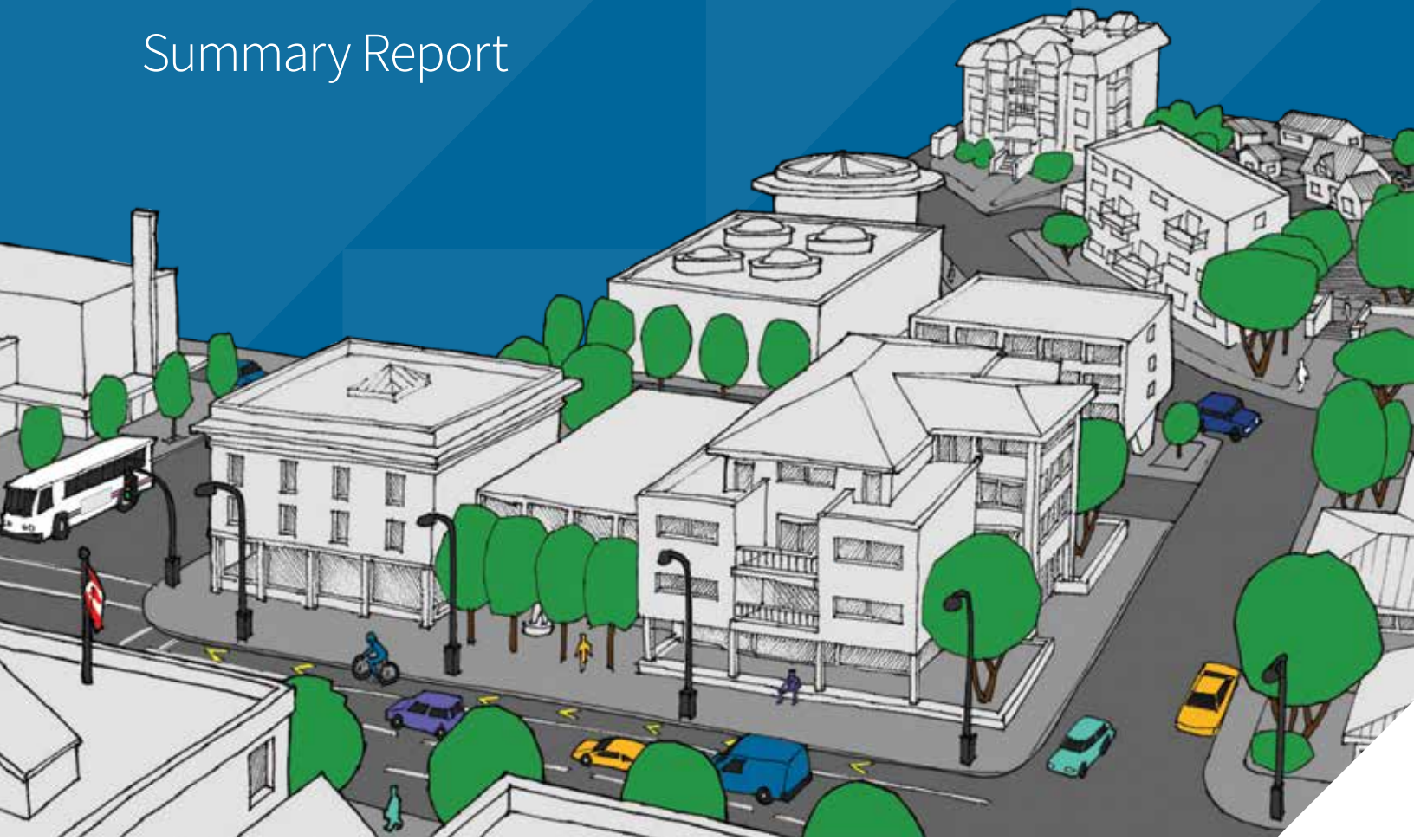
Winnipeg

OurWinnipeg
Residential Growth Study

Summary Report



August 2021

Corporate vision

To be a vibrant and healthy city which places its highest priority in quality of life for all its citizens.

Corporate mission

Working together to achieve affordable, responsive and innovative public service.

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Note: This report replaces an earlier version by correcting a number of identified errors.

Introduction

The Residential Growth Study was undertaken as a background study in support of the *OurWinnipeg* and *Complete Communities 2.0* review. Its purpose was to consider how the City can best accommodate 160,000 new Winnipeggers over the next 20 years.

Cited goals were:

a. To facilitate the responsible management of land within the City of Winnipeg.
b. To understand the opportunities and constraints of all potential residential and mixed-use growth areas.
c. To maximize the City's return on the investments it will need to make to accommodate growth over the next 20 years.
d. To leverage growth to achieve City-wide goals and objectives.
e. To ensure that the updated *OurWinnipeg* will be based on sound data and analysis.
f. To achieve cross-departmental integration.

This work consisted of three phases:

1. Development of assessment criteria.
2. Assessment of all existing and potential Corridors, Major Redevelopment Sites, and Greenfield Areas.
3. Development of growth scenarios.

It culminated in the preparation of 66 site-specific assessments of designated and potential Corridors, Major Redevelopment Sites, and Greenfield Areas done to better understand development opportunities and constraints, the potential sequencing of future development and the infrastructure needed to enable and support it, and the scale of work needed to realize the vision for each site. The study also developed three growth scenarios to consider the implications of various growth patterns.

The results of the Residential Growth Study have informed proposed *Complete Communities 2.0* policies in both specific and more general ways. For example, assessment results were used to inform greenfield phasing policies in the General Growth section and the creation of the Priority Corridor designation in the Corridors section, while the selection of a preferred growth scenario was integrated as the plan's intensification target.

Apart from informing *Complete Communities 2.0*, it is hoped that this information may be broadly useful as a basic foundation of shared knowledge for all stakeholders, including Council, the Public Service, the development industry, and members of the public.

As per Request for Proposal No. 906-2017, this work was supported by consultants IBI Group Professional Services (Canada) Inc. and AECOM Canada Ltd.

Development of Assessment Criteria

BACKGROUND

The first part of the Residential Growth Study entailed developing criteria to measure how individual study areas would promote complete communities principles. The criteria that were used are described in the table below, including the variables considered and the data source.

Different criteria were applied to the three different study categories. They were organized into three sub-categories: Complete Communities, Development Potential and Readiness, and Mobility.

	Measure	Variable	Data source	Applicability		
				Corridors	Major Redevelopment Sites	Greenfield Areas
Complete Communities	**Proximity to employment**	Distance to and total jobs per employment area	Job data is derived from Census data	✓	✓	✓
Complete Communities	**Capacities of nearby schools**	Distance to and capacities of nearby elementary and junior high schools	School capacity data derived from the Schools Finance Branch, Manitoba Education and Training	✓	✓	✓
Complete Communities	**Proximity to parks**	Percentage of site area within 400m of existing parks	Park data derived from the Public Works Department	✓	✓	
Development potential and readiness	**Recent development activity**	Permits issued for new residential units within the study area and extending out to a distance of 200m from January 1, 2011 to December 31, 2018	City of Winnipeg building permit data	✓		
Development potential and readiness	**Value per acre**	Assessed property value per acre	Information derived from City assessment data	✓		
Development potential and readiness	**Land ownership**	Unique land owners per acre	Information derived from City assessment data			✓
Mobility	**Transit quality – infill**	Distance to a bus stop (< 500m) and transit frequency	Assessment of transit quality derived from the study "Measuring Winnipeggers' Convenient Access to Public Transit", developed by the International Institute for Sustainable Development and updated to assign scores to the Southwest Rapid Transit corridor	✓	✓	

Table 1: Assessment criteria and their applicability to study area categories

	Measure	Variable	Data source	Applicability		
				Corridors	Major Redevelopment Sites	Greenfield areas
Mobility	**Connectivity to quality transit**	Distance traveled by future feeder buses to connecting route	Assessment of transit quality derived from the study "Measuring Winnipeggers' Convenient Access to Public Transit", developed by the International Institute for Sustainable Development and updated to assign scores to the Southwest Rapid Transit corridor			✓
	Site connectivity and contiguity	Opportunities to extend adjacent roads into the study area	Location of roads derived from GIS data		✓	✓
	Bicycle level of service	Road density, road connectivity, topography, road permeability, and population/ employment density, comprising a Bicycle Level of Service score	Bicycle Level of Service scores derived from Map 2.9 of the Pedestrian and Cycling Strategies	✓	✓	
	Walkability	Intersections per hectare and sidewalk coverage	Intersection density derived from GIS data. Sidewalk coverage scores derived from Map 2.2 of the Pedestrian and Cycling Strategies	✓	✓	
	Vehicular congestion	Ratio of AM peak vehicle hours traveled to free-flowing vehicle miles traveled	Data provided by Public Works, derived from travel demand model, and assigned to study areas on a district basis. "Vehicle hours traveled" is the hours traveled by each vehicle during a given time period multiplied by the number of vehicles on that segment of roadway. The score for each WATS district is informed by all model links originating in that district. "AM Peak" represents the highest one hour AM peak period, while "free-flowing" represents free-flowing speed conditions (i.e. vehicles traveling the speed limit)	✓	✓	✓

Table 1: Assessment criteria and their applicability to study area categories

These criteria were developed in consultation with applicable City departments and external stakeholders, including the public. While multiple meetings were held with development industry representatives about the criteria, the Urban Planning Division liaised with others as needed. For example, meetings with school division representatives were held to craft "Capacities of Nearby Schools", while "Transit Quality – Infill" leveraged existing work done by the International Institute for Sustainable Development measuring Winnipeggers' convenient access to transit.

Criteria were chosen based on their ability to compare study areas in a quantitative manner, originally guided by three general categories: Complete Communities, Development Potential, and Mobility. This work was challenged to develop criteria to reflect everything it hoped to measure. For example:

- It had hoped to measure proximity to retail amenities but was ultimately challenged to do so. Retail is very fluid and can change significantly over the 20 year time horizon of Complete Communities. What should be considered "retail"? A bank, coffee shop, convenience store, doggie day care, grocery store, tattoo parlour? Are they all valued equally? Even if a definition could be agreed upon, it would then be challenged to find a reliable up-to-date data source.
- A criterion measuring proximity to future employment was considered but was ultimately not proceeded with because it was felt that it was too speculative. While future employment areas within and outside of the City could be identified relatively easily, it was difficult to appropriately weight them, as that would have required an accurate estimation of their absorption.
- It had hoped to better capture market readiness, but doing this well ultimately requires delving into the details of a site-by-site development pro forma, which would have entailed a much more sophisticated effort than this work was resourced for. The criterion "Recent Development Activity" crudely addresses this, but more should be done in the future to enhance the Urban Planning Division's ability to assess this.

In order to provide an opportunity to capture considerations such as these that were valuable but difficult to quantify, an opportunity was provided to comment in a more qualitative manner under "Other Strengths and Weaknesses".

Assessment results should only be compared within categories, not between. Study area scores were weighted relative to other sites only within the same category.

PUBLIC CONSULTATION

In May 2018, an online survey was disseminated to inform the selection of assessment criteria. It was promoted through five pop-up events across the city, including Kildonan Place, Millennium Library, Wellness Institute, St Norbert Farmer's Market, and CF Polo Park. In total, the survey received 530 responses.

The first question had respondents prioritize the importance of five broad categories as it pertains to the accommodation of residential growth. Four of the five categories were ranked very similarly, with "Proximity to Destinations" narrowly scoring the best results. "Development Potential" resonated least with respondents by nearly a full point. Average scores were as follows (1 being the highest priority):

- Proximity to destinations – 2.64
- Access to transit – 2.83
- Walk/bike potential – 2.87
- City costs – 2.89
- Development potential – 3.64

The second set of questions gauged the importance of different elements within each of these broad categories (5 being the highest average score).

- Within the Proximity to Destinations category, proximity to daily needs resonated most strongly by a considerable margin (4.45). Proximity to employment (3.74) and leisure opportunities (3.75) were next, with entertainment and cultural centres (3.00) and shopping (2.69) scoring the lowest within the category.
- Within the Access to Transit category, respondents prioritized distance to stops (4.10) and higher frequencies (3.92) over a desire to minimize transfers (3.29) and distance to Rapid Transit (3.07).
- Respondents prioritized all three elements within the Walk/Bike Potential category quite highly, including that the area is designed to encourage walking (4.34), the ability to walk/ride to a wide range of amenities (4.31), and the availability of safe local routes to ride (4.17).
- Within the City Costs category, respondents felt most strongly that the City should prioritize development in areas with existing infrastructure capacity (4.35). Respondents felt reasonably strongly that the City should incentivize development in strategic areas (3.43), while there was the least support for investing in new infrastructure to allow for the development of new areas (2.46).
- Most considerations within the Development Potential category were valued highly and quite similarly,

including leveraging growth to revitalize areas that would benefit from increased investment (4.16), prioritizing areas that can accommodate commercial shops and services in addition to residential development (3.88), prioritizing higher densities over lower densities (3.86), and the prioritization of areas that are feasible to build (3.78). Respondents felt least strongly that areas that can be built sooner should be prioritized over areas that would be built later (2.99).

The results of this survey were ultimately used to help translate the assessment results into Complete Communities policy. For example, the emphasis respondents placed on access to transit and proximity to daily needs can be seen in the document's new definition for Corridors (targeted segments of the Primary Transit Network focused around local commercial opportunities) and their prioritization for intensification. Additionally, respondents felt very strongly that the City should prioritize development in areas with existing infrastructure capacity; accordingly, such a high-level principle was added to the General Growth section guiding how the City will accommodate development.

