Corp. (Victoria) was awarded an \$8 billion work package for non-combat vessels. The outcome of this investment will see a significant increase in ship building, maintenance and related supply chain activities across the region over the next 15 years related to the Royal Canadian Navy, Canadian Coast Guard and hopefully B.C. Ferries fleets.

■ **A Growing Technology Sector Defining the Capital Region**

- The Advanced Technology sector in Greater Victoria has become a leading economic generator for the region, exceeding \$1.95 billion in annual revenues. Over the past two decades, the sector has grown to over 900 companies, employing more than 13,000 people, for a total economic

impact in excess of \$2.6 billion. The growth of this sector has outpaced the provincial average, making Greater Victoria the second largest technology sector in B.C.

- The Victoria Advanced Technology Council (VIATeC) represents many advanced technology businesses in the region, including green energy, engineering, new media, digital and life sciences. The hub of Greater Victoria's technology community is the Vancouver Island Technology Park (VITP), owned by the University of Victoria. VITP is a vibrant hub of emerging and established companies with strong representation among life sciences, digital technologies and alternative energy. UVic also leads the VENUS and NEPTUNE projects, which are creating new economic opportunities in the marine technology sector.

■ **A Master Plan for the City's Central Core Area and Gateway**

- Colwood's Official Community Plan positions the Central Core as a regional growth area for knowledge, education and creative-based industries. Policies are intended to ensure that the area is planned for sufficient and appropriate floor space capacity to meet local and regional demands, includes and identify sites for office development, and works with development proponents to attract 'anchor' office/business tenants through proactive development partnerships, and supports those businesses whose needs cannot be met within the Central Core area in other locations in the city.
- Colwood's Central Core (including Sooke Road and Island Highway frontages) is well positioned as a strategic employment area and gateway to the community. A master planning effort is required however, to ensure that this key area of the community develops as envisioned in the Official Community Plan. This includes the integration of a regional transit hub, an appropriate road network and streetscape design, walkability elements and the creation of a commercial revitalization zone that will introduce incentives to attract needed investment to the area. A key consideration in the master planning for this area of the city should be a partnership opportunity to relocate the City Hall Complex. This decision would kick start investment and interest in the 'downtown' and support the businesses already present.

■ **Revitalization Tax Exemption Programs to Support Business Development**

- The Government of British Columbia provides Municipalities under the Community Charter the authority to exempt properties from municipal property value taxes through a revitalization tax exemption program (RTE). To use this authority, a Council must establish a revitalization program (with defined reasons for and objectives of the program), enter into agreements with property owners, and then exempt their property from taxation once all specified conditions of the program and the agreement have been met. Exemptions may apply to the value of land or improvements, or both. Councils are free to specify, within their revitalization programs, the amounts and extent of tax exemptions available.
- Examples of revitalization objectives that could be encouraged through the RTEs scheme include: environmental revitalization (encouraging green building technology, environmental sustainability, brownfield redevelopment), economic revitalization (encouraging investment and employment), social revitalization (encouraging affordable housing, construction and preservation of affordable rental housing), and other types of revitalization (redevelopment for community sustainability, conservation of heritage property, residential intensification, neighbourhood rejuvenation, or facade improvements and beautification).

■ **Increasing Support for Arts and Cultural Amenities**

- Given the range of cultural assets already located in Colwood it is not surprising the West Shore Centre for Performing Arts and Royal Bay Theatre Development Study confirmed that there is growing support for investment in art and cultural amenities in Colwood.
- A business case has been developed for a \$35 million theatre and mixed-use arts, education and wellness complex that would serve the cultural needs of a growing region and contribute to sustainable economic development within the broader region. While a location for the complex is still being discussed, Colwood should be actively pursuing partners and funding options for securing the development of this facility.

Challenges

■ **Changes to Planning Framework will Take Time**

- A 5 year review of Colwood’s Official Community Plan will begin in 2014. Given the range of issues that are expected to be addressed, it may be some time before changes are evident in the municipal land use planning framework. Coupled with the need to bring the zoning provisions in line with OCP, this may stall development interest in the community over the short to medium term.

