Okanagan Falls Incorporation Study

Okanagan Falls Incorporation Study Committee
April 16, 2024

AGENDA

TIME & PLACE: Tuesday, April 16, 2024
6:00 pm – 8:30 pm
Okanagan Falls Community Centre
1141 Cedar Street, Okanagan Falls

PURPOSE: From 6:00 pm to 8:30 pm on Tuesday, April 16, 2024, the Okanagan Falls Incorporation Study Committee will meet as part of the analysis phase of the study. At this meeting the Committee will review five new *Service Sheets*, including the *Sheet* on local roads, and the *Sheets* on sewer, water, local policing and administration. The Committee will also receive the revised *Economic Development Service Sheet* for review and endorsement. Finally, the *Communications & Community Engagement Strategy* will be presented to the Committee. Members of the public in attendance will be invited to ask questions and provide comments on agenda items towards the end of the meeting.

AGENDA:

1. Call to Order – 6:00 pm

   – Chair Wilson will call the meeting to order and ask for the agenda to be adopted

2. Introductions

   – Chair Wilson will ask Committee members, the consultants, RDOS staff and the Ministry of Municipal Affairs representative to introduce themselves

3. Committee Meeting Minutes

   – The Committee will be asked to adopt the February 5, 2024, Committee Meeting Minutes (see attached)

4. Study Purpose and Process

   – The consultants will briefly review, as they do at every Committee meeting, the purpose of and process for the Incorporation Study

5. Service Sheets

   – The consultants will present five new *Service Sheets* and one revised *Sheet*:

     - Local Roads Service
     - Sewer Service
     - Water Service
     - Local Policing Service
     - Administration
     - Economic Development Service

   – An engineer from the consulting team will attend to present and answer questions on the *Road Investment Review* undertaken in support of the *Local Roads Service Sheet*
   – All of the sheets are presented as DRAFT documents, pending endorsement by the Committee
   – Each presentation will explore the key differences between the two local government scenarios
   – Committee members will be given an opportunity to ask questions on each service sheet
   – The Committee will be asked to endorse each sheet (with or without amendments) or refer the sheet back to consultants for further consideration

6. Communications and Engagement

   – The consultants will answer questions on the *Communications & Community Engagement Strategy* that will guide the community engagement phase of the study

7. Project Team and Communications Updates

   – The consultants will brief the Committee on Project Team discussions that have occurred since the February 5, 2024, Committee meeting
   – The consultants will review with the Committee the information that has been posted on the study since mid-September

8. Questions and Comments from Public in Attendance – 8:00 pm (20 mins)

   – Individuals who wish to ask questions or provide comments will be asked to identify themselves and indicate if they live in the study area

9. Next Meeting

   – Next meeting is confirmed for Tuesday, May 28, 2024
   – The consultants will provide a brief preview of what to expect at the next meeting

10. Adjourn — 8:30 pm

ATTACHMENTS: The following documents are included in the agenda package for review:

- February 5, 2024, Committee Meeting Minutes
- Local Roads Service
  - *Road Investment Review*
- Sewer Service
- Water Service
- Local Policing Service
- Administration
- Communications & Community Engagement Strategy

Okanagan Falls Incorporation Study Committee
Committee Meeting
February 5, 2024

MINUTES

MEMBERS PRESENT:	Eugene Dettling	Kelvin Hall
	Judy Garner	Eleanor Walker
	Randy Ludwar	Kea Adachi
	Ian Bowen	Rick Wilson
	Marcel Olsthoorn	
MEMBERS ABSENT:	Debbie Rose	
EX-OFFICIO MEMBERS PRESENT:	Electoral Area "D" Director M. Taylor	
	Electoral Area "D" Alternate Director Area "D" J. D'Andrea	
OTHERS PRESENT:		
	Allan Neilson, Neilson Strategies Inc.	
	Sherry Hurst, Leftside Partners Inc.	
	Natasha Horsman, Horsman Strategies	
	Simon Rasmussen, Ministry of Municipal Affairs	
STAFF PRESENT;	M. Aucoin, Legislative Coordinator	
	K. Roemer, Clerk	

The meeting was called to order at 6:02 pm by Rick Wilson, Chair

A. APPROVAL OF MINUTES

MOVED AND SECONDED
THAT the Minutes for the Okanagan Falls Incorporation Study Committee Meeting of November 21, 2023 be adopted. –**CARRIED**

C. INTRODUCTIONS

D. STUDY PURPOSE and PROCESS
The consultants reviewed with the Committee the purpose and process for the Incorporation Study.