While concepts related to development potential resonated least with survey respondents, they cannot be easily dismissed. The City of Winnipeg needs to be mindful of its return on the investments in growth-enabling and growth-supportive infrastructure it will make. If it is to undertake projects with the intent of enabling growth, it should be done with an understanding of the likelihood that growth will occur. Similarly, as discussed elsewhere, the need for greenfield development also cannot be dismissed.

INDUSTRY CONSULTATION

In May 2018, an initial project kickoff workshop was held with industry representatives. The workshop introduced the project by seeking feedback on the potential weighting of high-level criteria (Complete Communities, Development Potential and Readiness, Mobility, and City Costs) before considering opportunities and constraints throughout the city (a similar workshop was held with members of the *OurWinnipeg* Community Advisory Committee the next day). This workshop was preceded by a presentation at a UDI breakfast seminar several weeks prior. There was a general dissatisfaction among participants that the criteria in the first exercise were insufficiently defined and that hindered the provision of feedback. The discussion of opportunities and constraints was better, but limited in depth.

The project team resolved that additional consultation opportunities would be required once the criteria were further developed.

In Winter 2018-19, five meetings were held with UDI representatives to discuss proposed assessment criteria. These meetings provided for robust, in-depth conversations. In addition to discussion about specific criteria, some of the main themes that participants emphasized were:

- Participants emphasized the importance of capturing market desirability, emphasizing that the desirability of infill areas varied significantly. With regards to greenfield desirability, participants said that the most important factor is providing supply in different quadrants.
- Participants were concerned that the work over-emphasized the City-borne costs of development without recognizing its benefits.
- Participants were concerned that the results of these assessments may lead to the City becoming unsupportive of development in areas with lower scores. They saw value in this work providing a scorecard type of deliverable for all study areas but cautioned against stringent implementation.
- Participants were concerned that the servicing information informing this work would be insufficient to meaningfully prioritize growth areas.

These discussions shaped this work in the following ways:

- Their feedback shaped the specific assessment criteria. For example, the Recent Development Activity criterion was added to the Corridors assessment to address market desirability as suggested. Strong consideration was given to a Proximity to Future Employment criterion at the behest of participants, and where it was determined to be difficult to accurately quantify, qualitative comments were added. Feedback was also used to eliminate criteria that had been previously considered. A criterion addressing greenfield desirability was considered but ultimately not proceeded with, as it was felt that this would be best addressed by ensuring that land supply by quadrant was considered in the greenfield phasing plan.
- It was felt that their suggestion to present this information as a scorecard deliverable was appropriate in lieu of earlier intentions to quantitatively weight the criteria and produce scores for each study area.

Servicing Analysis

In order to assess the relative merits of developing one site over another, it was critical that the project understand the servicing requirements necessary to enable and support build out. This was easier to do for some categories than others.

Greenfield Areas, as well as Major Redevelopment Sites with clearly defined development capacities, were much more straightforward to analyze. Infill areas where growth will be more incremental and spatially variable, most notably Corridors, are much more complex to analyze and require additional analysis. But as much as was possible, potential capital projects were identified and servicing commentary was provided in the site assessments. Analysis was focused on four service areas:

- Water and wastewater servicing;
- Major road projects;
- Community centres and libraries; and
- Fire and paramedic services.

These services were selected based on the value they offered towards comparing study area. Growth-related projects that are needed regardless of the spatial distribution of growth (e.g. transit garages) were excluded. For example, consultations with Winnipeg Police Services found that differences in the geographic distribution of growth would have little-to-no impact on their delivery of planned capital projects.

Questions guiding this inquiry and approach are noted in the table below. For the most part, answers to the study questions were provided via correspondences with appropriate City departments, with the exception of water and wastewater servicing, where initial Water and Waste analysis was then peer reviewed and expanded upon by engineering subconsultant AECOM.

Service	Question	How was the question answered?
Water and wastewater servicing	What regional, City-funded infrastructure related to water and/or wastewater conveyance is required to allow for full build-out of the study area?	Engineering subconsultant AECOM reviewed, supplemented, and expanded upon an initial Water and Waste review of all study areas. More detailed methodological information is provided below.
Major road projects	Will full build-out of the study area create or enhance pressure to proceed with a planned major road project?	Projects were identified from the Transportation Master Plan (2011), with the exception of the Warde Ave. extension which was not included but identified as a prerequisite to development. Answers to the study question were based on VISUM model analysis and future forecast data.
Community centres and libraries	Will full build-out of the study area create or enhance pressure for the City to develop a new facility?	Answers to the study question were based on level of service targets from the Council-adopted Recreation, Leisure, and Library Facilities Policy.
Fire and Paramedic Services	Can sufficient fire coverage be provided to accommodate full build-out of the study area?	Answers to the study question were based on GIS analysis and NFPA 1710 response time standards.

Table 2: Servicing analysis study questions

Total City-borne, growth-related project costs were assigned to study areas where the appropriate department identified them as being needed to enable initial site development or support its full build-out by addressing anticipated service level deficiencies. Where projects were identified as benefiting multiple study areas, costs were allocated based on forecasted population at full build-out.

This work compiled the best data available, of which there was a range. Some infrastructure projects are imminent City priorities, in which case a high level of project scoping and design has occurred, whereas other projects had not been contemplated as being within a 20 year time horizon, in which case high-level, order of magnitude estimates are the best that can be provided. At minimum, project costs were estimated to represent approximate orders-of-magnitude. This variation is an unavoidable reality of this work. The study's results are much more fulsome for Greenfield Areas than Corridors due to the additional complexity of this analysis in infill areas. The greenfield analysis is as comprehensive as one could undertake at this high level without knowing more specifics about individual developments, the many variables surrounding those specifics, and the fact assumptions could change as a result of other external factors. This analysis should not be used to conclude that the servicing of greenfield areas is definitively costlier than areas within the intensification target area; to arrive at such a conclusion would require additional study.

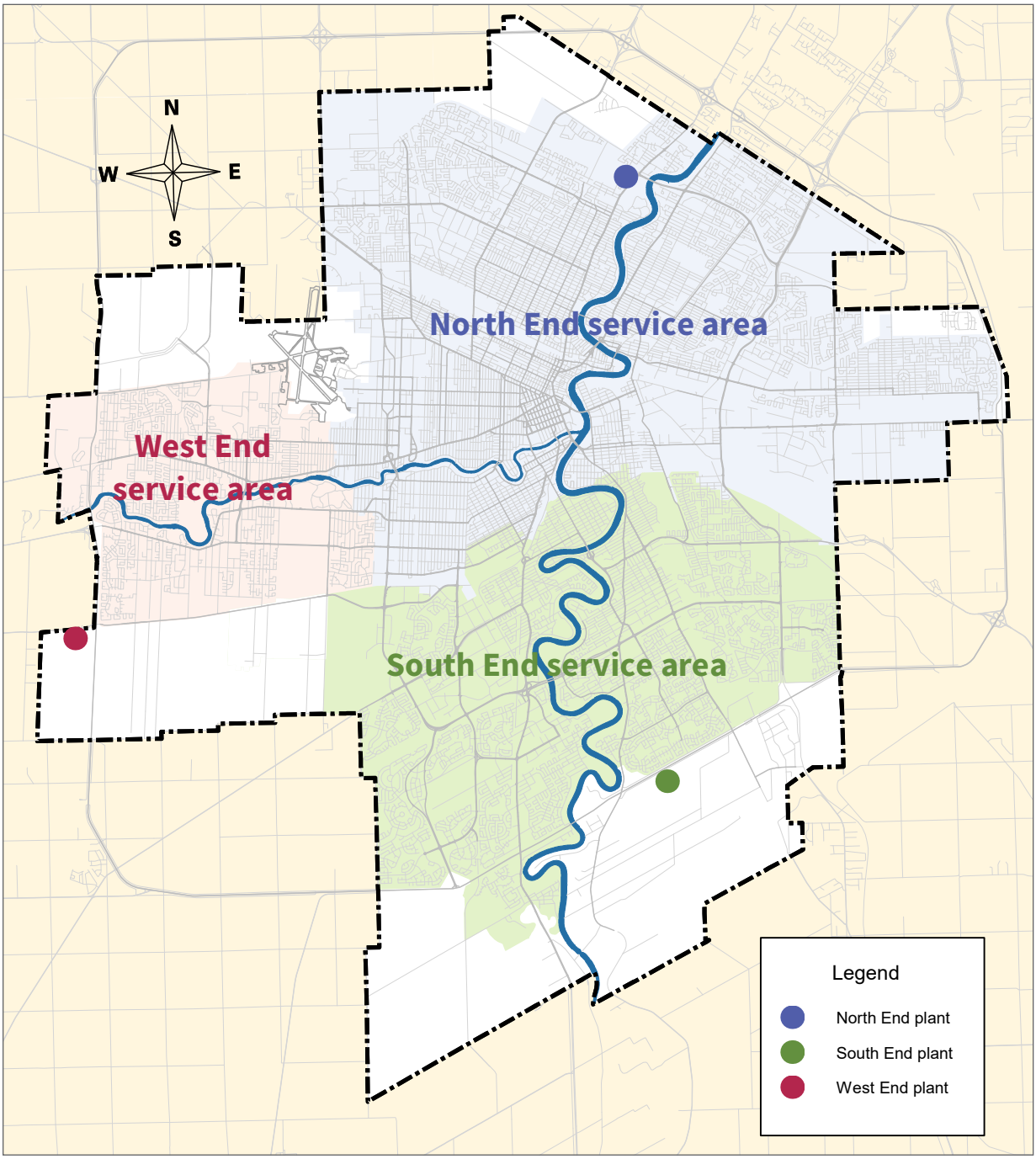
The study's findings are considered very high level for the purposes of ranking the sites against themselves. They are not for the purposes of budgeting or negotiating agreements and are solely for the purposes of this study or other future high-level scoping exercise.

ADDITIONAL WATER AND WASTEWATER SERVICING COMMENTARY

With water and wastewater servicing having been the most complex service to analyze, some additional commentary is warranted. These comments are based on conditions at the time of publication.

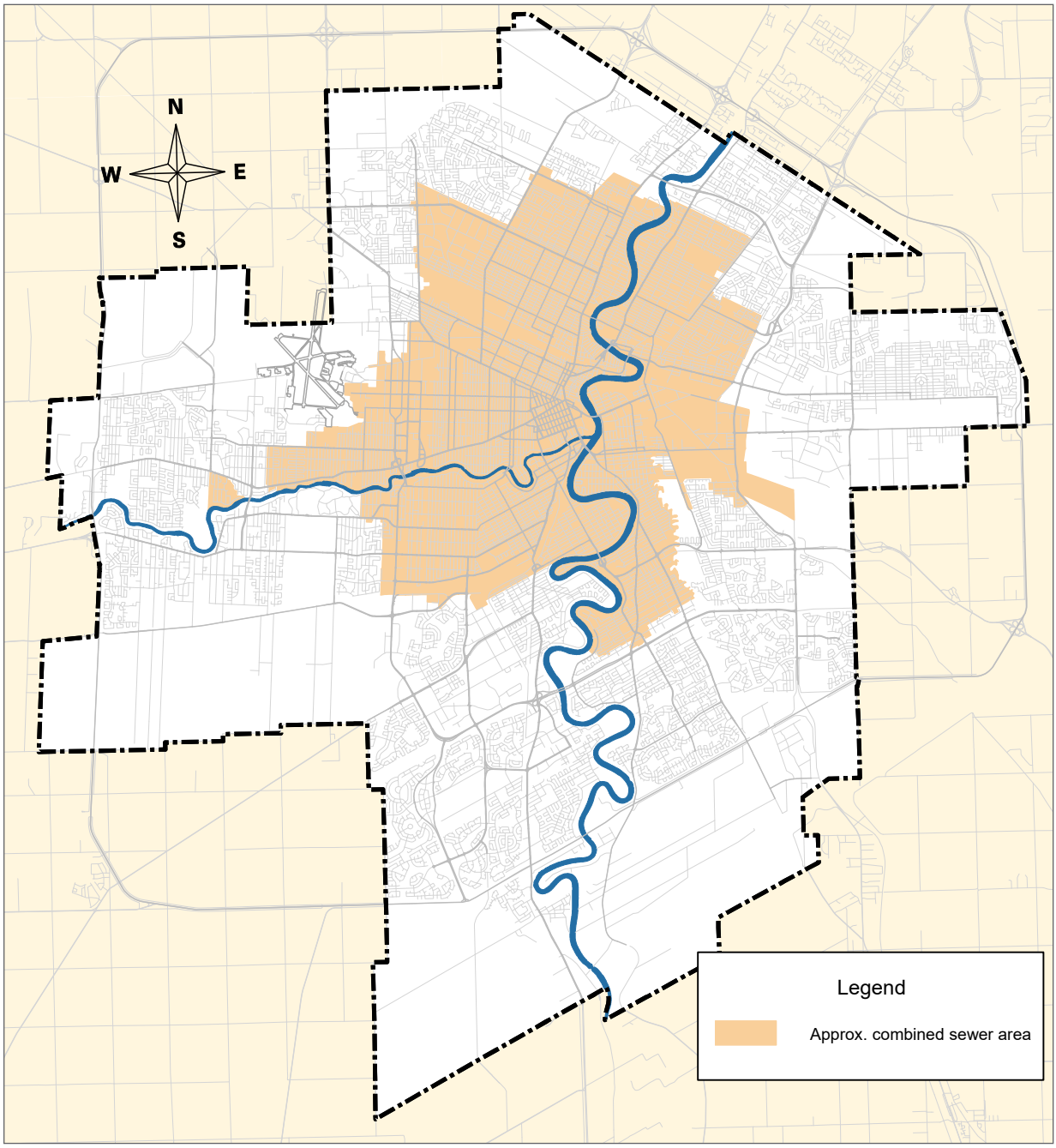
- Wastewater treatment plants for each study area were noted, reflecting varying capacities and planning stages. The North End, South End, and West End sewage treatment plants handle approximately 60%, 30%, and 10% of the City's wastewater respectively. The City is currently in the process of upgrading the water quality of the plants' discharge to meet recent changes to provincial regulation. North End plant upgrades to meet the new effluent regulations and to increase treatment capacity have been planned but no funding is in place. The South End plant is currently undergoing upgrades to meet the new regulations and an increase in capacity, although this current upgrade is sufficient to treat all of the lands considered in this study. The West End plant is currently very limited in its ability to accommodate new development and would require significant upgrades to treat much more additional wastewater.