■ **Costs Associated with Sustainable Policies Concern for Business**

- Despite the City of Colwood’s efforts to become a sustainable community, there is a prevailing opinion by those that participated in the business consultation that the integration of ‘green’ building design requirements on the part of the city will be cost prohibitive for business and result in needed investment being directed to other communities.

■ **Stalled Capital City Development Seen a Negative Harbinger for Community**

- While many community and business stakeholders acknowledge that development in Colwood has moved at a slower pace, there is little desire to see commercial development trump good planning, particularly as it relates to the ‘downtown’. Of concern however, is the impact of the stalled Capital City Centre development and the message that it conveys to would be investors in Colwood, particularly given the level of development activity in neighbouring communities. While decisions affecting the development of these lands are not within the city’s control, more communication with the local business community on the future of this site should be addressed.

■ **Ongoing Budgetary and Fiscal Constraints**

- Colwood’s heavy reliance on residential tax assessment and an increase in local debt has led to limited financial flexibility with which to manage and encourage growth. While this position has improved in recent years, it still represents a threat to long term economic prosperity. There is also a growing concern within the local business community that they will bear the brunt of the need to finance future infrastructure needs through increased taxation. This in turn discourages further investment in Colwood.

Appendix F: Best Practice Review

In developing an economic development strategic action plan, successful strategies can often be learned, in part, from the experience of other similar communities. The best practice review is a high level scan of actions undertaken in other jurisdictions that address economic development issues raised in the background review, stakeholder engagement, and assessment of strengths, weaknesses, opportunities and challenges.

The types of economic development initiatives researched include:

- Business retention and attraction
- Communications and marketing
- Place-making
- Waterfront development
- Downtown redevelopment
- Revitalization zones
- Regional economic development

The review analyzes each type of initiative with a statement of issue, then explores approaches to the issue by the best practice city, including consideration of partners and funding, and concludes with possible takeaways for the Colwood Economic Development Strategy.

Comparator Communities

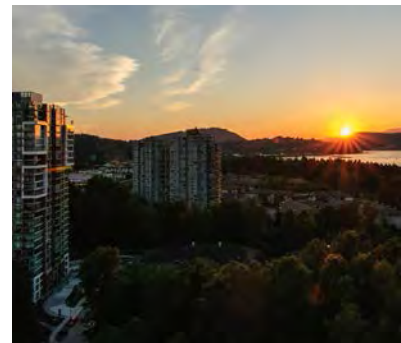
Comparator communities were selected based on size and growth patterns, access to a larger metropolitan area, high quality of life experience and similar regulatory environment. Consideration has also been given to the framework of each community’s economic development strategies or programming as well as local land use policy. The cities considered for a best practice review include:



Vernon⁷



Squamish⁸



Port Moody⁹

7 Image: Vernon BC, Ernest Hawkes, CC-BY-2.0

8 Image: Squamish Valley Music Festival, John Biehler, CC-BY-SA 2.0

9 Image: Sunset @ Port Moody, Jerome Decq, CC-BY-2.0

Community	Population	Population growth (2006-2011)	Closest metropolitan area (driving distance)
Vernon	38,150	6%	Vancouver 5hours
Squamish	17,158	15%	Vancouver 45min
Port Moody	32,975	20%	Vancouver 40min
Colwood	16,000	10%	Victoria 20min

Business retention and attraction (BR+E)

Statement of Issue

A significant percentage of employment growth comes from new positions developed by the existing business community. Hence finding ways to retain existing businesses and support business development is critical to long-term employment growth. Business retention and attraction programs (BR+E) are designed to encourage business growth. This often requires building strong relationships with existing businesses and listening to their needs, then adjusting policies and creating programs to address them. The BR+E support systems that communities develop are also elements of a broader economic development program designed to attract new industries.

Best Practice Review

Vernon

Vernon’s Economic Development Strategy stresses the need to build firm relationships with existing businesses and employers, and to establish mechanisms to ‘feel the pulse’ of business and to improved business practices. Networking opportunities are being enhanced and the City is partnering with other organizations in order to deliver on them. Initiatives include the development of an Investment Guide, and a Business Visitation program where established business leaders spend time with new business owners to share ideas and provide support.