E. SERVICE SHEETS

1. The Demographic Profile Sheet was presented and reviewed by the committee. Discussion included but was not limited to:
    a. *Question asked for clarification regarding averages / percentages shown on Demographic Profile Sheet and what impact they might mean for the study*
    b. *Question regarding where OK Falls would rate in comparison to other municipalities/ Villages within the province. EG – how many smaller, how many larger?*
        i. *Consultants will make some additions, and circulate a revised edition to the committee.*

2. The Solid Waste Services Sheet was presented and reviewed by the committee. Discussion included but was not limited to:
    a. *Question asked that once the current contract with Waste Management is over could the municipality take on some of the services themselves?*
        i. *Yes the municipality could take on some of the services but they may lose economies of scale in doing so.*
    b. *Question asked could the Area Director and Mayor of the municipality be the same person and then have two votes on the RDOS Board?*
        i. *In theory yes it could be the same person and they would have two votes. In reality, the new municipality would be represented on the Regional Dsitrict Baord by one Municipal Director (the Mayor, or a Councillor), and the Electoral Area would be represented by one Electoral Area Director. On weighted votes, the respective populations of each jurisdiction would determine the number of votes accorded to each Director.*

MOVED and SECONDED
THAT the Solid Waste Service Sheet be endorsed as presented by the consultants. **–CARRIED**

3. The Economic Development Services Sheet was presented and reviewed by the committee. Discussion included but was not limited to:
    a. *Director Taylor clarified that the Okanagan Falls office has transitioned from Economic Development to Community Services.*
    b. *Question asked about whether an Area "D" without Okanagan Falls would be able to opt out of contributing to a Economic Development service.*
        i. *Yes, Area "D" would not be obligated to contribute to the Economic Development service operated by an incorporated Okanagan Falls.*
    c. *Question asked about if the Okanagan Falls office is operating as a Community Services office, would the rest of Area "D" be more willing to contribute to the service.*
    d. *Committee asked about the financial impacts of changing the assumption in the Service Sheet to instead assume an incorporated Okanagan Falls continues with the current staffing (1.5 FTE) dedicated to economic development*
        i. *The consultants can make that change and bring the Service Sheet back to the committee with that change at the next meeting.*

MOVED AND SECONDED
THAT the Economic Development Service Sheet NOT be endorsed as presented by the consultants and THAT the consultants come back to the committee with more information for the March 19, 2024 meeting. **–CARRIED**

4. The Parks, Recreation & Cemetery Services Sheet was presented and reviewed by the committee. Discussion included but was not limited to:
    a. *Area "C" and the Town of Oliver was cited as an example of an electoral area and neighbouring municipality funding Parks and Recreation services together.*
    b. *Questions were raised about the number of parks in the study area, and the distinction between regional versus local parks.*
        i. *Consultants indicated that information was reviewed by RDOS, but they will provide some additional clarification and recirculate to the Committee*

    The Parks, Recreation & Cemetery Services Sheet be endorsed as presented by the consultants. **–CARRIED**
    Opposed: Committee member Garner

5. The Transportation Services Sheet was presented and reviewed by the committee. Discussion included but was not limited to:
    a. *Question asked about whether the surveyor of tax fee is included in numbers being presented to committee in all service sheets.*
        i. *It is not included but will be shown in the Administration Service Sheet.*

    MOVED AND SECONDED
    THAT the Transportation Services Sheet be endorsed as presented by the consultants.
    –CARRIED

6. The Incorporation Impacts on Agricultural Properties Issue Sheet was presented and reviewed by the committee. Discussion included but was not limited to:
    a. *Question asked regarding tax levels for Farm Class properties.*
        i. *Consultants reminded the committee that decisions that may be made by a possible future Council are not within their purview.*

    MOVED AND SECONDED
    THAT the Incorporation Impacts on Agricultural Properties Issue Sheet be endorsed as presented by the consultants.
    –CARRIED

F. PROJECT TEAM AND COMMUNICATIONS UPATES

1. The consultants briefed the Committee on the Project Team discussions that have occurred since the November 21, 2023 meeting.
2. The consultants reviewed with the Committee all the information that has been posted on the study website since mid-September.

G. QUESTIONS AND COMMENTS FROM THE PUBLIC IN ATTENDANCE

Members of the Public that were in attendance in person and online were given the opportunity it identify themselves and indicate if they lived in the study area to ask questions. Questions and discussion included but were not limited to:

a. *Question asked regarding road maintenance changes if incorporation moves forward.*
    i. Roads Service Sheet will be presented to the committee at the next meeting.
b. *A request was made for microphones or for committee members could speak so that the public in attendance are able to more easily hear the discussion.*
c. *Question regarding Service Sheet for Fire Department.*
    i. Service Sheet was presented at previous meeting and is available online and at the Okanagan Falls office.
d. *Question asked about public participation during committee meeting, rather than waiting until the end.*
    i. Chair Wilson clarified that at this stage of the process the committee is reviewing and endorsing information to go out to the public at the engagement stage, at which point the public will have greater input and opportunity to provide feedback.

H. NEXT MEETING

1. The next meeting is confirmed for March 19, 2024.
2. The consultants will provide a brief preview of what to expect at the next meeting.

I. ADJOURNMENT

MOVED and SECONDED
THAT the meeting adjourn at 8:24 pm. **-CARRIED**

Local Road Services

The Local Roads Services Sheet was developed for presentation to the Okanagan Falls Incorporation Study Committee at its meeting on April 16, 2024. The sheet was prepared using information available at the time of writing. Changes will be made if new information becomes available.

