

KING + WHITCHURCH- STOUFFVILLE CULTIVATING BUSINESS

Rev. Oct 2012

Business Retention + Expansion Final Report



B R + E

BUSINESS RETENTION AND EXPANSION



Acknowledgements

This Business Retention + Expansion Project was completed with assistance from the following project partners and was jointly funded by the Ontario Ministry of Agriculture, Food and Rural Affairs and all project partners.



Report Prepared By:



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EXECUTIVE SUMMARY

The Town of Whitchurch-Stouffville and King Township initiated a Business Retention and Expansion (BR+E) project, **King + W-S Cultivating Business** which focusses on agricultural and rural-based businesses. This initiative follows the successful completion of a 2007 BR+E project in Whitchurch-Stouffville which targeted businesses in existing designated employment areas and recommended a need to further explore local opportunities and constraints for rural and agricultural businesses.


Partnering with the Regional Municipality of York and the York Federation of Agriculture, funding was received from the Ontario Ministry of Agriculture, Food and Rural Affairs to conduct a BR+E to better understand the constraints and opportunities for local agriculture and rural businesses. The partnership between the Town of Whitchurch-Stouffville and the Township King was very natural given their similar challenges and opportunities in rural and agricultural areas and their mutual goals to grow and prosper as a region.

Short term goals included providing community support for local businesses and identifying and addressing immediate individual business concerns, while longer term goals included:

- Increasing competitiveness of local businesses,
- Developing relationships between sectors, government and local community,
- Establishing and implementing a strategic action plan for economic development,
- Increasing business development and job creation,
- Increasing community capacity for economic development, and
- Promoting long term viability of the agricultural sector.

A total of 333 invitations to participate were sent to rural businesses in addition to 316 farming businesses. Interviewers were successful in conducting interviews with 71 businesses in total between November of 2011 and March of 2012. All businesses completed a 'general' retention survey and additional research was conducted on those in the farm, retail, tourism and mining sectors. While the number of completed surveys may appear to be low when compared to the number of invitations sent, it is important to note that a BR+E project is primarily focussed on relationship building and not statistical significance.

The project was directed and managed by a BR+E Leadership Team comprised of community and industry leaders from both Whitchurch-Stouffville and King. The Leadership Team met to review the findings on April 20, 2012 and May 11, 2012, when they provided input and meaningful discussion to inform the process to identify items for the Action Plan (Section 6.0). During this process a 'Vision' was identified.



Vision - 'We are a viable community that builds strong relationships between businesses, business networks, all levels of government, & residents fostering a supportive, farm-friendly & rural business environment.'

Throughout the process no immediate issues of concern were identified but many requests for information were received on a range of topics including assistance with site identification, alternate energy programs and workshop information. This information was provided to businesses almost immediately upon request.

Emerging from the survey results, six key themes were identified:

1. **Business climate** – area businesses have an overall positive view of the business climate. However, there are challenges and barriers for expansion and development of new business which must be addressed in order for the area to grow.

2. **Future plans** – the majority of businesses plan to maintain the current level of activity or expand over the next three year period of operation.
3. **Business development** – businesses were looking for ways to improve their costs as well as increase services essential to their business growth.
4. **Business markets** – most businesses project a positive increase in their projected sales growth in the future showing confidence in their industry and their chosen location.
5. **Workforce development** – there is a significant demand for labour, both seasonal and permanent accompanied by hiring challenges which will require mitigation.
6. **Community development** – overall, businesses have a positive image of their community as a place to live and do business despite challenges.

In general, King and Whitchurch-Stouffville businesses have expansion plans and are positive for further growth in the future. Businesses appreciate their quality of life, agriculture and location as the area's greatest strengths while expressing concern over labour shortages, essential services and the development process.

Several goals were identified as a result of this BR+E process as follows, including:

- Enhance networking to provide opportunities for businesses to develop relationships, share information and work together to increase productivity, expand and grow the entire agriculture value chain.
- Communicate the value of agriculture, as well as, market and promote the innovative agricultural and rural businesses in King and Whitchurch-Stouffville and promote agri/culinary tourism opportunities.
- Provide opportunities for businesses to access resources and training pertaining to marketing and promoting their business.
- Ensure that agricultural and rural businesses have access to a talented workforce now and in the future through partnering with work appropriate agencies to identify solutions.
- Improve the availability and condition of agricultural commercial and industrial properties by ensuring the highest level of infrastructure and services are available to businesses.
- Create an enabling environment through more integrated local planning and economic development systems, ensuring that no barriers to new or existing businesses exist. Ensure the Economic Development Officers are a “one-stop shop” for agriculture and rural businesses.
- Develop one of the most dynamic, prosperous and innovative regional economies through supporting the development of the sectors within the agricultural and rural-based business community.

Rural and agricultural businesses in Whitchurch-Stouffville and King are growing and have a positive attitude towards the future despite some areas for concern and improvement. Residents and businesses are proud of their agricultural ‘roots’ and have a strong determination to continue in their sector. Most consider their businesses to also be a way of life and are committed to protecting their rural culture and to protecting the agricultural sector for future generations.

A MESSAGE FROM OUR MAYORS

The Town of Whitchurch-Stouffville and Township of King, both located in Northern York Region are excellent communities to live, work and do business. We are home to a rich rural and agricultural heritage and present day activities that contribute not only to our economic base but also to our overall quality of life.

To ensure the continued success of our agricultural and rural-based businesses, our Economic Development programs for 2011-2012 have undertaken a joint Business Retention and Expansion (BR+E) project, titled **King + W-S Cultivating Business**. Both the agricultural and rural-based businesses in Whitchurch-Stouffville and King face similar challenges and opportunities. Undertaking this project in partnership leverages local resources and assists in building relationships.

The intention of this report is to provide a better understanding of the local business environment, the challenges facing local businesses, as well as identifying opportunities for future growth in Whitchurch-Stouffville and King. Our Councils are committed to supporting existing local businesses and ensuring that we are well-positioned to attract businesses to our communities.

On behalf of all Members of Council in the Town of Whitchurch-Stouffville and Township of King, we would like to thank the dedicated volunteers on the Leadership Committee who conducted the surveys and brought forward the actions items contained within this report. As well, we acknowledge that without the funding support from the Ontario Ministry of Agriculture, Food and Rural Affairs as well as contributions from project partners including the Regional Municipality of York, York Federation of Agriculture, the Whitchurch-Stouffville Chamber of Commerce and the King Chamber of Commerce this project would not have been possible.

Lastly, our business owners have been an invaluable resource and have made an enormous contribution to the success of this initiative. We are appreciative of the time taken to complete surveys and provide input to the project. We encourage our businesses to stay involved as we implement the actions contained within this report.

Sincerely,

Mayor Wayne Emmerson, Town of Whitchurch-Stouffville



Mayor Steve Pellegrini, King Township



1.0 INTRODUCTION

1.1: BR+E Background

Business Retention and Expansion (BR+E) is an initiative designed to strengthen the local economy, and build the capacity of communities. It was developed as an economic development tool for rural Ontario by the Ontario Ministry of Agriculture Food and Rural Affairs, with the unique approach of engaging communities to actively invest in the health of the local business.

BR+E allows for communities to work in partnership with multiple business interest groups by providing a systematic interview and data gathering approach to gauge the health of the local economy. The information gathered through the process clearly outlines the current strengths and arising opportunities for community partners to implement measures to further develop the local business economy.

The Business Retention and Expansion (BR+E) project titled *King + W-S Cultivating Business*, follows the successful completion of the 2007 BR+E project in Whitchurch-Stouffville and focuses on agricultural and rural-based businesses. In 2007, the Town of Whitchurch-Stouffville undertook a BR+E project that targeted businesses in existing designated employment areas (as captured in the York Region Employment Survey), but did not capture the constraints and opportunities for local agriculture and rural businesses. The 2011-2012 BR+E project chose to focus on agricultural and rural-based businesses in partnership with King Township as this is a significant part of the economic base in both communities. Both the Town of Whitchurch-Stouffville and Township of King face similar challenges and opportunities in rural and agricultural areas and undertaking this project in partnership leverages local resources (financial and other). The project also assists in building partnerships between York Region Economic Development Branch, York Federation of Agriculture and local Chambers of Commerce. The results of the business interviews will be used to develop an action plan to strengthen rural agricultural businesses.

In June of 2011, the Town of Whitchurch-Stouffville in partnership with the Township of King, Regional Municipality of York and the York Federation of Agriculture, applied to the Ministry of Agriculture, Food and Rural Affairs to conduct an Agricultural and Rural Business Retention and Expansion project to better understand the constraints and opportunities for local agriculture and rural businesses. Short and long term goals of the project were identified as:

Short term objectives of the BR+E:

- Provide community support for local businesses
- Identify and address, where possible, immediate individual business concerns
- Promote awareness of support currently available to local businesses
- Provide baseline information and ground-truthing issues and opportunities for potential inclusion into the Greater Toronto Area Agricultural Action Committee, Greater Toronto Country side Mayor's Alliance (GTCMA), York Region Economic Development Strategy,

York Region 2061 Vision and 2015 review of Oak Ridges Moraine and Green Belt legislation.

Long term objectives of the BR+E:

- Increase the competitiveness of local businesses
- Develop relationships between different sectors, government and the local community
- Establish and implement a strategic action plan for economic development
- Increase business development and job creation
- Increase community capacity for economic development
- Promote long term viability of the agricultural sector in a near urban setting

1.2: Our Communities: King + Whitchurch-Stouffville

Located in the heart of the Greater Toronto Area, in Northern York Region, the Town of Whitchurch-Stouffville and King Township are home to a rich rural and agricultural business community and heritage. The communities are unique in terms of the challenges they face in the agricultural sector. King Township and Whitchurch-Stouffville are both in the Greenbelt and the Oak Ridges Moraine. In fact, 85% of Whitchurch-Stouffville is located in this protected area. As a lower tier municipality, town planning documents must conform to those of the Region and the Province of Ontario including the Oak Ridges Moraine Conservation Plan and Greenbelt Act, policies designed with the very important work of protecting the area.

In this process however, businesses and municipalities find themselves restricted in terms of the ability to advance the economic development potential of local agriculture and rural development. Anecdotal evidence to date demonstrates the frustration of local agricultural producers in their attempts to expand and/or innovate their business due to the restrictive provincial planning policies of these legislations. Some of these restrictions have proven to be limited in accommodating non-traditional agricultural uses, including limited value-added possibilities and agri-tourism/eco-tourism. The results of the BR+E better articulate the barriers that provincial policy regulations create and drill down to other emerging challenges that require attention.

Another significant impact on the agricultural/equestrian sector is the OLG Slots Program. Despite the \$1.1 billion dollars in revenue for the OLG, slots will end at racetracks by March 31, 2013 which will place 60,000 people out of work and has the potential to significantly and permanently change the horse racing and equestrian industry¹. The direct impact of this action will immediately affect breeders, trainers and drivers throughout the province and the industry will have to be very creative to survive. The indirect impact will also be serious and will be felt in the area of King and Whitchurch-Stouffville. For more than ten years, the Slots at Racetracks Program has been a highly successful partnership which has allowed the horse racing industry to sustain itself and continue providing many economic benefits to the rural and municipal economies. The 'trickle down' effect will be felt across the value chain by retailers, tourism operators, suppliers and service providers and will directly affect the local economy while threatening a valued sector of the economy as well as the culture of the area.

These issues, among others, were the impetus for undertaking the 2011/2012 BR+E with a focus on agriculture and rural businesses.

¹ Ontario Horse Racing Industry Association, Fact Sheet, 2012

2.0 METHODOLOGY

Planning for the joint King + W-S Cultivating Business project began on November 18, 2011. The mailing list was established by using traffic zones from the YLM Business Directory to determine the list of targeted businesses. Businesses were selected based on being an agriculture and/or rural based business. The York Federation of Agriculture used their mailing list to send invitations to their members to participate as well. A media release was distributed inviting any interested business to participate.

King Township mailed 136 invitations to rural businesses as well as 210 farming businesses. The Town of Whitchurch-Stouffville invited 197 rural businesses and 106 farm businesses. The total number of businesses completing the survey was 71 – 38 in Whitchurch-Stouffville and 33 in King. While this may not appear to be “statistically significant” results, in fact, they represent a significant achievement. Given the timing of the project, it was a challenge to access business owner/operators as many were out of the country for winter. Given the seasonal nature of agriculture and rural businesses, the winter months were not favourable. However, since BR+E is an iterative process, the Economic Development programs in each community can continue to reach out to business owners. In addition, BR+E is an ongoing process because seeks to engage local businesses and build strong relationships with them as a primary objective.

There were 5 interviewers in addition to the project coordinator. A training session was held for all interviewers and interviewing was conducted between the period of November 18, 2011 and March 30, 2012. All interviews were conducted in person with the exception of 4 surveys which were completed by the participants and returned to the project coordinator. Data analysis of the surveys was completed through OMAFRA's Business Retention and Expansion (BR+E) economic development program online tool. The sector breakdown of businesses can be seen from the NAICS (North American Industry Classification System) chart:

All Sectors % Completed Surveys	# Sent	# Completed
2 Digit NAICS		
11 Agriculture, Farming, Forestry, Fishing & Hunting	346	41
21 Mining & Minerals	1	1
22 Utilities	0	1
23 Construction	69	2
31-33 Manufacturing	19	0
41 Wholesale Trade	19	0
44-45 Retail	44	13
48-19 Transportation & Warehousing	8	2
51 Information & Cultural Industries	8	0
52 Finance & Insurance	5	0
53 Real Estate & Rental & Leasing	15	0
54 Professional Scientific & Technical Services	18	0
55 Management of Companies & Enterprises	4	0
56 Administrative & Support, Waste Management	46	0
61 Educational Services	2	1
62 Health Care and Social Assistance	15	1
71 Arts, Entertainment & Recreation	3	3

72	Food Services & Accommodation	11	1
81	Other Services (except Public Administration)	16	4
91	Public Administration	0	0
Total Surveys		649	71

The project was directed and managed by the BR+E Leadership Team comprised of the following community leaders from both Whitchurch-Stouffville and King:

Name	Position
Avia Eek	Councillor Ward 6 King Township
Clyde Smith	Councillor Ward 3 Town of Whitchurch-Stouffville
David Cash	CAO, Town of Whitchurch-Stouffville
Edward Nelles	Executive Director, Whitchurch-Stouffville Chamber of Commerce
Jamie Smyth	Economic Development Officer, King Township
Jennifer Coxworthy	King Chamber of Commerce
Julie Geering	BR+E Project Coordinator
Kathy Little	Advertising and Grant Specialist Regional Municipality of York, Economic Development and Tourism
Kathy Simpson	Project Consultant, Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA)
Kim Empringham	Secretary/Treasurer/Director, York Federation of Agriculture
Mike O'Hara	Headacher Farm, King Township
Nirvana Champion	Economic Development Officer, Town of Whitchurch-Stouffville
Paul Hulshof	Hulsdale Farm, Whitchurch-Stouffville
Susan Plamondon	CAO, King Township

Immediate Action / 'Red Flag' Issues:

Throughout the interview process, businesses were able to request information or assistance on a variety of issues. These requests were facilitated through the Project Coordinator and Economic Development Officers in each community.

Resolution of critical business concerns is an important element of the BR+E process. Known as 'red flags', these issues may pertain to business expansion, downsizing, relocation or closure. 'Red flags' may also be issues that significantly impact business operations. No critical 'red flag' issues were identified during this BR+E process.



A summary of the actions undertaken to date are as follows:

- Businesses requested workshops on the following topics:
 - Succession planning
 - Financing
 - Business planning
 - Marketing
- 4 businesses indicated they were looking for a new site
- 2 businesses requested assistance in selling their property
- 3 businesses requested information on retrofit programs
- 24 businesses were interested in receiving information on alternate energy – biogas, solar, geothermal, wind/turbines
- 2 businesses requested information on the Canadian Agricultural Adaptation Program (CAAP)
- Individual requests were made for:
 - Equine Report
 - Assistance with a culvert issue

- Assistance on approval process

3.0 SURVEY RESULTS

The Business Retention and Expansion survey that was administered to businesses covered the following topics:

- Company information and demographics
- Impressions of the local business climate
- Future plans of the business
- Business development issues
- Market development
- Workforce development
- Local community issues

In addition, sector surveys were tailored especially to issues relating to the tourism, farming, mining and retail sectors. All quantitative data has been combined for King and W-S. Qualitative comments are separated for comparison.

3.1 Retention Survey

3.1.1. Company Information

In order to classify businesses, they were asked a range of questions pertaining to the size and length of time in business. When asked which definition best described their business, 55% self-identified as a corporation and 23% indicated they were a sole proprietorship (Figure 1). In addition, thirty-eight percent of businesses have been in business for more than 35 years indicating a high level of confidence in the economy and satisfaction in the business environment. Only 12% of businesses were considered 'new' being in existence for less than 3 years. This reinforces that in both Whitchurch-Stouffville and King agricultural businesses are long established contributors to the local economy.