Squamish

Squamish has appointed an Economic Development Officer and charged that position with developing a range programs and services. The City has conducted a Business Retention and Expansion survey, established regular networking events, promoted a Buy Local program and a Business Incubator program. In addition, they support a youth entrepreneur program that encourages young people to stay in Squamish and develop their ideas into businesses. Squamish city hall has reviewed and improved their Development Approvals processes, and created a development incentives program involving tax advantages.

Port Moody

Port Moody is also undertaking many of the initiatives noted in Vernon and Squamish. In particular they have reviewed their bylaws to ensure that they are supportive of small, home-based businesses and reviewed available lands to ensure there is sufficient property available for both internal growth and new development.

Takeaways for Colwood Economic Development Strategy

The following strategies could be considered based on the experience of the comparator communities:

- Hire an Economic Development Officer is essential to establishing a strong relationship with the local business community

- Strengthen relationships with the business community through business visitation, and partnerships with local and regional business organizations
- Review bylaws to ensure that they are consistent with economic development objectives
- Use a development incentives approach to encourage businesses to meet City economic development objectives

Communications and marketing

Statement of Issue

Getting the message out that a community is ‘open for business’ is seen by most municipalities as being a critical role of a successful economic development department. The internet has become the cornerstone of this effort, through a variety of websites and internet marketing initiatives. Equally important is the capacity within City Hall or partner organizations to keep the positive information and stories flowing.

Best Practice Review

Vernon

Vernon has a stand-alone economic development website, separate from the City website, and regularly updates their communications materials, including investment sector profiles, as well as communicating issues and initiatives to the business community through the website. The city also has a focus, within communications, on developing economic development leadership to cultivate the business leaders of tomorrow. Council’s Economic Development Committee has a Marketing Sub-Committee. The department also works through partner organizations to leverage and build on their marketing activities.

Squamish

Squamish has a strong brand that reflects both business and quality of life opportunities in the community: the Outdoor Recreation Capital of Canada. They also produce many reports in Mandarin, recognizing the investment power of the Chinese community.

Port Moody

Port Moody has an Economic Development Commission and promotes economic development and tourism as key pillars of their strategic planning, together with sustainability goals. The City has created a Sustainability Division with their Development Services Department; sustainability goals include economic development objectives such as financial sustainability and an increasing tax base. Port Moody uses their website to distribute a quarterly economic profile to potential business investors.

Takeaways for Colwood Economic Development Strategy

The following strategies could be considered based on the experience of the comparator communities:

- Establish a stand-alone economic development website
- Identify partner organizations and encourage joint economic development marketing programs

- Complete a City branding exercise
- Develop sector profiles and other resource materials for entrepreneurs and investors. Consider translating them into Mandarin and/or other languages familiar to potential investors

Place-making

Statement of Issue

Place-making is a community oriented approach to the planning, design and maintenance of public spaces. A beautiful community with amenities that contribute to community pride and the quality of life experience in a community is recognized as a key element in attracting entrepreneurs and their families as new residents and retaining residents. Place-making is a practical application of the concept that creativity is the lifeblood of economic growth and that attracting creative people will support long term employment growth.

Best Practice Review

Vernon

Vernon recognizes that traffic management is a critical place-making issue for the community. A sense of place must emerge from the heavy traffic that has no alternative but to grind through its city centre. The City has invested in various park improvements and in arts facilities, and is planning to build a state of the art museum and art gallery to add to its community amenities. Vernon has successfully developed a range of events including the Funtastic Slo-Pitch Tournament and Lake City Casino Funtastic Music Festival, which was nominated for the CSTA Event of the Year in 2009.

Squamish

Squamish has transformed itself into an attractive and active community from a pit stop on the way to Whistler and a dormitory suburb for both Whistler and Vancouver. And it has converted its economic image as a wood and forestry centre on the BC Railway, into high technology industries and the home to great events such as international windsurfing, music festivals, and mountain biking.

Port Moody

Port Moody has branded itself as 'City of the Arts' and has worked tirelessly to build a range of economic initiatives within their brand. The City's efforts have included an annual Festival of the Arts and supporting a wide range of live arts which have in turn enhanced its quality of place. The Newport Village development is widely considered one of the Lower Mainland's most successful urban villages and Rocky Point Park, with its wide range of both urban and natural environments, has received many awards for its great sense of place.