Information presented on the Okanagan Falls Incorporation scenario is based on the following assumption:

> *That an Okanagan Falls municipality would assume ownership of, and responsibility for operating and maintaining all local roads within the municipality*

THE PRESENT

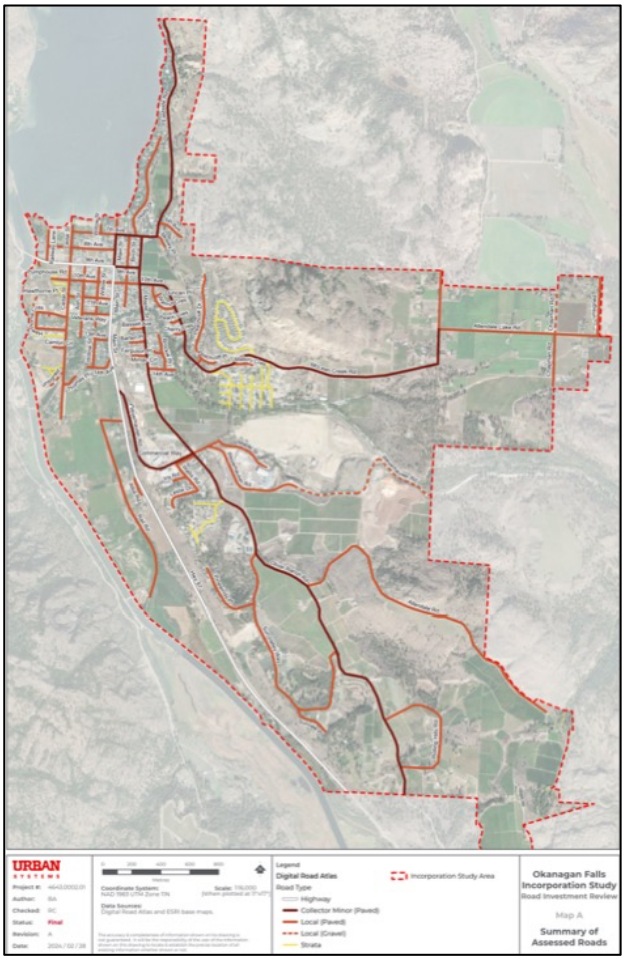
➤ What service is provided?

As in all unincorporated areas, local roads in Okanagan Falls are owned by the provincial government and managed by the Ministry of Transportation and Infrastructure (MOTI). MOTI's road management function includes regular maintenance of the roads and their associated drainage, plus periodic road resurfacing and rehabilitation works. Specific tasks include:

- road sweeping
- snow clearing and ice control
- ditch clearing
- pothole patching
- gravel road maintenance
- signage maintenance
- crack sealing
- traffic management

The Ministry is responsible for all types of public roads in unincorporated areas, from multi-lane provincial highways to gravel local roads. The only roads the Ministry is not responsible for are strata (i.e., private) roads. The Okanagan Falls Incorporation Study Area has an inventory of approximately 34 km of local roads, not including Highway 97, as depicted in Figure 1. The inventory includes minor collector, and both paved and gravel local roads.

Figure 1: Okanagan Falls Road Inventory by Type



For the purposes of road maintenance, MOTI divides the Province into 28 service areas. MOTI engages private contractors in multi-year agreements to undertake routine maintenance, repairs, upkeep of surrounding electrical infrastructure and application of pavement markings in each service area. Okanagan Falls is located within Service Area 8 — South Okanagan. The contractor responsible for Area 8 is Aim Roads. The value of the 10-year contract (signed in 2019) is approximately $17.7 million per year (amounts are adjusted annually for inflation and changes to infrastructure). The contract is scheduled to expire on March 31, 2029.

All MOTI contractors, including Aim Roads, sign a Highway Maintenance Agreement which includes specifications related to maintenance of road surfaces, control of roadside vegetation (including noxious weeds), drainage, winter clearing, traffic signs, etc. The maintenance specifications describe what services are to be provided and set out minimum standards for completed work as well as performance timelines. Detailed specifications for all aspects of maintenance are available on the MOTI website.

Road Condition

As part of the Incorporation Study, a *Roads Investment Review* (RIR) was conducted by Urban Systems Ltd. The key objective of the RIR was to identify and assess the physical condition of the area's roads through visual inspection, and to provide information related to the ongoing budget expected to sustain the level of service of their roads through road maintenance and renewal projects.

The RIR provides a surface condition rating — good, fair or poor— as well as an inventory of other roadway components that directly affect the condition and lifespan of the road surface and cost of roadway improvements (maintenance, resurface and reconstruction). The inspection evaluation informs the estimated annual roads capital and maintenance programs and future asset management planning initiatives should the area incorporate. In some cases more detailed geotechnical and road structure investigations are recommended to help determine if alternative road rehabilitation methods (e.g., full depth reclamation) would be appropriate as part of road rehabilitation works. The findings of the surface conditions are summarized in Figure 2.

