REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN

Electoral Area "D" Service and Boundary Configuration Study Committee Agenda

Wednesday, January 12, 2022
6:00 – 8:00 pm

Via Zoom
https://us02web.zoom.us/j/81732069379?pwd=eDlYaHFPeVo1K2oyWEkzWFJSTzU2dz09

PURPOSE From 6:00 pm to 8:00 pm on Wednesday January 12, 2022, the Electoral Area "D" Service and Boundary Configuration Study Committee will meet as part of the study. The Committee will have an opportunity to review drafts of one last Incorporation Insights paper, and a revised version of two Fact Sheets. The Committee will also discuss logistics for the upcoming Open Houses and public engagement events.

A. HOUSEKEEPING

- This meeting is being recorded
- Ensure to mute yourself except when speaking to reduce sound feedback.
- Reiterate project purpose / scope
- Format for including the EA Director/Alternate input on agenda items

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B. APPROVAL OF AGENDA

RECOMMENDATION 1
THAT the Agenda for the January 12, 2022 Electoral Area "D" Service and Boundary Configuration Committee be approved.

C. RECEIPT OF THE DECEMBER 8, 2021 MEETING MINUTES

RECOMMENDATION 2
THAT the minutes of the December 8, 2021 Electoral Area "D" Service and Boundary Configuration Committee be received.

D. CONSULTANTS - Sherry Hurst & Allan Neilson

- Fact Sheets – the consultants have updates to two Fact Sheets based on discussions and feedback from the December 8, 2021 meeting, and are bringing forward the final Incorporation Insights paper for Committee review and input
- Discussion regarding the Open House meetings

E. QUESTION PERIOD

F. ADJOURNMENT

ATTACHMENTS

The following documents are included in the agenda package for the Committee's review:

- December 8, 2021, Committee Meeting Minutes
- Revised Draft Fact Sheets: Transit Services, Administration Services,
- Draft Incorporation Insight: Boundary Considerations
- Copy of Skaha Matters January advertisement/article
- Copy of Overview Mailout

REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN

Electoral Area "D" Service and Boundary Configuration Committee

MINUTES

Wednesday, December 8, 2021

COMMITTEE MEMBERS PRESENT:

Matt Taylor
Phyllis Radchenko
Vi Creasey
Myleen Mallach
Bob Daly
Kurt Hiebert
Kay Medland
Eleanor Walker

COMMITTEE MEMBERS ABSENT: David Forst, Kerrie MacLean,

EX-OFFICIO COMMITTEE MEMBERS PRESENT:
Electoral Area "D" Director, R. Obirek

GUESTS PRESENT: Consultants Allan Neilson and Sherry Hurst

STAFF PRESENT:
C. Malden, Manager of Legislative Services
J. Zaffino, Manager of Finance

A. CALL TO ORDER

The Meeting was called to order at 6:08 pm.

B. HOUSEKEEPING

a. This meeting is being recorded
b. Ensure to mute yourself except when speaking to reduce sound feedback.
c. Reiterate project purpose / scope
d. Format for including the EA Director/Alternate input on agenda items

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C. APPROVAL OF AGENDA

The agenda of the December 8, 2021 meeting of the Electoral Area "D" Service and Boundary Configuration Committee was approved. CARRIED

D. RECEIPT OF THE NOVEMBER 10, 2021 MEETING MINUTES

The minutes of the November 10, 2021 meeting of the Electoral Area "D" Service and Boundary Configuration Committee were received. CARRIED

E. CONSULTANTS –Allan Neilson and Sherry Hurst

The Consultant presented the following four fact sheets. The committee was asked to provide comments on each.

- **WATER SERVICES**
- **TRANSIT SERVICES**
- **ADMINISTRATION**
- **PROVINCIAL SERVICES**

The committee determined that further discussion on the Incorporation Impacts (Boundary Considerations) would take place at the January 12, 2022 meeting.

The committee discussed the timing and location of public meetings and possible venues. It was recommended that all meetings take place in Okanagan Falls at the community centre, with each meeting focussing on specific areas of the electoral area. This would enable attendance via zoom, as well as attendance in person if provincial health orders allowed.

Discussion also took place on how the committee should review and comment on the mail-out planned for the first week of January. It was determined that it would be reviewed by a small sub-committee and then put out to the committee as a whole for final feedback. Staff were encouraged to use the most cost effective method available.

F. ADJOURNMENT

The meeting adjourned at 8:04 pm

RDOS Area "D" Service & Boundary Study
Fact Sheets
DRAFT - December 2021

TRANSIT SERVICES

➢ What service is provided?

Electoral Area "D" is serviced by BC Transit through the South Okanagan-Similkameen Transit system. There are two separate services that apply to Area "D" – regional transit, which all the RDOS municipalities and electoral areas contribute to, as well as Area "D" Transit services, which are only provided to and paid by a defined service area within Area "D".

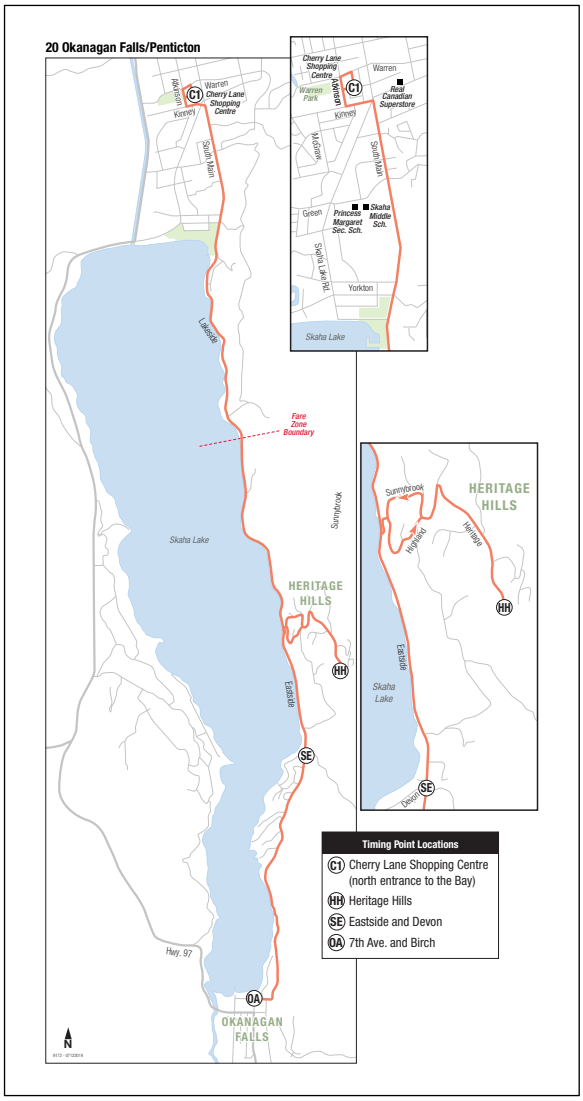
Area "D" Transit
The #20 bus provides five times daily return service between Penticton and Okanagan Falls along the east side of Skaha Lake via Eastside Road, with service extending into Heritage Hills subdivision. The #21 bus provides five daily local service loops within Okanagan Falls community, two of which extend service up to Peach Cliff estates. The Area "D" routes are shown in Figure 1.