FIGURE 1: CLASSIFICATION OF BUSINESSES INTERVIEWED

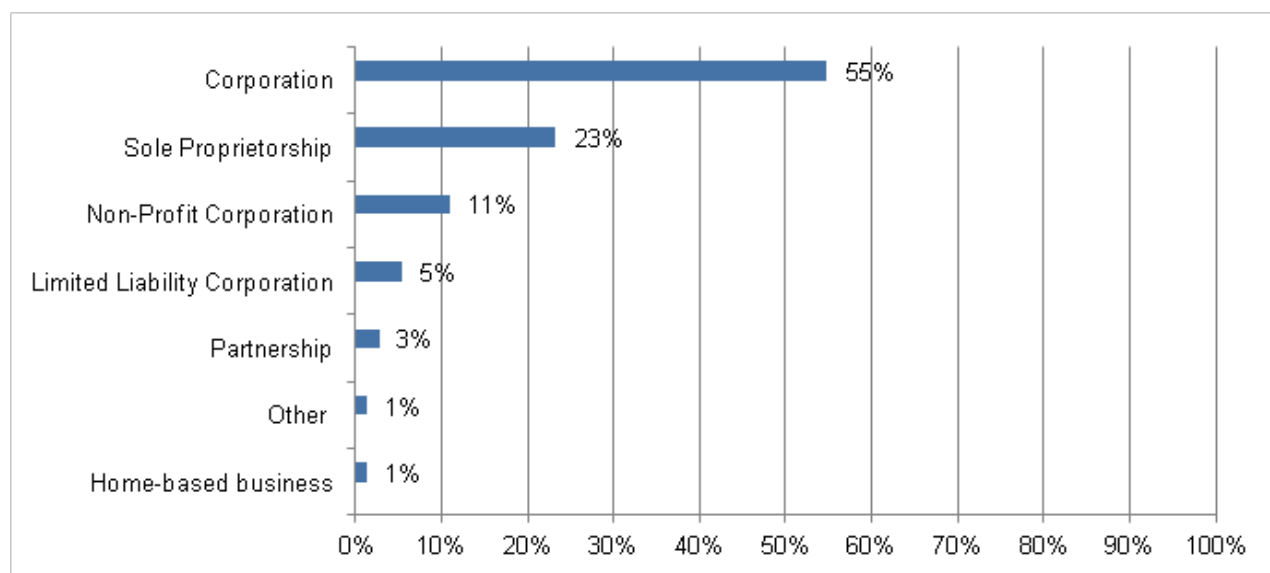
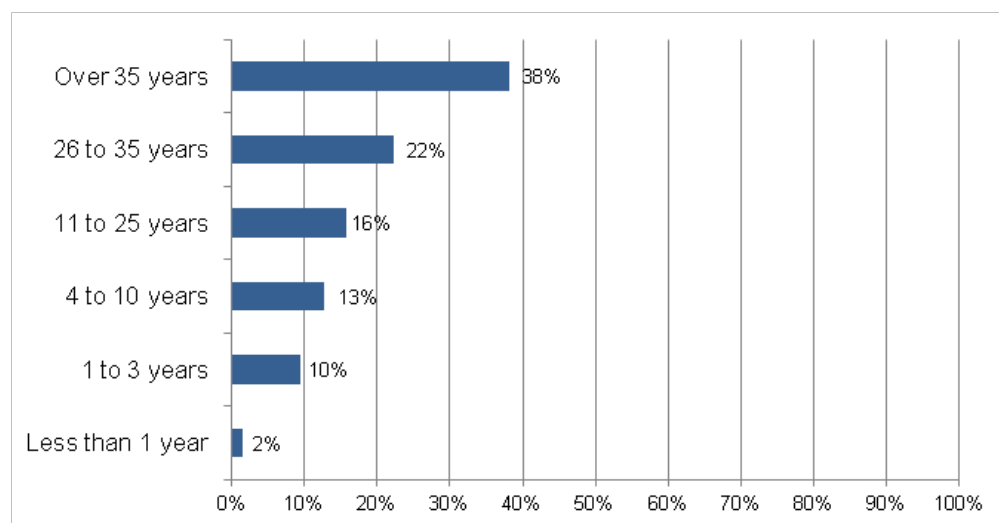
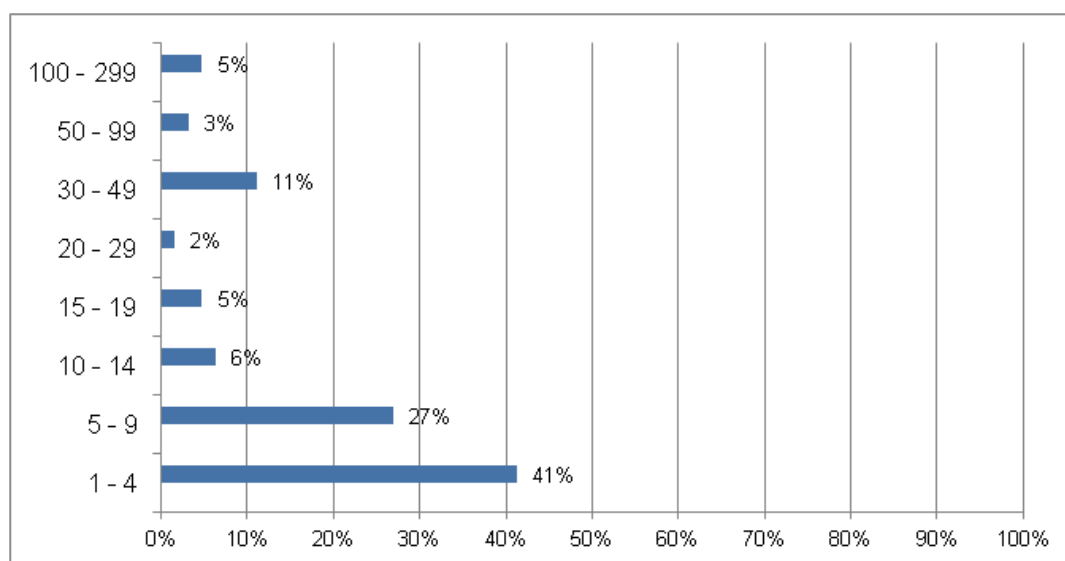


FIGURE 2: LENGTH OF TIME IN BUSINESS



When asked about their employee levels, 68% of businesses had fewer than 10 employees with one business indicating in excess of 100 employees. Eleven percent had between 30 and 49 employees (Figure 3). When asked the status of their employees, 40% were permanent full time with an additional 35% being considered 'seasonal'. An additional 12% were considered permanent part time. With the work force doubling in the summer months, an available labour pool is critical for that time.

FIGURE 3: NUMBER OF EMPLOYEES IN BUSINESS

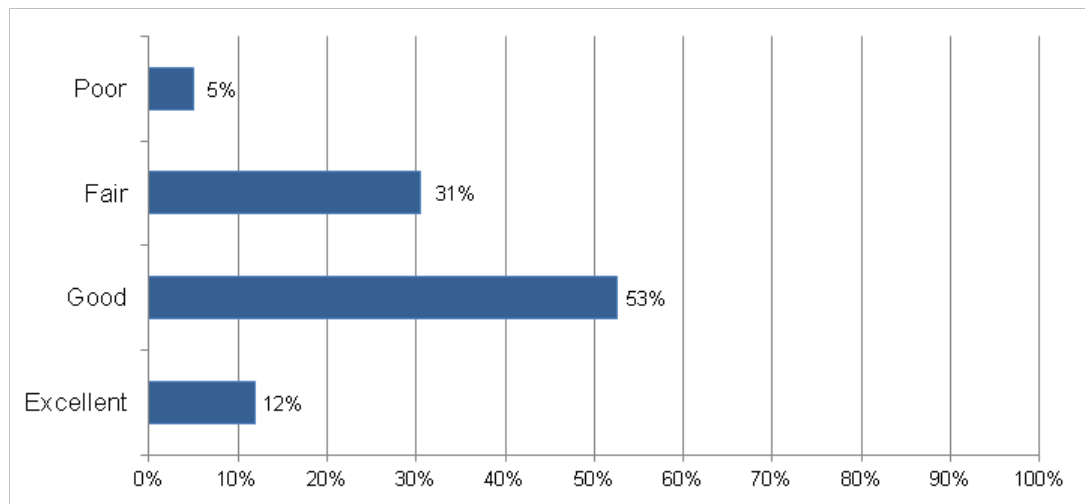


3.1.2 Business Climate

Survey respondents were asked to evaluate the King and Whitchurch-Stouffville local business climate. The local business climate refers to the conditions within a community that have an effect on the success of overall local business operations. The overall impression of the area as a place to do business was positive with 65% indicating it is an excellent/good place in which to do business. Thirty-six percent felt the business climate was fair/poor. Businesses said that their attitude about doing

business in the community had become more positive in the past 3 years (27%) and 57% said their attitude has remained as positive as it was 3 years ago.

FIGURE 4: IMPRESSIONS OF LOCAL BUSINESS CLIMATE



Businesses were asked to comment on what they felt were the **'greatest opportunities'** for the local business climate in the community. Opinions varied, but in general it was felt that the area's locational advantages and the opportunity to pursue growth in the area of growing ethnic foods were positive opportunities to expand on. Comments were as follows:

W-S	King
New development and population/housing growth in the area (7)	Location - Proximity to Toronto, 401 and airport (2)
Location - Proximity to Toronto, 401 and airport (6)	Tourist area – agri/culinary tourism (2)
Raise greater awareness of buy/eat locally (3)	Growing ethnic foods
Specialty crops (2)	Great area for horses and close to horse shows (2)
Retail; more small businesses rather than big box (2)	Potential new development (2)
Growing ethnic foods (2)	Agriculture
Value added outlets for packaging	Raise greater awareness of buying locally
Revisit zoning and municipal restrictions– Oak Ridges Moraine zoning is restrictive; business opening hours	A more flexible signage policy
Need a reliable transit system – taxi or bus service	More promotion of Kentucky North

Conversely, when businesses were asked what were the **'greatest challenges'** facing the local business climate in this community the responses centered on restrictive regulations, resistance to buying locally, broadband availability and road issues. Additional comments included:

W-S	King
Municipal and OMAFRA regulations are restrictive relative to wholesale sausage business, duck farming, alcohol business, greenbelt regulations, retail (6)	Local transportation is difficult – narrow bridges; not suitable for moving equipment; need to widen King Road (4)

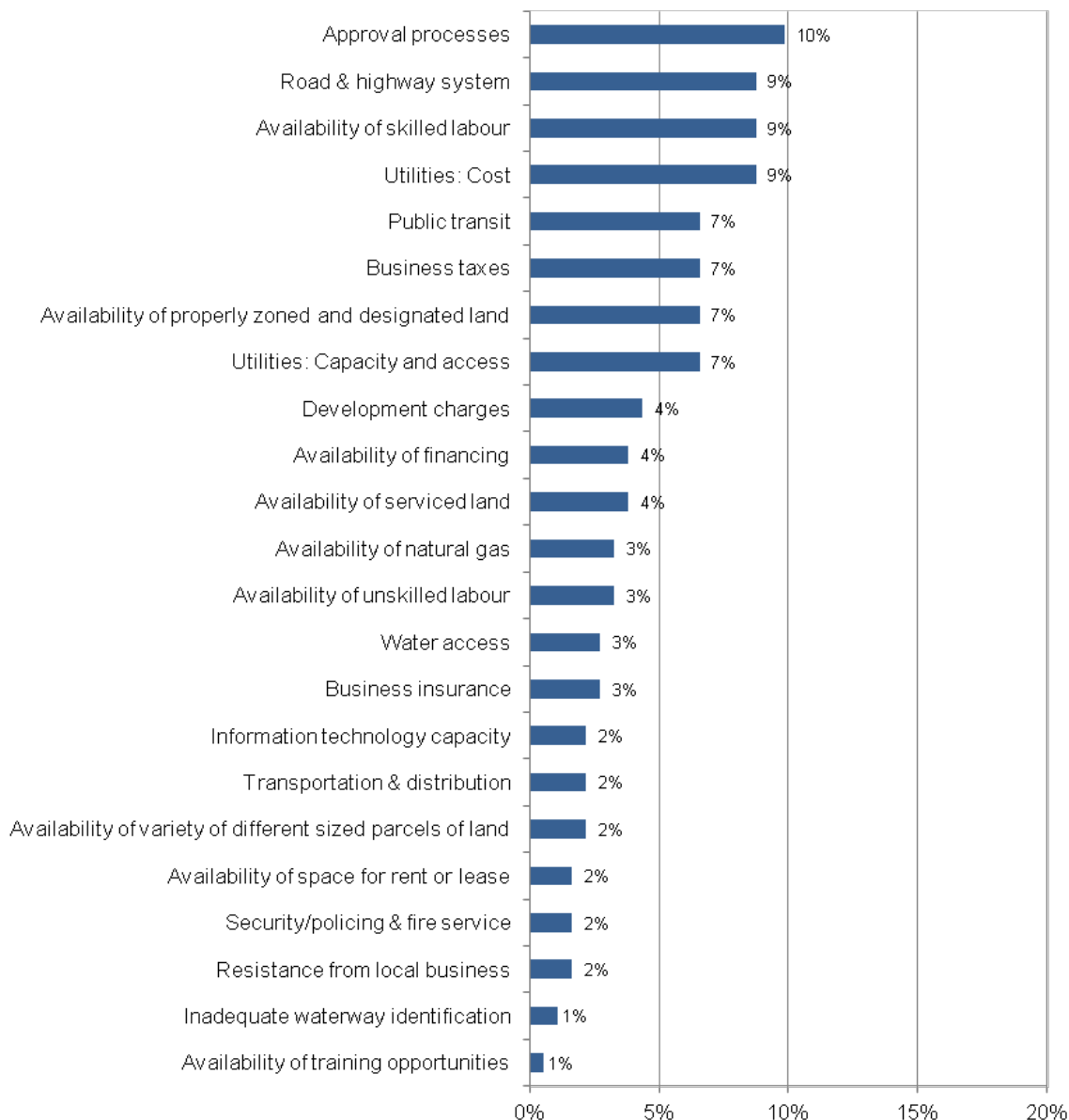
Getting people to buy locally and support local businesses(4)	Getting people to buy locally and support local businesses (2)
High cost of land, living and doing business due to proximity to the city (3)	Lack of business focus/draw; lack of awareness (2)
Roads do not support movement of wide farm equipment through the area – curbs and islands a problem – Stouffville Road (parking) (3)	Need to make tourist information available – agri-tourism (2)
Traffic issues – hard to move around efficiently – population is increasing (2)	Lack of available farm land; zoned Holland Marsh for agriculture only (2)
Shortage of labour – can Seneca College run a program to train in agriculture/equestrian industry? (2)	Crop insurance premiums are high
Shortage of land – perception that rented land is being sold to developers instead of returned to farmers (2)	More development of horse industry – host a horse show
High taxes including water and sewer	Lack of farm supply companies
Oak Ridge's Moraine Legislation	Municipal regulations and land use issues
Tolerance of farming /agricultural community by local residents	Agriculture is not respected; farmers need to be more vocal and consumers need to be more aware of local food growers
TRCA (Toronto and Region Conservation Authority) difficult to deal with	Competition from chain/big box stores
Global economy	Need to develop ethnic food market – local food movement
Services - natural gas, phone, water	Need more and better signage
Competition from big box stores	Lack of a regional approach to development; need to develop long term relationships with all communities



PHOTO COURTESY OF WHITCHURCH-STOUFFVILLE

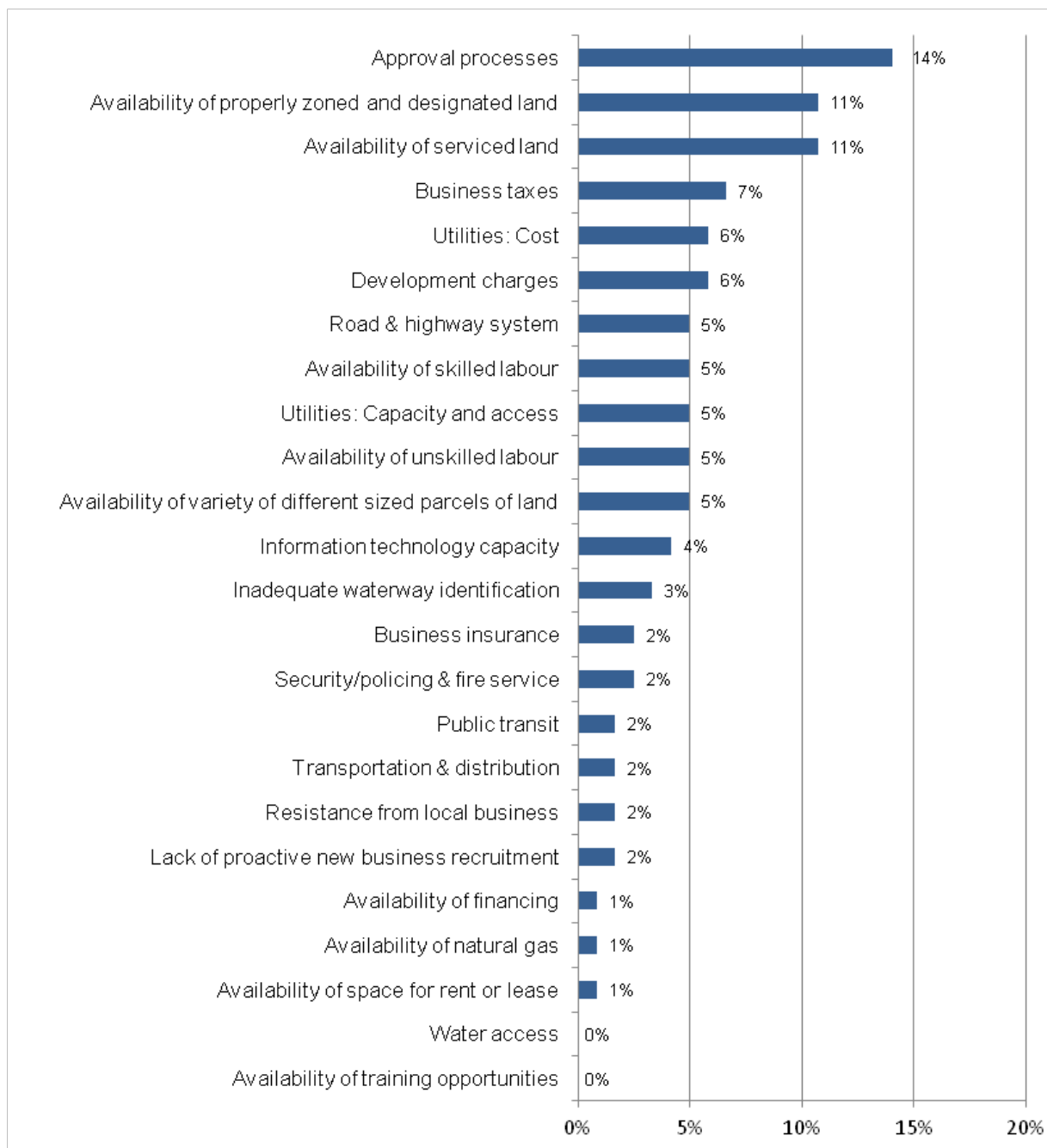
Businesses were asked to describe **barriers to the expansion of existing businesses** in the community. Rounding out the top five barriers were the approval process, road and highway system, availability of skilled labour, cost of utilities and public transit

FIGURE 5: BARRIERS TO EXPANSION OF EXISTING BUSINESS



When asked to describe the **barriers to the development of new businesses** in the community, results were focused again on the approval process in addition to the availability of properly zoned and serviced land.