Figure 2: Surface Distress Overview

GENERALIZED CONDITION RATING	LENGTH (KM)	PERCENTAGE (%)
Poor	3.7	11%
Fair	26.2	78%
Good	3.7	11%
TOTAL	**33.6**	100%

The RIR estimated the investments required to rehabilitate the roads in poor condition, and to bring the local roads to a standard where routine maintenance would be sufficient to extend the life of the road network. Some of the key findings in the report, and associated estimates are as follows:

- the cost to either reclaim or reconstruct the 3.7 km of roads rated "poor" was estimated to range from $2.4 million to $4.74 million, depending on the approach needed (will depend upon a geotechnical analysis)
- roads identified as "fair" were recommended for a mill and overlay program that would extend over 20 years, at an estimated cost of $700,000 per year
- a backlog of crack sealing and spray patching was noted, totalling an estimated $410,000, which could be completed over a 5-year period
- an assessment of drainage was outside the scope of work of the condition assessment; however, the report notes that several drainage concerns were identified, including areas with no natural drainage connectivity, roads where surface drainage improvements were needed, places where vegetation at the pavement edge is causing ponding on the road, a lack of crown or crossfall on some roads, a lack of ditching and a number of areas where drainage improvements would extend the life of the existing roads

The report was intended to help inform the Committee and the Study, but will also be shared with the Province and MOTI to help them appreciate the road-related issues the Incorporation Study Area would be facing if it were to incorporate.

➤ Who makes decisions?

Decisions on road maintenance and upgrading are currently made by MOTI through its District Office. The District Office has some discretion over the allocation of spending, but is constrained by budgetary decisions and priorities set in Victoria. Resurfacing and capital projects are identified at the District level, then compared and prioritized across the broader region (the Southern Interior Region is comprised of 5 districts).

Electoral area directors have no authority over the way MOTI allocates its budget. Directors may, however, make representations to the provincial government.

Through its long-range land use planning, the Regional District addresses local transportation needs and preferences in an effort to influence Ministry decisions. Area "D" has not updated its Official Community Plan (OCP) since 2013 (prior to when the electoral area was divided into two). Regardless, the OCP identifies objectives and policies as a means of informing MOTI of the RDOS and local interests related to roads. Safety of transportation modes is a key theme in the OCP. Policies and transportation priorities referenced in the OCP include:

- an acknowledgement that the location of Highway 97, which extends through Okanagan Falls, has a significant impact on local travel safety and pedestrian safety
- statements encouraging the Province to identify and make improvements that will increase the safety at the intersection of 10th Avenue and Highway 97, and the intersection of 9th Avenue and Main Street (Highway 97)
- statements encouraging the development of walkways and bicycle routes particularly within Okanagan Falls
- a statement that rights-of-way acquired by the Province for major roads are encouraged to be developed wide enough to accommodate bicycle and pedestrian traffic as well as vehicular traffic
- a stated desire to work with the Province to identify grades, roadway widths, and other road standards that may be more appropriate for this area than the Province-wide standards, while recognizing that roads need to meet standards regarding function, safety, maintenance and emergency vehicle access
- statements encouraging the Province to engage the community when continuing to undertake capital works to improve the safety of Eastside Road and provide adequate paved road widths for bicyclists and pedestrians

Under its maintenance contract, Aim Roads is expected to meet defined service obligations and specifications related to maintenance of road surfaces, control of roadside vegetation, drainage maintenance, winter clearing, traffic signs and other items. The specifications describe the services as well as minimum standards and performance timelines. Staff in MOTI's District Office oversee the contract.

➤ What is spent on the service?

MOTI spends more than $415 million annually on highway contracts throughout the Province. The annual figure for the most recent South Okanagan (Area 8) contract — the area in which Okanagan Falls is located — is $17.7 million for the 2019-2020 fiscal year. This amount is adjusted annually to reflect changes to the infrastructure, as well as inflation. Based on the 2,330 km of roads included in Area 8, the contract equates to approximately $7,600 of maintenance costs per road kilometre (2019 figure). This figure includes maintenance costs for highways through the area, including Highway 97.

As noted in the RIR, MOTI has estimated that the annual maintenance budget for the Okanagan Falls Incorporation Study Area local roads is $284,000. MOTI has indicated that the cost is derived by assigning the total regional road maintenance contract amount to a cost per kilometer, then applying that cost for the length of the subject roads. The cost includes activities such as snow clearing, street sweeper, maintaining signs and line painting and other routine maintenance tasks (a cost breakdown was not provided).

MOTI has indicated that annual resurfacing (capital) amount was estimated at $116,000 per year. This amount was based on a high-level estimate for resurfacing per km, not specifically on the roads within Okanagan Falls or any actual road assessment. Based on these estimates, the annual spending on local roads in Okanagan Falls is $400,000, including general maintenance and longer-term capital works.

➤ How are the costs recovered?

Residents in electoral areas pay a rural area property tax to the Province that is not paid by taxpayers in municipalities. While there is no direct relationship between the rural area tax and the funding of roads, the tax is typically described as a source of funding for provincial services, including local roads, to residents in unincorporated areas. Based on the provincial rural property tax rate ($0.34 on every $1,000 of property value in 2023) and the assessment base of Okanagan Falls Study Area, in 2023 the study area contributed approximately $354,000 in provincial rural rate taxes, as shown in Figure 3.