Area "D" also benefits from the #40 route that provides twice daily return service between Osoyoos and Penticton, although it travels through Area "I" and not Area "D". That route does stop in Okanagan Falls, but is not funded by Area "D".

Regional Transit
BC Transit offers a route that helps to connect RDOS with the Central Okanagan. The #70 bus route connects Penticton to Kelowna via Summerland, Peachland, Westbank, and West Kelowna. That route is funded regionally.

In addition to connecting the southern Okanagan communities, this service is often referenced as "Health Connection" route, as it is funded in part Interior Health. BC Transit offers "Health Connections" service aimed at providing communities with accessible transportation options to non-emergency medical appointments. Passengers must call to arrange their trips. Generally this route is planned along the #40 route.

Figure 1: Route #20



➢ Who delivers the service?

BC Transit delivers the service on behalf of the regional district. Operation of buses, including management of drivers and vehicle maintenance is handled by Penticton Transit Service Ltd. on contract to the RDOS and BC Transit.

It is important to note that although the Area "D" Transit service is provided to and recovered from a portion of Area "D" residents, the delivery of the service is through BC Transit is tied together with the delivery of service in Area "E" in the Naramata. The contract with BC Transit is for both the Area "D" and Naramata services, making it challenging to change either of these two separate services.

➢ Who makes decisions?

Decisions about transit fares, routes and service levels are made by the RDOS Board of Directors. In making its decisions, the Board considers information and planning advice provided by BC Transit.

The Board is also guided by the Transit Future Plan, which was completed in 2015 in partnership with BC Transit. The plan sets out an implementation strategy for short and long-term transit investments. BC Transit and the RDOS are currently engaged in a planning process known as the Transit Future Action Plan. The goal of the South-Okanagan Similkameen Transit Future Action Plan is to update the 2015 Transit Future Plan to help guide decision-making for transit in the South Okanagan-Similkameen Regional Transit System. The update is currently in the engagement phase.

The RDOS electoral area directors and board make decisions on whether to create or participate in specific services. Decisions regarding both the regional service and the local Area "D" service are made by the full Board. It has been noted that the Area "D" Transit service agreement ties the service to the Area "E" transit service, making the service and agreement for any one electoral area more challenging to alter.

➢ What is spent by RDOS on the services?

The cost of the regional transit and the Area "D" transit services are provided in Figure 2. The amount of the Area "D" service was reduced in 2021 budget, due in part to the COVID-19 pandemic and decrease in ridership during this time. The budget forecast for future years for this service is closer to $130,000, rather than the $109,228 in 2021.

It is also useful to note that the RDOS has operating reserve accounts for most services. The Area "D" transit service has a reserve account balance of $18,852 at the end of 2020, and the regional transit service operating reserve balance was $5,108.

Figure 2
Cost of Services
2021

Service	Cost[1]
Regional Transit	$295,682
Area "D" Transit	$109,228
Total	**$404,910**

1 Cost estimates are from adopted 2021 budget figures

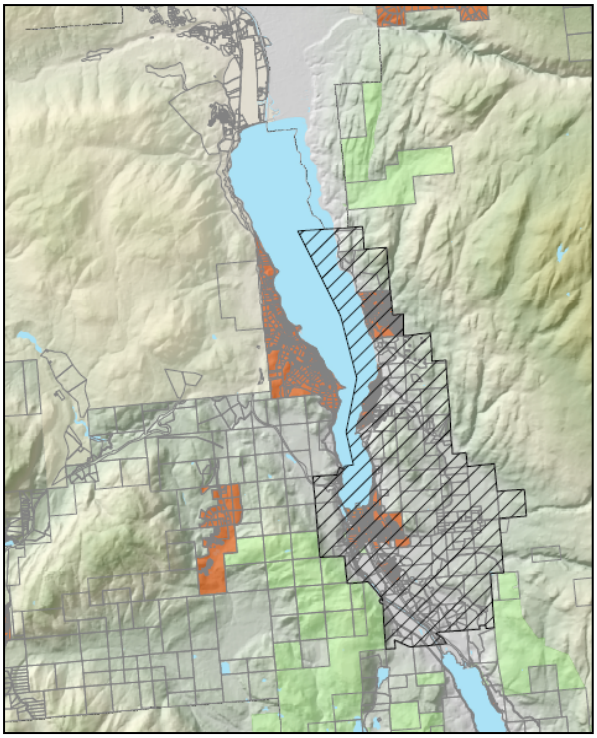
➢ How are the costs recovered?

Area "D" Transit
The Area "D" Transit system is recovered through a combination of tax requisition from the service area (see the crosshatched area in Figure 3), as well as passenger fares, and some grant funding. In 2021 a much lower rate than usual was anticipated to be recovered from passenger fares ($5,375 as opposed to $13,000). It should be noted that only those properties within the service area shown in Figure 3 contribute to the Area "D" Okanagan-Similkameen Transit System.

Regional Transit
The RDOS cost of the Okanagan-Similkameen Transit System is recovered through a combination of property taxes based on assessed value (land and improvements) throughout all of the RDOS, as well as transit fares, and some grant funding from

the Interior Health Authority and provincial government. The tax requisition, fare recovery and overall operational budget were lower for the service in 2021 than that budgeted for subsequent years. In 2021 the service also received a safe start provincial grant of close to $35,000 to help fund the service.

Figure 3: Area "D" Transit Service Area



➢ What is the cost to a typical residence?

Figure 4 provides the tax impacts to a typical Area "D" residence for transit service. Transit fares for service would be in addition to the amounts shown below. Fares for local service are $2.25 on the Okanagan-Similkameen Transit System (free for children under 12). The regional routes are $4, or $5 for route #70 which provides connection from Penticton through Summerland to Peachland, Westbank, West Kelowna and Kelowna.