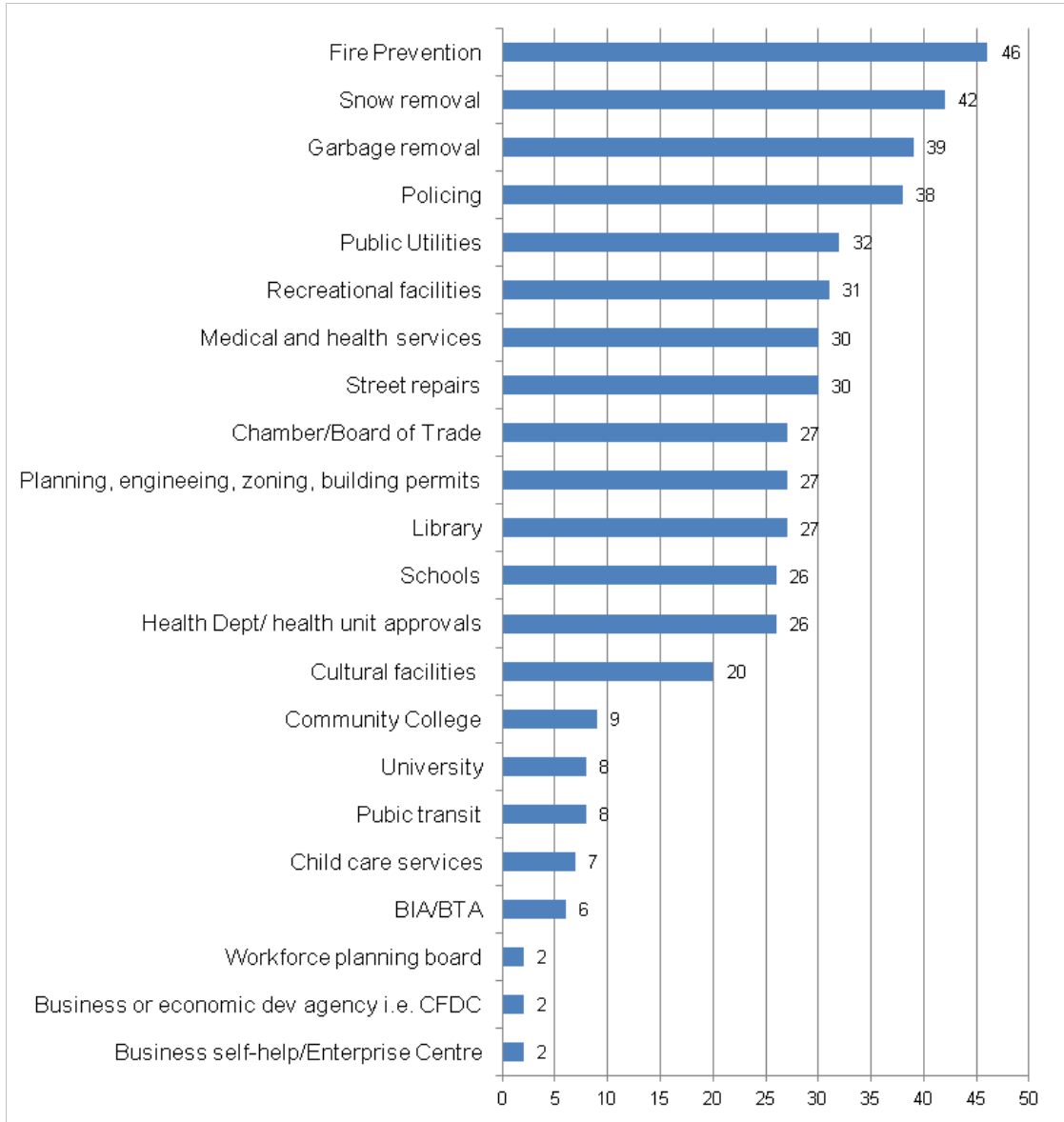
FIGURE 6: BARRIERS TO THE DEVELOPMENT OF NEW BUSINESSES



Daily operations of a business requires the use of services provided by local government, community, provincial, federal and businesses organizations. The figure below illustrates respondent satisfaction levels with the services provided by both local government and community organizations. Identified below are the services that respondents are either **most satisfied or somewhat satisfied** with. At the top of the list are fire services, snow removal, garbage removal and policing. Receiving fewer marks for

satisfaction were business development services. Numbers represented were actual responses, not percentages of the total.

FIGURE 7:VERY/SOMEWHAT SATISFIED WITH SERVICES PROVIDED BY LOCAL GOVERNMENT & COMMUNITY ORGANIZATIONS



To gauge the respondent’s level of access to Federal and Provincial programs within the last 2 years, businesses were asked if they have accessed services or planned on accessing funds in the future. Sixty-six percent requested more information on Federal and/or Provincial programs or services.

FIGURE 8: BUSINESSES ACCESSING FEDERAL AND PROVINCIAL PROGRAMS WITHIN LAST 2 YEARS

Have you accessed any Federal or Provincial programs or services within the past 2 years?	Yes 41%
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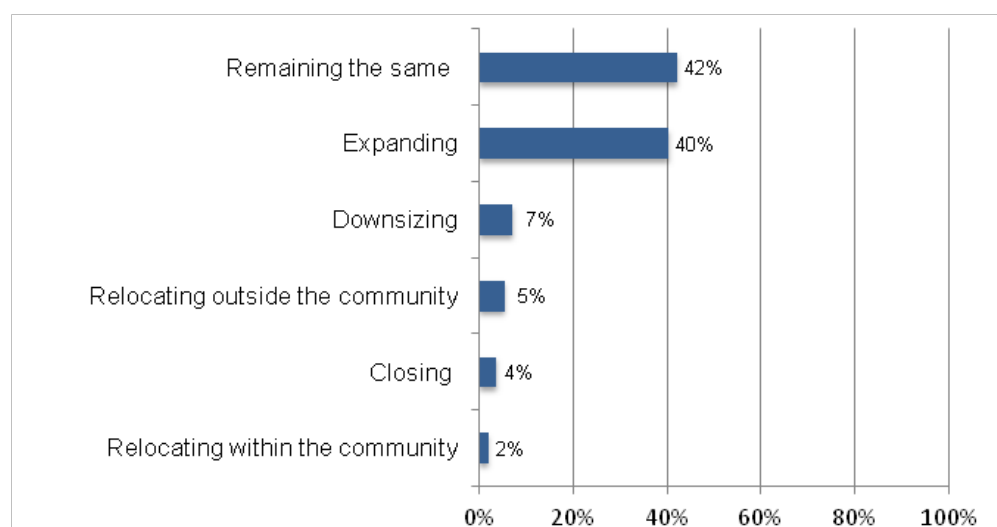
Are you planning on accessing any Federal or Provincial programs or services?	Yes 66%
Would you like to receive any information on Federal or Provincial programs or services?	Yes 66%

3.1.3 Future Plans

This section focused on questions regarding major business decisions of each organization over the next three years.

Figure 9 illustrates forty percent of all businesses in Whitchurch-Stouffville and King expect to expand during the next three years and 42% expect to remain at the same level of business. This is an extremely positive result, reinforcing that businesses are faring relatively well despite identified barriers and challenges. Conversely, seven percent of businesses planned to downsize and 9% will be at a loss to the area through closure or by relocating outside of the community. When asked what their main reasons were for downsizing (7%), reasons given were changing marketplace and lack of business profits.

FIGURE 9: FUTURE PLANS WITHIN NEXT 3 YEARS



3.1.4 Business Development

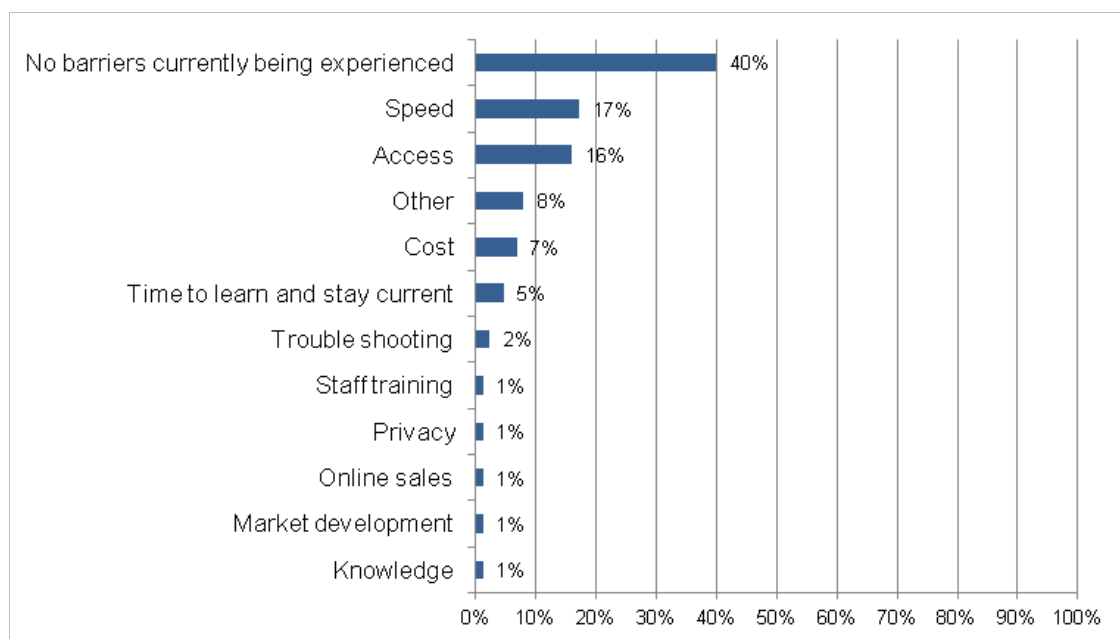
This section of the survey looked at a number of elements which included site considerations, energy sources, business decision making, business competitiveness and information technology.

When asked about an interest in alternate forms of energy, businesses showed a clear desire to learn more about reducing energy costs through solar, biogas and geothermal. Of businesses surveyed, 64% indicated they would benefit from alternative energy information while 36% were not interested. Of those interested, the following comments were noted:

W-S	King
Solar (6)	Solar (6)
Microfit/retrofit (4)	Wind (2)
Wind/turbines (2)	Geothermal (2)
Biogas technology (2)	Agriculture Innovation Program (AIP) Program
Geothermal	
Gas	
Biodiesel	

When asked which IT factors were barriers to their business, 40% did not have issues. Access to quality, high speed broadband internet service has been a key competitive factor for a number of years in Northern York Region communities. In Whitchurch-Stouffville, a number of initiatives have been pursued to find a rural broadband solution to no avail. Through this survey it was found that the majority of businesses experiencing an information technology barrier to business development primarily experienced a lack of speed and access to broadband internet.

FIGURE 10: IT BARRIERS TO BUSINESS



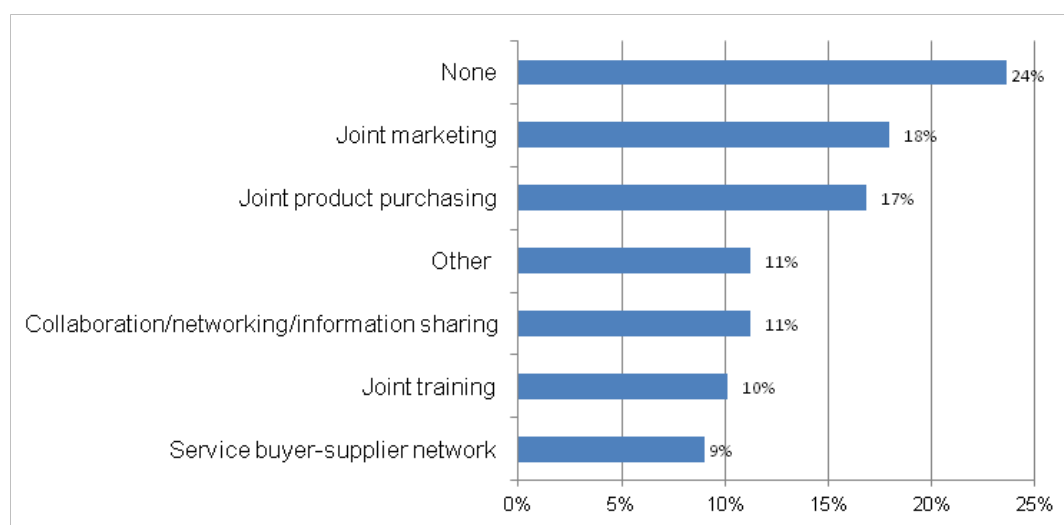
Moreover, businesses were asked what products or services they would like to purchase locally that they now purchase outside of the area. A variety of answers were received which ranged from livestock to retail as shown in the chart below. Most prominent responses were agricultural related supplies and services. When asked which complementary business development opportunities would allow their business to grow, responses included supplier, distributor, repair, equipment, manufacturer and processor type of businesses, demonstrating the importance of the agriculture value chain.

W-S	King
Livestock (3)	Cable TV
Farm Equipment; TSC Store (3)	Retail – grocery (3)
Cable TV (2)	Farm supplies

Feed and dairy supplies (2) – have to go to Newmarket	Local produce
Potato equipment	Wholesale – baking supplies
Seedlings	Trucking services
Trucking services	Feed and agri-supplies
Crop protection materials	
Local cheese makers, corks, glasses	
Packaging supplies	
Public transportation for employees	
Retail – clothing, baked goods	

When asked if they were interested in working co-operatively with other businesses in their community to pursue joint initiatives, the response was positive with 76% of businesses indicating they would. They felt the optimum areas for cooperation on joint initiatives were joint marketing and joint product purchasing.

FIGURE 11: JOINT VENTURES OF INTEREST TO RESPONDENTS



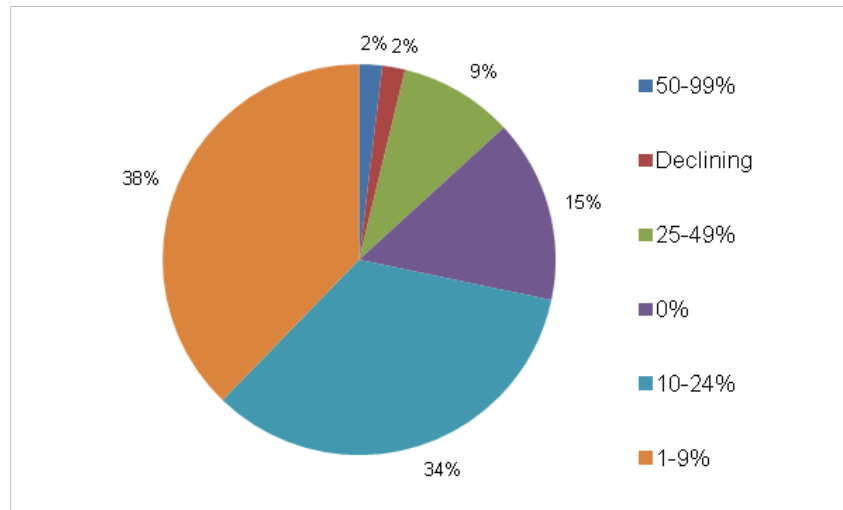
Businesses were asked if access to financial planning expertise was a barrier to their businesses growth. Ninety-one indicated that financial planning was not a barrier and 88% indicated that knowledge of financing and/or lending sources was not a barrier to their business growth.

3.1.5 Business Development Markets

In this section of the survey, business owners were asked questions regarding their competitiveness in the market place. The questions posed to the respondents were intended to provide insight around the demand for products and services.

An impressive 72% expect that their projected sales growth in the next year will be between 1% and 24%. An additional 9% expect to grow by 25% – 49%. Only 2% expect their projected sales will decline.

FIGURE 12: EXPECTED SALES GROWTH IN THE NEXT YEAR



When asked for the reasons for this increase in projected sales, the following reasons were given with more demand for products and services, improved marketing efforts, improved processes, greater tendency to support local businesses and new product/service lines being most often cited as reasons. The reasons given for a downturn in business included competition and the economy.