SEWAGE TREATMENT PLANT APPROXIMATE SERVICE AREAS



- The City's three sewage treatment plants generate sludge that must be collected and treated before disposal. All sludge generated in the City is sent to a facility at the North End plant where it is converted into biosolids. Several plant components have reached the end of their service life and must be replaced to maintain reliable operations. This facility has a finite capacity and could halt or restrict all development (residential, commercial, and industrial) in both the City of Winnipeg and Winnipeg Metro Region municipalities with whom the City has entered into service sharing agreements with within the next five to nine years. This project is not currently funded.

APPROXIMATE COMBINED SEWER AREA



- The location of Corridors and Major Redevelopment Sites within combined sewer areas was also noted. A new development in a combined sewer area must manage its total land drainage and wastewater outflows to the City's satisfaction, most notably to comply with its Environment Act license. This usually entails holding land drainage discharge in storage tanks until it can be released slowly, reducing the development's burden on the sewer system. This cost is typically borne by the developer, with potential implication on site developability.
- Further to the additional challenge of understanding constraints in the existing built-up area, such water and wastewater servicing challenges are generally more localized in nature than servicing challenges in greenfield areas. In greenfield areas, these services are constrained by the extension of regional water feeder mains and wastewater interceptors. Since this regional network already exists in infill areas, constraints generally occur at a more local site or block level. Identifying these issues requires much finer-grained, resource-intensive assessment analysis.

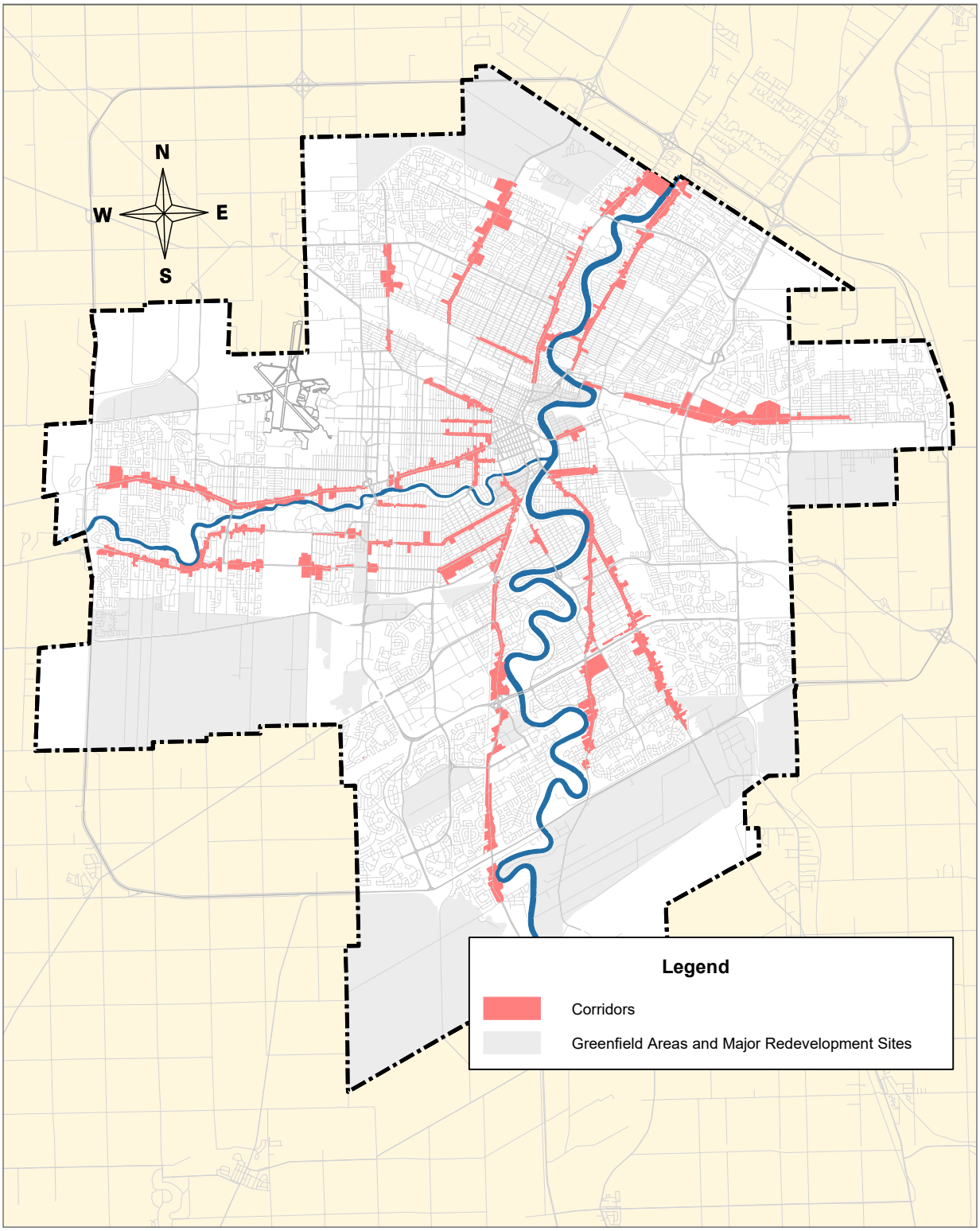
Site Assessments

The results of the criteria-based analysis and the servicing review were combined into scorecard-type assessments for 40 Corridors, 11 Major Redevelopment Sites, and 15 Greenfield Areas. These assessments also captured more qualitative commentary pertaining to more general land use and development considerations that were not captured in the criteria results. Greenfield Area assessments also include expected City-funded projects necessary to enable initial development and/or support development at full build-out.

The share of these project costs attributable to each site were then compiled and summarized in the assessments on a continuum of below-to-above average on a per-person basis.

The geographic boundaries of the study areas were defined as noted in maps on pages 15, 56, and 68.

CORRIDORS


N
W
E
S
Legend
Corridors
Greenfield Areas and Major Redevelopment Sites

Academy

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Proximity to Wellington Cr and Assiniboine Park, still relatively close to downtown
+ Presence of a BIZ zone to promote commercial development
+ Academy Rd PDO clarifies design expectations

- Many properties immediately adjacent to the corridor are flanking, limiting development potential
- The existing Academy Rd PDO only makes provisions for commercial development
- Not proposed to be part of the Primary Transit Network
- Limited pre-existing diversity of housing types

Broadway

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Proximity to downtown, University of Winnipeg, popular Sherbrook commercial amenities
+ A number of surface parking lots in the area offer redevelopment potential
+ Good pre-existing diversity of existing housing types
+ Part of the proposed Primary Transit Network
+ Presence of a BIZ zone to promote commercial development
+ Connectivity with Sherbrook corridor
+ Neighbourhood Main Streets PDO clarifies design expectations

Corydon - Harrow to Kenaston

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ May be opportunities for small scale intensification on corner lots
+ Part of the proposed Primary Transit Network

- Limited pre-existing diversity of housing types
- Many properties immediately adjacent to the corridor are flanking, limiting development potential

Corydon Village

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Presence of a BIZ zone to promote commercial development
+ Good pre-existing diversity of existing housing types
+ Part of the proposed Primary Transit Network
+ Close to popular commercial amenities of Corydon Village, Osborne Village
+ East end has good proximity to rapid transit
+ Corydon-Osborne Area Plan provides additional clarity on development expectations
+ Connectivity with Osborne Village, Pembina, and South Osborne corridors
+ Neighbourhood Main Streets and Corydon-Osborne PDOs clarify design expectations

Downtown Transcona

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Separate

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Presence of a BIZ zone to promote commercial development

+ Good pre-existing diversity of existing housing types

+ Part of the proposed Primary Transit Network

+ Downtown Transcona PDO clarifies design expectations

- The significant amounts of recent development activity in the Transcona West area may limit the market for additional multifamily development

Ellice

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to downtown
+ Good pre-existing diversity of existing housing types
+ Presence of a BIZ zone to promote commercial development
+ Part of the proposed Primary Transit Network
+ Neighbourhood Main Streets PDO clarifies design expectations

Grant - Cambridge to Kenaston

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ May be opportunities for small scale intensification on corner lots
+ Part of the proposed Primary Transit Network
+ Adjacent to the Kapyong Barracks Major Redevelopment Site

- Limited pre-existing diversity of housing types
- Many properties immediately adjacent to the corridor are flanking, limiting development potential

Grant - Kenaston to Roblin

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End and West End
Sewer type	Combined and Separate

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Very limited capacity in the West End wastewater treatment plant with no plans currently in place to upgrade it.

East of Edgeland Blvd, this Corridor discharges to the North End plant; west, it discharges to the West End plant.

East of Edgeland Blvd, this Corridor is serviced with a combined sewer system; west, it is serviced with a separated system.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to Assiniboine Forest and Park
+ Part of the proposed Primary Transit Network to Bill Clement Parkway
+ Adjacent to the Kapyong Barracks Major Redevelopment Site
+ There are otherwise limited opportunities for new multifamily development in Charleswood

- Limited pre-existing diversity of housing types

Grant - Pembina to Cambridge

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Part of the proposed Primary Transit Network

+ High amount of pre-existing multifamily development

+ Connectivity with Pembina corridor

- Limited development opportunity with much of the corridor already built-out with high rise apartment buildings

Henderson - Chief Peguis to Boundary

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Separate

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Proximity to river
+ High amount of pre-existing multifamily development
+ Opportunities remain to redevelop existing undeveloped sites
+ Part of the proposed Primary Transit Network

- Narrow river lots can be challenging to develop

Henderson - Disraeli to Chief Peguis

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined and Separate

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

South of Springfield Rd, this Corridor is serviced with a combined sewer system; north, it is serviced with a separated system.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to river
+ Opportunity to intensify existing low density residential uses
+ Part of the proposed Primary Transit Network
+ Good pre-existing diversity of existing housing types in certain areas

- Narrow river lots can be challenging to develop
- Many lots are relatively shallow, limiting redevelopment potential

Keewatin - Notre Dame to Underpass

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Good proximity to employment growth in the northwest
+ Good proximity to Red River College
+ Part of the proposed Primary Transit Network

- Most lots are relatively shallow, limiting redevelopment potential

Keewatin - Underpass to Inkster

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○
Capacities of nearby schools	○
Proximity to parks	○ ○ ○ ○ ◔
Recent development activity	◔
Transit quality - infill	○ ○
Bicycle level of service	○ ○
Walkability	○ ○ ◔
Vehicular congestion	○ ○ ○ ◔
Assessed value per acre	○

Wastewater treatment plant

North End

Sewer type

Combined and Separate

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

On the east side of Keewatin, this Corridor is serviced with a combined sewer system; on the west side, it is serviced with a separated system.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Good proximity to employment growth in the northwest

+ Good proximity to Red River College

+ Part of the proposed Primary Transit Network

Main - Downtown to Kildonan Park

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Significant offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to downtown on one end, proximity to Kildonan Park on the other
+ Planned rapid transit route as per proposed Primary Transit Network
+ Wide right-of-way could be conducive for streetscaping improvements
+ Presence of a BIZ zone to promote commercial development
+ Good pre-existing diversity of existing housing types
+ Neighbourhood Main Streets PDO at south end clarifies design expectations

- Most lots are relatively shallow, limiting redevelopment potential

Main - Kildonan Park to Boundary

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant

North End

Sewer type

Separate

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Larger lots are conducive to redevelopment

+ Wide right-of-way could be conducive for streetscaping improvements

+ Proximity to Kildonan Park on the south end

+ Part of the Primary Transit Network

- Limited redevelopment potential

Marion and Goulet

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to Downtown
+ Presence of a BIZ zone to promote commercial development
+ Good pre-existing diversity of existing housing types
+ Part of the proposed Primary Transit Network
+ East end has good proximity to the Public Markets Major Redevelopment Site

McPhillips - Inkster to Boundary

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

East side of McPhillips Rd south of Leila Av, this Corridor is serviced with a combined sewer system; elsewhere, it is serviced with a separated system.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Large auto-oriented commercial sites could be intensified
+ Proximity to commercial uses, including Regional Mixed Use Centre at Leila and McPhillips
+ Good proximity to employment growth in the northwest
+ Part of the proposed Primary Transit Network

McPhillips - Selkirk to Inkster

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Opportunity to accommodate small scale intensification in existing low density residential uses

+ Part of the Primary Transit Network

- Most lots are shallow and narrow, limiting redevelopment potential

- Limited commercial uses

Nairn - Louise Bridge to Overpass

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to river
+ Proximity to downtown, South Point Douglas Major Redevelopment Site
+ Planned rapid transit route as per proposed Primary Transit Network
+ Good pre-existing diversity of existing housing types