Takeaways for Colwood Economic Development Strategy

The following strategies could be considered based on the experience of the comparator communities:

- Develop the cultural industries that are already located in Colwood
- Ensure that place-making is a key element in a future downtown planning exercise

- Develop an events strategy targeting all kinds of events - arts, culture, sports, festivals
- Consider how parks and trails can be improved to increase sense of place and be effectively leveraged to attract new residents and visitors

Waterfront development

Statement of Issue

Often strongly linked to place-making, a community's waterfront is recognized as critical to various aspects of economic development. Historically, waterfronts were associated with marine industries, docks, and shipping. These uses often involved heavy industry and many of the waterfronts in Canadian cities today contain high levels of pollution from poor waste management practices that were part and parcel of industrial management at one time.

However the re-emergence of waterfronts as people-places has characterized the land use planning of many major cities in the past 40 years: from Vancouver, to Victoria, Toronto to Boston and Shanghai. This trend has brought residential, commercial and public realm improvements to many waterfronts; however, in any time when global trade has also grown, waterfronts must also continue to accommodate large and expanding port facilities.

Best Practice Review

Vernon

Vernon's waterfront is lakeshore and the city was developed a distance away from the lake. The lakeshore is therefore largely untouched by industry and comprises parkland and residential development. Vernon's current plans for its lakeshore include increased residential density and the expansion of tourism oriented land uses. The City is achieving this through a Waterfront Plan and improving accessibility by transit from the City Centre.

Squamish

Squamish has, over the past 20 years, reclaimed its waterfront from heavy industry. The City has invested heavily in brownfield remediation and now has over 100 acres of land ready for development. It has recently appointed a developer to manage the associated development processes and established the Squamish Oceanfront Development Corporation to manage the overall development.

Port Moody

Port Moody has more waterfront per capital than any other B.C. community. The most accessible areas, close to the City Centre, are dedicated parkland, while farther along the Burrard Inlets northern shore and up the Indian Arm, the waterfront is prime residential development. The Loco Oil refinery used to occupy a significant portion of waterfront, but it closed in 2001 and the owners, Imperial Oil, are planning a major residential development.

Takeaways for Colwood Economic Development Strategy

The following strategies could be considered based on the experience of the comparator communities:

- Develop a comprehensive waterfront master plan

- Ensure Royal Bay development maximizes community values in its waterfront development, as well as ensuring that its commercial development integrates with Colwood’s economic development planning
- Work with Department of National Defense to maximize marine industry development on their lands

Downtown redevelopment

Statement Of Issue

As with place-making, creating and maintaining a vibrant, attractive downtown is very much a part of economic development planning. Downtowns often contain independent businesses that add character to the community and attract and retain residents. The downtown core is a natural community gathering place, when the appropriate public areas are developed to facilitate events and public gatherings. For these reasons the downtown can be the heart of a community, and an important asset for both business and resident attraction.

Best Practice Review

Vernon

Vernon’s Official Community Plan (OCP) and Downtown Neighbourhood Plan promote increased commercial and residential development in the downtown. The plans also promote improved access to parking and improved pedestrian and bicycling linkages within the city. A public market is proposed as is improving the attractiveness of the accommodations district.

Squamish

Squamish has established a Business Improvement Area for their downtown and have completed several iterations of downtown revitalization planning.

Port Moody

Port Moody has established a growth plan that effectively changes its downtown from a commuter strip on St John’s Street to a new commercial, public administration and high-rise residential area. City Hall has been relocated adjacent to a major recreation complex and waterfront park. The new City Hall is co-located with a municipal library and theatre (which doubles as Council Chambers). The City Hall development is also next to the new residential district of Newport Village.

Takeaways for Colwood Economic Development Strategy

The following strategies could be considered based on the experience of the comparator communities:

- Develop a Downtown Plan for the Colwood Corners area
- Consider relocating City Hall using city lands for leverage to attract a co-developer
- Consider establishing a Business Improvement Area
- Ensure the link with rapid transit plays a central role in the Downtown Plan

Revitalization zones

Statement of Issue

The BC Community Charter offers BC municipalities a variety of ways to encourage and achieve a range of economic, social and environmental objectives. While BC municipalities are somewhat restricted in the range of financial tools at their disposal, their ability to vary levels of property taxation offers some fiscal flexibility that can be used to encourage economic development. While rates for various classes of property can be kept low, this generally applies across the municipality. However, under section 226 of the Community Charter, Councils can adopt a Community Revitalization Bylaw which allows tax exemptions for up to 10 years for specific properties or types of properties. This exemption can only apply to the municipal portion of the tax notice, not to school or other portions.