W-S	King
More demand for service/product (2)	Expansion of product lines
Improve website and marketing efforts (2)	Global supply and market demand
Customers are changing habits – buying locally (2)	Greater production efficiency
Increase in production; improved focus and efficiency (2)	Increase In sales
New and different product/service lines (2)	Excellent pricing for commodities
Value-added products	Improvements in product
Have a new and innovative product	Good economy
Crop prices are better	
More catering due to local festivals and events	

Businesses were asked if they received market research and/or other trend information regarding their business sector or company. Sixty percent indicated they did receive market research and/or trend information. When asked where they received this information the replies were as follows:

- Ontario Independent Meat Packers and Processors
- Ontario Soil and Crop
- OMAFRA – Fruits and Vegetables Publication Ontario Farm Fresh (4)
- John Deere
- Statistics Canada
- Ontario Camp Association
- University of Guelph
- Fresh Vegetable Growers of Ontario
- Horseport
- The Chronicle

- The Practical Horseman
- Canadian Thoroughbred
- Wine Council of Ontario
- Bakers Journal
- OFA
- Ontario grain growers
- Data Transmission Network (DTN) Farm Papers
- Turf Producers International

Seventy-five percent of businesses surveyed indicated that their sources could be shared with other businesses within the community.

3.1.6 Workforce Development

Business growth and innovation is often driven by the quality of its labour force. The workforce development section of the survey examined current employment levels, labour supply and needs, recruitment, skills training and mentoring opportunities. Recalling the seasonal nature of the workforce in each community, the need for more labour was clearly identified.

Businesses were asked if during the next 3 years, the number of employees in their business will increase, decrease or remain the same. Figure 13 shows that more than half intend to increase their workforce with another 40% expecting levels to remain the same. When asked what factors were responsible for this, responses were captured in Figure 14 showing an increase/decrease in sales, new products or services and renovation/expansion being noted most often.



PHOTO COURTESY OF WHITCHURCH-STOUFFVILLE

FIGURE 13: INCREASE OR DECREASE IN NUMBER OF EMPLOYEES DURING THE NEXT YEAR

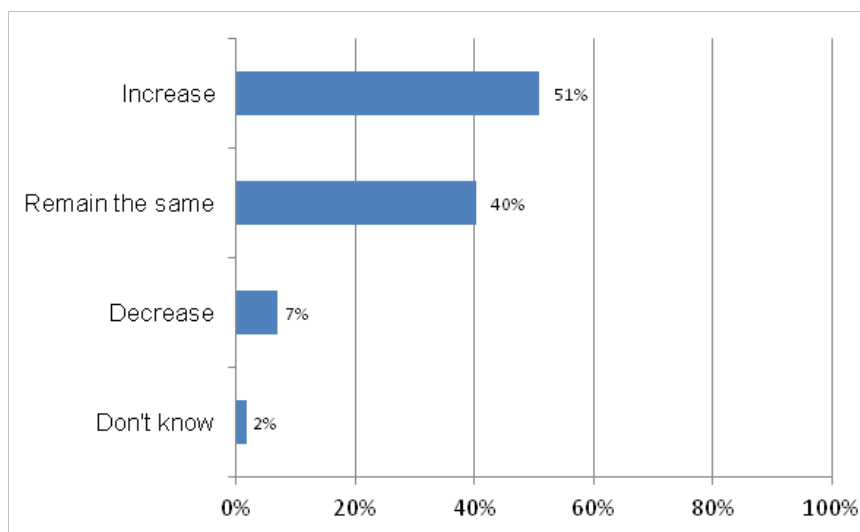
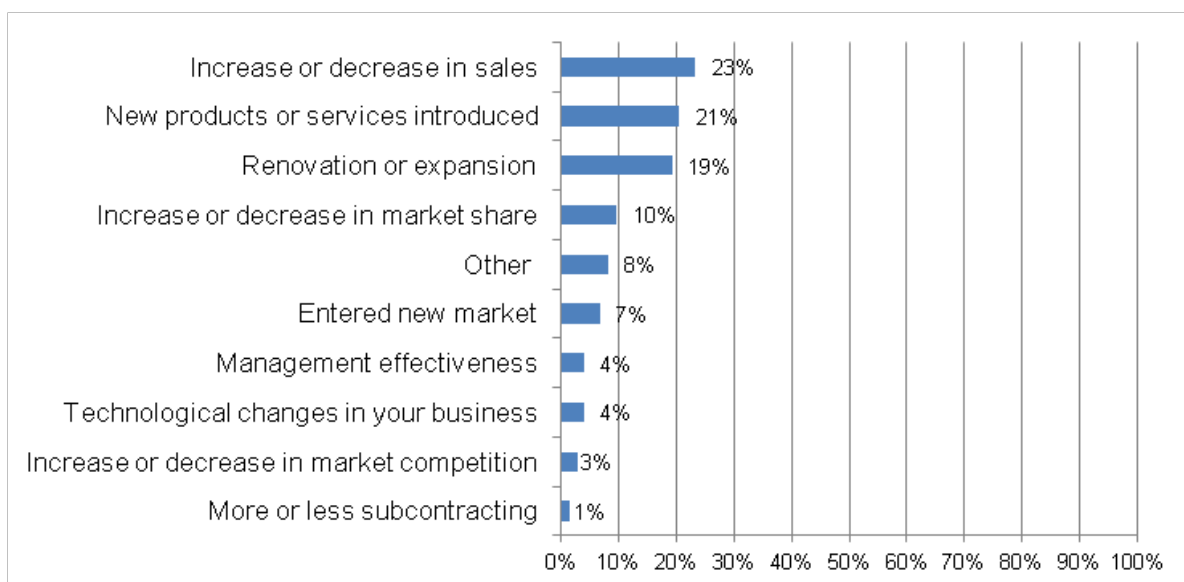


FIGURE14: REASONS FOR INCREASE/DECREASE IN EMPLOYEE LEVELS DURING NEXT YEAR



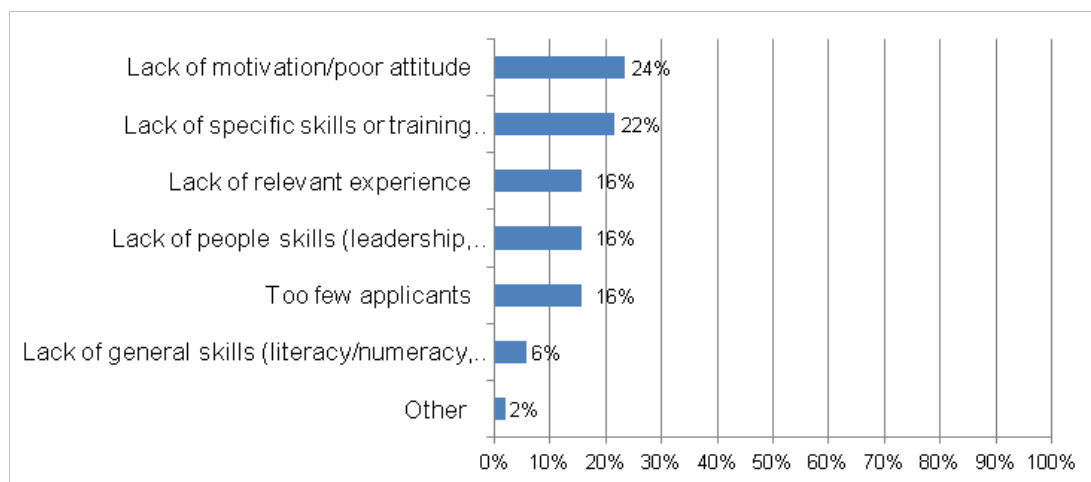
Additionally, fifty-seven percent indicated they had difficulties in hiring. When asked 'How did you overcome the hiring difficulties?' the most common responses were recruited outside of Canada, hired staff that did not meet requirements, hired temporary help and adjusted shifts and schedules for existing employees. Other responses are included below:

- Recruited outside of Canada (7)
- Hired staff that did not meet requirements (6)
- Reassigned workloads (4)
- Overtime and longer shifts for existing employees (4)
- Hired temporary help (4)
- Improved salary/benefits (2)
- Improved training (2)
- Business functioned with fewer employees (2)

- Advertised in sector magazines/papers i.e. Horse Jobs, EMG (Equestrian Management Group) Bulletin Boards, Yard & Groom International
- Acquired new/more efficient technology

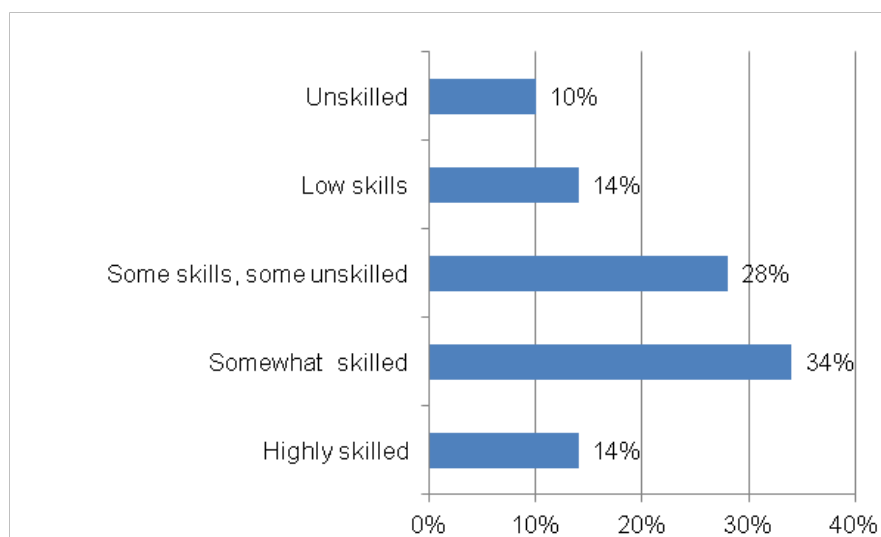
When asked how they would describe their company's hiring challenges, the results noted lack of motivation/poor attitude and lack of specific skills or training as the most common issues.

FIGURE15: HIRING CHALLENGES



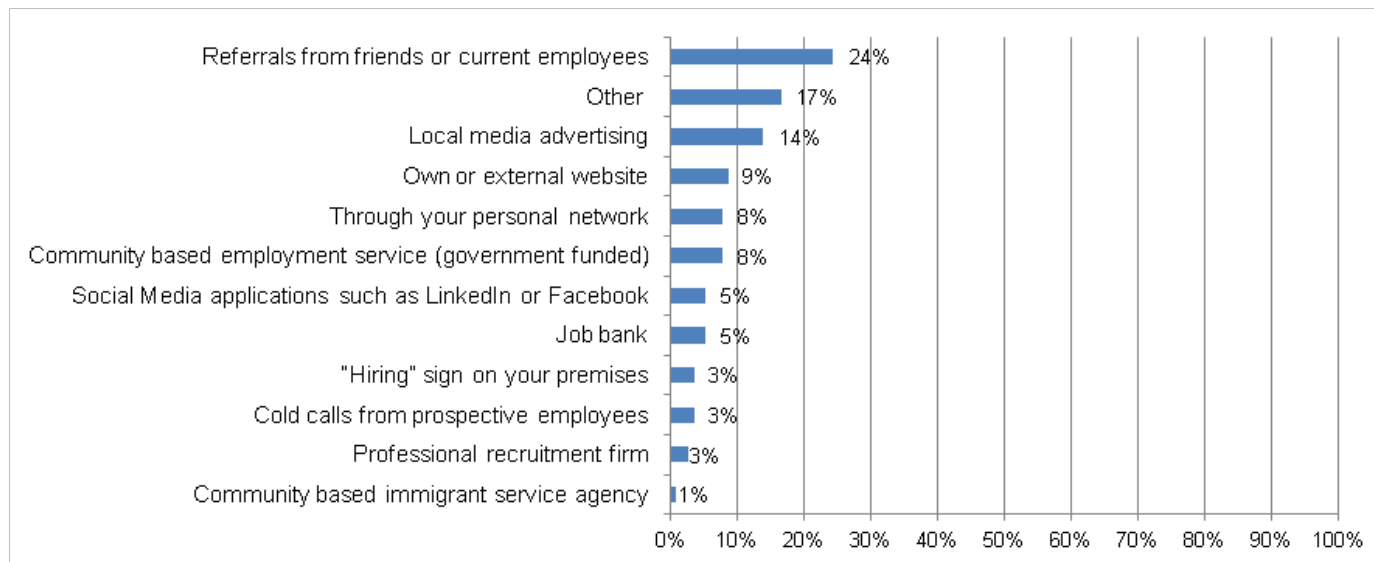
When asked to rank the skill profile of their company's workforce, respondents noted that 14% require a highly skilled workforce with 34% requiring somewhat skilled employees.

FIGURE 16: SKILL PROFILE OF COMPANY WORKFORCE



Businesses were asked how they currently recruit new employees. The most common response was referrals from friends or current employees. Responses in the 'other' category (17%) included Foreign Agricultural Resource Management Services, Seasonal Agricultural Workers Program, Service Canada foreign Worker Program, Camp International Christian, networking, internet, Yard & Groomers (UK), temporary agencies and retired people.

FIGURE 17: METHODS OF RECRUITMENT

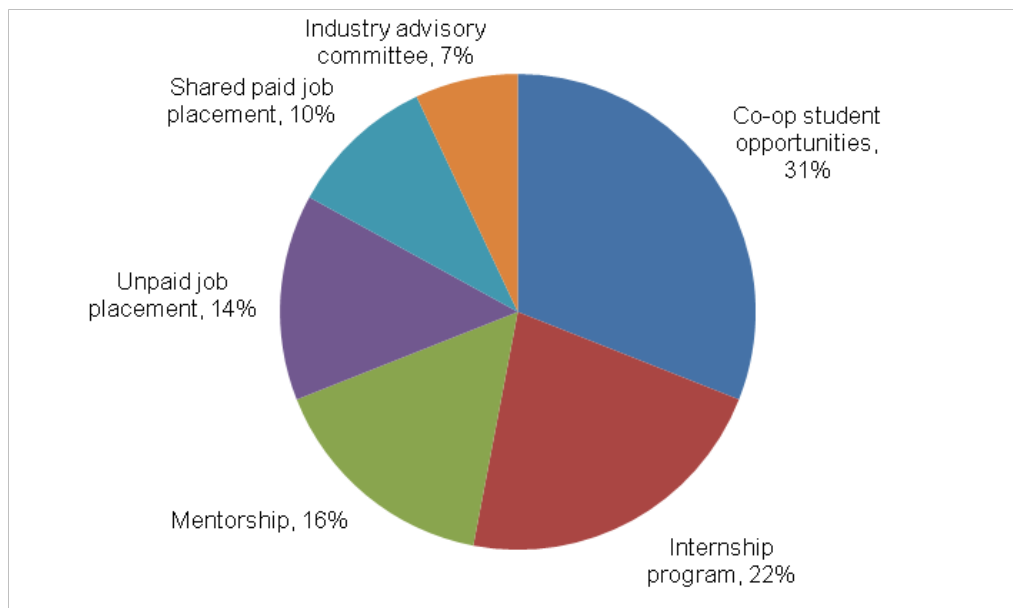


When asked if they offer new employees from outside the area any assistance with relocation or integration into the community, 5% said 'yes', 11% said sometimes and 14% said rarely. When asked what kind of assistance with relocation or integration is offered, the responses included:

- Service Canada Foreign Workers Program
- Camp International Christian
- F.A.R.M.S (Foreign Agricultural Resource Management Services)
- S.A.W.P. (Seasonal Agricultural Workers Program)
- Network opportunities
- Internet training
- Yard and Groomers, England
- Temporary agency services (private)
- Family and friends
- Retired people – mentors

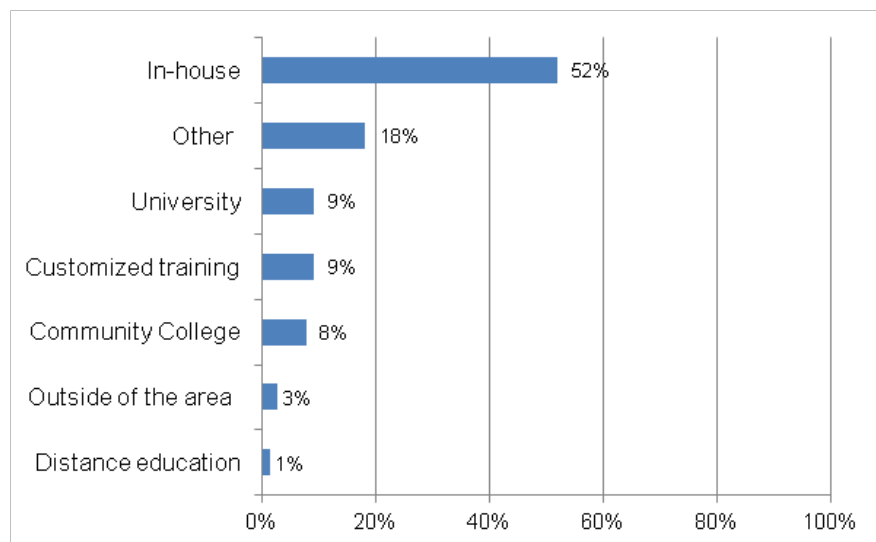
In response to a question asking if their business would be interested in participating in partnership initiatives, the most popular responses were co-op student opportunities (31%) and internship programs (22%).

FIGURE18: INTEREST IN PARTICIPATING IN PARTNERSHIP INITIATIVES



The majority of businesses surveyed (52%) train their employees in-house. The breakdown of other sources of training was as follows:

FIGURE 19: SOURCES OF EMPLOYEE TRAINING



Significant barriers to employees receiving the necessary training were noted as:

- Losing trained employees to other businesses
- Costs
- Awareness of existing training programs.

Secondary issues included:

- Relevant training is not offered at local institutions
- Distance to training facility
- Availability of training locally

3.1.7 Business Development Community

This section asked the participants to reflect on their overall perceptions of their community.