Figure 3: Annual Road Costs (2023)

SERVICE	COST[1]	TAX REQ[2]
Roads	$400,000	$353,895
Total	**$400,000**	**$353,895**

[1] *Cost is based on a high-level MOTI estimate*

[2] *Tax Requisition reflects the Provincial Rural Rate and not necessarily allocated directly or solely to roads*

Figure 4 shows the cost of the Provincial Rural Tax rate on a residence within Okanagan Falls valued at $500,000.

Figure 4: Cost Impact on a Typical Residence (2023)

SERVICE	RES RATE	OWING[1]
Roads	0.3400	$170.00
	Total	**$170.00**

[1] *Impact is calculated on a home assessed at $500,000.*

INCORPORATION

➤ What impact would incorporation have on these services?

A decision by local electors to incorporate would result in the transfer of responsibility for, and ownership of, the local road network (33.6 km) from the provincial government to the new Okanagan Falls municipality. The transfer would empower the municipal council to:

- change road classifications and maintenance standards
- set priorities for annual and long-term capital road works, and integrate the works with other servicing priorities and projects
- give priority to alternate modes of travel such as walking and cycling
- integrate land-use planning and road planning decisions
- identify commercial truck routes in the municipality (not on the provincial highway)
- develop a strategy for financing growth-related infrastructure (e.g., grants, reserves, capital borrowing, development cost charges)

Based on experiences in past incorporation initiatives, the new Council could face pressure to upgrade certain roads and, in general, increase the level of investment

in the local road network. The new municipal Council would have considerable discretion, however, over the municipality's local roads budget and how it is spent.

➢ How would incorporation impact service delivery?

Once under municipal authority, and past a transition period identified by the Province, service delivery would no longer be through MOTI and its contract with AIM Roads. While it may be possible for the municipality to contract AIM to provide the service, the new municipality would no longer be part of the broader MOTI contract for the Service Area 8.

The municipality would evaluate whether to have its own public works and roads crew to provide part or all of the roads maintenance service, or to contract the service out (or a combination of the two). Having the service provided through MOTI for a transition period enables new municipalities the time to establish its own roads crew, including the acquisition of the associated equipment and materials, or to find a suitable contractor.

For the purposes of this *Service Sheet*, it is assumed that the new municipality would hire staff to complete the majority of the routine road maintenance work in-house, and use extra contracted resources as needed. In addition, some of the engineering staff identified in other *Service Sheets* (sewer, water) would provide some engineering oversight, management, long-range planning and management of capital projects for the new municipality. Some of these services are beyond those captured in local road maintenance, and include broader transportation planning and review of roads as part of new developments.

➢ How would incorporation impact service costs?

Local Road Operations and Maintenance Cost

MOTI's current cost to maintain the roads, as noted previously, is based on a 10-year contract for a large service area. While the Ministry's maintenance contract cost provides some baseline information, it is generally not helpful in establishing the true cost of maintaining the existing road network by the new municipality. MOTI benefits by significant economies of scale associated with the large maintenance service area (2,330 km of roads) and lengthy service contract. The Ministry is also able to exercise its considerable purchasing power to negotiate competitive rates.

The RIR acknowledges the shortcoming of the MOTI estimates, and uses experience with the MOTI costs, as well as other municipal budgets, as the basis for estimating the annual maintenance cost for the Okanagan Falls Incorporation Study Area local roads. The Town of Oliver and Osoyoos were used as comparables with care taken to remove the budget items from maintenance budgets that would not apply in the Okanagan Falls context (e.g., sidewalk maintenance and drainage works). The RIR concludes that an operations and maintenance budget of approximately $426,000 is an appropriate range for Okanagan Falls, based on the length of the road inventory, and assuming roads transferred to the municipality are in fair or good condition.

Additional Operating Costs

As noted previously, neither the MOTI maintenance, nor the comparable municipal amounts include an allowance for drainage. The RIR notes that drainage concerns exist. While the Incorporation Study typically estimates the costs to provide the same service levels, drainage is one matter on which the current level of service provided by MOTI may not be acceptable, particularly given climate change factors and risks of flood events. If nothing else, the lack of a drainage assessment is worth noting, with acknowledgment that some investments in both assessing and resolving drainage issues, and conducting routine maintenance, would be prudent for any new municipality to expect. Relying upon estimates in other municipalities may not adequately reflect the Okanagan Falls context; however, in the absence of any evaluation, it is noted that the Town of Osoyoos, which has 41.4 km of local roads, budgeted $32,550 in 2023, and $43,900 in 2024 toward storm drainage maintenance.

In addition to the regular maintenance, which would be undertaken by the public works department or on contract, there are some additional roads-related engineering functions undertaken by the municipality, such as preparation and updating of municipal roads standards, capital planning (long-term transportation plans), management of roads capital projects, as well as roads-related reviews of development applications. Staff time spent on these roles has been accounted for in addition to the roads maintenance budget, based upon an assumed staff complement that includes 2.5 FTE public works operators (equipment operators/ labourers), and other engineering/operations resources shared between the water and sewer utilities, including a director of engineering, engineering technologist and manager of capital works, for a total of 3.6 FTE.