Best Practice Review

Vernon

Vernon has established a revitalization zone in order to incentivize City Centre development. They have also adopted Council resolutions/bylaws which allow for both building permit fees and development cost charges to be reduced or waived for developments that meet a range of City-stated criteria. In addition, some parcels of City owned land have been identified for use in moving economic development related initiatives forward.

Squamish

Squamish has established an Investment Incentive Program which encourages commercial development in the downtown core and industrial development in the Squamish Industrial Park. Grants are also available for Façade Improvement for businesses in the downtown.

Port Moody

Port Moody has established a Heritage Revitalization Tax Exemption Bylaw (2011) for the older part of its downtown, but has not extended tax exemptions to either non-heritage land uses or to the newer areas of Port Moody. The City's new OCP does establish a new policy for density bonusing that allows landowners to develop at a higher density in return for provision of community amenities like parks and recreation facilities, arts and cultural facilities and public art.

Takeaways for Colwood Economic Development Strategy

The following strategies could be considered based on the experience of the comparator communities:

- Consider extending the current Hotel oriented Revitalizing bylaw to cover all aspects of the City's economic development vision
- Use density bonusing to strengthen the community space in the downtown core and elsewhere in Colwood

Regional economic development

Statement of Issue

In BC, all Official Community Plans (OCP) must conform to the policies and projections that have been jointly agreed in the Regional Context Statement; this document is currently under revision in the Capital Region and will be known as the Regional Sustainability Strategy once it is adopted. In addition, the Region is responsible for many services such as water and sewer, overall transportation planning, and regional parks.

Best Practice Review

Vernon

Vernon is in the North Okanagan Regional District (NORD). The City and some adjacent municipalities have established various mechanisms in addition to NORD to develop and deliver services.

Squamish

Squamish is in the Squamish Lillooet Regional District. This is a very large and very rural and mountainous area. Generally the regional district provides relatively few services to Squamish.

Port Moody

Port Moody is part of Metro Vancouver, which provides a wide range of regional services. In particular, transit is a regional function and collaboration on rapid transit over the past 30 years will bring an expanded ALRT to the City by 2016. The City's new OCP is a reflection of this development which will make the City more accessible to the rest of the region and allow the City to attract employment to the areas around the new transit stations.

Takeaways for Colwood Economic Development Strategy

The following strategies could be considered based on the experience of the comparator communities:

- Ensure that Colwood supports the vision of the CRD's Regional Sustainability Strategy
- Advocate for the creation of a regional transit hub in the City of Colwood
- Maximize and recognize the benefits that come from regional services including marketing, business development and access to funding sources

Appendix G: Detailed Implementation Plan

Goals/Objectives/Actions	Timing (Immediate 0-18m, Near 18m-2yr, Long 3-5yr)			Potential Partners	Resource Requirement
	Immd.	Near	Long		
Goal 1: Foster partnerships that advance our economic sustainability					
<i>Objective: To demonstrate leadership in advocating for and supporting collaborative economic development as a way to advance local economic development priorities</i>					
1. Position economic development as a core service for Colwood through the hiring of a full time economic development manager to oversee the implementation of the Economic Development Strategic Plan.					
<ul style="list-style-type: none"> The economic development manager will build the necessary relationships with economic development partners, the regional business community and area municipalities. 	Ongoing				
<ul style="list-style-type: none"> The economic development manager will prepare an annual business plan that details all actions planned for the fiscal year (with relevant performance metrics) and provide an annual report on the achievements in implementing the efforts of the previous year. The economic development manager will provide bi-annual progress updates to both municipal council and the community at large. 	Ongoing				
<ul style="list-style-type: none"> The economic development manager will engage economic development partners (GVDA, Industry Associations, Chamber of Commerce, RRU, DND, First Nations, Coastal Collective, border municipalities etc.) on a consistent and ongoing basis to gain an understanding of programming and partnership opportunities available to Colwood. 	Ongoing				
<ul style="list-style-type: none"> The economic development manager will assist with the creation of working groups around specific projects or initiatives, when required. 	Ongoing				
<ul style="list-style-type: none"> The economic development manager should take the lead on assisting potential investors and area businesses to navigate the development approval process and assist in navigating the programming and funding offered by the City, province or the federal government. 	Ongoing				