Figure 4
Cost Impact on Typical Residence
2021

Service	Tax Req.[1]	Res. Rate	Owing[2]
Regional Transit	$216,008	0.0086	$3.88
Area "D" Transit[3]	$85,131	0.0774	$34.82
Total			**$38.70**

1 Tax requisition amount excludes 5.25% Surveyor of Taxes fee

2 Impact is calculated on a home assessed at $450,000

3 Rate only applies to a portion of Area "D" (within the service area only)

➢ What impact would incorporation have on these services?

A new municipality would become responsible for providing transit services; however, it is anticipated that the new municipality would continue to participate in the regional transit service, and would perhaps have their own contract or agreement directly with RDOS and City of Penticton to guide their own municipal service (similar to that of Area "D" transit service now). No changes to cost or service level would be required as a result of incorporation.

As noted with all services, there would be a change in governance. Within a municipality, it would be the municipal Council that would have the authority to make decisions regarding the transit service, and a municipal director would participate in discussions at the RDOS Board level regarding service levels and cost for regional services. The Ministry of Transportation indicated that incorporation could provide opportunities to change the current agreement with BC Transit, which ties the some service levels together with transit service in Area "E".

RDOS Area "D" Service & Boundary Study
Fact Sheets
December 2021 - DRAFT

ADMINISTRATION SERVICES

What services are provided?

General administration services consist of a variety of functions that support the elected officials of the RDOS and their work, as well as the overall management of the organization, including the following services:

- Corporate Facilities
- Finance
- General Government
- Human Resources
- Legislative Services
- Information Services
- Electoral Area Administration
- Grants in Aid
- Rural Projects, and,
- Equipment Purchases.

Together these services include all of the functions that support the Board and Committee meetings, elections and referenda, finance, human resources, information systems, communications, as well as property, record and risk management. Corporate Facilities, Finance, Human Resources, Legislative Services and Information Services is charged out as an administrative overhead based on the Board's policy.

Who delivers the service?

General government and administration services are delivered primarily by RDOS staff under the direction of the Chief Administrative Officer (CAO), who is responsible for service delivery and organizational management. The RDOS CAO is supported by a senior management team comprised of 9 positions: Managers of Legislative Services, Human Resources, Finance, Information Services, Engineering, Operations, Community Services, Planning and Building & Bylaw Enforcement. The senior management team oversees a total complement of approximately 100 full- and part-time staff.

In addition to the RDOS functions and services, all electoral area residents pay a fee to the office of the Surveyor of Taxes, to cover the cost of collecting taxes on behalf of the province. The Surveyor imposes a fee on taxpayers of $5.25 for each $100 in property taxes levied by regional districts and improvement districts. This fee covers the cost of administration, enforcement and bad debts.

Who makes decisions?

Decisions regarding general government and administrative services are made by the RDOS Board of Directors. Some services apply to all electoral areas and member municipalities, in which case decisions regarding policies and spending would be made by the full Board. Other services which apply just to electoral areas (such as electoral areas administration), would be made by only those Board members representing the areas participating in the service (i.e. electoral area representatives). The CAO is then responsible to implement the directives of the Board, including administrative decisions that occur at the staff level.

What is spent by RDOS on the services?

The total amount spent for general government and administration can be broken down into:

- the 2021 budgeted cost for RDOS general government;
- the 2021 budgeted cost of electoral area administration services;
- the 2021 budgeted cost for general services unaccounted for through other services, such as grants in aid and rural projects in Area "D."
- the Surveyor of Taxes fee for collecting the regional district's taxes (Area "D" amount).

Total budgeted costs for 2021 are shown in Figure 1. The amounts in Figure 1 for represent the total cost of these services, and not the portion that Area "D" residences pay for through tax requisition. The portion for the Grants in Aid, Rural Projects and Surveyor of Taxes is the amount only for Area "D".

It is worth noting that some costs reflect an unusual year. Rural projects, for instance, included a $103,250 cost for the Centennial Park Washrooms (funded through Gas Tax), as well as an extra $40,000 contingency and $45,000 allocation to the operating reserve, all of which resulted in a budget for 2021 that is considerably higher than the more typical $40,500 budget in 2022 and 2023.

How are the costs recovered?

While administration encompasses many services, several of these services are paid by allocating administration costs to each individual service, and recovering that amount from that service and attributing the "recoveries" to some of the administrative services. Accordingly, several of these services are not paid for through directly through tax requisition, but instead are recovered from the individual services. Where amounts have been recovered from individual services already referenced in other fact sheets, those will not be double counted here. Services that are funded primarily from administrative recoveries include Corporate Facilities, Finance, Human Resources, Information Services, Legislative Services and Equipment Purchases.

General government, electoral area administration, rural projects and grant in aid services are not recovered through internal "recoveries" and instead are recovered through property taxes on the basis of converted assessment, including land and improvements. Other revenue sources for general and electoral area government include small portion of grants in lieu of taxes, provincial grants, interest income and miscellaneous revenue.

Figure 1
Cost of Services
2021

Service Component	Cost[1]
RDOS General Government	$1,606,663
Electoral Area Administration	$2,463,411
Area "D" Grants in Aid	$21,457
Area "D" Rural Projects[2]	$227,209
Surveyor of Taxes	$134,833
Corporate Facilities	$532,899
Finance	$160,729
Human Resources	$168,607
Legislative Services	$320,230
Equipment Purchases	$43,028
Information Services	$907,750
Total	**$6,586,816**

1 Cost estimates are from adopted 2021 budget figures
2 2021 was estimated at a higher than usual cost for Rural Projects due to a Gas Tax funded project in Area "D" (centennial park washroom), as well as higher contingency, and some surplus funds that were earmarked for the operational reserve. The total budgeted cost of the Centennial Park Washroom in 2021 was $103,260.

Reserve accounts are created for most services in order to set aside funds for future expenditures. All reserve funds associated with general government and administration are shown in Figure 2.

Figure 2
Reserve Totals
Administration

Service	Reserve Total[1]
General Government Capital	$259,919
General Government Feasibility Fund	$157,509
Rural Area Feasibility Fund	$75,624
Information Systems (Operating Reserve)	$91,062
Information Systems Renewal	$101,889
Electoral Area "D" Community Gas Tax	$614,209
GIS Mapping	$85,149

1 Reserve totals are as at the end of 2020.

The Surveyor of Taxes charges a fee of 5.25% calculated on the total Regional District taxes levied to each property. The amount therefore varies per property, based on services received and assessed value. This amount has not been included in the RDOS rates referenced in individual service *Fact Sheets*, as not to double count.

What is the cost to the typical resident?

