

## ***Appendices***

## **Appendix 1**

### **Updated Milestones, Challenges and Issues, and Opportunities Statements from the Surveys and Questionnaires**

The three documents incorporated in Appendix 1 under Haliburton County Milestones, Challenges and Issues and Opportunities, were compiled from responses received to an E-mail survey sent out to a list of stakeholders in the County, responses from citizens received to an on-line survey on the County of Haliburton web site, and responses from Marketing and Economic Diversification Committee members to a similar set of questions by September 7th, 2003. All of these, together with input received from the public consultations, have been used in constructing the diagnosis of the County, in recommending the various strategic orientations, and in making the recommendations.

#### **1. HALIBURTON COUNTY MILESTONES 1997 - 2003**

The categories used below overlap to a certain extent as is inevitable. However, they demonstrate what people see as significant events in the County of Haliburton's development over the past 6 years. Most 'events' can be seen as unambiguously positive, while others may have a negative side to them.

As several people pointed out, many of the 'events' are still 'a work in progress' but significant progress is being made.

#### ***Events***

##### **Political infrastructure**

- Re-organization of the County's political structure (amalgamation of ten townships into four), which according to many has improved the functioning of the County
- Political leaders showing more willingness to embrace new ways of doing things
- Official Plans to provide guidance for future land use decisions
  - Official Plan – continuing progress towards finalization
  - Preparation of lower tier OP's

##### **Medical infrastructure**

- Two new hospitals in Minden and Haliburton
  - Hospital building complete with new extended care beds at Haliburton site launched
  - Maintaining 24 hour emergency service
  - Proper health care facilities in the Highlands
- Multi-million dollar hospital financial campaign is yielding positive results

##### **Educational infrastructure**

- Sir Sanford College expansion
- Amalgamation of school boards

- Recent needs assessment regarding the public library system though under funding remains an issue
- Multi-million dollar college financial campaign is yielding positive results
- But closing of schools in smaller communities is a negative milestone for any

#### **Communications infrastructure**

- Progression of Hwy 35 bypass in Minden
- Airport expansion
- Improvement in roads
- 911 project
- CANOE Radio
- Recent needs assessment regarding high speed internet access  
Connect Ontario - the potential to realize a high speed Broadband network for telecommunications through the provincial Connect Ontario initiative and the federal Broadband for Rural and Northern Development (BRAND) initiative

#### **Recreational & tourism infrastructure**

- The Marketing Plan emphasizes Tourism/Destination Marketing
- The growth of the Trails & Tours Association
- Initiatives from Chamber of Commerce and Trails and Tours Network
- Trails and Tours initiative was revived and has resulted in a 1.2 million dollar development project related to trails and tours in the County
- Master Plan for the Rail Trails
- A large number of creative and innovative community projects, reflecting a vibrant community and a real grassroots approach on the action side

#### **Arts & culture**

- Master Plan for the Arts
- Strengthening of the already strong arts community; including music, visual and theatre arts
- Formation of the Arts Committee and all of their initiatives to promote the art sector
- Northern Lights Performing Arts Pavilion
- Highlands Summer Festival

#### **Commercial & industrial development**

- Tim Horton's impending arrival
- Expansion of service industry
- New low impact business attracted to the area (Limberlost, Densign)
- The regional economy appears to have been quite consistent over the last few years
- Lack of pro-active economic development portfolio (a non-event)

#### **Community development and organization**

- New brand image developed and marketing plan implementation
- Revitalization of the Chamber of Commerce and recognition of its role in economic development, not just tourism  
Membership of the Chamber of Commerce increasing

## The Haliburton Highlands Chamber of Commerce new role in the Marketing of the County

- County youth group (importance to provide young people with opportunities)
- Re-establishing OPP headquarters in Minden
- A large number of creative and innovative community projects by various groups, e.g. The Hawk Lake Log Chute; Trails and Tours initiatives; Sculpture Forest; Village Green; Gooderham and Area Art and Crafts Tour (involving partnerships with municipal and county governments, local businesses as well as donors and funders within and outside of the county)
- Interested and committed people as well as structures (formal and informal) in place to make things happen
- Volunteer component is very strong, relevant and vibrant in all sectors of the community. This is a significant barometer of the strength of the community.
- The creation of the community grants program by the CED committee of the Haliburton County Development Corporation
- Significant progress in Family Services (broad penetration of services in the County, promoted positive image of involvement with a children's service agency, enhanced the expectation of inclusionary practices, significant amounts of external funding leveraged), especially the youth programs
- But closing of the Women's Emergency House