Participants were invited to consider the community's advantages and disadvantages as a place to do business, significant positive and negative changes in recent years and the community's ability to attract and retain new employees.

Businesses were asked to list the community's **greatest advantages as a place to do business**. Top advantages noted were location, rural landscape and quality of life.

W-S	King
Location – proximity to Toronto, markets, highways (21)	Location – proximity to Toronto, markets, highways (9)
Rural landscape and quality of life (13)	Natural resources – water, green areas (3)
Growing population (3)	Access to local food, dairy, wine (3)
Transportation network; highways (3)	Local demographics – disposable income, educated, community orientated (3)

Conversely the businesses were asked what they considered as the community's **greatest disadvantages as a place to do business**. Businesses felt that agricultural issues, lack of services (water, internet, etc.) and lack of local transportation were among the greatest community disadvantages.

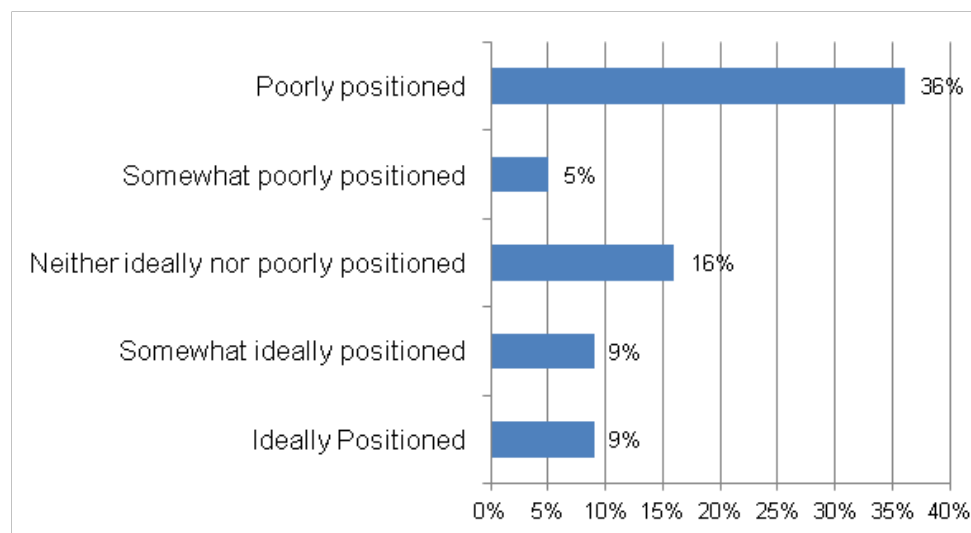
WS	King
Agricultural Issues – vet services, feed, red tape, supplies, available farm land, local intolerance (8)	Lack of some utilities – internet, cable, gas, sewage (4)
Lack of services – hydro, water, internet, gas stations, machine shops, equipment dealers (8)	Lack of local transportation (3)
Traffic issues (4)	Lack of existing business base and identity (3)
Lack of transportation, cost of living and doing business, lack of available land (3 each)	Cost of operating a business i.e. taxes (3)

Businesses were asked which new businesses, services or products would they like to see added to this community. Topping the list in both communities was retail, particularly in the farm supply sector.

W-S	King
Farm supply store – TSC (5) Public transit (4) Gas station (3) Revitalized downtown (3) Abattoir (2) Meat shop (2) Movie theatre (2) Housing in downtown area Retail – higher end, grocery, Mobile welders Large equipment machinists Agricultural market Retail and manufacturing space – affordable Parking Land Nursery supplies Entertainment park Accommodations Gymnastics club Better use of outdoor space Bakery Restaurants – Italian, ethnic	Retail – grocery, liquor, antiques, boutiques (3) Fitness centre – indoor swimming (2) Farm supply store – TSC Distribution centre for produce Whole food store Eco Village/Park Services – hair salon, doctor, dentist Technology based businesses Restaurants – Swiss Chalet Accommodations

Businesses were asked how well positioned they felt their community is to attract **new immigrant employees**. (Note that for the purposes of this survey ‘new immigrant’ is considered to have been in Canada for less than three years). Businesses in both Whitchurch-Stouffville and King did not feel that their community was well positioned with only 18% feeling they were somewhat or ideally positioned.

FIGURE 20: IMPRESSIONS OF HOW WELL THE COMMUNITY IS POSITIONED TO ATTRACT NEW IMMIGRANT EMPLOYEES



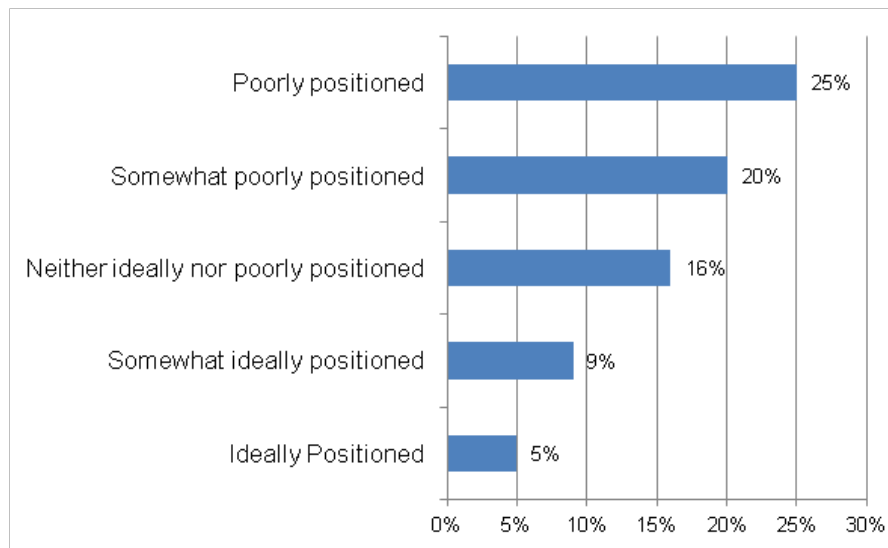
Additional comments supporting this concern were:

- Lack of affordable housing
- Lack of social activities

- No public transportation
- Too much isolation to integrate them
- Lack of jobs
- Need ESL

Businesses were also asked how well positioned they feel their community is to retain and attract employees under the age of thirty. Again businesses felt they were poorly positioned with only 14% feeling their community was well positioned or somewhat well positioned to retain and attract employees **under the age of thirty**.

FIGURE 21: IMPRESSIONS OF HOW WELL THE COMMUNITY IS POSITIONED TO ATTRACT AND RETAIN EMPLOYEES UNDER 30

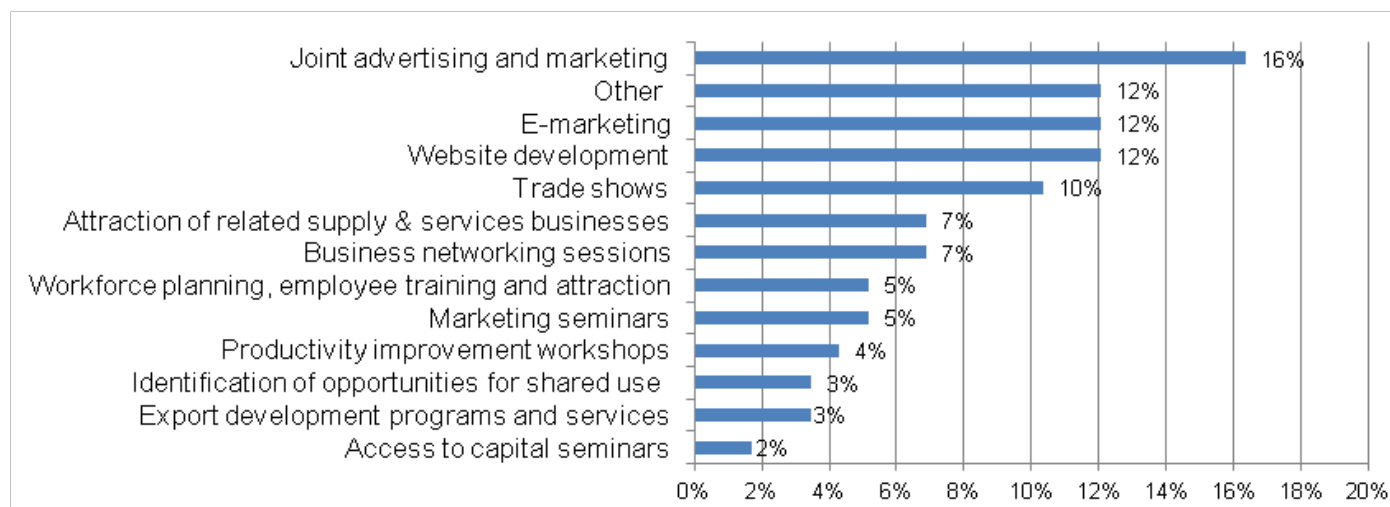


Additional comments supporting this concern included:

- High cost of housing
- No industry
- Difficult to start a business due to economy
- Good proximity to GTA and Toronto

When asked what assistance, if any, could the community, local government or economic development organizations give to support their business, the most often referred to answers were marketing, website development and trade events.

FIGURE 22: ASSISTANCE THAT COULD BE PROVIDED TO SUPPORT LOCAL BUSINESSES



In terms of overall impact on their community's economic development, businesses were asked what they felt was the **most significant change, positive or negative**, that they have witnessed in their community in the **past five years**.

W-S	King
Positive: <ul style="list-style-type: none"> • More housing (3) • New developments (3) • Population growth (3) • Growth of W-S (2) • New big business – Walmart, Canadian Tire (2) • Positive feel on Main Street • Transit • Better roads • Health Dept. on top of water issue • Greater open minded thinking • Increased awareness of ecological impact on the environment and community • Nineteen on the Park 	Positive: <ul style="list-style-type: none"> • Townships website • York Energy Centre • Government initiative to create a strategic plan • Holland Marsh Growers Association, dredging of the canal • Traffic lights – Keele/Hwy 9, Jane and Kettleby Rd. • Trisan Centre • Installation of sewers to Jane St. • Promotion of Holland Marsh • Best practice – Albion Hills Community Farm , Toronto Region Conservation Authority
Negative: <ul style="list-style-type: none"> • Loss of farmer owned land • Main street poorly designed • Increased traffic, narrow roads • Too much residential intensification • Has been very little growth • No new businesses • Big box stores have hurt local retail 	Negative: <ul style="list-style-type: none"> • Signage • No progress – no results • Massive traffic issues – impediment to farming • Infrastructure is hurting farms • Sewers in Nobleton • Natural gas Peaker Power Plant

Again in terms of overall impact on their community's economic development, businesses were asked what is the **most significant change, positive or negative**, that they would like to see in their community in the **next five years**.

W-S	King
<ul style="list-style-type: none"> • Need more business development (3) • Need to support agriculture and rural businesses (3) • Widening of the roads • Place restraints on the use of land – value has risen too fast • Bring Bethesda Rd. up to standard with a traffic light at Hwy 48 • Better dialogue with the Toronto and Region Conservation Authority • Better transportation infrastructure • Centralized marketing • Need more local businesses • Need to improve our quality of life – sense of place • Need a college to keep youth • Revitalization of Main Street • More focus on ‘buy local’ and promoting local businesses • Year round sheltered farmers market • Need more and better signage 	<ul style="list-style-type: none"> • Need improved services – hydro • Cut and peel facility processing plant • Increased enthusiasm and support of businesses to move forward • Decide on a business focus • Need stronger leadership In York Region • Need manufacturing companies with large employment bases • Need road and transportation improvements • Encourage retail in the area • Need more commercial zoning • Need a long range plan • Need an equine indoor facility for auctions, horse shows, jumping, educational programs (convert Schomberg Arena)

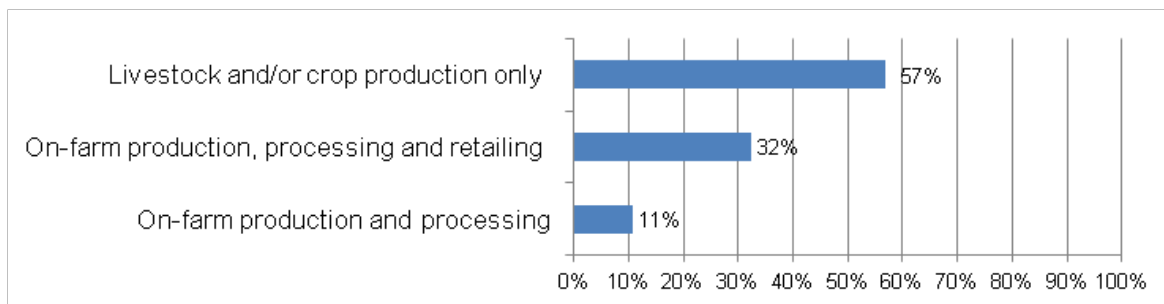
3.2 Farm Survey

In addition to completing the retention survey, thirty-seven businesses were interviewed in the farming sector. Fifty-Seven percent of businesses were in the livestock and/or crop production category (57%), 11% were in on-farm production and processing and 32% were in the business of on-farm production, processing and retailing. A breakdown of the businesses by category is as follows:

FIGURE 23: TYPES OF BUSINESSES INTERVIEWED IN FARM SURVEY

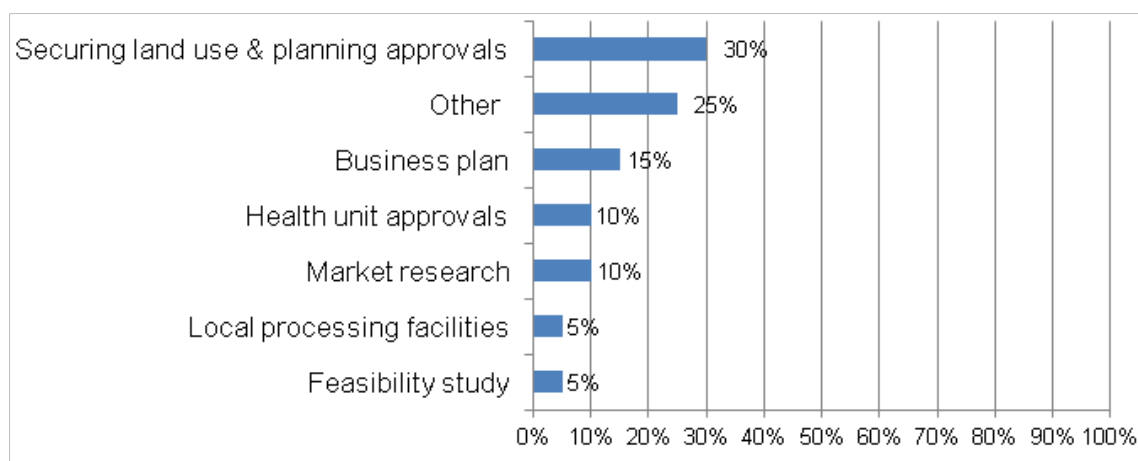
Livestock and/or crop production	On-farm production and processing	On-farm production, processing and retailing
Poultry Farm	Sweet Corn	Beef, Veal, Lamb, Goat Abattoir
Apple Orchard (2)	Cattle	Grape Orchard
Greenhouse Flowers & Garden Center	Vegetable leafy ethnic	Vegetables, ethnic
Alfalfa sprouts	Wheat crop and flour mill	Wheat grass
Horse boarding & training (4)		Grape vineyard
Potatoes		Apiculture - Bees/honey
Organic Vegetables		Duck farm
Carrots		Fresh flower
Cash crops (2)		Apple Orchard
Cattle		Cash crop
Dairy farm (2)		Sod farm
Cedar trees		Chicken farm
Abattoir		

FIGURE 24: BREAKDOWN OF BUSINESSES BY CATEGORY INTERVIEWED IN FARM SURVEY



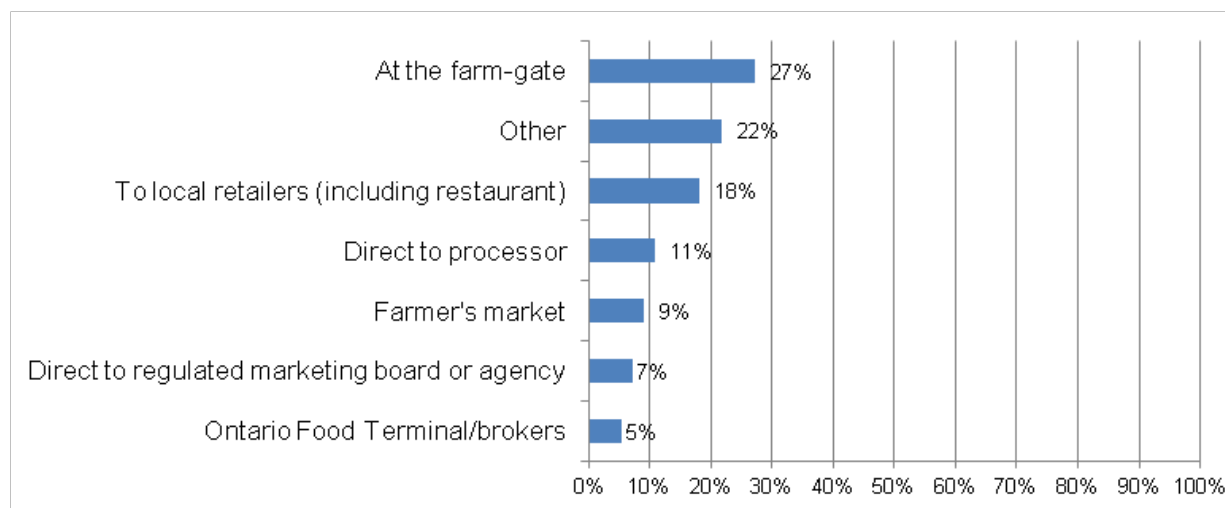
Forty-eight percent of businesses were interested in expanding and diversifying their business to include value added processing. When asked what information or assistance they required to include process as part of their farm business, most responses were related to planning approval and business planning.