Figure 3 provides the cost to a typical Area "D" residence for general administration services. The 2021 property tax impact of administration services provided by RDOS to Area "D" is approximately $525,618. This translates into $175 on a home assessed at $450,000. In addition, owners pay the surveyor of taxes fee of 5.25% on the total amount of regional district taxes collected, bringing the total to $220.

Figure 3
Cost Impact on Typical Residence
2021

Service	Tax Req.	Res. Rate	Owing[1]
Area "D" General Government	$76,225	0.0564	$25.38
Area "D" EA Admin	$406,785	0.3010	$135.43
Grants in Aid	$16,762	0.0124	$5.58
Rural Projects	$25,846	0.0191	$8.61
Surveyor of Taxes	$134,833	0.0998	$44.89
Total	**$660,451**		**$219.89**

1 Impact is calculated on a home assessed at $450,000

What impact would incorporation have on these services?

Incorporation is not expected to have a significant impact on any of the administrative services referenced in this Fact Sheet. The services that are delivered to all electoral areas would be delivered to a smaller service area, and those delivered just to Electoral Area D would be adjusted depending on the incorporated area. Where services lose contributions from the newly incorporated municipality (i.e. electoral area administration), there may be a corresponding reduction in the costs for those services, resulting in minimal changes to the overall taxation requirements.

The primary impact of incorporation on these services is therefore governance, rather than any direct change to the service, service level, or service cost.

Once incorporated, a municipality would no longer contribute to electoral area administration costs, nor grants in aid or rural projects. Those same types of priority projects could be funded through the new municipality. Residents would continue to contribute to the General Government costs that are shared amongst all the municipalities and electoral areas in the RDOS.

As a municipality, residents would no longer pay the provincial Surveyor of Taxes. Instead the municipality would be responsible for issuing tax notices and collecting and remitting taxes to the appropriate authority.

As noted previously, a municipal council member would represent the municipality as a director on the RDOS Board, and the municipal director would participate in discussions and decisions regarding regional services in which the municipality participates

RDOS Area "D" Service & Boundary Configuration Study
Incorporation Insight
December, 2021

BOUNDARY CONSIDERATIONS

What is the purpose of this paper?

Electoral Area "D" of the Regional District of Okanagan Similkameen is currently undergoing a *Services and Boundary Configuration Study*. The study proposes to examine the services provided in Electoral Area "D", and to identify any issues or concerns with services or governance. The study includes consideration of different boundary configurations and explores the high-level impact that incorporation would have on political representation, governance structure and service provision in those scenarios.

The *Services and Boundary Configuration Study* does not presume that an incorporation study will proceed. Ultimately the Study Committee must contemplate whether an incorporation study might be an appropriate future step, and if so, identify the most suitable boundary for that subsequent analysis.

Therefore, as part of the *Services and Boundary Configuration Study*, this paper on boundary considerations shares with the Committee and residents the factors and criteria that are typically used to identify a municipal boundary. The paper is serves as a primer in advance of the boundary identification process that forms part of this study.

➢ Why is an incorporation boundary needed?

Prior to initiating an Incorporation Study, the Ministry of Municipal Affairs establishes an incorporation study area boundary. The boundary is required to enable the committee and its consultants to gather and analyze the data for the study, and is critical in determining the costs for each option being considered. It is only once the boundary is determined that the specific services provided to the area can be identified and quantified, assessment base totalled, and tax impacts calculated.

The process to determine the tax impacts and compare the existing costs and services to an incorporation scenario is comprehensive – it involves a considerable amount of work by the regional district, consultants, the Ministry of Municipal Affairs, and incorporation committee, as well as residents. The goal of the process is to provide information to the community so residents can make an informed decision on whether they would like to incorporate. Providing clear information is a key objective of the process; providing only one scenario helps to make this process straightforward for residents who must weigh the options.

➢ How is a boundary established?

Establishing a boundary for an incorporation study is a three-phase process. It involves:

- Data collection and review
- Gathering community input
- Establishing criteria

After the collection of both qualitative and quantitative inputs, and analysis of that information relative to key criteria, consultants provide some suggested options for review by the regional district, as well as by the Ministry. Prior to being approved for the purposes of an incorporation study, the boundary is typically recommended by a committee, endorsed by the regional district, and approved by the Ministry. Ministry staff look to input from the boundary study, including recommendations from consultants, the

study committee and the regional district, to help inform a decision.

DATA COLLECTION AND REVIEW

Many of the factors considered in determining a boundary rely upon factual data that is collected and analyzed. Some data sources and information collected includes (but is not necessarily limited to):

- Regional Growth Strategies and relevant policies
- Official Community Plans or other land use plans
- existing settlement patterns
- land use or zoning regulations
- population and population density
- Statistics Canada Census information
- local government services (all types) and service areas
- infrastructure master plans and/or proposed capital improvements
- local road networks
- property assessment class maps/information
- property assessment values
- Agricultural Land Reserve (ALR) and farm property inventories

COMMUNITY INPUT

Community input is a key component of governance studies that are completed prior to an incorporation study. Community concerns are often the reason governance and subsequent incorporation studies are initiated.

Community input provides an opportunity for all community members to learn about who provides services, how the current system works, and share perspectives on what is working well, as well as identify concerns or needs that are not being met. Depending on the issues identified, options can be developed to address community concerns, including alternatives within the current governance framework as well as those that require changes to the governance structure.

As with any qualitative input, there is always a range of perspectives and opinions shared. Just because concerns are identified in a certain area does not necessarily mean that the area will be included within an incorporation study. Conversely, just because some members of a community are uncertain of the costs or regulations that might occur in an incorporation scenario does not mean the community would be excluded.

Community input is one of the factors considered by consultants, the regional district and Ministry of Municipal Affairs when determining a boundary. As noted previously, however, there are many factors that go into establishing a logical municipal boundary. It is normal to have a range of opinions within the incorporation study area; the incorporation study process highlights the changes and impacts of an incorporation, and provides all residents with the opportunity to hear about and understand the potential impacts. It is only once that information is available that residents can make informed decisions on the best path forward for their own property, and for their community.

DEVELOP CRITERIA

Once the quantitative and qualitative data have been compiled, the factors can be compared to criteria that are relevant to the community. Some criteria are considered for the incorporation of any community; others may relate to the specific situation and directions identified by the community. For example, there may be areas that would not otherwise be included within the proposed municipal boundary based on tax base, land use and service boundary analysis; however, if residents express a strong sense of connection to a specific neighbourhood, and desire to be included within the boundary rather than separated from the community with which they identify, then that community may be included.

Figure 1 provides a summary of some of the main data inputs or factors considered, related evaluation criteria and an explanation of why they are included as part of the process. The factors are not listed in any particular order – all factors are important and are taken into consideration.