Goals/Objectives/Actions	Timing (Immediate 0-18m, Near 18m-2yr, Long 3-5yr)			Potential Partners	Resource Requirement
	Immd.	Near	Long		
2. Prepare and maintain a Community Profile and Business Investment Profile (e.g. www.airdrie.ca) that can be leveraged by GVDA and the West Shore Chamber of Commerce in their efforts to attract future residents and workers, businesses and prospective regional, national and international investors to the region.					
3. Initiate a crowdsourcing initiative for the City of Colwood to raise money for small businesses and solicit input on community development projects. Work with Royal Roads University, Camosun College, VIATeC, UVic and area high schools to identify projects that will facilitate economic activity, social innovation, support local entrepreneurs and start-ups and foster community pride.					
4. Give consideration to the creation of a Community Investment Fund that will foster partnerships with not for profit organizations and neighbourhood associations in nurturing, enhancing and celebrating Colwood's unique cultural, artistic and recreational attributes.					
<ul style="list-style-type: none"> The policy should apply to eligible not for profit organizations requesting monies from the city to host festivals and events and/or eligible neighbourhood associations requesting funds for neighbourhood capacity building initiatives. 	Ongoing				
<ul style="list-style-type: none"> The policy should build local capacity in the community by enhancing the unique arts, cultural and recreational aspects of Colwood through events, festivals and neighbourhood projects. 	Ongoing				
<ul style="list-style-type: none"> The policy should enable social connections between various groups in the community and contribute to Colwood's sense of identity, place and community. 	Ongoing				
5. Work with the West Shore Chamber of Commerce, the Coastal Collective and surrounding municipalities to complete a West Shore Cultural Asset Mapping exercise that will further nurture the development of the region's cultural and cultural tourism sectors and increase public awareness and participation in available programming and activities and improve the long term sustainability of the assets themselves.					

Goals/Objectives/Actions	Timing (Immediate 0-18m, Near 18m-2yr, Long 3-5yr)			Potential Partners	Resource Requirement
	Immd.	Near	Long		
6. Develop a Sustainability Roundtable Series with Royal Roads University that invites local residents and the businesses to participate in conversations about sustainability, community-minded commerce, place-making, local food, creativity and education	Immediate and Ongoing				
7. Engage VIATeC and Royal Roads University in discussions around the opportunity and feasibility of locating a satellite business incubator that would serve business start-ups and provide entrepreneurial programming for the West Shore communities.					
8. Revisit and revise the Memorandum of Understanding between Royal Roads University and the City to confirm opportunities for ongoing collaboration and cooperation.					
9. Partner with First Nations in discussions on economic development opportunities, such as the opportunity to locate a Cultural Centre in the City of Colwood.					
10. Engage the Department of National Defence in a discussion of the forthcoming Master Plan for the DND lands within Colwood.					
<ul style="list-style-type: none"> ■ Pursue opportunities for the divesture of lands along Sooke Road as part of the City's efforts to draw investment to the corridor. 					
<ul style="list-style-type: none"> ■ Determine the recreational needs of DND's service personnel in Colwood and Esquimalt and the opportunities for a shared use arrangement as a way to ensure the long term viability of the Juan De Fuca Recreation Centre 					
Performance Measures <ul style="list-style-type: none"> ■ Change in the numbers of entrepreneurs in the community ■ Presence of community endowments and philanthropic giving ■ Increased business and resident engagement – number of businesses/households, number of people ■ Private and public contributions accessed or leveraged through initiatives ■ Local regional partnerships – number of partnerships, size of partnerships, type of partnerships ■ Community engagement- quality of ideas generated or implemented 					