Nairn - Overpass to Panet

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Planned rapid transit route as per proposed Primary Transit Network

+ Proximity to commercial uses, including Regional Mixed Use Centre at Lagimodiere and Regent

- Most lots on the north side of the corridor are shallow and narrow, limiting redevelopment potential

- Designated Employment Lands to the south may create land use conflicts with residential uses

Notre Dame

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to Downtown, HSC
+ Part of the proposed Primary Transit Network
+ Existing West Alexander-Centennial Secondary Plan provides additional clarity on development expectations
+ Presence of a BIZ zone to promote commercial development
+ Good pre-existing diversity of existing housing types

Osborne Village

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to downtown

+ Presence of a BIZ zone to promote commercial development

+ Good pre-existing diversity of existing housing types

+ Part of the proposed Primary Transit Network

+ Close to popular commercial amenities of Corydon Village, Osborne Village

+ South end has good proximity to rapid transit

+ Corydon-Osborne Area Plan and Osborne Village Neighbourhood Plan provides additional clarity on development expectations

+ Connectivity with Corydon Village, Pembina, and South Osborne corridors

+ Neighbourhood Main Streets and Corydon-Osborne PDO clarify design expectations

Pembina - Chevrier to Boundary

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	South End
Sewer type	Separate

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Proximity to the University of Manitoba and need for student housing
+ Presence of a BIZ zone in St Norbert to promote commercial development
+ Large auto-oriented commercial sites could be intensified
+ Proximity to rapid transit
+ Part of the Primary Transit Network
+ Wide right-of-way could be conducive for streetscaping improvements
+ St Norbert PDO clarifies design expectations

Pembina - Jubilee to Chevrier

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	South End
Sewer type	Separate

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Proximity to rapid transit
+ Part of the Primary Transit Network
+ Wide right-of-way could be conducive for streetscaping improvements

Pembina - Osborne to Jubilee

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End and South End
Sewer type	Combined and Separate

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

North of Jessie Ave, this Corridor discharges to the North End plant; south of Jessie Ave, it discharges to the South End plant.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to rapid transit at north and south ends of the corridor

+ Part of the Primary Transit Network

+ Wide right-of-way could be conducive for streetscaping improvements

+ Close to popular commercial amenities of Corydon Village, Osborne Village

+ Corydon-Osborne Area Plan and Osborne Village Neighbourhood Plan provides additional clarity on development expectations

+ Proximity to downtown

+ Connectivity with Corydon Village, South Osborne, and Osborne Village corridors

+ Corydon-Osborne PDO clarifies design expectations at north end

- Irregular lot dimensions on east side of Pembina may hinder redevelopment

Portage - Downtown to Polo Park

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal to moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to downtown to the east, proximity to Polo Park Regional Mixed Use Centre to the west
+ Planned rapid transit route as per proposed Primary Transit Network
+ Proximity to Sherbrook and Broadway corridors
+ Wide right-of-way could be conducive for streetscaping improvements
+ Presence of a BIZ zone to promote commercial development

- Most lots are relatively shallow, limiting redevelopment potential
- An eventual third airport runway may limit development potential in the long term

Portage - Mount Royal to Boundary

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	West End
Sewer type	Combined and Separate

Phasing and servicing comments

Very limited capacity in the West End wastewater treatment plant with no plans currently in place to upgrade it.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

East of Olive St, this Corridor is serviced with a combined sewer system; west of Olive St, it is serviced with a separated system.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Large auto-oriented commercial sites could be intensified
+ Part of the Primary Transit Network
+ Wide right-of-way could be conducive for streetscaping improvements
+ Good pre-existing diversity of existing multifamily housing

Portage - Route 90 to Mount Royal

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End and West End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Very limited capacity in the West End wastewater treatment plant with no plans currently in place to upgrade it.

West of Lyle St, this Corridor discharges to the West End plant; east of Lyle St, it discharges to the North End plant.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to Polo Park Regional Mixed Use Centre to the east
+ Proximity to Assiniboine Park
+ Planned rapid transit route as per proposed Primary Transit Network
+ Wide right-of-way could be conducive for streetscaping improvements
+ Presence of a BIZ zone to promote commercial development

- Most lots are relatively shallow, limiting redevelopment potential
- Residential development is currently restricted by the Airport Vicinity Protection Area

Provencher

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to downtown
+ Proximity to St Boniface College
+ Presence of a BIZ zone to promote commercial development
+ Good pre-existing diversity of existing housing types
+ Part of the proposed Primary Transit Network
+ North St Boniface Secondary Plan provides additional clarity on development expectations
+ Boulevard Provencher PDO clarifies design expectations

Regent - Panet to Plessis

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Separate

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to Kildonan Place Regional Mixed Use Centre

+ Planned rapid transit route to Lagimodiere as per proposed Primary Transit Network

+ Wide right-of-way could be conducive for streetscaping improvements

- No existing residential context

- Extremely car oriented in existing design

Roblin - Grant to Boundary

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant

West End

Sewer type

Separate

Phasing and servicing comments

Very limited capacity in the West End wastewater treatment plant with no plans currently in place to upgrade it.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ There are otherwise limited opportunities for new multifamily development in Charleswood

- Limited pre-existing diversity of housing types
- Not part of the proposed Primary Transit Network

Roblin - Kenaston to Grant

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End and West End
Sewer type	Combined and Separate

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Very limited capacity in the West End wastewater treatment plant with no plans currently in place to upgrade it.

West of Park Blvd N, this Corridor discharges to the West End plant; east of Park Blvd N, it discharges to the North End plant.

West of Park Blvd N, this Corridor is serviced by a combined sewer system; east of Park Blvd N, it is serviced by a separated system.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to Assiniboine Park and Forest

+ Proximity to Kapyong Barracks Major Redevelopment Site at east

+ Part of the Primary Transit Network up to Assiniboine Park

+ There are otherwise limited opportunities for new multifamily development in Charleswood

- Limited pre-existing diversity of housing types

- Not part of the proposed Primary Transit Network past Assiniboine Park

Sargent

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Proximity to downtown
+ Good pre-existing diversity of existing housing types
+ Presence of a BIZ zone to promote commercial development
+ Part of the proposed Primary Transit Network
+ Neighbourhood Main Streets PDO clarifies design expectations

Selkirk

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Good pre-existing diversity of existing housing types
+ Presence of a BIZ zone to promote commercial development
+ Part of the proposed Primary Transit Network
+ Connectivity with Main St corridor
+ Neighbourhood Main Streets PDO clarifies design expectations

Sherbrook

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to downtown
+ Good pre-existing diversity of existing housing types
+ Presence of a BIZ zone to promote commercial development
+ Part of the proposed Primary Transit Network
+ Home to popular commercial amenities
+ Connectivity with Academy, Broadway, and Portage corridors
+ Neighbourhood Main Streets PDO clarifies design expectations

South Osborne

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	South End
Sewer type	Combined

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to rapid transit at Osborne Station. Otherwise part of the proposed Primary Transit Network.

+ Presence of a BIZ zone to promote commercial development

+ Home to popular commercial amenities

+ Proximity to river

+ Connectivity with Corydon Village, Osborne Village corridors

+ Neighbourhood Main Streets PDO clarifies design expectations

St Anne's - Bishop Grandin to Boundary

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	South End
Sewer type	Separate

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

Minimal offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to Seine river
+ High amount of pre-existing multifamily development
+ Opportunities remain to redevelop existing underdeveloped sites
+ Part of the proposed Primary Transit Network

- Narrow river lots can be challenging to develop

St Anne's - St Mary's to Bishop Grandin

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant

South End

Sewer type

Combined

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Presence of a BIZ zone between St Mary's Rd and Fermor Ave to promote commercial development
+ Good pre-existing diversity of existing housing types
+ Part of the proposed Primary Transit Network
+ Good pre-existing diversity of existing multifamily housing
+ Connectivity with St Mary's corridor

St Mary's - Bishop Grandin to Boundary

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	South End
Sewer type	Separate

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

There does not appear to be significant constraints to local wastewater collection and land drainage in the separated system.

Moderate offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to St Vital Mall Regional Mixed Use Centre
+ High amount of pre-existing multifamily development
+ Planned rapid transit route as per proposed Primary Transit Network

- Rearage lots preclude development opportunities

St Mary's - Downtown to Bishop Grandin

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to parks	
Recent development activity	
Transit quality - infill	
Bicycle level of service	
Walkability	
Vehicular congestion	
Assessed value per acre	

Wastewater treatment plant	North End and South End
Sewer type	Combined

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

North of Coniston St, this Corridor discharges to the North End plant; south of Coniston St, it discharges to the South End plant.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

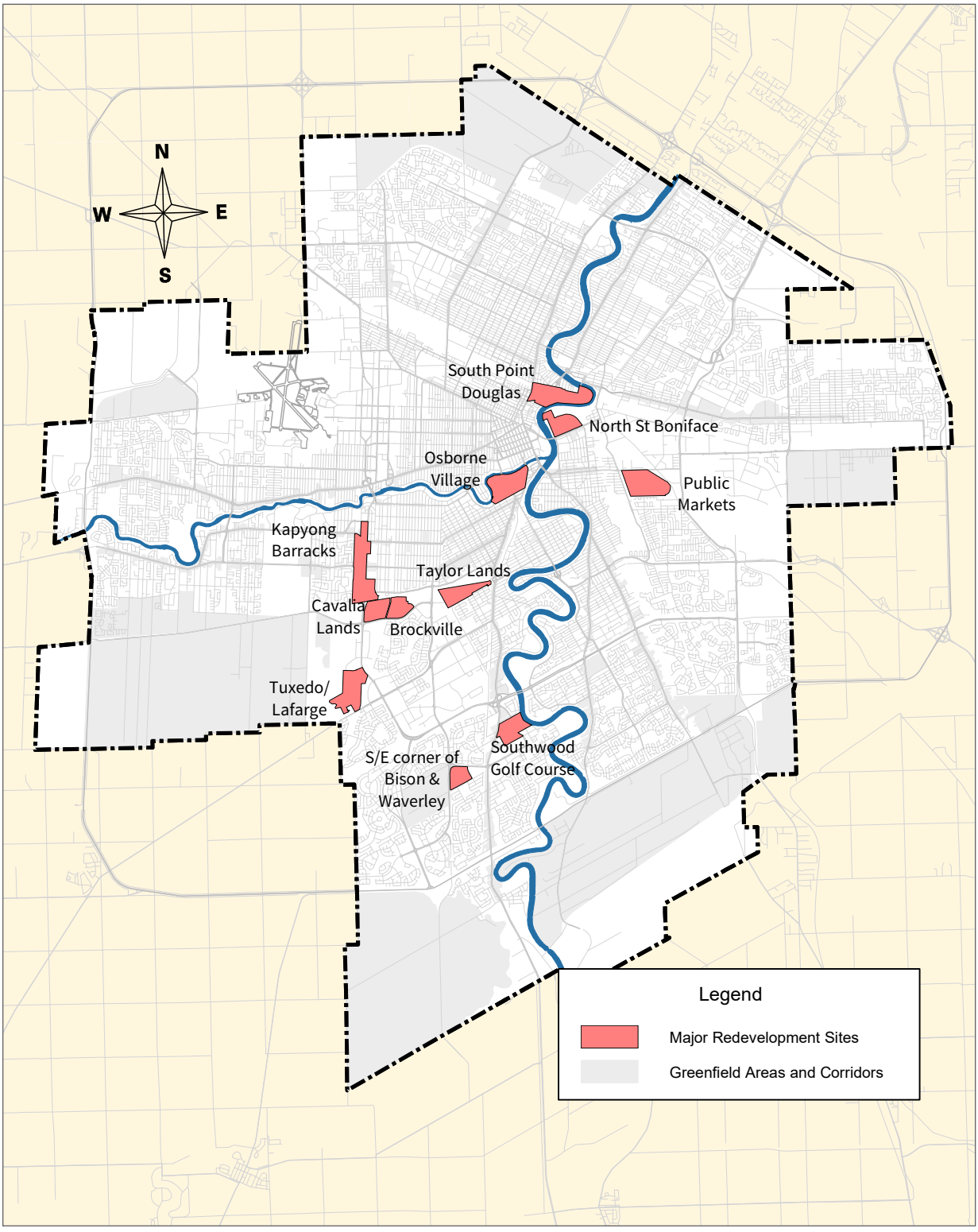
Significant offsite improvements to local water distribution system may be required to service this area.

Other strengths and weaknesses

+ Proximity to Downtown
+ Presence of a BIZ zone to promote commercial development
+ Good pre-existing diversity of existing housing types
+ Planned rapid transit route as per proposed Primary Transit Network
+ Good pre-existing diversity of existing multifamily housing
+ Opportunity to intensify existing low density residential uses
+ Connectivity with Marion/Goulet and St Anne's corridors

- Flankage lots close to Marion St offer limited redevelopment potential

MAJOR REDEVELOPMENT SITES



Brockville

Potential total units at full build out	500
Potential population at full build out	1,250
Wastewater treatment plant	South End
Local area plan approved?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to existing parks	
Transit quality - infill	
Site connectivity and contiguity	
Bicycle level of service	
Existing walkability	
Vehicular congestion	

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Full build-out may be constrained prior to completion of Southwest wastewater interceptor improvements; subject to further study.

Local wastewater may need to be extended a significant distance, at the developer's expense.

Minimal offsite improvements may be required to the existing surrounding local water distribution system.