### **Strategic planning**

- Community Strategic Planning Committee formed in *October 1997*– named HUB
- Community Forums held in each of the following summers: 1998, 1999, 2000 and 2001
- Economic Diversification Group formed in 1997, and later merged with the Marketing Committee
- 1999 Randolph Report adopted, despite the diminished support given to it
- 2001 - Hub reporting structure removed and County Orientation Groups given 'advisory' status reporting directly to County Planning Committee
- Environmental committee re-structured in 2003
- All the targets determined in the initial strategic plan were met, but with varying degrees of success; after further consultation, some targets were deemed to be not realistic or appropriate at the time
- Many actions have been implemented

### **Continuing trends**

- The focus on economic development and the Official Plan
- Growing awareness of environmental issues
- Increase in people moving to our area (although hard data are elusive)
- Newer lakeshore property is of higher values and the needs of the new people are having impacts of the services provided
- Ageing population moving into former family cottages (renovations versus new home construction)
- Gentrification of the lake communities
- Expansion of / changes to downtown Haliburton and the resulting impact on the physical and economic landscape

## **Provincial environment**

- Downloading of services by the province
- The inclusion of the County of Haliburton within the Central Ontario Smart Growth region instead of in the Eastern Ontario or Northern Ontario Smart Growth regions – raises questions regarding how appropriate this is for the County of Haliburton's social and economic needs

## **2. HALIBURTON CHALLENGES AND ISSUES SEPTEMBER 7 2003**

In the view of many respondents, the County political structure has a role to play in meeting most, if not all of the challenges identified below, and grappling with the issues. But the nature of this role is variable, and depends in large part on what other players in the County are pursuing and achieving. A major issue is therefore sorting out the different roles that each player can take on.

### **Political issues**

- Ensuring there is political buy-in to a manageable structure for implementation of any plan
- The County could have a role to play in most issues, but to differing degrees and different ways: these need to be investigated properly (e.g. the roles of the two tiers of municipalities, private sector, other public sector, and community organizations) and then communicated clearly to partners (other players) and citizens
- Some respondents felt that consideration should be given to further amalgamation, including having just one County government for the area
- An important issue is to provide the leadership necessary to guide the development of the community and its economic base to achieve the goals of the citizenry
- Ensure that service delivery is carefully assessed and planned so that it can respond effectively to people's needs; as part of this, ensure that we understand where we stand in terms of the various services in relation to our 'competitors', e.g. other regions with a retirement function
- Development of effective partnerships between the County and the lower levels of government
- A commitment from the County to be proactive on identified priorities
- Communicating a strong message to various groups that the price of inaction is too high and that we (the County and the community) should manage and initiate change on our own terms
- A major issue is to have a permanent CED officer to implement the Strategic Plan and work with all the different partners
- An important issue is to consider how to establish an effective forum for public discussion and direction, if not decision-making, concerning matters other than land use and roads that depend on public funding, i.e., recreation, culture, social issues, environment
- It was suggested that there is an issue with the degree of openness of township meetings; full minutes should be posted on the internet, and there should be no closed door meetings

- Putting in place an effective communications program to ensure accountability to all segments of the population and all players
- This would also relate to having a mechanism for carrying the plan into action, and monitoring it, to ensure that the vision is maintained up-front-and-centre as the target towards which management of change is directed
- There also needs to be a financial commitment (County, as well as developing other sources) as part of the implementation process, and it has to be as long-term as the plan
- The completion of the County Official Plan

### **Communications**

- Ensuring that the County and its partners proceed to realize the high speed Broadband network
  - To realize future economic opportunity, including home-based business
  - To reduce the County's relative economic disadvantage within the Province
- Ensure that the County is able to make use of information technology to create and access data that are essential to the strategic planning and implementation process

### **Environment**

- Being ready to cope with the greater responsibility and liability relating to water quality and treatment, source protection, lake capacity, unhealthy septic systems (develop the staffing capabilities and expertise to effectively handle these issues)
- Or alternatively, this could involve the creation of, or an arrangement with, a Conservation Authority to handle issues relative to water management and the relationships between water and land use and development
- Waste management is a major issue – should it be a County responsibility?
- There remain very significant issues in relation to lake development and forest management that have not been tackled by the Official Plan
- Forests are one of the cornerstones of the County and good forest stewardship must be encouraged
- Quality of life should be central – environment in the broadest sense of the term 'environment'
- There are limits to development, and environmental controls are needed in order to maintain our natural features, particularly to maintain forests and lakes

### **Economic development**

- Investigate ways of developing small and alternate forms of business
- Continued efforts to diversify and reduce economic dependency represent major challenges
- The issue of broadening the tax base (diversification of sources of revenue) is directly related to the narrowness of our economic base
- Need to promote what economic activity exists more effectively, and understand how to sustain it