Goals/Objectives/Actions	Timing (Immediate 0-18m, Near 18m-2yr, Long 3-5yr)			Potential Partners	Resource Requirement
	Immd.	Near	Long		
Goal 2: Create an attractive and liveable oceanfront community					
<i>Objectives: To balance the need for growth with the community's unique cultural, heritage and environmental values</i>					
11. Prepare a Downtown Revitalization Plan for the City of Colwood that will foster the development of a well-functioning and vibrant commercial area and residential neighbourhood. The plan should implement a simplified planning policy regime (OCP and Zoning) that outlines the desire for a compatible mix of uses, building heights, urban form, street network, open spaces, parking and parkland requirements and potential revitalization incentives. The City Centre land use policies and zoning should be expanded to include the Mixed Use Employment Area along Island Highway given its premier gateway location in the City.					
<ul style="list-style-type: none"> Confirm the feasibility of relocating Colwood's City Hall to the City Centre as part of a larger mixed used development opportunity that would kick-start investment in the area. 					
<ul style="list-style-type: none"> Issue a formal Expression of Interest to solicit partners in the development of a mixed used building that incorporates City Hall in conjunction with retail and additional office space. 					
<ul style="list-style-type: none"> Secure the commitment and financing for the construction of a Regional Transit Hub in Colwood's City Centre as part of the City's efforts to establish a downtown that functions as a civic, recreational and employment centre for the City and region. 					
<ul style="list-style-type: none"> Give consideration to pre-zoning for the desired types/forms of development in the City Centre in advance of development applications. Zoning should be inclusive and simple based on the desire to regenerate/revitalize the area. 					
<ul style="list-style-type: none"> Introduce a revitalization tax exemption policy geared to the attraction of mixed use development in the City Centre. 					
12. Undertake public realm improvements to Sooke Road between Goldstream and Veterans Memorial Parkway commensurate with its role as a major urban corridor for Colwood. Improvements should include:					

Goals/Objectives/Actions	Timing (Immediate 0-18m, Near 18m-2yr, Long 3-5yr)			Potential Partners	Resource Requirement
	Immd.	Near	Long		
<ul style="list-style-type: none"> Street edge improvements (e.g. landscaped strips with trees, shrubs, planters, street furniture) that reinforce it as pedestrian space. 					
<ul style="list-style-type: none"> Traffic calming through the introduction of sidewalks and bike lanes. 					
<p>13. Complete a comprehensive Waterfront Plan (and proforma) that articulates the community's vision for all the lands within its jurisdiction. This would include the lands owned by DND, those managed by RRU, and those currently under development planning in Royal Bay. As the last stretch of undeveloped and under-developed waterfront in the region, the Plan should outline the planned roles and functions of this 'Waterfront Precinct', how it will be connected to the City's neighbourhoods, how it will be accessed and used by residents and visitors and how it will contribute to the City's sustainability goals. This land has great economic potential to add to the City's public realm, and to showcase its environmental, recreation and tourism values and opportunities. Specific actions would include:</p>					
<ul style="list-style-type: none"> Pursue opportunities to strengthen the post-secondary presence. 					
<ul style="list-style-type: none"> Pursue opportunities to secure a performing arts centre/cultural centre to the waterfront area. 					
<ul style="list-style-type: none"> Work with the Coast Cultural Cooperative to enhance the opportunities for cultural tourism 					
<ul style="list-style-type: none"> Having completed the Waterfront Plan, initiate discussions with area MLAs and MPs to secure financial support for the redevelopment of Colwood's waterfront and proposed public realm improvements. 					
<p>14. Provide further enhancements to Colwood's quality of place experience as a means to differentiate the community in its efforts to attract future residents, visitors and investment to the City. Specific actions should include:</p>	Immediate and Ongoing				
<ul style="list-style-type: none"> Gateway and way finder signage. 					