FIGURE 25: INFORMATION/ASSISTANCE REQUIRED TO ADVANCE PROCESSING PLANS



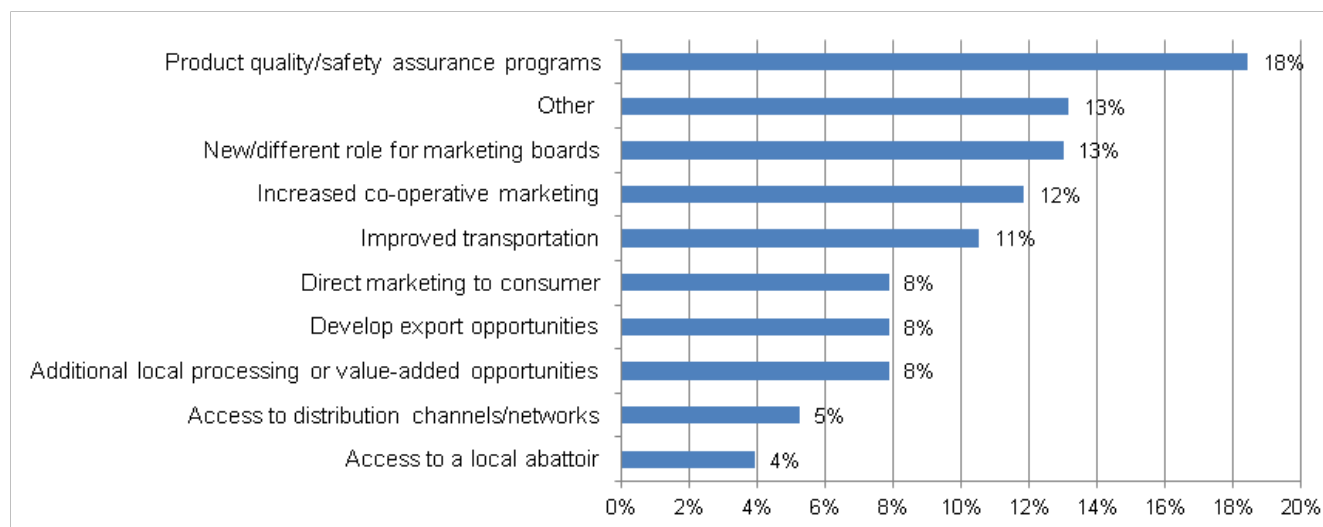
Businesses were asked how they currently market their product (primary and/or processed). The primary answer was at the farm gate at 27%. Responses in the 'other' category included direct to the customer, to other farms, at competitions and through export.

FIGURE 26: CURRENT METHODS OF MARKETING PRODUCT (PRIMARY AND/OR PROCESSED)



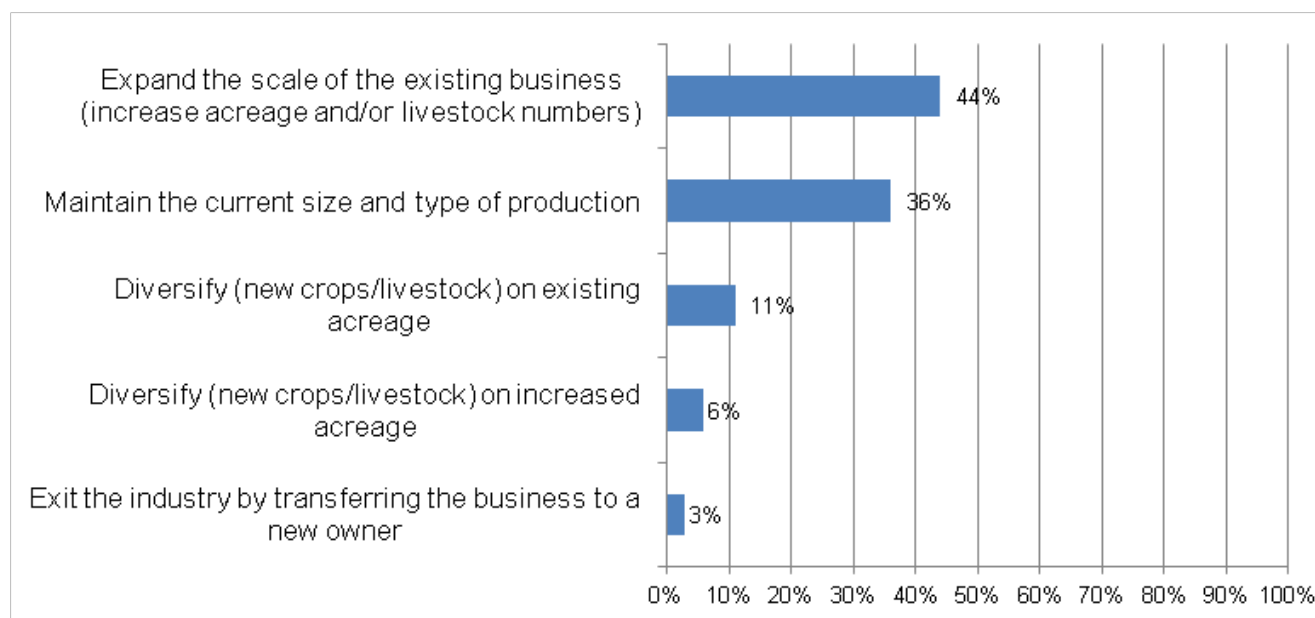
When asked how the market potential of their agricultural product could be enhanced, businesses replied through quality/safety assurance programs and by a new/different role for the marketing boards and agencies.

FIGURE 27: METHODS OF INCREASING MARKET POTENTIAL OF AGRICULTURAL PRODUCTS



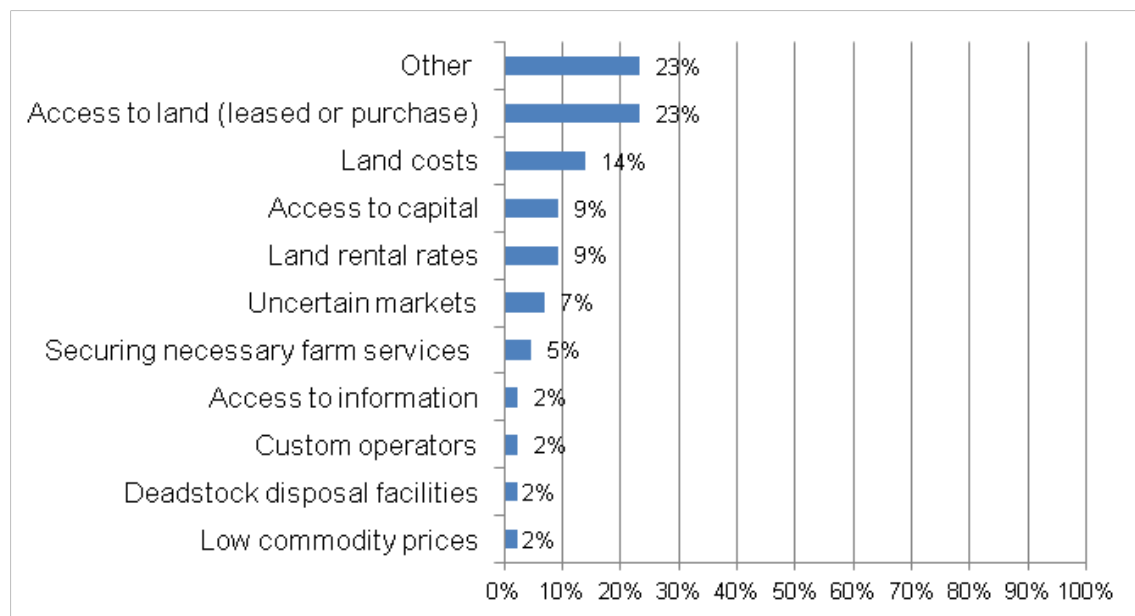
When asked 'What are your plans for your farm operation within the next 3 years?' responses were primarily expanding (44%) and maintaining (36%). Only 3% plan to exit the industry (sell). Many respondents who plan to expand did not request assistance with their expansion. This level of expanding and maintaining their farm is a positive sign for the agriculture community in Whitchurch-Stouffville and King.

FIGURE 28: FUTURE PLANS IN NEXT 3 YEARS



Farm businesses were asked what barriers they are experiencing to the expansion of their farm operation. The primary barrier was access to land.

FIGURE 29: BARRIERS TO EXPANSION

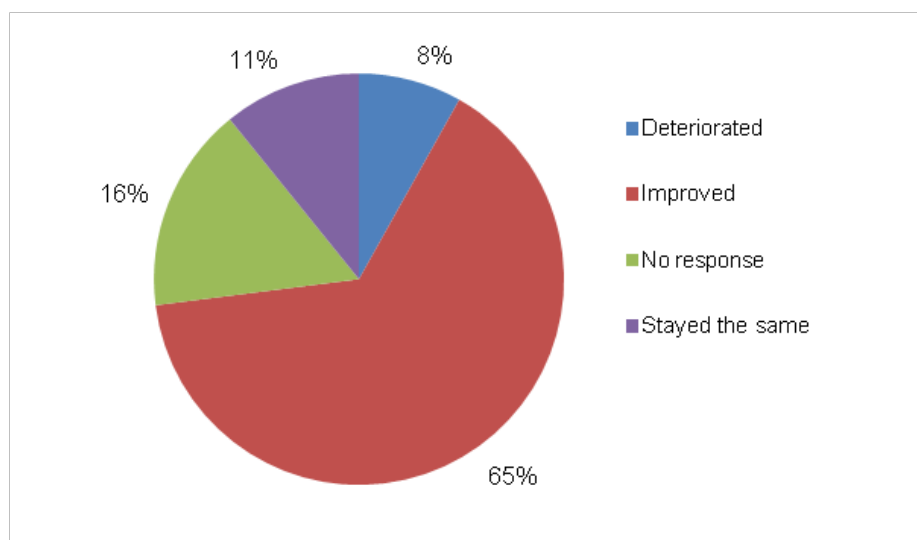


Those in the 'Other' category included:

- Green space and Oak Ridge's Moraine designation
- Building and renovation issues
- Zoning
- Environmental Farm Plan
- Electric power supply – single-3 phased
- Competition with developers for land
- Greenbelt regulations
- Trespass damage – people, ATVs, houses
- Canadian Food Inspection Agency
- Approvals

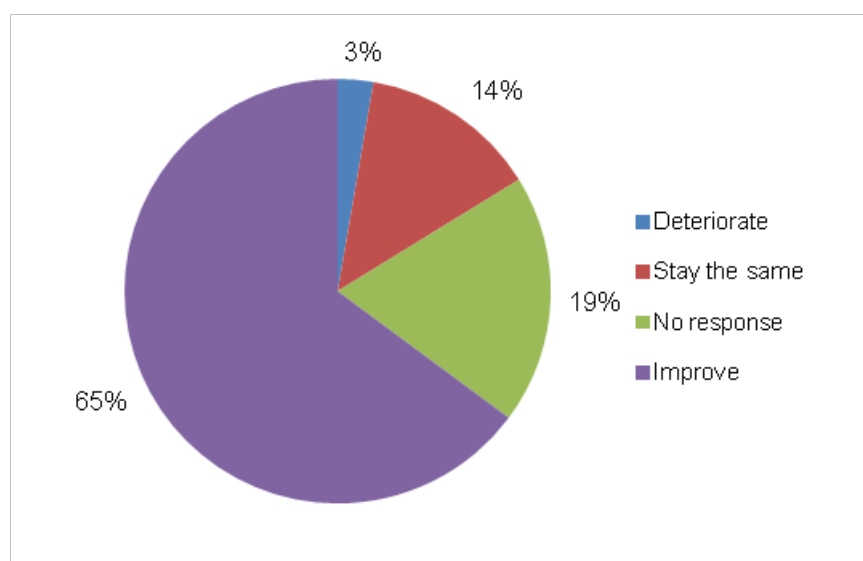
When asked 'has your farm operation's financial situation changed in the past 3 years', 11% of businesses indicated their financial situation had stayed the same and 65% had improved.

FIGURE 30: CHANGE IN FARM OPERATION'S FINANCIAL SITUATION IN PAST 3 YEARS



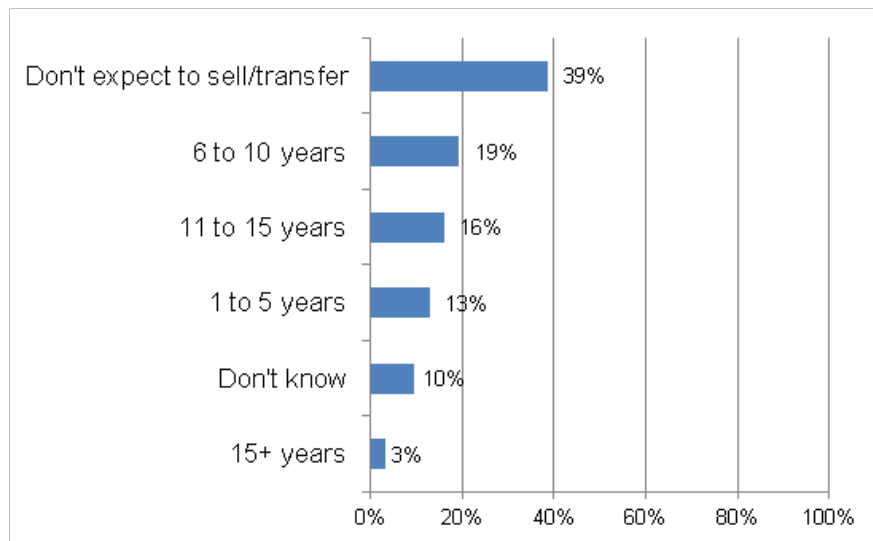
When asked whether they expect their farm operation's financial situation to improve, stay the same or deteriorate in the next 3 years, a high level of confidence was shown with 65% indicating they expected improvements (Figure 31).

FIGURE 31: FINANCIAL SITUATION EXPECTATIONS IN NEXT 3 YEARS



Businesses were asked when they expect to sell or transfer some or all of their farm assets. Thirty-nine percent did not expect to sell or transfer in the foreseeable future, while nineteen percent expected to sell in 6-10 years and 16% in 11-15 years.

FIGURE 32: FUTURE PLANS TO SELL OR TRANSFER SOME/ALL OF THEIR FARM ASSETS



Respondents were asked to rank various factors according to their priority for agricultural business in their community, the top five priorities for agricultural businesses were:

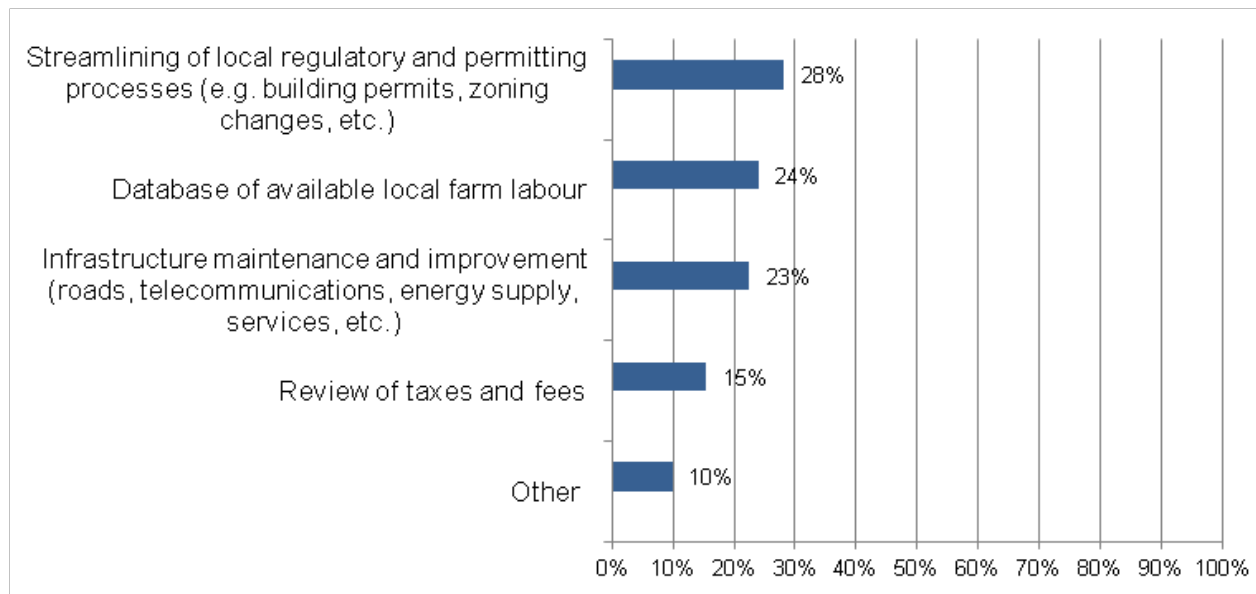
1. Road Maintenance
2. Drainage
3. Snow removal
4. Conflicts with non-farm residents
5. Pesticide safety certification



PHOTO COURTESY OF WHITCHURCH-STOUFFVILLE

Businesses felt that streamlining of local regulatory and permitting processes was a way in which local government could assist agricultural businesses in their area. Other suggestions included a database of available local farm labour and infrastructure improvements.