Local Road Capital Cost

Roads require capital investments in order to maximize their life spans. The RIR report recommends that proactive road maintenance be prioritized to stretch the useful life of the existing roads by lessening the rate of further deterioration. An estimate has been provided in the report for an annual amount of $700,000 to upgrade the fair roads over a period of 20 years, in addition to the completion of backlogged crack sealing or patching, estimated at $410,000. Note that this amount does not anticipate upgrading the road standards, such as the inclusion of sidewalks or curb and gutters, but rather assumes the existing road widths and standards, but with maintenance that allows the roads to continue to function.

Reserves and Capital Funding

Communities take on a financial burden when they incorporate and accept responsibility for local roads. To help ease this burden, the provincial government may extend funding for road maintenance, based on the existing road maintenance levels, during an incorporation transition period of between three and five years.[1] During this period the new municipality could begin to build a roads capital reserve using its own municipal funds that would not be required for roads maintenance. Time and funds could also be used during the transition period to acquire equipment needed to establish a public works department (or identify one or more contractors). The new municipality could identify and apply for federal and provincial grants to assist with ongoing road capital needs.

Even with the transition funding and access to grants, to satisfy the ongoing capital requirements that come with maintaining roads municipalities typically establish and contribute toward capital reserves on an annual basis. Reserve amounts are a function not only of the magnitude of the capital costs that are needed, but also of the likelihood of obtaining granting funding, and of the ability for the local tax base to afford any increases. As a guide, contributing $75,000 annually to a roads reserve would result in a property tax increase of approximately $36 on a house valued at $500,000.

Federal Gas Tax

A newly-incorporated municipality would be entitled to receive Community Works Funding, otherwise described as Gas Tax. The current gas tax agreement with BC expired in March 2024. The Provinces are currently negotiating a new agreement with the federal government, also anticipated to be a 10-year agreement. The Union of BC Municipalities (UBCM) is undertaking the negotiations on behalf of the BC municipalities. UBCM has indicated they “aim to be in a position to have a 10-year Agreement signed in advance of the program’s next allocated payment in July.” Until a renewed Agreement is signed, the program will continue to operate under the terms and conditions of the existing CCBF Agreement. Based on funding for municipalities with the closest populations, an estimate of $180,000 has been assumed. While grants are not typically included in operations, the Community Works Fund is a known amount that can be counted to help fund eligible infrastructure projects, including local roads and bridges.

[1] Any extension would be outlined by the Province in its Offer of Restructure Assistance.

Summary

Figure 6 provides a local roads service budget for the new municipality. The budget assumes that the road network transferred to the municipality has a condition rating of fair or better, with the backlog of crack sealing already completed ($410,000).[2] The budget includes

- $426,000 in maintenance and operations funding
- $26,400 in additional drainage funding
- $64,770 in long-range roads planning and engineering
- $75,000 in annual capital reserve contributions.

Figure 6 also notes the capital requirement estimate of $700,000 per year, which would be partially offset by approximately $180,000 in annual Community Works Fund grants.

Figure 6: Municipal Local Roads Budget

MUNICIPAL ROADS BUDGET	
Operating	
Maintenance & operations	$426,000
Storm Drainage	$26,400
Engineering/admin	$64,700
Capital Reserve	$75,000
Total	**$592,100**
Capital	
Annual Capital	$700,000
Community Works Fund	-$180,000
Total	**$520,000**

SUMMARY OF TAX IMPACTS

Figure 7 presents the tax impact of the two scenarios – the current situation (RDOS) and incorporation (MUNICIPAL).