The importance of every criterion, combined with the reality that it is unlikely that any single boundary option will maximize or fulfill all criteria, is what makes selecting a boundary so challenging. Ultimately once the data are considered together, and compared with the criteria, several boundary options and iterations may be drafted and considered before recommendations are made.

➢ Can the boundary change once it is established?

Once a specific boundary is used as the basis for an incorporation study, all the costs, tax impacts and budgeting created as part of that study are predicated on the specific assessment base, property class mix, and cost of services within that specific boundary. Minor changes to the boundary will not typically change the identified impacts significantly. Substantial changes, however, in terms of tax base, servicing or property class, could have significant impacts and warrant figures to be recalculated. Any re-examination of costs would be time-consuming, given that incorporation studies typically require between 1 and 2 years to complete. The primary objective of the boundary analysis, therefore, is to identify key concerns in advance to avoid the need for changes later in the process. Receiving endorsement of the boundary from a study committee, regional district and Ministry of Municipal Affairs helps to ensure that a range of perspectives were included, and reduces the need for changes later in the process.

If an incorporation occurs, and a municipality is established, there are opportunities and processes identified in the *Local Government Act* for property owners to apply to bring their properties in or out of a municipal boundary. This adjustment process follows a similar restructure process, albeit on a smaller scale. A property owner (or group of owners) would submit a request for inclusion or exclusion to the municipal council. If council approved the request, it would be forwarded to the Ministry of Municipal Affairs for processing. Before a boundary change could occur, elector approval from all municipal residents would be required through a vote (similar to a referendum), unless this requirement is waived by the Minister.[1]

[1] The Minister of Municipal Affairs can waive the requirement for elector assent from the entire municipality in the case of a reduction of a municipal boundary (boundary exclusion).

Figure 1
Boundary Considerations
Factors and Criteria

Factor	Criterion	Explanation
Future Growth and Development	Incorporation boundaries encompass areas identified for future growth/development in Regional Growth Strategy and Official Community Plan. Incorporation scenarios minimize the amount of protected agricultural land, and lands designated in the OCP as Agricultural, within the boundaries. Incorporation scenarios represent areas that are large enough to allow for future growth, but sufficiently compact to facilitate efficient and cost-effective servicing.	The RGS and OCP were developed through processes that included a considerable amount of public engagement. The plan identifies growth areas, and land use categories that reference where future development may occur, and that speak to allowable uses and densities. A range of land uses, such as Commercial, Medium Density Residential, Town Centre and Industrial may be important to include within the Incorporation Study Area boundary.
Property Assessment Class	Incorporation scenarios include properties that together cover a range of property assessment classes. Incorporation scenarios seek to minimize properties identified by BC Assessment as Class 9 Farm, due to the tax impacts to those Class 9 properties (loss of residential exemptions) after incorporation.	A diverse tax base allows for sharing of the tax burden across the various property classes, and provides opportunities to balance contributions from different uses during the establishment of tax rates.
Agricultural Land Reserve	Incorporation scenarios minimize the amount of ALR land included within the municipal boundaries.	Given that Class 9 (farm) properties lose tax exemptions in a municipal incorporation scenario, incorporation can present a burden for some ALR properties.
Local Government Services and Service Areas (water and sewer)	Incorporation scenarios include the whole of individual service areas, particularly for utility infrastructure (water and sewer).	Wherever practicable, efforts should be taken to include whole local service areas within a proposed municipal boundary. Service planning, governance, finance and operation are easier to manage when the entire service area is contained within one jurisdiction under the responsibility of one local government, and one jurisdiction has responsibility and control for both land use and utilities.

Factor	Criterion	Explanation
Local Service Areas (Fire)	Incorporation scenarios consider including whole of fire service areas within a municipal boundary, and consider implications of including areas not serviced within the municipal boundary.	The local fire service area boundaries reflect the response times for fire events, given fire hall locations and local road networks. Fire departments can provide services beyond municipal boundaries, so while it is administratively easier to include the entire service area boundary within one jurisdiction, it is not critical that the entire service area be within the incorporated area. It is less common to provide two different service levels within one municipality (i.e. to have portions of a municipality that receive no fire service, and other areas that do).
Potential Infrastructure	Incorporation scenarios accommodate the need for future infrastructure development, in particular anticipated expansion of sanitary sewer collection and treatment systems.	'Hard' infrastructure services are most efficiently provided where the jurisdiction has control over the utilities and the land use.
Local Road Network	Incorporation scenarios include only those roads that are required to facilitate efficient transportation and land use planning, complete communities and that are important to the local community. Incorporation scenarios, wherever practicable, include complete local roads, and do not create "orphan" road ends by excluding portions of no-thru roads.	Minimizing the number and length of local roads is an important cost consideration for any municipality. The longer the road network, the greater the operation and maintenance cost borne by the community.
Tax Base	Incorporation scenarios create an assessment base that is significant in value to support the municipal needs.	In addition to the diversity of the tax base, having a significant base helps to reduce the tax burden, particularly for fixed costs, contributes toward financial resiliency and increases the borrowing power.
Parcel and natural/physical boundaries	Incorporation scenarios follow established lot lines, and do not create municipal boundaries that divide lots. Incorporation scenarios use natural areas or community divisions, where possible, to help	The use of logical contiguous boundaries assists in providing efficient servicing, and fosters a sense of community between neighbours.

Factor	Criterion	Explanation
	preserve communities of interest, and create logical, contiguous boundaries.	
Population	Incorporation scenarios should have sufficient population to sustain a resilient community, including long-term options for municipal candidates and representation. Incorporation scenarios should represent areas with population densities that set the areas apart from their rural surroundings, and allow for the development and financing of efficient infrastructure.	While several municipalities in BC have small populations, larger populations are generally associated with economic viability and resiliency. Furthermore, larger populations are needed to ensure sufficient pool of candidates to fill council positions over time. Concentrations of people is a key factor in differentiating between urban development nodes and rural living. Density is also critical to the development of efficient infrastructure networks and more urban local services.
Community Input	Where practical, include whole settlement areas or communities within the boundary instead of dividing communities that identify as a node or place. Preference given to communities where issues regarding services, service levels and/or governance have been identified and where incorporation provides a potential solution to those issues.	Statistics Canada identifies Designated Places and Designated Centres based on input from the Province of BC. The boundaries of these designations may speak to sense of community. Other communities may develop or define themselves based on subdivision patterns, or key features or community hubs such as a park or local commercial area. Unless identified for inclusion through other criteria, areas that are satisfied with the current regional district model of services, service levels and governance, and have not expressed any interest in incorporation are generally not included.