Other strengths and weaknesses

+ Proximity to Kenaston/Sterling Lyon Regional Mixed Use Centre
+ Established precedent for multifamily development may limit land use conflict

- Limited existing residential amenities, given that it is a former industrial area
- Proximity to existing designated industrial areas

Cavalia Lands

Potential total units at full build out	430
Potential population at full build out	1,075
Wastewater treatment plant	South End
Local area plan approved?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○ ◔
Capacities of nearby schools	○ ◔
Proximity to existing parks	○
Transit quality - infill	○
Site connectivity and contiguity	○ ○
Bicycle level of service	○ ○
Existing walkability	○
Vehicular congestion	○ ○ ◔

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Full build-out may be constrained prior to completion of Southwest wastewater interceptor improvements; subject to further study.

Local wastewater may need to be extended a significant distance, at the developer's expense.

Minimal offsite improvements may be required to the existing surrounding local water distribution system.

Other strengths and weaknesses

+ Proximity to Kenaston/Sterling Lyon Regional Mixed Use Centre
+ Kenaston is part of the proposed Primary Transit Network

- Currently designated for industrial uses
- No existing residential amenities, given that it is an existing industrial area
- Site contamination issues

Kapyong Barracks

Potential total units at full build out	2,100
Potential population at full build out	5,300
Wastewater treatment plant	North End
Local area plan approved?	In progress

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to existing parks	
Transit quality - infill	
Site connectivity and contiguity	
Bicycle level of service	
Existing walkability	
Vehicular congestion	

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Opportunity to separate the combined sewer system when planned Route 90 improvements are implemented.

Significant offsite improvements may be required to the existing surrounding local water distribution system.

Other strengths and weaknesses

+ Enabling First Nations development will help the City work towards its reconcilitation goals.
+ Kenaston is part of the proposed Primary Transit Network
+ Likely limited to no contamination issues

- The scale of the Kenaston widening project may render connectivity between the two sides of the site challenging.

North St Boniface

Potential total units at full build out	Hard to forecast - incremental growth
Potential population at full build out	
Wastewater treatment plant	North End
Local area plan approved?	Yes

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to existing parks	
Transit quality - infill	
Site connectivity and contiguity	
Bicycle level of service	
Existing walkability	
Vehicular congestion	

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Proximity to downtown, Provencher corridor, river, St Boniface College, Whittier Park
+ Provencher is part of the proposed Primary Transit Network
+ Existing residential uses and amenities
+ Existing North St Boniface Secondary Plan clarifies design expectations

Osborne Village

Potential total units at full build out	Hard to forecast - incremental growth
Potential population at full build out	
Wastewater treatment plant	North End
Local area plan approved?	Yes

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to existing parks	
Transit quality - infill	
Site connectivity and contiguity	
Bicycle level of service	
Existing walkability	
Vehicular congestion	

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Minimal offsite improvements may be required to the existing surrounding local water distribution system.

Other strengths and weaknesses

+ Proximity to downtown, Osborne, Corydon, Pembina, and South Osborne corridors, rapid transit, river

+ Osborne, Pembina, and Corydon are part of the proposed Primary Transit Network

+ Existing residential uses and amenities

+ Existing Osborne Village and Corydon-Osborne secondary plans clarify design expectations

- Limited number of vacant sites

Parker Lands

Potential total units at full build out	1,500
Potential population at full build out	3,750
Wastewater treatment plant	South End
Local area plan approved?	In progress

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to existing parks	
Transit quality - infill	
Site connectivity and contiguity	
Bicycle level of service	
Existing walkability	
Vehicular congestion	

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

There do not appear to be significant local wastewater collection challenges following separation of the nearby combined sewer area.

Moderate offsite improvements may be required to the existing surrounding local water distribution system.

Other strengths and weaknesses

+ Proxmity to rapid transit
+ Likely limited to no contamination issues

- Constrained site connectivity to the north.

Public Markets

Potential total units at full build out	1,500
Potential population at full build out	3,750
Wastewater treatment plant	North End
Local area plan approved?	Approved

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○ ○
Capacities of nearby schools	○ ◐
Proximity to existing parks	○ ○
Transit quality - infill	○ ◐
Site connectivity and contiguity	○ ○
Bicycle level of service	○ ○ ◐
Existing walkability	○ ◐
Vehicular congestion	○ ◐

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Regional and local wastewater and land drainage dependent on the separation of the Mission combined sewer area.

There does not appear to be significant constraints to local water distribution.

Will create additional pressure for transportation improvements at Marion St and Archibald St.

Other strengths and weaknesses

+ Proximity to Marion/Goulet corridor

+ Reasonable proximity to downtown

+ Low scores for existing park proximity and walkability can be improved upon through site design.

- Limited existing residential amenities, given that it is an existing industrial area. Focusing residential development along the west side as much as possible would mitigate this issue

- Challenging to accommodate residential development in proximity to existing industrial uses without creating land use conflict

- Constrained site access

- Site contamination issues

Southeast Corner of Bison & Waverley

Potential total units at full build out	1,000
Potential population at full build out	2,500
Wastewater treatment plant	South End
Local area plan approved?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to existing parks	
Transit quality - infill	
Site connectivity and contiguity	
Bicycle level of service	
Existing walkability	
Vehicular congestion	

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Full build-out may be constrained prior to completion of Southwest wastewater interceptor improvements; subject to further study.

Local wastewater may rely on the extension of a wastewater interceptor at Waverley St and Sandusky Dr in conjunction with Waverley West B, at the developer's expense.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Proximity to University of Manitoba and Victoria Hospital

+ Low scores for existing bicycle level of service and walkability can be improved upon through site design

+ Waverley/Bison Dr part of the proposed Primary Transit Network

+ Adjacent to existing multifamily development should limit land use conflict

South Point Douglas

Potential total units at full build out	3,700
Potential population at full build out	9,250
Wastewater treatment plant	North End
Local area plan approved?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to existing parks	
Transit quality - infill	
Site connectivity and contiguity	
Bicycle level of service	
Existing walkability	
Vehicular congestion	

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Its location within a combined sewer area means new development outflows (land drainage and wastewater) will be limited due to the City's Environment Act license. This may increase the costs of development, depending on factors such as site size, amount of hardscaped area, and extent of intensification.

Moderate offsite improvements may be required to the existing surrounding local water distribution system.

Other strengths and weaknesses

+ Proximity to downtown
+ Proximity to planned rapid transit corridor
+ Proximity to river

- Site contamination issues
- Proximity to rail line may limit development
- Existing operational industrial uses may create land use conflicts

Southwood Golf Course

Potential total units at full build out	4,500
Potential population at full build out	11,250
Wastewater treatment plant	South End
Local area plan approved?	In progress

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to existing parks	
Transit quality - infill	
Site connectivity and contiguity	
Bicycle level of service	
Existing walkability	
Vehicular congestion	

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Full build-out may be limited pending completion of Southwest Interceptor upgrades; further study required.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Low scores for existing park proximity and walkability can be improved upon through site design.
+ Proximity to University of Manitoba, rapid transit, Victoria Hospital
+ Likely limited to no contamination issues
+ Proximity to Pembina corridor

Tuxedo/Lafarge

Potential total units at full build out	2,700
Potential population at full build out	6,750
Wastewater treatment plant	South End
Local area plan approved?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Proximity to existing parks	
Transit quality - infill	
Site connectivity and contiguity	
Bicycle level of service	
Existing walkability	
Vehicular congestion	

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Requires an extension of a wastewater interceptor from Kenaston Blvd.

Full build-out may be constrained prior to completion of Southwest wastewater interceptor improvements; subject to further study.

There does not appear to be significant constraints to local water distribution.

Other strengths and weaknesses

+ Proximity to Kenaston/McGillivray Regional Mixed Use Centre

+ Proximity to FortWhyte Alive

+ Kenaston is part of the proposed Primary Transit Network

+ Low scores for existing park proximity and walkability can be improved upon through site design.

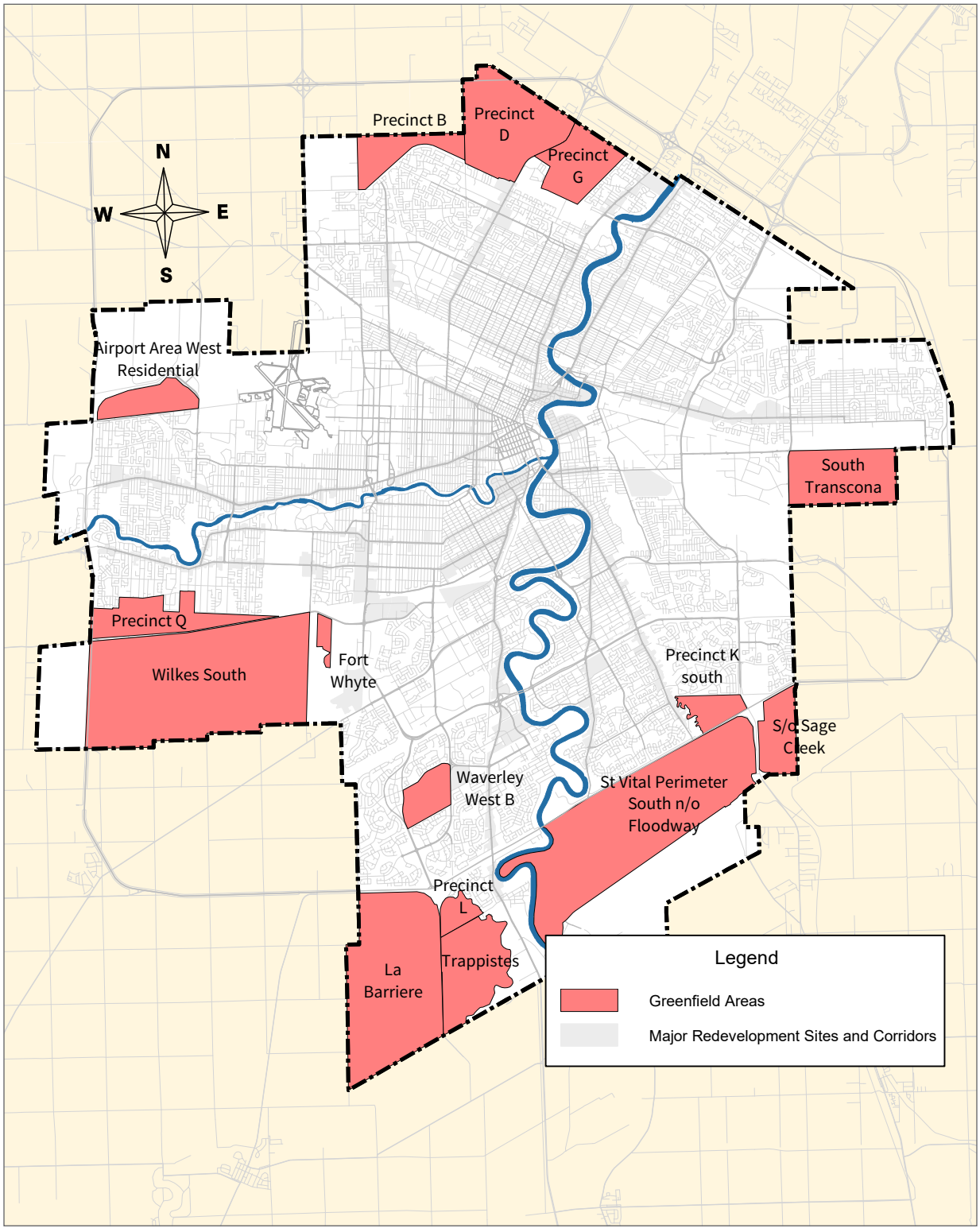
- Limited existing residential amenities, given that it is an existing industrial area

- Challenging to accommodate residential development in proximity to existing industrial uses without creating land use conflict

- Constrained site access

- Site contamination issues

GREENFIELD AREAS



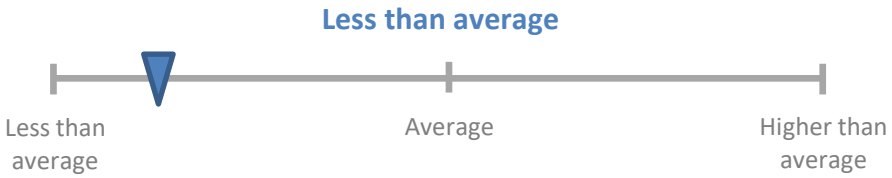
Airport Area West Residential

Potential total units at full build out	3,300 to 3,700
Potential population at full build out	8,100 to 9,400
Wastewater treatment plant	North End
Local area plan completed?	In progress

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○
Capacities of nearby schools	○ ○ ○ ○
Land ownership	○ ○ ○ ○
Transit connectivity	○ ○ ○ ○ ○
Site connectivity and contiguity	○ ○ ○ ○ ○
Vehicular congestion	○ ○ ○ ○ ◔

City-borne servicing costs per person



Expected City-funded projects required at full build out

Silver Ave extension

Wastewater force main & pump station*

Water feeder main*

(* - growth-enabling projects)

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Challenging soil conditions will make installation of services more difficult and expensive.

Approximately 5.5km of wastewater force main sewers and a major pump station likely required to provide regional wastewater service.

A water feedermain would need to be extended from the south to provide regional water service.

May be developer-borne costs related to flood protection around Sturgeon Creek due to undersized bridge/culvert crossings; further study required.

Other strengths and weaknesses

+ Proximate to underutlized community infrastructure due to aging population nearby.

+ Proximate to future employment growth in the desirable northwest quadrant.

+ Site servicing can be achieved in tandem with CentrePort industrial development.

+ The larger St James area has been underserved by new development for generations.