FIGURE 33: WAYS THAT LOCAL GOVERNMENT COULD ASSIST AGRICULTURAL BUSINESSES IN AREA



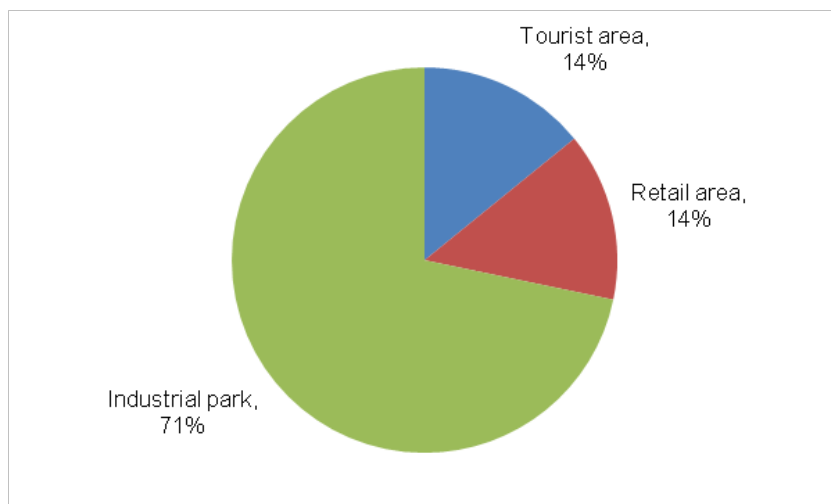
Businesses were asked about critical factors affecting their farm businesses over the past 12 months, the top five responses were:

1. Overall cost of doing business
2. Commodity prices
3. International competition
4. Public concern/awareness of industry
5. Availability of labour

3.3 Retail Survey

Thirteen businesses were interviewed in the retail sector. Fifty-eight percent of them identified themselves as being in an identifiable commercial district. The breakdown was as follows:

FIGURE 34: LOCATION OF RETAIL BUSINESSES PARTICIPATING IN SURVEY

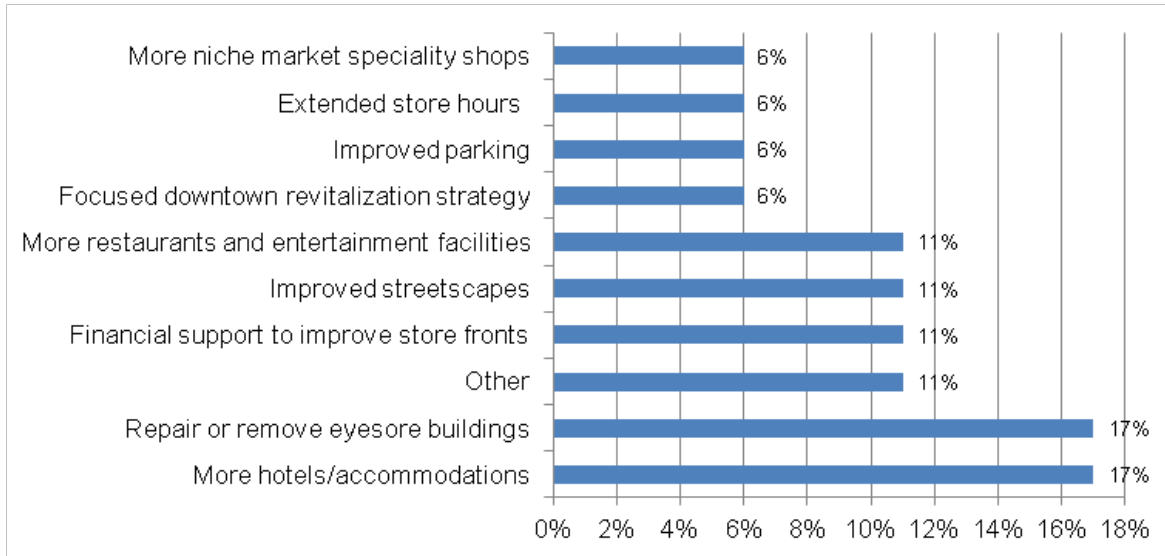


Businesses were asked if they felt there is a strategy in place for promoting and managing the commercial district they were in. The answer to this question was negative in all cases. When asked if there was an organization or group that represents the interests of their commercial district, the unanimous response was the Chambers of Commerce. Businesses felt they would benefit from the following programs or services:

- Store design and layout assistance
- Networking events
- Cooperative advertising/joint marketing
- Building improvement loan/grant programs
- Sign improvements in public areas (benches, lighting)
- Business directories, brochures, maps
- Retail and special event coordination
- Marketing on the web

The top 3 suggestions for improving the retail business environment were listed with the overall top two being more accommodations and removal of eyesore buildings (Figure 35).

FIGURE 35: WAYS TO IMPROVE THE RETAIL BUSINESS ENVIRONMENT



When asked what workshops they would like to participate in with the goal of becoming more competitive, businesses felt the following would be of most value:

- Retaining existing or attracting new customers
- Assessing new technologies
- Staff training and development
- Visual merchandising
- Financial management
- Marketing
- Evaluating market opportunities
- Dealing with the competition
- Customer service training



PHOTO COURTESY OF KING CITY

When asked which operational costs are serious concerns to the success of their businesses, the top concerns were:

- Cost and availability of part-time employees
- Insurance costs

Businesses were asked what four community assets they would most like to see developed in their community. The ranked results were:

- Walking and bike trails
- Farmers market
- Public parking
- Public washrooms located in the downtown area

3.4 Tourism Survey

Three businesses were interviewed in the tourism sector with the following results:

- 2 businesses identified themselves as being in the accommodation and food sector and one self-identified as 'other' (golf course).
- 2 felt the tourism industry in the area could be described as 'outlying non-urban'.
- 2 felt that the tourist season was mostly summer but some off-season traffic – they also felt there was potential for year round business.
- They all felt the area is good in which to operate a tourism business.
- They all felt that improved signage would make their community more physically appealing to tourists.
- Top community assets they would like to see developed were farmers markets, parks/green spaces, walking and bike trails and public cultural facilities (i.e. museums, entertainment centres etc.) .
- Only 1 business actively used tour packaging to attract clients.
- Primary current markets were identified as outdoor enthusiasts and local visitors within 100 km – this market was also identified as having the most potential.
- Respondents receive their market research regarding tourism trends, market and growth opportunities at tourism conferences, tourism associations and from the Ministry of Tourism, Culture and Sport.
- Tourism businesses felt that the primary products that attract visitors to the area are agri-tourism and outdoor activities. Growth sectors were identified as agri-tourism, ecotourism and outdoor activities.
- When asked to rate their level of satisfaction with various tourism facilities in the area, the highest rated was highway signage with the lowest rated being accommodations and attractions.
- All three businesses had participated in a Premier Ranked Tourism Destination Initiative.
- None of the businesses were interested in a Super Host Training Program for their staff.



PHOTO COURTESY OF WHITCHURCH-STOUFFVILLE

3.5 Mining Survey

One mining company was surveyed. This business is in the extraction business and sells to individuals, wholesalers/suppliers, retailers, contractors, sub-contractors and mining or mineral extraction companies.

When asked what ways could local business associations and/or economic development offices assist the mining businesses of the area, the response was marketing and trade promotion and co-ordination, investment and financial planning assistance, co-ordination or entrepreneur and education workshops (business planning, etc.), co-ordination of industry issues with government, identifying and tracking labour issues.

When asked what ways the local government could assist in the mining businesses of the area, the response was streamlining of local regulatory and permitting processes (e.g. building permits, zoning changes, etc.), advice/guidance on preparation of Official Plan policies and future zoning by-laws affecting mining, development of strategic plan for community.

3.5 Community Questions

Businesses were asked how important various agri-food communications/information sources were to their businesses. The results were Ontario Farmer, Ontario Farmer Daily (electronic) and commodity newsletters being the most often used as an information source to businesses (11 businesses in total – 4 in King and 7 in W-S).

Businesses were asked to rank various acts/ regulations/ legislation according to their impact on their agricultural business (11 businesses in total – 4 in King and 7 in W-S).

Although results were varied and low, it could be noted that the least positive in terms of impact would be the Oak Ridges Moraine Regulations.



PHOTO COURTESY OF KING CITY

The sector surveys were completed in addition to the retention survey. In some cases, the low response rates did not yield significant results; however, they did reflect some of the overarching themes that emerged from the retention survey, confirming some of the barriers, challenges and opportunities. The next section summarizes the key themes that emerged from each survey.

4.0 KEY THEMES

1. Business Climate: Overall positive business climate accompanied by barriers to new and expanding businesses.

- 60% of businesses have been in business for over 26 years with less than 12% 'new' (less than 3 years).
- Most businesses have a relatively modest workforce – less than 10.
- Most employees are full time; seasonal numbers equal that of full time in the summer months
- 65% rated the local business climate as excellent or good; 84% of respondents feel as positive as or more positive than they did 3 years ago.
- Biggest opportunities were noted as having a great location, recent local growth and growing awareness of buy/eat locally including agri-tourism possibilities.
- Biggest challenges were noted as restrictive regulations (provincial), inadequate road network, lack of support for local businesses and high cost of living and doing businesses (taxes, utilities)
- Barriers for expansion for existing businesses were identified as cost of utilities, local approval processes, availability of skilled labour and the road and highway system.
- Barriers for new business development include the local approval process, availability of properly zoned and designated land and availability of serviced land.
- Greatest satisfaction levels were identified as fire prevention and services, snow and garbage removal and policing.
- Lowest satisfaction levels were in the areas of business support organizations.
- There was nearly an even split between businesses accessing federal or provincial programs and services within the past 2 years.

2. Future Plans: Majority of businesses plan to maintain growth.

- 82% of businesses will remain the same over the next 3 years or expand; 4% will close and 5% will relocate out of the community
- Primary reasons for downsizing or relocation were change in business profits and changing marketplace

3. Business Development: in this economic climate, businesses are searching for more cost effective ways to do business.

- 64% indicated that their business would benefit from receiving information about exploring alternative energy sources – most were interested in solar, wind, geothermal and biogas.
- Internet speed and access were cited as the biggest information technology barriers to their businesses.
- Businesses purchased farm equipment/supplies/crop feed/seeds, retail (grocery), and cable TV services outside of their community
- More than 70% of businesses were interested in pursuing joint initiatives, particularly joint product purchasing and joint marketing.

- Complementary businesses that would allow existing businesses to grow included supplier, distributor, repair, equipment, manufacturing and processing.
- The great majority (90%) of businesses did not feel that financial planning expertise or knowledge of financing or lending sources were barriers to their business growth.

4. Business Development Markets: despite challenges, businesses maintain a positive market outlook.

- 72% indicated between 1 and 24% increase in projected sales growth in the next year; reasons given were more demand for product/service, increase in marketing efforts, new and different product lines and changing habits of customers i.e. buying locally.
- 2% of businesses felt their projected sales would decline next year due to competition and the economy.

5. Workforce Development: There is a demand for labour, yet significant workforce challenges that require attention.

- 51% of businesses will increase their employee level in the next 3 years, 40% will remain at the same levels and 7% will experience a decrease.
- Noted as possible causes for increase/decrease were renovation or expansion, increase/decrease in sales and new products or services introduced.
- 57% of businesses have had difficulties in hiring.
- Hiring difficulties were addressed through recruitment outside of Canada, hiring people who do not meet requirements, additional use of overtime and longer shifts, and hired temporary help.
- Companies described their hiring challenges as lack of motivation/poor attitude (24%) and lack of specific skills or training (22%).
- Businesses described their level of skills required in their employees as 44% highly or nearly highly skilled and 24% of jobs were considered at the low end of the range in terms of skill level.
- Employers recruit employees through referrals from friends or current employees (24%) or local media advertising (14%).
- Only 15% of businesses often or sometimes offer assistance to new employees from outside the area for relocation or integration.
- 53% of businesses were interested in participating in partnership initiatives with co-op students and internship programs.
- 52% of employees train their employees in-house.
- Barriers to employees receiving training were noted as losing trained employees to other businesses, awareness of existing training programs, relevant training not offered locally, and distance to training facility.

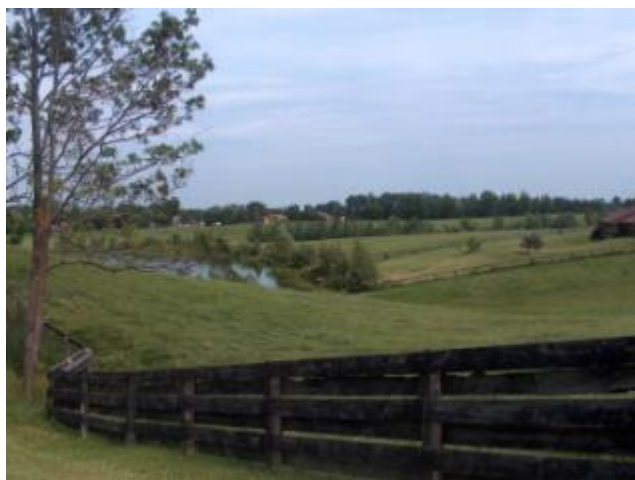


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6. Business Development Community: Positive community changes with more to accomplish.

- Greatest business advantages of the community were noted as location, rural qualities, natural resources including agricultural products, population growth, highways network and positive local demographics.
- Greatest disadvantages were significant agricultural issues, lack of some utilities, lack of services, lack of transportation, traffic issues, lack of existing business base and cost of living and operating a business.
- Business felt they would like to see new products and services in their community including farm supplies, various retail, public transit, gas station, revitalized downtowns, abattoir, and recreation amenities.
- 36% of businesses felt the community was poorly positioned to attract new immigrant employees. Reasons given included lack of affordable housing, social activities, public transit, jobs and language issues.
- 45% of businesses felt that the community was nearly or poorly positioned to attract and retain employees under the age of 30. Reasons included high cost of housing and no industry.
- Businesses felt that the community and local government/economic development organizations could provide assistance in the areas of joint advertising and marketing, website development and e-marketing.
- Positive changes in the last 5 years were noted as new housing and more business developments and population growth. Negative changes include the loss of farmer owned land, traffic issues, big box development and infrastructure issues.

5.0 VISION

On April 20, 2012 the Leadership Team met to review the key findings of the BR+E and began drafting a vision and actions.

The draft vision created by the group was:

“We are a viable community that builds strong relationships between businesses, business networks, all levels of government, & residents fostering a supportive, farm-friendly & rural business environment.”

The leadership team met again on May 11, 2012 and reviewed the draft plan and gave input into possible actions relating to the short and long term goals described in Section 1.0. this is presented in the following section of the report.



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6.0 KING + W-S CULTIVATING BUSINESS ACTION PLAN

The survey provided a number of key themes which have informed the creation of actions that will lay the foundation for a strong agricultural and rural business community. The action plan is divided into key themes, including:

1. Collaboration and Networking
2. Marketing, Promotion and Communications
3. Workforce Development
4. Community Improvement
5. Creating and Enabling Environment
6. Sector Development

The Leadership Team provided significant input in the creation of the action plan through their involvement and insight into the business community. Each theme in the action plan has specific goals to achieve which will pave the way for the growth and success of businesses in a five year period. The actions are assigned a priority timeline of Short-Term (6months-1year), Medium-Term (2-3 years) and Long-Term (3-5 years). The leads in charge of championing the action item, as well as supporting partners are identified.

This BR+E action plan supports, where appropriate the *Golden Horseshoe Food and Farming Action Plan 2021*. The action plan presented in this section identified specific actions from that document that our municipalities and community partners would like to closely align with and potentially support implementation efforts.

6.1 Collaboration and Networking

The survey results clearly demonstrated the need for businesses in King and Whitchurch-Stouffville to engage in more business-to-business opportunities through networking and joint initiatives. In the recent volatile economic climate, taking a collaborative approach to business development reduces the risk and increased available resources and expertise.

Goal: Enhance networking to provide opportunities for businesses to develop relationships, share information and work together to increase productivity, expand and grow the entire agriculture value chain.

Recommended Action	Lead	Priority Timeline	Supporting Partners
1. In partnership, the York Federation of Agriculture, the King Chamber of Commerce and the Whitchurch-Stouffville Chamber of Commerce should consider initiating a series of regular networking events for agricultural and rural-based businesses to build relationships to undertake joint initiatives for financing, marketing and purchasing.	King + WS Chambers of Commerce	Short-Term	Local municipalities, York Federation of Agriculture

2. Emerging from the networking events, consider developing a Peer-to-Peer partnership program to encourage joint marketing coordinating and joint product purchasing among other collaborations.	King + Whitchurch-Stouffville Chambers of Commerce	Short/Medium-Term	York Federation of Agriculture, local municipalities
3. Update the municipal websites for Whitchurch-Stouffville and King to include a dedicated page for agricultural and rural businesses to provide sector information and contact information for businesses.	Town of Whitchurch-Stouffville, Township of King	Short-Term, Ongoing	Regional Municipality of York
4. Initiate a “Chef/Farmer” meet and greet event to link producers to consumers.	York Federation of Agriculture/ King + Whitchurch-Stouffville Chambers of Commerce	Short-Term	Local Municipalities
5. Support the York Agricultural Advisory Liaison Group on sector specific issues and initiatives; such as ‘near urban’ issues that are unique to our communities.	Town of Whitchurch-Stouffville/Township of King	Medium-Term	Local Chambers of Commerce, industry champions, York Federation of Agriculture, Rural Ontario Institute, Greater Toronto Area Agricultural Action Committee

Alignment with Golden Horseshoe Food and Farming Action Plan 2021

Cultivate New Approaches

Task: Conduct research and pilot projects specifically designed for urban and near urban areas of the Golden Horseshoe.

Foster Innovation

Task: Work with food retailers to develop an innovation marketplace where new products can be introduced to consumers rapidly and cost effectively for evaluation and testing.