Area “D” Service & Boundary Configuration Study Update

Get Informed, Get Involved, Have Your Say!

The purpose of this study is to assess the state of governance and service delivery concerns in Area “D”, gauge interest among citizens in pursuing incorporation, and identify the preferred boundary configuration for any subsequent incorporation study.

Study Overview

Watch your mailbox for the Study Overview being mailed to every Area “D” household! The Overview will share some highlights from the work completed so far, including Service Fact Sheets, and high-level information about how incorporation impacts services and governance. The Overview summarizes the more detailed analysis of services provided to Area “D” communities, available on the RDOS website.

Open Houses - Save the Date!

The Committee is hosting 5 open houses, each with the focus on a different Area “D” neighbourhood or community. The intention is to give residents in each specific area an opportunity to share and discuss issues relevant to their community, engage with their neighbours, and learn about the services and governance that impact their area.

Open House meetings will be held:

- **Wednesday, February 16** - focus on Eastside Road South and Skaha Estates
- **Thursday, February 17** - focus on Upper Carmi and surrounding area
- **Wednesday, February 23** - focus on Eastside Road North (Vintage Views, Lakeshore Highlands and Heritage Hills)
- **Thursday, February 24** - focus on Vaseux Lake and surrounding area (Sun Valley and Rolling Hills)
- **Saturday, February 26** - focus on Okanagan Falls

The time and location for the meetings has yet to be finalized. Meetings will be held in accordance with any restrictions at the time, but are being planned to accommodate residents attending both in person (proof of vaccination required) and online. Meeting details and online registration information will be provided on the RDOS Regional Connections website closer to the date, and in the February edition of Skaha Matters.

Residents unable to attend the meeting for their community are encouraged to attend one of the other meetings, as everyone’s input will be recorded and considered. Come have your say!

Where do I find more information?

Learn more about the process, read the Fact Sheets and Incorporation Insights, submit your questions or sign up for updates on the RDOS Regional Connections website. Visit www.rdosregionalconnections.ca.

ELECTORAL AREA "D" SERVICE & BOUNDARY CONFIGURATION STUDY OVERVIEW

Get Informed, Get Involved, Have Your Say!

IS THIS AN INCORPORATION STUDY?

No. This study is a prerequisite for an incorporation study, and occurs prior to Ministry approval of an incorporation study.

This study will help Area "D":

- Learn what services they currently receive, and who provides them
- Learn how incorporation might impact services and governance
- Determine whether it makes sense for their community to participate in an incorporation study
- Establish a boundary for a future incorporation study
- Determine whether a future incorporation study is desirable

WHAT IS THE STUDY PURPOSE?

Electoral Area "D" of the Regional District of Okanagan Similkameen is currently undergoing a *Services and Boundary Configuration Study*. The purposes of the study are to:

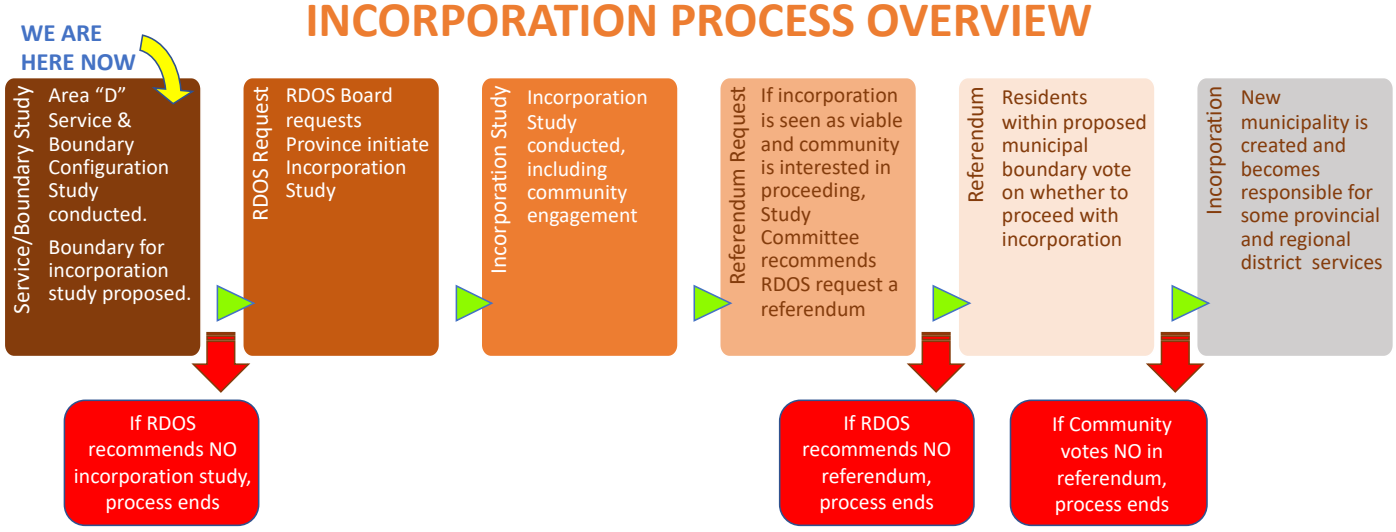
1) Examine the services provided in Electoral Area "D", identify any issues or concerns with services or governance, and gauge interest among citizens in pursuing incorporation.
2) Recommend a boundary after considering the high-level impact that incorporation would have on political representation, governance structure and service provision.

The *Services and Boundary Configuration Study* does not presume that an incorporation study will proceed. Ultimately the Study Committee, based on direction from the community, must contemplate whether an incorporation study might be an appropriate future step, and if so, identify the most suitable boundary for that subsequent analysis.

At this stage of the study, the Study Committee has reviewed and approved *Fact Sheets* for the services provided to Area "D" as well as some *Incorporation Insight* papers that provide an overview of the Incorporation Study Process, Incorporation Impacts, and Boundary Considerations.

Distribution of this Overview is intended to create awareness for the study, share information from the *Fact Sheets* and *Insight* papers, and inform residents as to how they can participate. In this next phase of the study, the Committee wants to hear and learn from residents about any issues or concerns they may have with respect to governance and services. Community input will determine whether a change in local government structure is desired. Understanding concerns will also help to identify a boundary for an incorporation study, and to gauge which communities might wish to be included.

INCORPORATION PROCESS OVERVIEW



WHAT DO RESIDENTS NEED TO KNOW?