+ Surrounding transportation network has available capacity.

- Challenging soil conditions will add cost premium to installation of services
- The easternmost +/- 240 acres fall within Area II of the Airport Vicinity Protection Area, which limits multifamily development to densities of 35 units per acre.

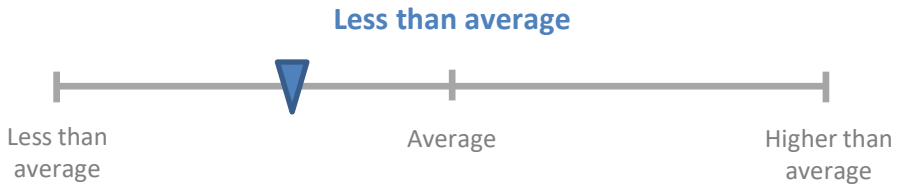
Fort Whyte

Potential total units at full build out	700 to 900
Potential population at full build out	1,800 to 2,200
Wastewater treatment plant	South End
Local area plan completed?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○ ○ ○
Capacities of nearby schools	○ ○ ○
Land ownership	○ ○ ○ ○ ○
Transit connectivity	○ ○
Site connectivity and contiguity	
Vehicular congestion	○ ○ ○ ○

City-borne servicing costs per person



Expected City-funded projects required at full build out

Wastewater interceptor*

Share of Southwest wastewater interceptor upgrades*

(* - growth-enabling projects)

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Wastewater interceptor will be extended from Kenaston Blvd

Full build-out may be limited pending completion of Southwest Interceptor upgrades; further study required.

Other strengths and weaknesses

+ Developer has expressed previous interest in showcasing sustainability features.

- Potential connectivity to adjacent areas is constrained.

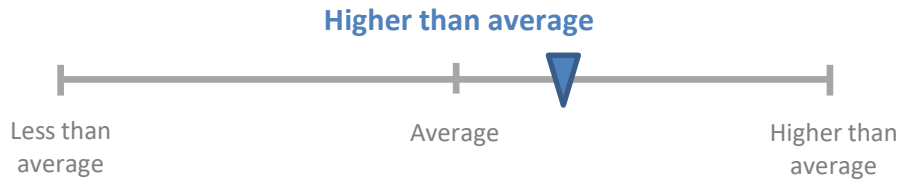
La Barriere

Potential total units at full build out	9,300 to 11,000
Potential population at full build out	23,300 to 27,500
Wastewater treatment plant	South End
Local area plan completed?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ◔
Capacities of nearby schools	
Land ownership	○ ○ ○ ○ ○
Transit connectivity	○
Site connectivity and contiguity	n/a
Vehicular congestion	○ ○ ◔

City-borne servicing costs per person



Expected City-funded projects required at full build out

- Share of community centre
- Share of library
- Fire station
- Share of Kenaston Blvd improvements
- Wastewater interceptor*
- Water feeder main*

(* - growth-enabling projects)

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Wastewater interceptor needs to be extended from the South End plant 6km to the east; extension would service Precinct L and Trappistes as well.

Water feedermain would be extended from Kenaston Blvd; extension would service Precinct L and Trappistes as well.

Regional land drainage will likely rely on drainage service extended from the LaSalle River; extension would service Trappistes as well.

Other strengths and weaknesses

- Phasing dependent on St Vital Perimeter South.
- Potential land use conflict with Brady landfill.
- Significant distance from existing jobs.

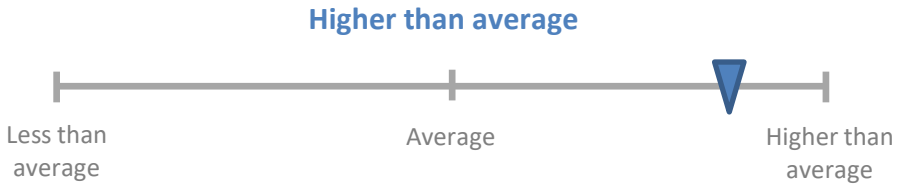
Precinct B

Potential total units at full build out	3,700 to 4,400
Potential population at full build out	9,300 to 11,100
Wastewater treatment plant	North End
Local area plan completed?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Land ownership	
Transit connectivity	
Site connectivity and contiguity	
Vehicular congestion	

City-borne servicing costs per person



Expected City-funded projects required at full build out

Share of community centre

Share of library

Share of Arlington Bridge

Share of Chief Peguis Trail*

Wastewater interceptor*

(* - growth-enabling projects)

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

With the Chief Peguis Trail and wastewater interceptor to be extended from east through to west, Precinct D would precede development.

Other strengths and weaknesses

+ Good proximity to future employment growth in the desirable northwest quadrant.

- Phasing dependent on Precinct D

- Existing constrained school capacities in the northwest quadrant

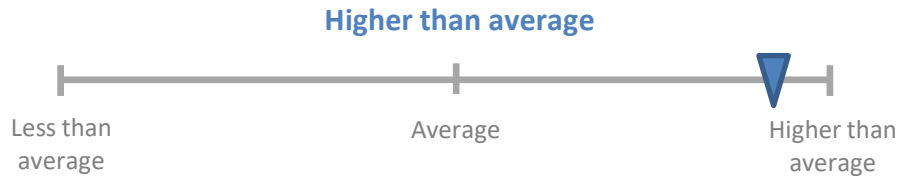
Precinct D

Potential total units at full build out	11,300 to 13,500
Potential population at full build out	28,300 to 33,700
Wastewater treatment plant	North End
Local area plan completed?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○ ○
Capacities of nearby schools	
Land ownership	○ ○ ◔
Transit connectivity	○ ○ ○ ◔
Site connectivity and contiguity	
Vehicular congestion	○ ○ ○ ◔

City-borne servicing costs per person



Expected City-funded projects required at full build out

Share of community centre

Share of library

Fire station

Share of Arlington Bridge

Share of Chief Peguis Trail*

Wastewater interceptor*

(* - growth-enabling projects)

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Regional land drainage system likely needs to be extended from Precinct G.

With the Chief Peguis Trail and the interceptor to be extended from east through to the west, Precinct G would precede development.

Other strengths and weaknesses

+ Good proximity to future employment growth in the northwest

+ Proposed future connection to Primary Transit Network on McPhillips

- Phasing dependent on Precinct G.

- Existing constrained school capacities in the northwest quadrant.

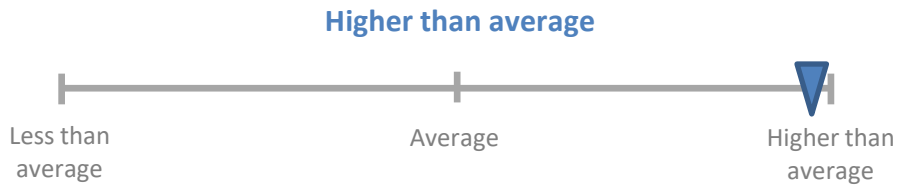
Precinct G

Potential total units at full build out	4,900 to 5,900
Potential population at full build out	12,400 to 14,700
Wastewater treatment plant	North End
Local area plan completed?	Yes

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○ ○ ○
Capacities of nearby schools	○
Land ownership	○ ○ ○ ○
Transit connectivity	○ ○
Site connectivity and contiguity	○ ○ ○ ○
Vehicular congestion	○ ◐

City-borne servicing costs per person



Expected City-funded projects required at full build out

Share of community centre

Share of library

Share of Arlington Bridge

Share of Chief Peguis Trail*

(* - growth-enabling projects)

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

Full build-out will be limited in advance of the completion of the Chief Peguis Trail, the specific extent to which is still pending further study.

Other strengths and weaknesses

+ Proximate to future employment growth in the desirable northwest quadrant.

+ Local area plan already completed.

+ Proposed future connection to high frequency transit on McPhillips.

- Existing constrained school capacities in the northwest quadrant.

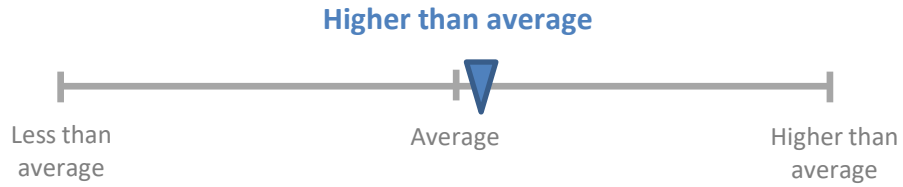
Precinct L

Potential total units at full build out	1,500 to 1,800
Potential population at full build out	3,800 to 4,500
Wastewater treatment plant	South End
Local area plan completed?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○
Capacities of nearby schools	○ ○ ○ ○ ○
Land ownership	○ ○ ○ ○
Transit connectivity	○ ◔
Site connectivity and contiguity	○ ○ ○
Vehicular congestion	○ ○ ◔

City-borne servicing costs per person



Expected City-funded projects required at full build out

Share of community centre

Share of library

Share of Kenaston Blvd improvements

Wastewater interceptor*

(* - growth-enabling projects)

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Wastewater interceptor needs to be extended from the South End plant 6km to the east; extension would service La Barriere and Trappistes as well.

Diking or other improvements may be necessary for flood protection from adjacent Westendorf Coulee, which appears vulnerable to Red/La Saller River flooding.

Other strengths and weaknesses

- Phasing dependent on St Vital Perimeter South.
- Significant distance from existing jobs.

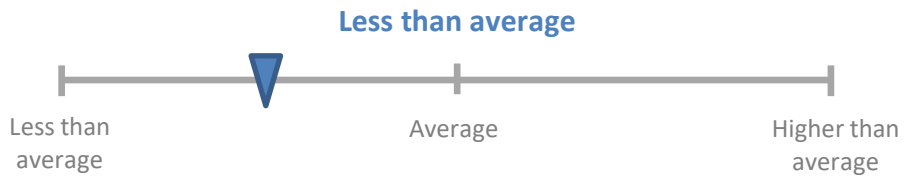
Precinct K South

Potential total units at full build out	1,600 to 1,800
Potential population at full build out	3,900 to 4,500
Wastewater treatment plant	South End
Local area plan completed?	Yes

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○ ◔
Capacities of nearby schools	○ ◔
Land ownership	○
Transit connectivity	○ ○ ○ ○
Site connectivity and contiguity	○ ○ ○ ○
Vehicular congestion	○ ◔

City-borne servicing costs per person



Expected City-funded projects required at full build out

Share of community centre

Share of Marion underpass

Share of St Mary's widening

Share of Osborne underpass/widening

Share of Warde Ave extension*

(* - growth-enabling projects)

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Development cannot proceed without the Warde Ave extension to St Anne's Rd

Other strengths and weaknesses

+ Seamlessly contiguous to the north half of Precinct K.

+ Local area plan already completed.

- Land ownership is fairly fractured.

- Transportation network in the southeast quadrant is very constrained.

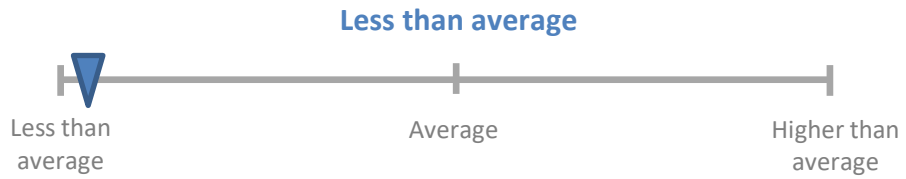
Precinct Q

Potential total units at full build out	3,000 to 3,200
Potential population at full build out	7,600 to 8,100
Wastewater treatment plant	West End
Local area plan completed?	Yes

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○ ○
Capacities of nearby schools	○ ○ ◔
Land ownership	
Transit connectivity	○ ○ ○ ○ ◔
Site connectivity and contiguity	○ ○ ○ ○ ○
Vehicular congestion	○ ○ ○ ◔

City-borne servicing costs per person



Expected City-funded projects required at full build out

Bill Clement Parkway (Grant to Wilkes)*

(* - growth-enabling projects)

Phasing and servicing comments

Very limited capacity in the West End wastewater treatment plant with no plans currently in place to upgrade it.

Per-person servicing costs are driven by the assignment of the costs of the Bill Clement Parkway from Grant Ave to Wilkes Ave, which is a prerequisite to developing most of the site. With the costs being shared with Wilkes South, per-person costs are quite low, but if they are attributed fully to Precinct Q, its servicing costs would be higher than all other greenfield sites.
Regional land drainage would be provided from various points in Charleswood, of which some are more challenging than others.

As per a Council motion from Dec. 13, 2017, the City will not approve or engage in any major capital infrastructure planning in the Wilkes South area until a sector plan is approved. This has implications for Precinct Q, as the first leg of the Bill Clement Parkway, required to enable full build out, is currently planned to terminate south of Wilkes Ave.

Other strengths and weaknesses

+ Local area plan already completed.

+ Opportunity to integrate well into existing adjacent community.

- Very limited capacity in the West End treatment plant.

- Establishing required land drainage connections at various points throughout Charleswood may be challenging. While this is the developer's responsibility, this may inhibit build-out.

- High degree of fractured land ownership will inhibit rate of build-out.