Goals/Objectives/Actions	Timing (Immediate 0-18m, Near 18m-2yr, Long 3-5yr)			Potential Partners	Resource Requirement
	Immd.	Near	Long		
<ul style="list-style-type: none"> Improved public access to the water's edge and public use of waterfront amenities. Provide gathering spaces that will draw residents and tourists, host community events and support festivals and events in the community. 					
<ul style="list-style-type: none"> Improvements to the City's trail system and bike paths as a way of enhancing mobility in Colwood and strengthen the relationship between residents of all ages and the city they live in. Identify opportunities to provide connections to regional trail and a bike path through Royal Roads University/DND lands. 					
<ul style="list-style-type: none"> Identify opportunities to more effectively link the City's waterfront with the City Centre by supporting improved access to the waterfront areas (e.g. trails, bike paths, public transit). 					
<p>15. Advocate for the development of a regional Cultural Plan and Cultural Asset Inventory to support the further development of the arts, culture, recreation and place based cultural tourism in the West Shore.</p>					
<ul style="list-style-type: none"> Create a searchable database and asset map of tourism and cultural resources in the West Shore 					
<p>16. Provide a continuum of housing options to accommodate the broadest demographic and improve overall levels of affordability including opportunities for live-work and senior housing.</p>					
<p>Performance Measures</p> <ul style="list-style-type: none"> Improved quality of life elements (parks, recreation, oceanfront access) Increased local ownership Housing availability Number of tourists/visitors Sustained Development Ranking of the community in leading indicator reports Increased give-back to communities 					

Goals/Objectives/Actions	Timing (Immediate 0-18m, Near 18m-2yr, Long 3-5yr)			Potential Partners	Resource Requirement
	Immd.	Near	Long		
Goal 3: Provide a supportive environment for business and investment					
<i>Objective: To enhance the City's competitive advantage for attracting and retaining local jobs and business investment opportunities</i>					
17. Add a state of the art and innovative economic development component to the City's website (e.g. http://www.squamish.ca/business-and-development/economic-development) as a way to distinguish Colwood from other west shore communities and highlight the City's vision for economic development.					
<ul style="list-style-type: none"> Prepare a community investment profile that illustrates the characteristics of the City as it relates to key socio economic indicators, community sustainability initiatives, planned investment and key employment sectors in the region. Include profiles of innovative local companies in each sector. 					
<ul style="list-style-type: none"> Leverage the site to communicate accurate and up to date information to residents and the development/investment community on the progress or status of major development initiatives 	Ongoing				
18. Maintain an inventory of available serviced and un-serviced commercial and industrial land and buildings, and make the information available on the City's website. The following information should be included at a minimum: <ul style="list-style-type: none"> parcel size; privately or municipally owned; contact information; zoning and servicing information 					
19. Facilitate regular meetings between the City staff and the city's development/investment community, as a way to ensure an understanding of issues and challenges facing developers/investors in Colwood and discuss opportunities to improve the overall investment climate.	Ongoing				
20. Consider the introduction of a Development Review Team approach modeled by other high functioning communities as a way to expedite the development approvals process. As part of this effort the City should communicate its intent to the development community.					

Goals/Objectives/Actions	Timing (Immediate 0-18m, Near 18m-2yr, Long 3-5yr)			Potential Partners	Resource Requirement
	Immd.	Near	Long		
21. Introduce revitalization tax exemptions for Colwood’s City Centre and Neighbourhood Centres as a way to increase commercial/office investment in these areas.					
22. Launch a Business Retention and Expansion Program with local businesses and the area Chamber of Commerce, (including home-based businesses) to determine the ongoing needs of businesses and build a network of stakeholders in the community that can assist in the implementation of the short-term actions in the strategy.					
<ul style="list-style-type: none"> Work with the West Shore Chamber of Commerce to promote and deliver small business seminars geared to e-marketing, website development, business networking, workforce planning and marketing and succession planning. Connect small businesses with senior business leaders in the region who can act as mentors and coaches. 					
23. Develop a Business Guide to Planning and Building Services that outlines services and processes of the city departments to assist with new investment and business expansion opportunities.					
24. Work with Royal Roads University to leverage and promote their entrepreneurship oriented applied research programs and initiatives for local businesses.	Immediate and Ongoing				
<ul style="list-style-type: none"> Examine and catalog existing programs and opportunities that currently support youth entrepreneurship in the region. Promote existing services. 					
<ul style="list-style-type: none"> In partnership with RRU, develop/expand youth entrepreneurship opportunities to identify and advance support activities and training needs for students and youth considering starting a small business 					
Performance Measures <ul style="list-style-type: none"> Total number of businesses assisted Number of economic development inquiries received Total amount of investment 					



CITY OF COLWOOD

3300 Wishart Road | Colwood, BC | V9C 1R1

www.Colwood.ca   CityofColwood

250-478-5999