- Ensure that the environment for business development in the County encourages entrepreneurs; they are necessary to diversify away from the image of a retirement only community
- Ensure that we are ready to meet the 'competition' , e.g. in tourism development
- Determining the role that tourism should play in the long term in the County's economy, and marketing the chosen strategies effectively
- Ensure that tourism development is pursued properly, so that it becomes a major contributor to a year-round set of activities – tourism is our bread-and-butter so we need to ensure it is not forgotten and build on the tremendous resources that exist in the County for tourism
- Improve the promotion of cultural events such as plays and music
- Recognize the potential resource represented by the part-time residents' 'capital' (intellectual, financial and personal/professional networks) and build upon it
- Find a way to create a full-time economic development or CED position with adequate funding
- There has to be attention given to expanding the employment base in the County, especially for the youth

### **Education**

- Ensure a sound infrastructure in education
- The under-funding and lack of attention paid to the library system, an important of the general educational opportunities available to the population
- Lack of integration of the resources of the retired population into the educational opportunities in the County

### **Health**

- Ensure a sound infrastructure in healthcare
- Build on the positive changes already undertaken
- Take steps to tackle the recruitment of doctors (develop a strategy to achieve this)
- Improve the home care infrastructure
- Ensure the County has emergency medical services that are competitive with surrounding regions
- Lack of recreational services as part of a 'healthy' community

### **Image & identity**

- Continue to build the "identity" of Haliburton County around the further development of appropriate tourism and industry
- Building a healthy community with a vision

### **Seniors & retirees**

- Understanding the needs and potential of seniors and the retiree population is still a major issue: this was dropped in the first round of implementation of the 1997 Strategic Plan but the issues involved remain significant
- Seniors housing and appropriate services

### **Social development & planning**

- Recognize and tackle poverty and exclusion in the County; unemployment remains high and there is still a substantial reliance on transfer payments
- Social issues need to be recognized as central to the County's long term development – the Official Plan deals with certain issues, but social issues, among others, falls between the cracks
- Provision of accessible meeting spaces (free or very low cost) for groups to meet in and plan
- Ensure that the process goes to the grass roots – this would be a long term exercise of mobilizing and communicating with different segments of the community

### **Transportation**

- There remains a real need for public transportation or some alternative such as a transportation co-operative
- Transportation remains an important issue in terms of accessibility to all forms of services, as well as being able to mobilize more effectively the volunteer base in the County
- Continued implementation of the Airport Development recommendations, and critically assess future demands and potential responses (capacity for expansion)
- Upgrading of roads, and paved bicycle lanes for cyclists/tourists
- The County should assume more township roads such as Dyno Road

### **Youth**

- Understanding the needs of youth and responding to them remains a major issue in the County
- The County and its citizens must prove to the youth that they are important to the rest of the communities involved
- Developing a long term recreation plan to respond to the needs of youth, but also of other segments of the population

## **3. COUNTY OF HALIBURTON OPPORTUNITIES SEPTEMBER 7 2003**

Note that many of these 'opportunities' were also expressed by the respondents as 'issues'. This is normal since 'problems' also represent 'opportunities' for action in many instances.

### **Economic diversification**

- Requires a dedicated staff person and associated budget
- Agricultural development (small-scale production) and local produce marketing
- Activities that make use of our existing resources (e.g. forests) in ways that are compatible with the County's vision, including appropriate tourist and cottage development
- There is a significant opportunity to engage in Community Economic Development, as a means of uniting many of the forces present in the County
- There is opportunity to champion Art, Culture and Heritage. They already play an important role in the County's life. Opportunities exist to invest in the

cultural facilities run by the County (the libraries) and having these as dynamic centres of creative and cultural activity

- The Haliburton County Development Corporation is in the process of developing a master plan for the arts in Haliburton County which is focused on economic development and creating a collaborative body representing all of the sectors of the arts. The County has an opportunity to support this initiative through its strategic plan and also through provision of some core funding for County wide initiatives
- There is an opportunity to provide leadership in guiding the nature of community and economic development

### **Commercial development**

- Need to establish the extent to which permanent residents shop outside of the County and why (e.g. due to pricing and variety available elsewhere)
- Develop a strategy to attract a mid-sized retailer to the County

### **Education**

- Ensure that we know what the different needs educationally of the different segments of our population are
- And then plan accordingly
- Use the varied and skilled resources, experience and knowledge of the retired population in training and other ways to enhance the educational opportunities in the County

### **Health care**

- Develop a strategy to combat the actual and impending shortage of doctors
- Investigate potential for developing a greater availability of medical procedures and facilities to reduce long distance travelling for such services
- Improve the level and accessibility of emergency health services
- Be ready to deal with water quality issues
- Be prepared to deal with West Nile virus

### **Housing**

- Develop a real needs assessment of housing and housing conditions for different segments of the housing market in the County
- Develop effective partnerships through an appropriate local infrastructure to deal with housing needs