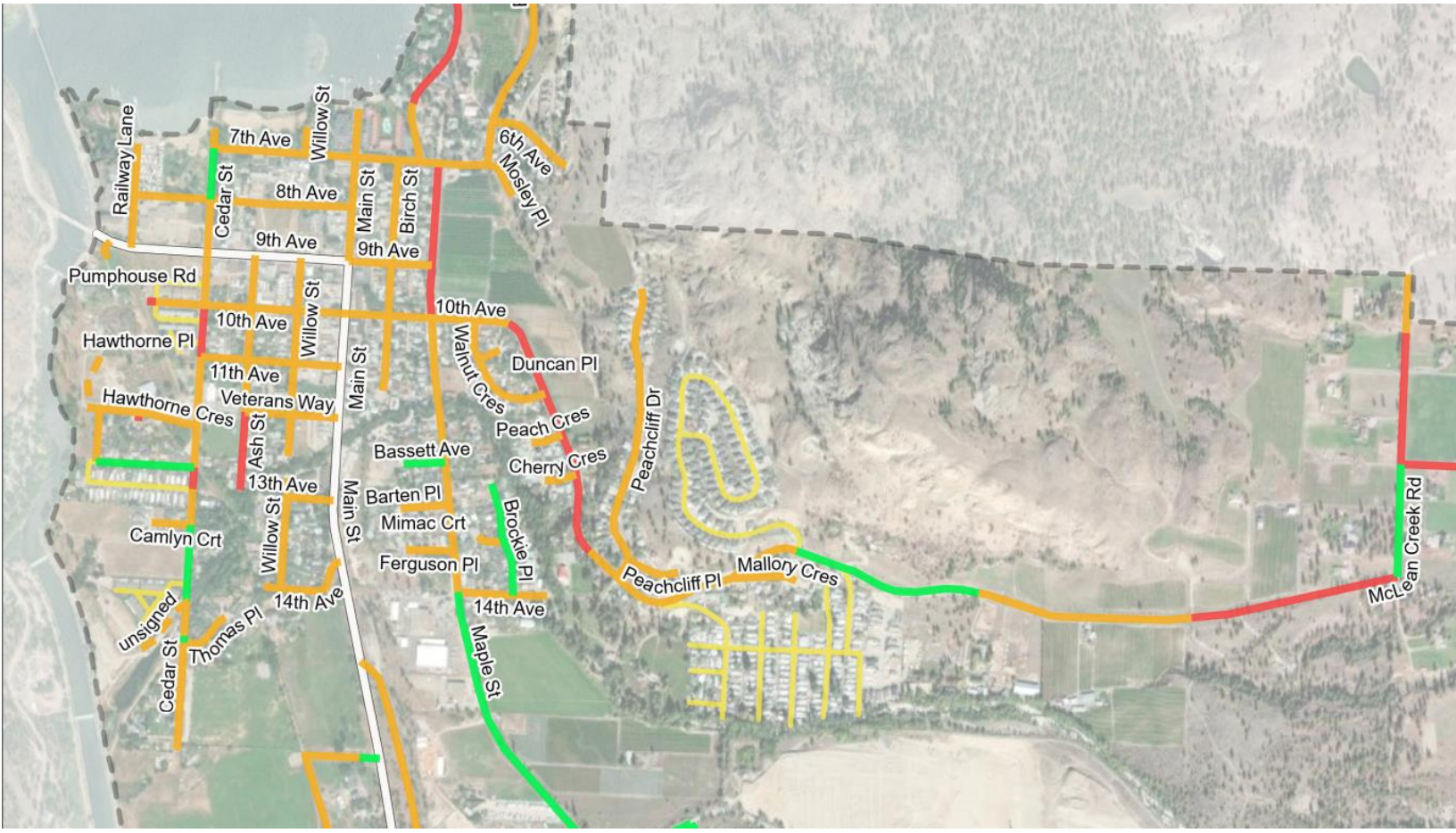
Figure 7: Tax Comparison of Regional District and Incorporation Scenarios

SERVICE	RDOS[1]	MUNICIPAL[1]
Local Roads	$170.00	$284.43
Total	**$170.00**	**$284.43**

[1] *Impact is calculated on a home assessed at $500,000*

[2] It is assumed these items would be addressed in the transition period where MOTI continues to maintain a new municipality's local roads.

Report



Okanagan Falls Incorporation Study
Road Investment Review

DRAFT

Prepared for:

Neilson Strategies

4643.0002.01 | April 2024

Prepared by:
Urban Systems Ltd.

Road Investment Review

Client: Neilson Strategies

Prepared by: Urban Systems Ltd.

Rick Collins, P.Eng.

Date issued: April 2024

Project No.: 4643.0002.01

DRAFT

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URBAN SYSTEMS

TABLE OF CONTENTS

1.0 Introduction 1

2.0 Reviewed Roads 2

3.0 Background 4

4.0 Road Assessment Considerations 5

5.0 Assessment Findings 9

5.1 Pavement Surface Distresses 9

5.2 Crack Sealing and Minor Patching 13

5.3 Bridge Surface Findings 14

5.4 Gravel Roads and Lanes 15

5.5 Drainage 16

6.0 Other Road Maintenance Costs 18

7.0 Summary 20

Appendix A: Maps

Appendix B: Road Summary Table

DRAFT

URBAN SYSTEMS

1.0 INTRODUCTION

This report provides the rationale, findings, and recommendations to inform the Road Investment Review (RIR) for Okanagan Falls community. The key objective of the RIR is to provide the constituents of the Okanagan Falls Incorporation Study area information related to the ongoing budget expected to sustain the level of service of their roads through purposeful road maintenance and renewal projects.

The RIR identifies and assesses the physical condition of the area's roads through visual inspection. This is done to develop a surface condition rating (good, fair or poor) as well as take stock of other roadway components that directly affect the condition and lifespan of the road surface and cost of roadway improvements (maintenance, resurface and reconstruction).

The inspection information is suitable for informing the potential annual roads capital and maintenance programs and future asset management planning initiatives should the area incorporate. More detailed geotechnical and road structure investigations are recommended to help determine if alternative road rehabilitation methods would be appropriate (i.e. full depth reclamation) as part of road rehabilitation works.

Limitations of Visual Assessments

Pavement deteriorates for a broad number of reasons such as materials, thickness, base course, construction quality, design, loading, drainage, weather, and maintenance levels. This deterioration is exhibited through a variety of surface distresses.

A surface condition review does not provide definitive road structural strength assessments such as what can be provided through load deflection testing. It also does not provide more detailed road structure composition information that could be determined through core sampling or test pits; however, surface conditions provide indications of underlying problems. It therefore can provide a general indication of road condition.