The information compiled so far identifies what services are currently provided to Area "D", who provides each service, how decisions are made about the service (how they are governed), and how much they cost. Each *Fact Sheet* then explores what impacts incorporation might have on each service. The *Fact Sheets* are available on the RDOS Regional Connections website. The graphic below highlights some of the impacts outlined in the *Fact Sheets* and *Incorporation Insight* papers.

What services are provided?

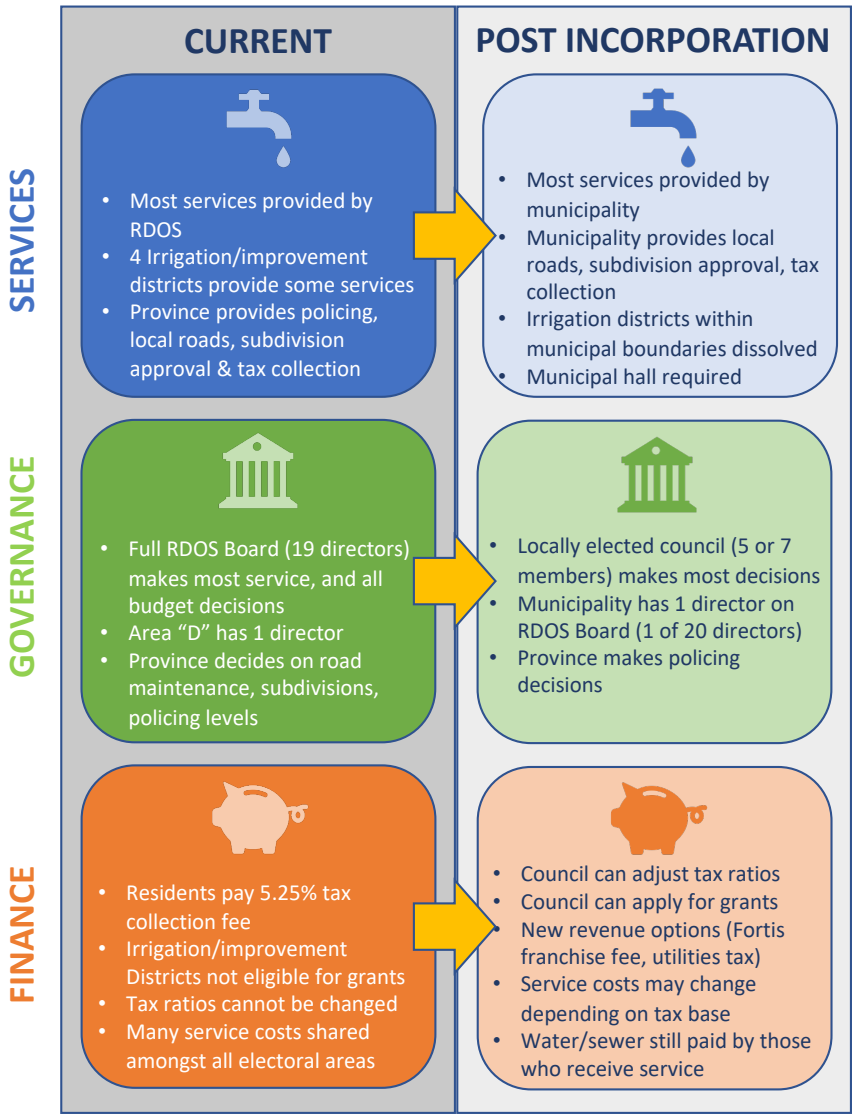
The Services provided to Area "D" residents are itemized in the chart on the opposite page, including whether the service is provided to all of Area "D" or just a portion. Individual service area maps for those services provided to only a subset of Area "D" residents (such as the area serviced by the Okanagan Falls Volunteer Fire Department, the Sun Valley water system, or the OK Falls parks and recreation service) are shown in the *Fact Sheets* prepared for each service. The chart on page 3 also notes who would be responsible for providing the service if Area "D" (or portion of Area "D") were incorporated as a municipality. It is worth noting that just because a local government has authority for providing a service, does not mean it has to deliver the service. Service delivery, such as garbage and recycling collection, can be contracted out. Likewise, library service is delivered by Okanagan Regional Library, and bus services are delivered by BC Transit, but taxes are still collected through the RDOS for those services. Municipalities often receive services from RDOS due to the economies of scale of sharing services with other regional jurisdictions. A new municipality could choose to participate in some regional services, or could decide to deliver those services independently.

Who makes decisions?

Currently the RDOS Board, made up of 19 directors from the six municipalities and 9 electoral areas in the region, make decisions for most services. If an area incorporated, governance would change and most decisions for the community would be made by a locally-elected Council of either 5 or 7 members.

What is the cost?

While cost impacts are a significant factor for many residents, it is difficult to anticipate the impacts until an incorporation boundary is decided, and the tax base determined. While high level increases or reductions can be identified, such as the increase in cost of maintaining roads, the decrease in the surveyor of tax fee, or the dedicated grant funding, until the tax base is determined, accurate estimates are not possible.