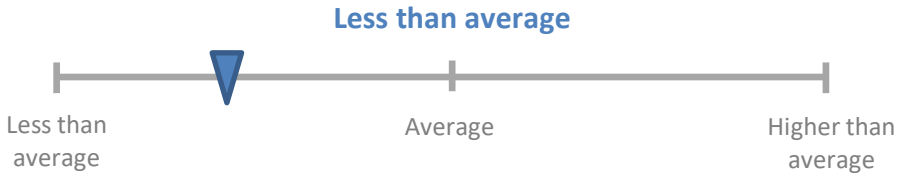
S/O Sage Creek

Potential total units at full build out	3,300 to 3,700
Potential population at full build out	8,100 to 9,400
Wastewater treatment plant	North End
Local area plan completed?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○
Capacities of nearby schools	
Land ownership	○ ○ ○ ○
Transit connectivity	○
Site connectivity and contiguity	
Vehicular congestion	○ ◐

City-borne servicing costs per person



Expected City-funded projects required at full build out

Community centre
Share of library
Fire station
Share of Marion underpass
Share of St Mary's widening
Share of Osborne underpass/widening
Wastewater interceptor*
Water feeder main*

(* - growth-enabling projects)

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Wastewater servicing of all greenfield areas south of the Perimeter Hwy originate at the South End plant. As a result, development in the study area will precede all other development south of the Permeter Hwy.

Regional water distribution system is not in place. Extending this service would likely first require a study of these lands along with St Vital Perimeter South.

Other strengths and weaknesses

- Existing rural residential population may resist development, particularly since the area is not currently designated for future urban development.

- Transportation network in the southeast quadrant is very constrained.

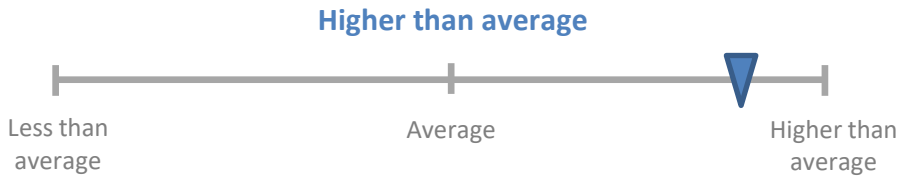
South Transcona

Potential total units at full build out	3,300 to 3,900
Potential population at full build out	8,300 to 9,800
Wastewater treatment plant	North End
Local area plan completed?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○ ◔
Capacities of nearby schools	◔
Land ownership	
Transit connectivity	○ ○ ○ ○ ◔
Site connectivity and contiguity	○
Vehicular congestion	○ ○ ◔

City-borne servicing costs per person



Expected City-funded projects required at full build out

Community centre
Fire station
Share of Schreyer Parkway
Share of Marion underpass
Share of Louise Bridge
Share of Mission combined sewer relief

Phasing and servicing comments

Unknown timeline and financing of required North End wastewater treatment plant upgrades.

May be limited capacity in the Dugald Rd wastewater interceptor for high wastewater-generating developments.

Regional land drainage for the site will be supported by the separation of the Mission combined sewer relief works, including the rehabilitation of the existing Dugald interceptor for land drainage and an additional land drainage trunk from the Seine River at Marion St to Dugald Rd and Lagimodiere Blvd. Will likely be funded in part from capital budget, but developers will also likely be required to contribute their share of these costs through the subdivision and rezoning process. In advance of these works, development may be able to proceed subject to more stringent land drainage design standards, which might include dedicating a larger portion of land for land drainage facilities.

Other strengths and weaknesses

+ Last remaining site in the northeast quadrant.

- High degree of fractured land ownership will inhibit rate of build-out.

- Poor connectivity to existing residential amenities.

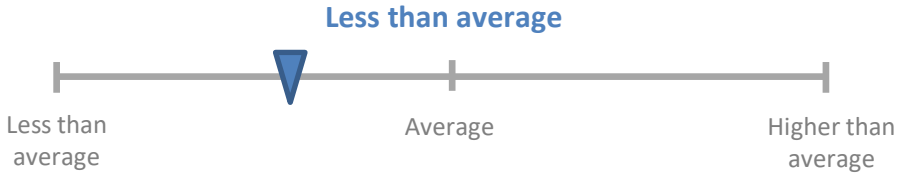
St Vital Perimeter South N/O Floodway

Potential total units at full build out	14,100 to 16,700
Potential population at full build out	35,300 to 41,700
Wastewater treatment plant	South End
Local area plan completed?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○ ○
Capacities of nearby schools	◔
Land ownership	○ ◔
Transit connectivity	○ ○ ○
Site connectivity and contiguity	○
Vehicular congestion	○ ◔

City-borne servicing costs per person



Expected City-funded projects required at full build out

Community centre
Share of library
Fire station
Share of Marion underpass
Share of St Mary's widening
Share of Osborne underpass/widening
Wastewater interceptor*
Water feeder main*

(* - growth-enabling projects)

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Wastewater servicing of all greenfield areas south of the Perimeter Hwy originate at the South End plant. As a result, development in the study area will precede all other development south of the Permeter Hwy.

Regional water disbitution system is not in place. Extending this service would likely first require a study of these lands along with S/O Sage Creek.

Lands west of St Mary's Rd are vulnerable to flooding, with no plans currently in place for protection.

Other strengths and weaknesses

- Existing rural residential population may resist development, particularly since the area is not currently designated for future urban development.

- Transportation network in the southeast quadrant is very constrained.

- High degree of fractured land ownership will inhibit rate of build-out.

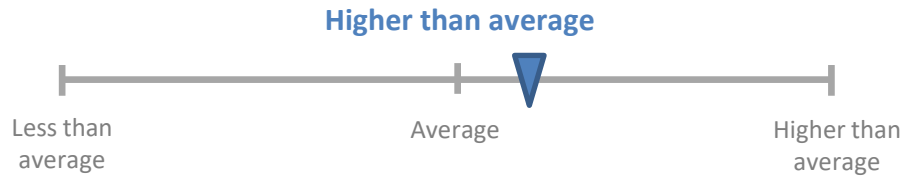
Trappistes

Potential total units at full build out	6,300 to 7,400
Potential population at full build out	15,700 to 18,500
Wastewater treatment plant	South End
Local area plan completed?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Land ownership	
Transit connectivity	
Site connectivity and contiguity	n/a
Vehicular congestion	

City-borne servicing costs per person



Expected City-funded projects required at full build out

Share of community centre
Share of library
Share of Kenaston Blvd improvements
Wastewater interceptor*
Water feeder main*

(* - growth-enabling projects)

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Wastewater interceptor needs to be extended from the South End plant 7.5km to the east; extension would service Precinct L and La Barriere as well.

Water feedermain would be extended from Kenaston Blvd; extension would service Precinct L and La Barriere as well.

The adjacent La Salle River provides a convenient opportunity for stormwater discharge; however, no regional drainage plans currrently exist.

Other strengths and weaknesses

- Phasing dependent on St Vital Perimeter South
- Potential land use conflict with Brady landfill
- Significant distance from existing jobs

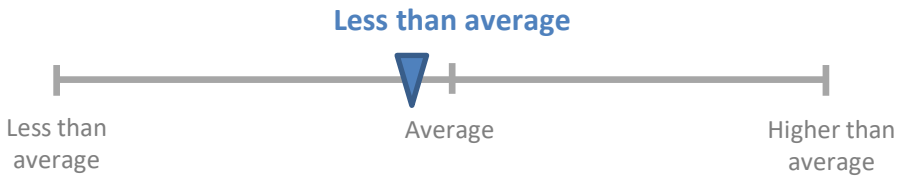
Waverley West B

Potential total units at full build out	2,800 to 3,400
Potential population at full build out	7,100 to 8,400
Wastewater treatment plant	South End
Local area plan completed?	Yes

Assessment criteria

Criteria	Scoring
Proximity to employment	
Capacities of nearby schools	
Land ownership	
Transit connectivity	
Site connectivity and contiguity	
Vehicular congestion	

City-borne servicing costs per person



Expected City-funded projects required at full build out

Share of Waverley West community centre/library

Share of fire station

Share of Kenaston Blvd improvements

Share of Southwest wastewater interceptor upgrades

Phasing and servicing comments

South End wastewater treatment plant currently undergoing upgrades to increase treatment capacity.

Full build-out may be constrained prior to completion of Southwest wastewater interceptor improvements; subject to further study.

Local wastewater may rely on the extension of a wastewater interceptor at Waverley St and Sandusky Dr, at the developer's expense.

Other strengths and weaknesses

+ Seamlessly contiguous to other Waverley West neighbourhoods.

+ Local area plan already completed.

- Constrained school capacities.

- High degree of fractured land ownership will inhibit rate of build-out.

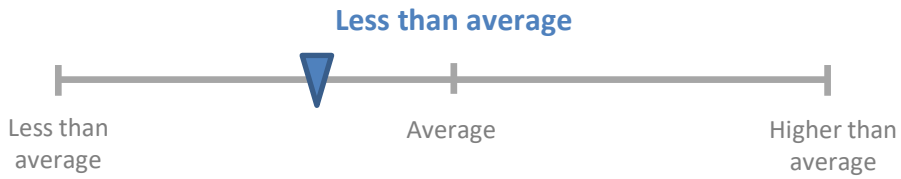
Wilkes South

Potential total units at full build out	32,900 to 39,100
Potential population at full build out	82,200 to 97,800
Wastewater treatment plant	West End
Local area plan completed?	No

Assessment criteria

Criteria	Scoring
Proximity to employment	○ ○ ○ ○ ○
Capacities of nearby schools	
Land ownership	○ ○ ◔
Transit connectivity	○ ○ ○
Site connectivity and contiguity	○ ○ ○
Vehicular congestion	○ ○ ○ ◔

City-borne servicing costs per person



Expected City-funded projects required at full build out

Two community centres
Library
Fire station
Sterling Lyon Parkway extension
Bill Clement Parkway (Wilkes to McGillivray)*
Wastewater interceptor*
Water feeder main*

(* - growth-enabling projects)

Phasing and servicing comments

Very limited capacity in the West End wastewater treatment plant with no plans currently in place to upgrade it.

Wastewater interceptor would be extended from the West End plant and be phased west-to-east, while the water feeder main would be extended from the northeast corner of the site and be phased from east-to-west.

With the Bill Clement Parkway being extended from the north, Precinct Q would precede development.

Regional land drainage would be provided from various points in Charleswood, of which some are more challenging than others. Part of this extension relies on development of adjacent Precinct Q lands.

As per a Council motion from Dec. 13, 2017, the City will not approve or engage in any major capital infrastructure planning in the Wilkes South area until a sector plan is approved.

Other strengths and weaknesses

+ While aggregate servicing costs are high, the site can accommodate significant development and per-unit costs are lower than average.

- Very limited wastewater treatment capacity at the West End plant.

- Existing rural residential population may resist development.

- While there are multiple available vehicular connection points to the north, they may not be able to accommodate significant traffic volumes, in which case this very large area would have very poor connectivity to the rest of the city.

Growth Scenarios

INTRODUCTION

As per the Conference Board of Canada and the City's Population, Housing, and Economic Forecast, accommodating 160,000 new Winnipeggers over 20 years will require about 82,000 new dwelling units. This translates into approximately 1,700 single family dwellings, 400 rowhouses, and 2,000 apartment units[1] a year. The third phase of the Residential Growth Study considered three different ways this housing mix could be distributed, to be articulated as an intensification target, with an aim towards maximizing *OurWinnipeg* and *Complete Communities 2.0* goals. The selection of a draft intensification target was informed by meetings with Council members, development industry representatives, and the *OurWinnipeg* Community Advisory Committee.

This phase of the work only considered a single mix of dwelling types since the intent of the forecast is intended to provide a common basis for all City departments to undertake long-range planning.

It should be emphasized further that unit types cannot be traded for each other on a one-for-one basis. With less people per dwelling living in an apartment or rowhouse than in a single family dwelling, a decrease in singles would result in a more-than-commensurate increase in multifamily units.

[1] A "single family dwelling" is defined by Statistics Canada as a dwelling unattached to any other dwelling with open space on all sides and no dwelling above or below. For the purposes of this work, semi-detached dwelling are included in this category, which are one of two dwellings attached side-by-side or back-to-back to each other with no dwellings above or below, where together the two units have open space on all sides.

A "rowhouse" is defined as one of three or more dwellings joined side-by-side or back-to-back, but not having any other dwellings above or below.

An "apartment" is a dwelling unit attached to other dwelling units in a form other than what is captured in the other definitions. This includes everything from an up-down duplex to a high-rise apartment.

OVERVIEW OF SCENARIOS

The first scenario considered 60% of all new dwelling units would be accommodated in greenfield areas versus 40% in the existing built-up area. This was considered to be largely status quo, with modest improvements needed to make infill development easier and more desirable to offset the depletion of easier opportunities over the time horizon of the plan. This scenario would see the existing built-up area accommodate 15% of all singles (vs 22% currently), 35% of all rows (vs 42%), and 65% of all apartments (vs 75%).

The second scenario considered a 50/50 split, where the greenfield share would decrease slightly over time through a more considerable effort in making infill easier and more desirable. This scenario would see the existing built-up area accommodate 20% of all singles, 50% of all rows, and 75% of all apartments.

The third considered 40% of new units in the existing built-up area, which would see the greenfield share decrease significantly through a substantial, concerted effort in enabling infill development. This scenario would see the existing built-up area accommodate 25% of all singles, 75% of all rows, and 87% of all apartments.

When comparing each scenario to recent growth, it should be noted that the Conference Board forecast, upon which each of the scenarios were based, anticipated a higher amount of singles relative to multis than what has actually materialized in recent years. More than anything the City could do, perhaps the single most important factor that will determine the achievement of a growth scenario is the amount of multifamily units built relative to singles, given that single family dwellings are difficult to accommodate in infill areas at a significant scale. If the rate of multifamily units built continues to outpace the forecasted rate, achievement of more aggressive scenarios becomes much easier. Likewise, if the reverse happens and demand for singles returns to historical levels, achieving even Scenario 1 may become quite difficult.