### **Seniors & retirees**

- Develop more supportive seniors housing opportunities
- Continue, with the help of agencies involved, to put together strong social programmes for the elderly
- Capitalize on the networks and capacity that exist within the retired population and use their expertise more effectively
- Develop better collaboration with different segments of the retired population
- Understand and then build upon the role that these segments of the population can play in education, both as sources of demand and in terms of contributing to supply

## **Tourism & Recreation**

- Need continued efforts on trails to support the local tourist industry, e.g. develop an ATV Tourism product with a network of managed trails for permanent and part-time residents and tourists
- Develop adequate funding for an effective tourism marketing board
- Develop more events to attract and retain tourists for longer periods
- Recognize the capacity of the community for environmentally-friendly economic development & build on it to benefit both full-time and part-time residents
- Build on our extensive art / culture community to attract visitors, expand both the scope of what we offer (e.g. plays, music) and make it more available to those who live here year-round
- Develop the 'transient tourist' market, not just the part-time or seasonal resident image
- Use Trails and Tours as a major marketing opportunity to support Haliburton as a "natural destination" close to the Greater Toronto Area
- Do not let the opportunities afforded by our tourism resources to slip by; make a real commitment to implement the Randolph report in a dynamic way
- Develop a long term recreation plan, and include a significant recreational facility in it as well as the further development of park space

## **Children & Youth**

- Continue to search for employment opportunities for our young and middle aged residents
- Create more recreation and economic opportunities for youth
- Find ways for engaging them more directly in the planning process
- There appears to be increased awareness of the value of investing in children and youth, so let's build on it
- Further development of services for children
- Respond better to the needs of young people in terms of education (in the broadest sense), including the development of a youth centre
- Develop after-school programs for youth (boys & girls)

## **Environment**

- Make sure that our economic development does not destroy the basis of our current development, i.e. clean water, healthy forest, and a sound local infrastructure; this is particularly so in relation to the distribution of cottage development around lakes
- Ensure there is a strong focus on good forest stewardship
- Ensure that pressures on lake development can be handled effectively by the existing and emerging planning apparatus
- Clean water is potentially a huge issue in some areas
- The County slogan is "A natural work of art" and the opportunity exists to build on this in all aspects of the County's development (e.g. in residential development, tourism, and stewardship of the natural resources)

### **Business development**

- Development of services to support home office, small business, and retirees entering a second career (development of an image – and a reality – of the County as an incubator for business)
- Ensure broadband and high speed internet access and more data availability through GIS
- Where to locate the next industrial park?
- Consider the strategy of business incubators (traditional sense)
- Respond to the need for a full-time economic development/CED post and fund it adequately
- Recognize the critical role played by tourism in the County's economy and do not let the opportunities slip by, at the same time as pursuing broader economic diversification

### **County identity**

- Continuing to build a sense of belonging to the county, not only to village, lake, and township

### **Volunteers, agencies & the community**

- Establish an Ambassador Program to market the county via volunteers
- Consideration of the establishment of a Community Foundation to receive “gifts of property” from full time and part time residents
- Undertake a careful analysis of local groups, organizations and initiatives (to reduce unnecessary duplication of effort)
- Build capacity further

### **Integration of different population segments**

- Ensure more effective integration of permanent residents as well as seasonal residents into County life
- Demystify the differences between permanent and part-time residents, as well as of those between merchants and residents
- Ensure that those permanent residents who are less affluent than many of the seasonal residents are not excluded from County life
- Capitalize on the networks and capacity that exist in the community already, and be more proactive in mobilizing them
- The many different types of retirees present in the County represent a tremendous asset in many ways, and not integrating them more effectively is a waste of a valuable resource

### **Social services & social fabric**

- Maintenance and development of services for residents
- Ensure that citizens know what social services exist and their accessibility through an effective communications program (or extend what has already been accomplished in the social services domain)
- Ensure that there is a stronger focus on social issues in the County
- Ensure adequate meeting places
- Maintain and develop library services
- Make a commitment to upgrade the majority of services, and find appropriate ways to achieve this

### **Transportation & communications**

- Engage the private sector to investigate needs and opportunities to improve accessibility both internal and external to the County
- Build on the new telecommunications infrastructure to yield new opportunities for the community, business and government including local employment
- The County has the opportunity through its Broadband initiative, a GIS and information strategy, the CAP program, the development of a community portal and a significant investment in its library system to provide infrastructure and tools which will benefit all County residents, businesses and organizations – by providing access to information and learning, business development, enhanced employment opportunities, and marketing.