6.2 Marketing, Promotion and Communications

A significant theme emerging from the survey data was the need for greater marketing, promotion and communications efforts to draw attention to the positive impact that agriculture and rural businesses have on the local and regional economy. Marketing the agricultural and rural-based businesses in King and Whitchurch-Stouffville will ensure greater acceptance, engagement and cooperation with this segment of the business community into the future. In addition, a number of businesses responded to the survey asking for information and training on marketing their business using different mediums.

Goal 1: Communicate the value of agriculture, as well as, market and promote the innovative agricultural and rural businesses in King and Whitchurch-Stouffville and promote agri/culinary tourism opportunities.

Goal 2: Provide opportunities for businesses to access resources and training pertaining to marketing and promoting their business.

Recommended Actions	Lead	Priority Timeline	Supporting Partners
6. Create a 'positive image' campaign for agriculture and rural-based businesses tied to the overall brands and value propositions of each community.	Town of Whitchurch-Stouffville/Township of King	Medium-Term	Greater Toronto Area Agricultural Action Committee
7. Consider the development of an Ambassador Program engaging local businesses (or retired business people) to become 'flag wavers' for Whitchurch-Stouffville and King. An Ambassador program is a very effective method of building a local network and broadening the communications reach for the region.	Town of Whitchurch-Stouffville/Township of King	Long-Term	York Federation of Agriculture, King and Whitchurch-Stouffville Chambers of Commerce
8. Host seminars and workshops catered to the marketing/promotions needs of agricultural and rural-based businesses.	King + Whitchurch-Stouffville Chambers of Commerce	Short-Term	Regional Municipality of York (York Small Business Enterprise Centre), local Municipalities
9. Investigate the TODS program (Tourism Oriented Directional Signing Program) offered through the Ontario Ministries of Tourism and Transportation and the York Region Tourism Directional Signage and	Town of Whitchurch-Stouffville/Township of King	Medium-Term	York Agricultural Advisory Liaison Group

Farm Fresh Signage Programs.			
10. Build greater relationships with the York Region Farm Fresh program. Meet with program managers to determine new directions and potential for involvement with this program.	Town of Whitchurch- Stouffville/Township of King	Short-Term	Regional Municipality of York
11. Investigate the possibility of a regional Taste Trail in Central Counties (Regional Tourism Organization 6).	Central Counties	Medium-Term	Local Municipalities

Alignment with the Golden Horseshoe Food and Farming Action Plan 2021

Growth the Cluster

Task: Develop communication plan and materials

Link Food, Farming and Health

Task: Conduct public campaigns aimed at informing consumers about local food and ornamental product choices.

Task: Design and offer updated activities through the primary and secondary education system to engage students in healthy nutrition, agricultural awareness and good food choices.

Foster Innovation

Task: Market the Golden Horseshoe as the place to invest in food and farming.

Enable the Cluster

Task: Enhance coordination 'Farm Fresh' and 'Culinary Trail' programs to showcase the celebration of farming to residents, tourists and visitors to the region.

Cultivate New Approaches

Task: Design and implement a program to educate the public about food and farming environmental best practices.

6.3 Workforce Development

Agriculture is experiencing a significant shift due to both global and local forces. The BR+E survey reinforced that some of these macroeconomic trends are being felt at the local and regional level particularly around the local labour force. Issues around access to skilled labour, succession planning and youth engagement and retention were identified as critical by business respondents.

Goal: Ensure that agricultural and rural businesses have access to a talented workforce now and in the future through partnering with work appropriate agencies to identify solutions.

Recommended Action	Lead	Priority Timeline	Supporting Partners
12. Create a database of training, post-secondary and Government programs and resources for businesses to use for training or accessing labour.	Workforce Planning Board of York Region, Bradford & West Gwillimbury, Regional Municipality of York	Long-Term	Ontario Ministry of Agriculture, Food and Rural Affairs, Post-Secondary Institutions, Regional Municipality of York, Local Municipalities
13. As labour was identified as being among the top agricultural sector challenges, conduct a follow up survey to understand the evolving workforce needs of the agricultural and rural-based business community.	Workforce Planning Board of York Region & Bradford West Gwillimbury	Long-Term	York Federation of Agriculture, Local Municipalities
14. Provide the results of this BR+E project to training institutions in York Region. Encourage training institutions to deliver training to meet skill shortages.	Town of Whitchurch-Stouffville/ Township of King	Short-Term	Regional Municipality of York
15. Develop a targeted co-operative education program focused on agriculture and rural-based businesses	York Region District School Board, York Catholic District School board	Long-Term	York Federation of Agriculture
16. Facilitate a focus group that will understand youth impressions of agriculture as a future career choice, and potentially build an Agriculture Mentorship Program.	Town of Whitchurch-Stouffville/ Township of King	Medium-Term	York Federation of Agriculture, York Region District School Board, York

			Catholic District School Board
Alignment with the Golden Horseshoe Food and Farming Action Plan 2021			
<p>Link Food, Farm and Health</p> <p>Action: Increase local food literacy with a focus on youth.</p> <p>Foster Innovation</p> <p>Task: Work closely with the food and farming sector to ensure that the Ontario colleges and universities are providing knowledge and skills that meet the needs of the sector.</p> <p>Task: Develop cooperative, internships, apprenticeships, scholarship and mentoring programs that introduce students to careers in food and farming.</p> <p>Task: Support incubators that provide access to capital, processing line time and expert advice for entrepreneurs in food and farming.</p>			

6.4 Community Improvement

At the foundation of any successful business development activity are the important community and place factors. The need for community improvement efforts in Whitchurch-Stouffville and King was at the forefront for survey respondents. While many respondents recognized that the communities were improving (through various community-based initiatives and efforts), there is still work to be done to create a sustainable enabling environment to attract and retain businesses.

Goal: Improve the availability and condition of agricultural commercial and industrial properties by ensuring the highest level of infrastructure and services are available to businesses.

Recommended Actions	Lead	Priority Timeline	Supporting Partners
17. Continue to support “Downtown Revitalization” in Whitchurch-Stouffville through the current Community Improvement Plan (CIP) project and investigate the potential for revitalization of the three ‘downtown’ areas in King Township through a CIP.	Town of Whitchurch-Stouffville/ Township of King	Short-term	N/A
18. Review the Road Safety Awareness Campaign put together by the Grain Farmers of Ontario in March of 2012. This program’s goals include providing rural road safety information for both farm vehicle operators and the general public to increase awareness of the seasonality of farm equipment on public roads and to clarify expectations and rules for everyone who uses Ontario’s rural roadways.	Town of Whitchurch-Stouffville/ Township of King	Medium-Term	Regional Municipality of York, York Federation of Agriculture, Ontario Farm Safety Association, Grain Farmers of Ontario
19. Municipal departments should consider assessing the current condition of the roads to determine if some could be made more ‘farm equipment friendly’.	Town of Whitchurch-Stouffville/ Township of King	Medium-Term	Regional Municipality of York, York Federation of Agriculture
20. Promote a regional broadband initiative to provide service to our underserved rural communities.	Regional Municipality of York/”Digital York”	Long-Term	Local Municipalities, Local Chambers of Commerce, Industry
21. Develop a recruitment strategy to attract new commercial investment to	Town of Whitchurch-	Long-Term	N/A

the identified commercial areas to diversify the types of retail opportunities.	Stouffville/ Township of King		
<i>Alignment with the Golden Horseshoe Food and Farming Action Plan 2021</i>			
<i>Grow the Cluster</i> Task: Identify gaps in infrastructure that are inhibiting growth in food and farming operations. Task: Attract investment to create or renew infrastructure to address identified needs. <i>Enable the Cluster</i> Task: Use various planning tools (e.g. community improvement plan approach) to foster supports to farming.			

6.5 Creating an Enabling Environment

Key findings from the survey demonstrated the need to remove barriers to business expansion and growth. Many of the barriers identified were related to the need for a more integrated economic development approach. One of the most prevalent themes that emerged from the survey data was the challenges faced by businesses relating to the approvals process, permitting, business taxes and other local regulatory barriers. By placing a focus on removing these barriers, the business climate in both communities will improve.

Goal: Create an enabling environment through more integrated local planning and economic development systems, ensuring that no barriers to new or existing businesses exist. Ensure the Economic Development Officers are a “one-stop shop” for agriculture and rural businesses.

Recommended Action	Lead	Priority Timing	Supporting Partners
22. Assess local regulations to mitigate the identified barriers in this BR+E project.	Town of Whitchurch-Stouffville/ Township of King	Short-Term	York Agricultural Advisory Liaison Group, Conservation Authorities
23. Planning and economic development staff in York Region, King and Whitchurch-Stouffville should work together to ensure a thorough, streamlined process is put in place to facilitate building and development approvals processes.	Town of Whitchurch-Stouffville/ Township of King	Medium-Term	Regional Municipality of York
24. Create a step-by-step brochure for farm and rural-based businesses to follow when planning to expand their business. Included a check list that guides businesses through the planning process and explains the Oak Ridges Moraine and Greenbelt regulations in plain language.	Town of Whitchurch-Stouffville/ Township of King	Long-Term	York Agricultural Advisory Liaison Group
25. Through involvement with the Greater Toronto Countryside Mayor's Alliance (GTCMA), influence the review of the Provincial Policy Statement and Greenbelt Plan/Oak Ridges Moraine for 2015.	Town of Whitchurch-Stouffville/ Township of King	Short to Medium-Term	GTCMA, Greater Toronto Area Agricultural Action Committee
26. Promote the York Region Small Business Enterprise Centre and other regional business support tools for	Town of Whitchurch-Stouffville/	Short-Term	Regional Municipality of York

local businesses.	Township of King		
Alignment with the Golden Horseshoe Food and Farming Action Plan 2021			
<p>Enable the Cluster</p> <p>Action: Harmonize and improve policy tools in the Golden Horseshoe (e.g. provincial policies, Official Plans, taxation, regulations) for consistent implementation responsive to the needs of food and farming businesses.</p> <p>Task: Review regulations and policies to identify issues and conflicts, and work to resolve them</p> <p>Task: Update land use policy to provide flexibility for value retention and valued added food and farming businesses. (e.g. similar to Niagara Region)</p> <p>Task: Appoint a senior official in each municipal jurisdiction to assist food and farming entrepreneurs to navigate approval processes and provide feedback to all regulatory authorities on ways to expedite review and approval processes.</p> <p>Foster Innovation</p> <p>Task: Identify and develop avenues that provide access to business planning, capital, opportunities for market development and enable commercialization of new food and farming products.</p> <p>Cultivate New Approaches</p> <p>Task: Prepare a credible position for improvements to the Greenbelt Plan policies and/or their implementation from a food and farming perspective.</p>			

6.6 Sector Development

The impetus for this project was the recognition the agriculture value chain (producers, distributors, retailers, consumers, etc.) is a critical part of King and Whitchurch-Stouffville economic base. Contributing to the ongoing development of the agricultural and rural-based business community is both a short and long term objective of this BR+E project.

Goal: Develop one of the most dynamic, prosperous and innovative regional economies through supporting the development of the sectors within the agricultural and rural-based business community.

Recommended Action	Lead	Priority Timing	Supporting Partners
27. Host an information session about alternative energy sources and programs.	King + W-S Chambers of Commerce	Short-Term	Government of Ontario, Ontario Power Authority
28. Make recommendations to OMAFRA regarding providing greater support to small businesses that require compliance with Free-Standing Meat Plant Licensing.	Town of Whitchurch-Stouffville	Short-Term	N/A
29. Evaluate opportunities in the 'ethnic food' sector and provide training seminars to those who might have the capacity and interest in expanding to this sector. Ethnic food was identified in the project has having significant opportunities as well as being considered as having growth potential.	Holland Marsh Growers Association/King+ W-S Chambers of Commerce	Medium-Term	York Federation of Agriculture, Local Municipalities, York Region Food Network
30. Investigate the possibility of undertaking a study to assess the economic impact of agriculture across the N6 (Northern York Region) with target sub-sector profiles to develop key agricultural and rural-based business segments.	Regional Municipality of York/Greater Toronto Area Agricultural Action Committee	Long-Term	Local Municipalities, King + W-S Chambers of Commerce, York Federation of Agriculture
31. Initiate a feedback recycling program in the Township of King for equine businesses.	Township of King	Short-Term	N/A
32. Establish an on-going business visitation program to continue to build relationships with local agricultural and rural-based businesses to stay up to date on current issues, challenges and	Town of Whitchurch-Stouffville/ Township of King	Long-Term	York Federation of Agriculture

opportunities.			
33. Maintain a current database of rural and agriculture-based business support programs and grants, including sector specific data and policy.	Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA Connects)	Medium-Term	York Federation of Agriculture
Alignment with the Golden Horseshoe Food and Farming Action Plan 2021			
<p>Grow the Cluster</p> <p>Task: Identify the production, processing, distribution and marketing infrastructure required to achieve integration between different parts of the cluster.</p> <p>Task: Review existing documentation and research on ethnic food markets and identify research gaps</p> <p>Task: Complete and maintain an inventory of existing production, processing, distribution and marketing infrastructure that supports food and farming activities.</p> <p>Cultivate New Approaches</p> <p>Track the trends (e.g. shifting demographics and preferences, changing climate, international trade and economic conditions and development pressures and assess impacts on food and farming)</p>			

7.0 WHITCHURCH-STOUFFVILLE BR+E IMPLEMENTATION PLAN

Further consultation with key partners and stakeholders was conducted from June-August 2012 with the intention of developing an implementation plan for Whitchurch-Stouffville. This implementation plan is based on action items where the Town of Whitchurch-Stouffville is the lead and identified supporting partners. The actions are assigned a priority timeline of Short-Term (6months-1year), Medium-Term (2-3 years) and Long-Term (3-5 years). Some of the action items identified as 'short-term' have already been initiated or completed, indicated in the 'status' column in the table below.

7.1 Short-Term Action Items

Recommended Action	Supporting Partners	Priority Timeline	Status
Collaboration & Networking			
1. Update the municipal websites for Whitchurch-Stouffville and King to include a dedicated page for agricultural and rural businesses to provide sector information and contact information for businesses.	Regional Municipality of York	2013	To be completed
Marketing, Promotion and Communications			
2. Build greater relationships with the York Region Farm Fresh program. Meet with program managers to determine new directions and potential for involvement with this program.	Regional Municipality of York	2012	Completed
Workforce Development			
3. Provide the results of this BR+E project to training institutions in York Region. Encourage training institutions to deliver training to meet skill shortages.	N/A	2012	To be completed
Community Improvement			
4. Continue to support "Downtown Revitalization" in Whitchurch-Stouffville through the current Community Improvement Plan (CIP) project.	N/A	Ongoing	Ongoing

Creating an Enabling Environment			
5. Assess local regulations to mitigate the identified barriers in this BR+E project.	Regional Municipality of York, Conservation Authorities	2013	To be completed
6. Promote the York Region Small Business Enterprise Centre and other regional business support tools for local businesses.	Regional Municipality of York	Ongoing	To be completed
7. Through involvement with the Greater Toronto Countryside Mayor's Alliance (GTCMA), influence the review of the Provincial Policy Statement and Greenbelt Plan/Oak Ridges Moraine for 2015.	GTCMA, Greater Toronto Area Agricultural Action Committee	2012-2015	In progress
Sector Development			
8. Make recommendations to OMAFRA regarding providing greater support to small businesses that require compliance with Free-Standing Meat Plant Licensing.	N/A	2012	To be completed

7.2 Medium-Term Action Items

Recommended Action	Supporting Partners	Priority Timeline
Marketing, Promotion and Communications		
9. Create a 'positive image' campaign for agriculture and rural-based businesses tied to the overall brands and value propositions of each community.	Greater Toronto Area Agricultural Action Committee	2014
Workforce Development		
10. Facilitate a focus group that will understand youth impressions of agriculture as a future career choice, and potentially build an Agriculture Mentorship Program.	York Federation of Agriculture, York Region District School Board, York Catholic District School Board	2014

Community Improvement		
11. Review the Road Safety Awareness Campaign put together by the Grain Farmers of Ontario in March of 2012. This program's goals include providing rural road safety information for both farm vehicle operators and the general public to increase awareness of the seasonality of farm equipment on public roads and to clarify expectations and rules for everyone who uses Ontario's rural roadways.	Regional Municipality of York, York Federation of Agriculture, Ontario Farm Safety Association, Grain Farmers of Ontario	2014
12. Municipal departments should consider assessing the current condition of the roads to determine if some could be made more 'farm equipment friendly'.	Regional Municipality of York	2014
Creating an Enabling Environment		
13. Planning and economic development staff in York Region, King and Whitchurch-Stouffville should work together to ensure a thorough, streamlined process is put in place to facilitate building and development approvals processes.	Regional Municipality of York	2013-2014

7.3 Long-Term Action Items

Recommended Action	Supporting Partners	Priority Timeline
Marketing, Promotion and Communications		
14. Consider the development of an Ambassador Program engaging local businesses (or retired business people) to become 'flag wavers' for Whitchurch-Stouffville and King. An Ambassador program is a very effective method of building a local network and broadening the communications reach for the region.	York Federation of Agriculture, King + W-S Chambers of Commerce	2016
Community Improvement		
15. Develop a recruitment strategy to attract new commercial investment to the identified commercial areas to diversify the types of retail opportunities.	N/A	2015

Sector Development		
16. Establish an on-going business visitation program to continue to build relationships with local agricultural and rural-based businesses to stay up to date on current issues, challenges and opportunities.	York Federation of Agriculture	2015
Creating and Enabling Environment		
17. Create a step-by-step brochure for farm and rural-based businesses to follow when planning to expand their business. Included a checklist that guides businesses through the planning process and explains the Oak Ridges Moraine and Greenbelt regulations in plain language.	York Agricultural Advisory Liaison Group	2015-2016