	Scenario 1	Scenario 2	Scenario 3	Current growth (2011-18)
Distribution	**Greenfield: 60%** **Infill: 40%**	**Greenfield: 50%** **Infill: 50%**	**Greenfield: 40%** **Infill: 60%**	**Greenfield: 55%** **Infill: 45%**
Description	Largely status quo, but with modest steps to facilitating infill development to offset the depletion of easier infill opportunities.	Greenfield share to decrease slightly over time through a more considerable effort in making infill easier and more desirable.	Greenfield share to decrease significantly over time through a substantial, concerted effort in making infill easier and more desirable.	
Distribution by housing type	**Greenfield total:** 2,460 units/year 85% of all singles 65% of all rows 35% of all apartments	**Greenfield total:** 2,050 units/year 80% of all singles 50% of all rows 25% of all apartments	**Greenfield total:** 1,640 units/year 75% of all singles 25% of all rows 13% of all apartments	**Greenfield total:** 2,200 units/year 78% of all singles 58% of all rows 25% of all apartments
	Infill total: 1,640 units/year 15% of all singles 35% of all rows 65% of all apartments	**Infill total:** 2,050 units/year 20% of all singles 50% of all rows 75% of all apartments	**Infill total:** 2,460 units/year 25% of all singles 75% of all rows 87% of all apartments	**Infill total:** 1,800 units/year 22% of all singles 42% of all rows 75% of all apartments
Greenfield land requirement reductions	**Full requirements**	**10%** reduction from Scenario 1 requirements	**22%** reduction from Scenario 1 requirements	

Table 3: Overview of scenarios considered

SCENARIO EVALUATION AND SELECTION OF A PREFERRED SCENARIO

In order to select a preferred scenario, each were assessed based on their potential implications for policy development and investment implications, conformance with *OurWinnipeg* sustainable development principles, and other metrics. With regards to the first of these evaluations, it was found that each successively aggressive scenario requires a commensurate "pushing of the bounds" from the status quo. The more the City wishes to increase the amount of residential units accommodated in the existing built-up area, the more it needs to increase the permissiveness of infill development, its use of financial incentives, and investment in transit level of service and public realm improvements in these areas.

Further, while incremental increases could likely be achieved through some combination of these incentives, at some point the achievement of a very aggressive target would likely require restricting the amount of multifamily units located in greenfield areas, given the finite amount of these units. Additionally, Scenario 3 would minimize the required amount of new greenfield infrastructure, but perhaps not as much as expected. Given the limitations of accommodating new singles in the existing built-up area, greenfield land will still be required as long as the City intends to accommodate the demand for detached dwellings. This demand is land consumptive (Scenario 3 would still accommodate 1,275 new singles a year) and, in the case of Scenario 3, would lack a lot of density that could help pay for this.

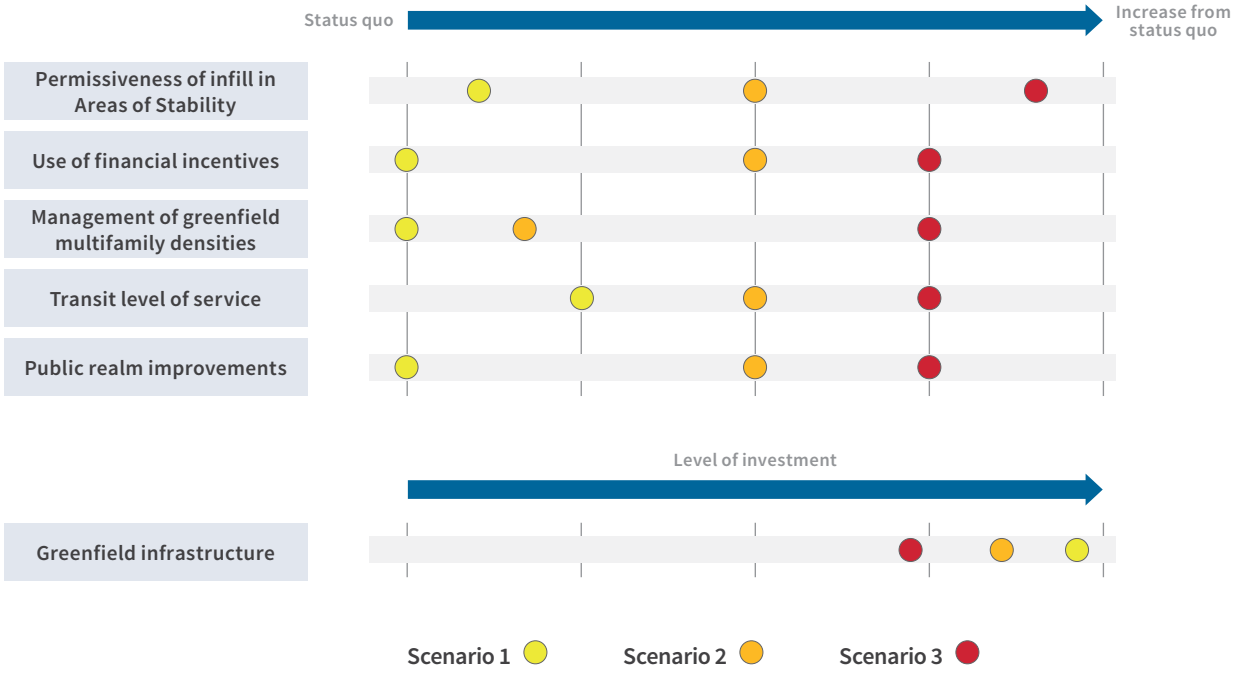


Table 4: Proposed scenarios and their policy and investment implications

With regards to the second analysis, higher rates of intensification better align with many of the *OurWinnipeg* Sustainable Development Goals. Scenarios 2 and 3 best align with the Winnipeg Climate Action Plan emissions target and would most enhance the vitality of existing neighbourhoods and support sustainable transportation options.

However, restricting greenfield densities at the high end of the contemplated scenarios would limit vitality and undermine the potential for sustainable transportation in these new neighbourhoods, while also potentially limiting economic competitiveness by restricting desired housing types.

Goal		Scenario 1	Scenario 2	Scenario 3
City Building	Environmental Resilience	Doesn't achieve Climate Change Action Plan target.	Achieves Climate Change Action Plan target.	Exceeds Climate Change Action Plan target and positions the City well for further reductions.
	Good Health and Well-Being	Infill enhances neighbourhood vitality and better supports sustainable transportation.	More infill further enhances neighbourhood vitality and better supports sustainable transportation.s	Even more infill further enhances neighbourhood vitality and better supports sustainable transportation.
	& Social Equity	Maximizing greenfield densities supports amenities and sustainable transportation in new neighbourhoods.	Slightly lesser greenfield densities still supports amenities and sustainable transportation in new neighbourhoods.	Restricting greenfield densities would limit amenities and sustainable transportation.
	Economic Prosperity	Desired housing types may not be fully provided in infill areas, hampering economic prosperity and competitiveness.	Maximizing infill and greenfield opportunities best provide desired housing types, optimizing economic prosperity and competitiveness.	Desired housing types may not be fully provided in greenfields, hampering economic prosperity and competitiveness.
	Leadership and Good Governance	Easiest to achieve with existing resourcing and operational organization.	Would require changes to existing resourcing and operational organization.	Would require the most changes to existing resourcing and operational organization and would be the most difficult to achieve.

Table 5: Proposed scenarios and their alignment with OurWinnipeg sustainability goals

The results of the third analysis play out in a similar manner. Increased density in existing neighbourhoods increases their vitality and maximizes the viability of sustainable transportation in these areas, in addition to best promoting the City's climate change goal and minimizing greenfield land consumption and new infrastructure. However, past a certain point, these qualities become negatively affected in new neighbourhoods.

An overly aggressive infill-oriented scenario also creates additional uncertainty with regards to costs borne by the City in accommodating growth given its existing base of information regarding servicing capacities in the existing built-up area, and would require the greatest policy implementation effort.

Metric		Scoring		
		Scenario 1	Scenario 2	Scenario 3
Complete Communities	Reinforces and enhances vitality of existing neighbourhoods	✓	✓✓	✓✓✓
	Density of new greenfield neighbourhoods	✓✓✓	✓✓	✓
Transportation and Infrastructure	Supports transit, cycling, and walking as viable modes of transportation	✓	✓✓	✓✓✓
	Certainty of City costs	✓✓✓	✓✓	✓
	Minimizes required linear infrastructure	✓	✓✓	✓✓✓
Environment	Climate change goal	—	✓	✓✓
	Minimizes greenfield land consumption	✓	✓✓	✓✓✓
Implementation	Policy implementation effort	✓	✓✓	✓✓✓

Good: ✓ **Better: ✓✓** **Best: ✓✓✓** **Does not meet criteria: —**

Table 6: Proposed scenarios and their relationship to evaluation metrics

With these considerations in mind, most who were consulted agreed that the City should increase its efforts to accommodate infill development, but that restricting willing developers from building greater densities in greenfield areas would run contrary to complete communities principles. This pointed to Scenario 2 as the preferred scenario to be embedded into *Complete Communities 2.0* as the basis for its intensification target. Achieving Scenario 2 maximizes the achievement of most City goals, including achievement of its emissions target. Restricting densities in Scenario 3, in contrast, would be extremely difficult, limiting greenfield areas to only 13% of all apartment units at a time when more than two-thirds of all new dwellings would be multifamily.

DEVELOPMENT INDUSTRY CONSULTATION

In Fall 2019, a series of meetings were held to discuss the merits of potential growth scenarios. This included an initial meeting with a smaller group of representatives, a presentation at a UDI breakfast seminar, and a larger meeting with a wider range of infill and greenfield developers. Some of the main themes that participants expressed included:

- Participants were supportive of further enabling of infill development to achieve a greater share of residential units in the existing built-up area, but not if it entails restricting multifamily densities in greenfield areas, as more aggressive scenarios proposed. A mix of housing and densities in new neighbourhoods should continue to be promoted. Some participants emphasized that existing rates of infill development are already quite strong and that the City will be challenged to maintain these rates as easier opportunities are depleted.
- Some participants expressed concern about the City setting targets for intensification when more needs to be done to understand servicing capacities in these areas, while others refuted this notion, claiming in their experience to have not found this issue to be limiting.

Recommendations for Implementation

Towards the conclusion of their assignment, land economics consultant IBI Group prepared a memo with recommendations for growth management, building off of the findings of this study. They asserted that the City will be challenged to accommodate forecasted growth regardless of the eventual greenfield/infill mix, emphasizing the importance of strong relationships, open communication, transparency, and data sharing with all stakeholders

Their recommendations were as follows:

1. Ensure future housing forecasts provide greater direction on multifamily dwelling types

The population and housing forecast currently used by the City of Winnipeg distinguishes between single and multifamily units, but multifamily units can be delivered in a variety of housing types such as townhomes, stacked townhomes, and low-, mid-, and high-rise apartments, each with varying abilities to be accommodated in infill areas and implications for land consumption. Future forecasts should endeavor to provide greater multifamily granularity.

2. Create an intensification and Corridors strategy

While the current draft Residential Infill Strategy identifies opportunities for intensification across designated Mature Communities, this should be expanded more widely across the intensification target area. Additional analysis would identify specific opportunities to accommodate different dwelling types and prioritize the use of enabling tools such as local area planning and infrastructure investment, including public realm improvements.

3. Coordinate land use policies and growth scenarios

IBI recommended that the preferred growth scenario be embedded into *OurWInnipeg* and *Complete Communities 2.0* and that they allow for local area plans to be implemented as necessary, and that greenfield phasing policies are provided to support implementation of future growth areas. These recommendations have been embedded into the draft plans, notably including the incorporation of the preferred growth scenario as the plans' intensification target.

4. Establish an industry and inter-departmental working group for the on-going monitoring of growth and infrastructure within the city

Regular dialogue between land use and development stakeholders internal and external to the City of Winnipeg can create buy-in around potential directions, mitigate future disputes, and create a collaborative approach to growth. Key members could include development industry representatives, managers from appropriate City departments, community representatives, and other stakeholders such as major institutions. IBI cited the City of Hamilton's Development Industry Liaison Group as an example to consider.

5. Enhance the City's understanding of infrastructure investments needed to accommodate growth

The City should enhance its understanding of the ability of existing water, wastewater, and land drainage infrastructure to support growth in existing areas as build upon its existing understanding of infrastructure necessary to accommodate growth in greenfield areas. From there, it should refine its list of infrastructure projects necessary to accommodate growth and their timing, ensuring coordination between City departments, and secure new revenue tools to finance these projects. A more fulsome understanding of these projects will assist the City in prioritizing growth areas and inform stakeholders of necessary investments.

6. Finalize greenfield phasing

IBI recommended that the City determine the sequencing of future greenfield areas and implement them with land use policies, coordinating this sequencing with the efficient delivery of infrastructure. This sequencing should incorporate the findings of the Residential Growth Study Greenfield Area assessments. This recommendation has been reflected in the draft *Complete Communities 2.0*.

7. Establish a monitoring and review process for growth

Annual monitoring practices should be undertaken, including the achievement of the intensification target and the monitoring of multifamily dwelling type splits to inform future forecasting activities. Regular check-ins with industry should be conducted to understand any issues that are being experienced.

City Contact Information

Information on the City of Winnipeg is available at **winnipeg.ca/ourwinnipeg**
Inquiries may also be directed to **311** | Outside of Winnipeg: **1-877-311-4974**

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