### **Political life & planning for development**

- Better integration of different population segments into political life
- Ensure accountability to all segments of the population
- Ensure there is more agreement on the values underlying decision-making and develop mechanisms to monitor that the values are being respected
- Consider strategies to encourage more younger people to get involved in political life in the County and local municipalities
- Sort out more effectively the different roles and functions of the different players, and use this to add impetus to the implementation of the strategic plan
- Look for more creative ways to generate revenues
- Develop a plan to ensure that both tiers of government are equipped with the new information technology and are able to use it to deliver services more effectively, e.g. in contributing in a major way to the monitoring of change in the County
- More amalgamation could also provide other opportunities
- Be more pro-active in searching out sources of funding to support these types of initiatives
- Develop leadership capacity (politically and in other walks of life in the County) and ensure more permanent mechanisms for community forums and for debate and negotiation between different players (e.g. the municipalities, the County, the Chamber, various associations, the Haliburton County Development Corporation, etc.)

## Appendix 2

### Basic Statistical Information for the County of Haliburton

Haliburton County is characterized by a small and dispersed population (Tables A.1 and A.2), with rapid growth in the early 1990s yielding to a levelling off (or even decline) between 1996 and 2001. The population is shared between the four local municipalities (Table A.3), with the two larger municipalities showing decline in population between 1996 and 2001, while the two smaller ones show an increase (these changes have been corrected for boundary changes so reflect the situation as captured by the Census of Canada).

Haliburton County's demographic change over the last intercensal period places it behind all but one of the counties in Eastern Ontario (the comparison used in the 1997 Strategic Plan), and also substantially behind the Muskokas, one of the areas the County often compares itself to in terms of markets for tourism and cottagers (Table A.4).

Despite the stability or even decrease in the overall population for the County, the number of households is increasing (Table A.1), while household size continues to fall (in line with experience in Ontario generally). The County's population continues to age compared to Ontario's population (Table A.1). While household incomes are relatively low, they are increasing, reflecting no doubt the movement in of a number of families with higher incomes. Income dependency levels are also relatively high, but government transfers as a source of income are dropping, which indicates a drop in dependency levels. The increase in importance of 'other sources' of income reflects retirement incomes, demonstrating the importance of the retiree population as a source of economic development in the County.

The County also shows a healthy rate of creation of registered businesses compared to the Ontario rate of change over the period 1991-2001. The profile of establishments by sector shows a marked dominance of sectors related to the seasonal population (construction and real estate, for instance, and various services) and tourism in general (accommodation, food and drinking establishments). The recent increase in the number of establishments in the professional, scientific and technical services sector is encouraging.

<b>Table A.1</b>																									
<b>Highlights of the County of Haliburton's Profile</b>																									
Population	<p>- A small and dispersed population (15,321: 1996; 15,085: 2001)</p> <ul style="list-style-type: none"> <li>• Rapid growth in the early 1990s (plus 6.2% 1991-1996)</li> <li>• Recent change from census negative (-1.5% 1996-2001) but contested by local leadership</li> </ul> <p>- A huge seasonal population</p> <p>- Households increasing ( +1.3% 1996-2001)</p> <p>- Average size of household decreasing (2.42 in 1996 to 2.35 in 2001)</p> <p>- An ageing population</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th style="text-align: center;"><i>% population of Haliburton County 2001</i></th> <th colspan="2" style="text-align: center;"><i>Haliburton County % divided by Ontario %</i></th> </tr> <tr> <th></th> <th></th> <th style="text-align: center;"><i>1991</i></th> <th style="text-align: center;"><i>2001</i></th> </tr> </thead> <tbody> <tr> <td>55-64 years</td> <td style="text-align: center;">15.7%</td> <td style="text-align: center;">1.64</td> <td style="text-align: center;">1.69</td> </tr> <tr> <td>65-74 years</td> <td style="text-align: center;">15.0%</td> <td style="text-align: center;">1.84</td> <td style="text-align: center;">2.08</td> </tr> <tr> <td>&gt; 74 years</td> <td style="text-align: center;">9.0%</td> <td style="text-align: center;">1.40</td> <td style="text-align: center;">1.58</td> </tr> </tbody> </table>		<i>% population of Haliburton County 2001</i>	<i>Haliburton County % divided by Ontario %</i>				<i>1991</i>	<i>2001</i>	55-64 years	15.7%	1.64	1.69	65-74 years	15.0%	1.84	2.08	> 74 years	9.0%	1.40	1.58				
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Business sectors with more than 50 establishments* in Haliburton County*	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th colspan="2" style="text-align: center;"><i>Number of establishments</i></th> </tr> <tr> <th></th> <th style="text-align: center;"><i>1999</i></th> <th style="text-align: center;"><i>2001</i></th> </tr> </thead> <tbody> <tr> <td>Trade contracting</td> <td style="text-align: center;">117</td> <td style="text-align: center;">134</td> </tr> <tr> <td>Prime construction</td> <td style="text-align: center;">97</td> <td style="text-align: center;">111</td> </tr> <tr> <td>Real estate</td> <td style="text-align: center;">72</td> <td style="text-align: center;">100</td> </tr> <tr> <td>Professional, scientific &amp; Technical services</td> <td style="text-align: center;">58</td> <td style="text-align: center;">78</td> </tr> <tr> <td>Food / drinking places</td> <td style="text-align: center;">58</td> <td style="text-align: center;">71</td> </tr> <tr> <td>Accommodation services</td> <td style="text-align: center;">53</td> <td style="text-align: center;">59</td> </tr> </tbody> </table>		<i>Number of establishments</i>			<i>1999</i>	<i>2001</i>	Trade contracting	117	134	Prime construction	97	111	Real estate	72	100	Professional, scientific & Technical services	58	78	Food / drinking places	58	71	Accommodation services	53	59
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\*Based on Statistics Canada, Business registrations