AREA "D" SERVICES & PROVIDERS, BEFORE & AFTER INCORPORATION

SERVICE TYPE (as per RDOS Fact Sheets)	SERVICE PROVIDED TO AREA "D"	CURRENT SERVICE AREA	CURRENT SERVICE PROVIDER	SERVICE PROVIDER AFTER INCORPORATION (if within municipal boundary)
SOLID WASTE AND RECYCLIING	Curbside recycling and garbage collection	ALL	RDOS	MUNICIPALITY
	Illegal dumping	ALL	RDOS	RDOS
	Solid waste management	ALL	RDOS	RDOS
	Refuse disposal/Landfill operations	ALL	RDOS	RDOS
LIBRARY	Okanagan Regional Library	PARTS OF AREA D	RDOS (through ORL)	MUNICIPALITY (ORL)
PARKS & RECREATION	Regional parks and trails	ALL	RDOS	RDOS
	Ok Falls parks, recreation and facilities	PARTS OF AREA D	RDOS	MUNICIPALITY
SEWER	Okanagan Falls Sewer	PARTS OF AREA D	RDOS	MUNICIPALITY
	Vintage Views sewer system	PARTS OF AREA D	VINTAGE VIEWS WWTP (PRIVATE UTILITY)	VINTAGE VIEWS WWTP (PRIVATE UTILITY)
	Septage disposal	ALL	RDOS	MUNICIPALITY
EMERGENCY SERVICES	Emergency planning	ALL	RDOS	RDOS
	911 emergency call system	ALL	RDOS	RDOS
	Fire protection	PARTS OF AREA D	RDOS	MUNICIPALITY
	Victim assistance contribution	ALL	RDOS	MUNICIPALITY
PLANNING AND BUILDING	Electoral area planning	ALL	RDOS	MUNICIPALITY
	Subdivision servicing	ALL	RDOS	MUNICIPALITY
	Subdivision approval	ALL	PROVINCE (MOTI)	MUNICIPALITY
	Regional growth strategy	ALL	RDOS	RDOS
	Building inspection	ALL	RDOS	MUNICIPALITY
	Heritage conservation	ALL	RDOS	RDOS
	Heritage Hills street lighting	PARTS OF AREA D	RDOS	MUNICIPALITY
BYLAW ENFORCEMENT	Noise control	ALL	RDOS	MUNICIPALITY
	Untidy/unsightly premises	ALL	RDOS	MUNICIPALITY
	Animal control	ALL	RDOS	MUNICIPALITY
ECONOMIC DEVELOPMENT	Area "D" economic development	ALL	RDOS	MUNICIPALITY
	Regional economic development (OK Film)	ALL	RDOS	RDOS
ENVIRONMENTAL SERVICES	Nuisance (stariing) control	ALL	RDOS	RDOS
	Mosquito control	ALL	RDOS	RDOS
	Invasive species	ALL	RDOS	RDOS
	Sterile insect release	ALL	RDOS (THROUGH SIR)	RDOS (THROUGH SIR)
	Destruction of pests (weeds and insects)	ALL	RDOS	RDOS
	Environmenal conservation service	ALL	RDOS	RDOS
WATER	Sun Valley water system	PARTS OF AREA D	RDOS	MUNICIPALITY
	Okanagan Falls water system	PARTS OF AREA D	OK FALLS ID	MUNICIPALITY
	Skaha Estates water system	PARTS OF AREA D	SKAHA ESTATES ID	MUNICIPALITY
	Vaseux Lake water system	PARTS OF AREA D	VASEUX LAKE ID	MUNICIPALITY
	Rolling Hills water system	PARTS OF AREA D	ROLLING HILLS WATERWORKS ID	MUNICIPALITY
	Heritage Hills/Vintage Views/Lakeshore Highlands water system (private)	PARTS OF AREA D	LAKESHORE WATERWORKS (PRIVATE UTILITY)	LAKESHORE WATERWORKS (PRIVATE UTILITY)
	Okanagan Basin Water Board	ALL	RDOS (THROUGH OBWB)	RDOS (THROUGH OBWB)
ADMINISTRATION	Electoral area government administration	ALL	RDOS	MUNICIPALITY
	General govenrment regional administration	ALL	RDOS	RDOS
	Grant in aid program	ALL	RDOS	MUNICIPALITY
	Rural projects (Area "D")	ALL	RDOS	MUNICIPALITY
TRANSIT	Electoral Area "D" transit system service	PARTS OF AREA D	RDOS (BC TRANSIT)	MUNICIPALITY
	Regional transit	ALL	RDOS (BC TRANSIT)	RDOS
	South Okanagan transit system	PARTS OF AREA D	RDOS (BC TRANSIT)	RDOS
PROVINCIAL SERVICES	Roads	ALL	PROVINCE (MOTI)	MUNICIPALITY
	Policing	ALL	PROVINCE (PSSG)	PROVINCE*

RDOS	Operated by the RDOS, on a region-wide or sub-regional basis (so assumed would still be operated by RDOS after incorporation)
MUNICIPALITY	Municipal responsibility (if within municipal boundary); could choose to have someone else (including RDOS) deliver service
PROVINCE	Provincial responsibility
OTHER	Other authority

** Note that if the municipality were to exceed 5,000 population in the future, the municipality would be responsible for providing local police service; however municipal council would have only limited influence over policing decisions*

HOW TO LEARN MORE

Check out the

RDOS REGIONAL CONNECTIONS WEBSITE

www.rdosregionalconnections.ca

The website is the official source of information for the Study. The site includes:

- ✓ Fact Sheets
- ✓ Incorporation Insights
- ✓ Committee meeting dates, agendas and minutes
- ✓ Links to attend the committee meetings (available on the agenda)
- ✓ Dates for upcoming events
- ✓ Frequently Asked Questions
- ✓ An area to submit your questions to the Committee, RDOS or consultant to answer

Other opportunities to get involved:

- ✓ Attend a Study Committee meeting (Second Wednesday of each month from 6 – 8 pm)
- ✓ Attend the open house for your community (see schedule on this page)
- ✓ Attend the panel discussion (date to be determined)
- ✓ Check out the monthly updates in *Skaha Matters*
- ✓ Submit questions for our FAQ on the RDOS regional connections website
- ✓ Fill out the Boundary Options survey mailed to you in April!



Photo credit: Kari Medig

HOW DO I HAVE MY SAY?

OPEN HOUSES

The Study Committee is hosting 5 open houses, each with the focus on a different Area "D" neighbourhood or community. The intention is to give residents in each specific area an opportunity to share and discuss issues relevant to their community, engage with their neighbours, and learn about the services and governance that impact their area.

Open house meetings will be held:

- February 16 – focus on Eastside Road South/Skaha Estates, 7 pm
- February 17 – focus on Upper Carmi & surrounding area, 7 pm *(location to be determined)*
- February 23 – focus on Eastside Road North (Vintage Views, Lakeshore Highlands, Heritage Hills), 7 pm
- February 24 – focus on Vaseux Lake & surrounding Area (Sun Valley, Rolling Hills), 7 pm
- Saturday February 26 – focus on Okanagan Falls, 1 pm

Meetings will be held at the OK Falls Elementary School gym, excepting the Upper Carmi meeting (location to be determined). Meetings will be held in accordance with any restrictions at the time but are being planned as 'hybrid' meetings to accommodate residents attending both in person (proof of vaccination required) and online. Meeting details will be provided on the RDOS Regional Connections website closer to the date, and the February edition of *Skaha Matters*. Residents unable to attend their community meeting are encouraged to attend one of the other meetings, as everyone's input will be recorded and considered.

DISCUSSION PANEL

In addition to the community Open House meetings, a discussion with panelists representing communities that have been through the incorporation process, as well as a community in the midst of the process, is being prepared. Residents can submit questions to the panelists and learn from their experiences. The Discussion Panel is planned for early March – watch for details!

BOUNDARY OPTIONS SURVEY

Once the community open houses are complete, the consultants will collate the input. A public input summary will be provided to the Committee and available online.

During this phase, the consultants will be reviewing technical information, including BC assessment information, service boundaries, zoning & OCP designations that can be combined with the community input received to prepare some preliminary boundary options. These boundary options will be refined by the Committee, and then shared in a mailout survey to all Area "D" residents in April to identify preferences and collect further community input.