Table A.2 Haliburton County: Population Growth, 1981 - 2001								
Population					% population change			
1981	1986	1991	1996	2001	1981-86	1986-91	1991-96	1996-01
11,361	11,961	14,421	15,321	15,085	5.3	20.6	6.2	-1.5

Source: Census of Canada, 1981, 1986, 1991, 1996, 2001.

Table A.3 Haliburton County and Local Municipalities Population Change, 1996-2001*			
Unit	1996 population	2001 population	% change in population 1996-2001
Dysart	5380	4924	-8.5
Minden Hills*	5336	5312	-0.4
Algonquin Highlands	1687	1827	+8.3
Highlands East	2918	3022	+3.6
HALIBURTON COUNTY	15321	15085	-1.5

Source: Census of Canada, 2001

\* 1996 data based on boundaries adjusted to be compatible with 2001 boundaries.

Table A.4 Haliburton County: Population Growth Compared to Selected Nearby Ontario Counties, Ontario and Canada, 1991 - 2001				
County	% change in population 1991-96	1991-1996: Ratio of Haliburton County's growth to other units	% change in population 1996-2001	1996-2001: Number of percentage points Haliburton's growth rate was smaller than (-) or greater than (+) the other units**
Haliburton	6.2		-1.5	
Renfrew	5.0	1.24	-1.1	(-)0.4
Northumberland	4.6	1.35	4.1	(-)5.6
Leeds/Grenville	6.7	0.93	0.3	(-)1.8
Lennox/Addington	5.3	1.17	0.7	(-)2.2
Lanark	9.2	0.67	4.4	(-)5.9
Stormont	3.2	1.94	-1.6	(+)0.1
Victoria*	7.3	0.85	1.8	(-)3.3
Frontenac	5.6	1.11	1.6	(-)3.1
Peterborough	2.9	2.14	2.0	(-)3.5
Muskokas	19.3	0.32	5.2	(-)6.7
ONTARIO	6.6	0.94	6.1	(-)7.6
CANADA	5.7	1.09	4.84	(-)6.3

Source: Census of Canada, 1986, 1991, 1996, 2001.

\* Kawartha Lakes from January 1<sup>st</sup>, 2001

\*\* Calculated as the percentage point spread between Haliburton's rate and the benchmark rate

## Appendix 3

### The Strategic Orientation Profiles

These profiles summarize the most important characteristics of the County in relation to each Strategic Orientation. A profile provides the general information base from which the diagnosis is made in the Strategic Plan for each Strategic Orientation. A standard format is used to organize the profiles:

1. The current 'state-of-affairs' of the Strategic Orientation in the County, in which some suggestions are also made for key indicators of the 'health' of the Strategic Orientation
2. The identification of the key interests or examples of key interests that should be involved
3. The most important resources accessible in each Strategic Orientation
4. The identification of significant shaping factors

In each case, these lists are provided as starting points, and represent the main characteristics upon which the diagnoses were made. With further reflection and work by the various Committees and groups, they will be inevitably updated and modified. The profile is therefore a template to use in organizing information that will be useful in further planning meetings.

#### 3.1 Communications

##### *The current situation in the County with respect to Communications*

The following key points can be made:

- Progress towards the development of a state-of-the-art telecommunications infrastructure
- Lack of an adequate, easily accessible and accurate information base on key dimensions of life (economy and society) and the environment in the County
- Continued difficulties in effective communications with the population, even though information availability has increased
- Some parts of the County are very poorly served by the media, e.g. the northern parts of the County and local newspapers
- A relatively poor understanding of the needs of different segments of the population
- The small, dispersed population over a large area poses a major challenge to effective communications (which a more ubiquitous and accessible telecommunications infrastructure would go some way towards resolving)

##### *The principal interests and stakeholders to be involved*

The following is a list of the principal interests and stakeholders that should be involved in this Strategic Orientation:

- Businesses
- Educational institutions

- County and local municipal governments
- Connect Ontario (the Connect Haliburton initiative)
- CANOE radio
- The local media
- The institutional and organizational networks through which targeted communication can be organized, e.g. the lake associations and seasonal property owners
- The increasingly large pool of informed citizens

#### *The resources for Communications*

The principal resources that can be drawn upon immediately in this Strategic Orientation are:

- The institutional and organizational networks through which targeted communication can be organized, e.g. the lake associations and seasonal property owners
- Educational system
- Provincial and federal ministries and their staff and programs
- Libraries
- The Haliburton Highlands Chamber of Commerce
- Service clubs, recreational associations, etc.
- Churches
- Social services agencies and organizations

#### *Shaping factors*

The following represent some of the most important shaping factors that will affect change in this Strategic Orientation:

- Growing demands by different segments of the population to be properly informed, and to be involved in the management of change
- Increasing awareness of the need to have adequate information in order to be able to plan, manage and monitor change
- The increasing importance of telecommunications to people and business in the conduct of their everyday activities
- The growing number of active local groups (associations, clubs) creating demands for more effective communications, but also providing one of the vehicles through which communications can be established with different segments of the seasonal and permanent population

### **3.2 Economic Diversification**

#### *The current situation in the County with respect to Economic Diversification*

The following key points can be made:

- Improved diversification of the economic base, but still quite narrow
- Continued high levels of income dependency, although this is improving
- Business creation particularly small businesses demonstrates the positive side to the County's business environment
- More resources in the natural environment being used in some industries
- Tourism industry a major component of the County's economy, and signs of diversification in tourism activity appearing (trails and tours development, ecotourism, dog sledding, tourists seeking educational experiences, . . .)

- The dynamic cultural and social life (activities, organizations) in the County also underlies one of the cornerstones in the tourist economy, i.e. the seasonal population
- However, population growth has slowed from the mid-1990s, suggesting that the local market, other than for population related services, is not likely to be a major attraction for business

*The principal interests and stakeholders to be involved*

The following is a list of the principal interests and stakeholders that should be involved in this Strategic Orientation:

- All business interests (i.e. natural resource-based industries (especially forestry-based industries), retailing, tourist/hospitality establishments, manufacturing, hi-tech businesses, consulting, home-based businesses)
- Banking
- Educational institutions/agencies involved in labour training/skills development
- Arts and crafts associations
- Producer associations, e.g. local agricultural associations
- Labour groups
- Youth groups and school organizations
- Health and social services (one of the basic people-related infrastructure components), and associations related to recreation and sports (one of the dimensions of quality of life, and, as such, part of the 'package' that people and businesses buy into when they decide to come to the County)

*The resources for Economic Diversification*

The principal resources that can be drawn upon immediately in this Strategic Orientation are:

- Human resources, notably existing business operators, the labour pool (skills and costs)
- Institutional and organization resources: the Marketing and Economic Diversification Committee; the Haliburton County Development Corporation; the Haliburton Highlands Chamber of Commerce; the Trails & Tours Association; business association; Board of Education; Sir Sanford Fleming College; School of Fine Arts; County/local/provincial governments; the federal government (e.g. Human Resources Development Canada and training support)
- Infrastructure: available industrial park space and land availability generally; the road system; a dynamic management at Stanhope airport; actual and potential telecommunications infrastructure (Internet service providers, cellular telephone services); financial services (the banks)
- Other resources: forestry resources (for manufacturing, tourism, educational activities); natural landscapes (forests, lakes, rivers, wildlife) as a base for tourism activities; natural and historic heritage; existing tourism events (e.g. festivals); museums and galleries
- Increased sensitivity on the part of many players directly involved in economic development regarding the need to inform and involve citizens, e.g. the public meetings held by Stanhope airport over plans for future development

*Shaping factors*

The following represent some of the most important shaping factors that will affect change in this Strategic Orientation:

- Evolution of tourism demand (e.g. demand for more 'authentic' experiences, based on direct contact with 'nature', local history and culture)
- Some seasonal residents becoming permanent residents and bringing with them a desire to start or relocate a business (e.g. in consulting)
- Spill-over of demand for cottages from areas such as the Muskokas which are rapidly becoming saturated (inflationary land and house market conditions, relative scarcity of building lots)
- The continued growth in telecommunications as a support for business, in delivering certain types of services, and in accessing the market
- Growth in winter tourism, linked to search by part of the tourist market for personal experiences, personal activities (e.g. get-away weekends, dog sledding, cross-country skiing, snowmobiling . . .)
- Increasing demands from citizens, governments and various organizations for development to be 'sustainable', i.e. for a balance to be sought and managed in terms of economic development, and its impacts (positive and negative) on the environment and community

### **3.3 Environment**

#### *The current situation in the County with respect to Environment*

The following key points can be made:

- The presence of large tracts of relatively undeveloped forest and lake environment
- Overall densities of development are relatively low compared to nearby cottage / tourist destination areas
- The natural environment contains resources of great utility for certain types of economic development, e.g. forest resources for wood-based manufacturing, and tourism the combination of lakes and forests for cottagers, ecotourism
- Some indicators suggest degradation of water quality in some areas
- Septic systems present a major challenge
- Waste management is also a major challenge (currently being assessed)
- Inadequate information about lake capacities
- Conflicting opinions about level of degradation, partly related to a lack of adequate information on many dimensions of the environment
- Official Plans have made some headway, but a general set of guidelines for appropriate development and the way in which development takes place is still needed
- An awareness that a proper 'balance' must be sought between development and the environment, i.e. the management of change in a sustainable fashion

#### *The principal interests and stakeholders to be involved*

The following is a list of the principal interests and stakeholders that should be involved in this Strategic Orientation:

- The Haliburton County Environmental Advisory Committee
- Environment Haliburton!
- Ministry of Natural Resources and related activities, Ministry of the Environment; Fisheries
- The players associated with the management of the Trent-Severn system
- Lake associations (cottagers), ratepayers associations

- Trails and Tours Association, Ecotourism Coordinator
- Educational institutions
- The Haliburton Forest and Wildlife Reserve and its Wolf Compound

#### *The resources for Environment*

The principal resources that can be drawn upon immediately in this Strategic Orientation are:

- The natural environment resources: forests, lakes, wildlife
- Human resources: business operators and managers (forest-based activities, outdoor recreational activities and groups, tourist establishments especially those involving a direct use of the natural environment)
- Institutional and organizational: lake/property owner associations; County and local municipal governments; Ministry of Natural Resources; Ministry of Agriculture and Food
- Infrastructure: Sir Sanford Fleming College; Dorset Centre; Haliburton Forest and Wildlife Reserve, the Fish Hatchery, etc.

#### *Shaping factors*

The following represent some of the most important shaping factors that will affect change in this Strategic Orientation:

- Increasing local tier responsibility for many environmental issues
- Issues of resources (financial and professional expertise) available at the local level to regulate and manage many environmental issues
- Developing new sources of revenue at the local levels (e.g. through Economic Diversification) to cover the increasing costs of environmental 'services'
- The fall-out from the Walkerton catastrophe
- Continued growth in seasonal population, with the inevitable increasing complexity of values and demands for involvement in monitoring and managing development in relation to the environment (part of a more general and growing environmental awareness)
- Cottage conversion

### **3.4 Services for People**

#### *The current situation in the County with respect to Services for People*

The following key points can be made:

- Accessibility difficulties for certain areas and segments of the population
- Continued high levels of poverty, exclusion, income dependency, and unemployment
- The degree of accessibility for, and inclusion of, all sectors and population segments in management and planning processes (the state of public participation)
- Lack of effective County-wide planning for social and 'health' services ('health' in the broadest sense of the term)
- Lack of accessible information base upon which to base a 'report card' on the social health of the community
- Restructuring of health services to provide a much improved health infrastructure
- Continued concern for the recruitment of medical personnel and their replacement

### *The principal interests and stakeholders to be involved*

The following is a list of the principal interests and stakeholders that should be involved in this Strategic Orientation:

- All segments of the population and activities
- County and local government politicians and staff
- Emergency services, police
- Provincial ministries and agencies
- The seasonal population and their associations
- The permanent resident population
- Business
- Seniors
- Retirees and near retirees
- Youth
- Populations 'at-risk'
- Social services agencies and organizations, e.g. Haliburton County Family Services, Access Centre, Home Support Services, Haliburton Highlands Health Services, U-Links, Emergency Services
- Education system and institutions, both in terms of their interest and expertise in 'training' and in terms of their ability to inform about the social health of the community and to mobilize certain segments of the population

### *The resources for Services for People*

The principal resources that can be drawn upon immediately in this Strategic Orientation are:

- The population segments listed under key interests above (bases from which to draw volunteers and expertise)
- Committed staff of the many institutions and organizations in the County
- Institutional resources: County and local, the educational system, non-for-profit organizations, health and social service agencies, service clubs, Sir Sanford Fleming College, BIA's
- The physical infrastructure associated with the health, social services and educational systems
- Rereational facilities in the various parts of the County

### *Shaping factors*

The following represent some of the most important shaping factors that will affect change in this Strategic Orientation:

- Changing patterns of demand related to changing demographic composition, e.g. seasonal population components becoming permanent residents, population ageing
- Potential for developing effective partnerships between public, private and not-for-profit community sectors
- Continued pressures for efficiency and effectiveness in government at all levels
- The substantial and dynamic volunteer base in the community
- The use of modern communications technology in delivering some types of services