A visual assessment of the road surface does not definitively determine if the road has an adequate road base, the base condition or extent of any base failure. Should a more accurate assessment of the roads be desired, we recommend that a geotechnical assessment be completed in key locations to better understand the existence and condition of the road structure prior to overlaying or reconstructing roads. A geotechnical assessment would help provide more confidence in the approach needed to rehabilitate the roads in question.

The visual assessments are only based on inspections at a single point in time. If multiple assessments are completed over time, the rate of deterioration can be judged to help determine a road's stability. Understanding the rate of decay of a road surface and underlying structure is valuable to determine the best road improvement treatments and their recommended timings. This is especially valuable for low volume roads, where the structure could present extensive base failure but the road may be able to continue to meet the current service level for many years because the traffic loading does not degrade the road very quickly.

2.0 REVIEWED ROADS

The area currently being considered for incorporation has almost 34 km of roads, excluding Highway 97 and private roads. most roads being paved. It is understood that Highway 97 would remain the responsibility of the Ministry of Transportation and Infrastructure (MoTI) and thus is not considered in this review.

Map A, included in Appendix A, provides an overview of the roads.

Should the area incorporate, there are also two road bridges, drainage infrastructure, parking areas, signage, line painting and other related road infrastructure that would become the municipality's infrastructure.



Figure 2.1: Cedar St. Bridge



Figure 2.2: Maple Street Bridge (Signed as Oliver Ranch Bridge)

The field assessment was conducted in November 2023 and included all roads presented in Map A that are noted as local and collector roads. The BC Digital Road Atlas, which is a GIS database, provides a summary of those roads. In that GIS each of the roads are segmented as shown in Map B. The road ratings developed for this investigation align with those segments. The GIS results in some segments being relatively short compared to some other portions. However, our analysis remained consistent with the existing GIS data to promote consistency.

Ownership of Weyerhaeuser Road

The parcel database provided by Regional District of Okanagan-Similkameen online mapping indicates that there is no right-of-way for a significant portion of this road, as noted in Figure 2.3. This road also has risk of erosion from Shuttleworth Creek, as noted in Figure 2.3 and Figure 2.4.

It is appreciated that access to properties is an important component to road layout. However, perhaps property amalgamations, securing a new right-of-way and other factors should be considered before a newly incorporated municipality accepts responsibility for some of Weyerhaeuser Road in this area.

Weyerhaeuser Road has been included in the analysis. As the erosion concern from Shuttleworth Creek is along a gravel portion of the road it does not impact the assessment of the paved sections of roads.

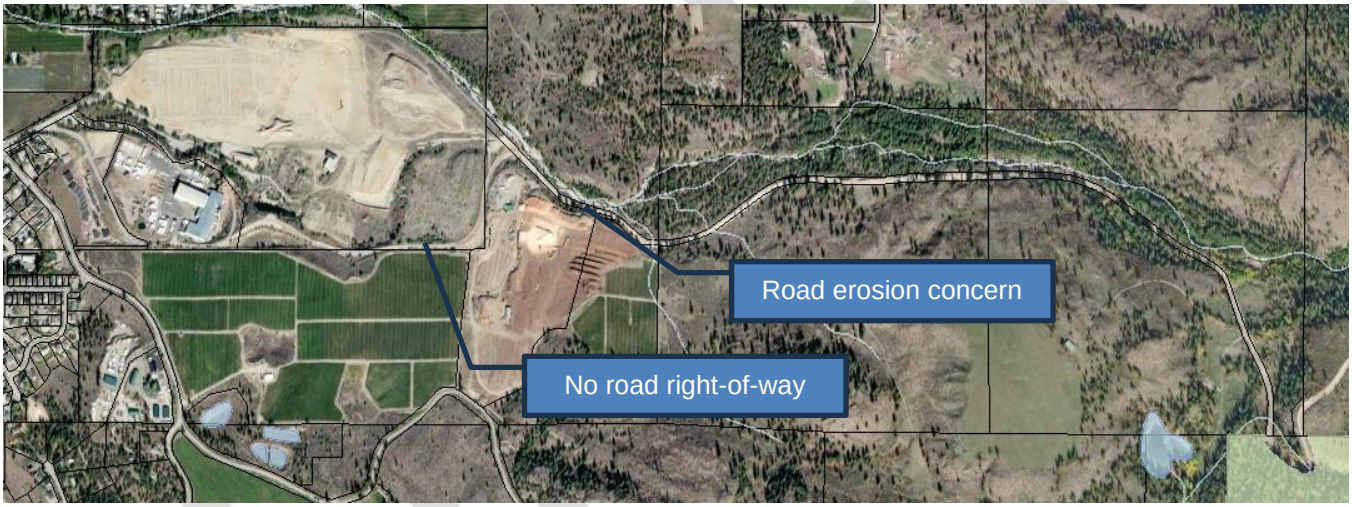


Figure 2.3: Parcel Database from Regional District of Okanagan-Similkameen Online Mapping



Figure 2.4: Erosion Location Concern on Weyerhaeuser Road

3.0 BACKGROUND

Pavements will typically deteriorate over time at an ever-increasing rate in the absence of timely maintenance and rehabilitation actions as shown in Figure 3.1 below.

As deterioration increases, so do the associated repair costs. Investments in effective and systematic maintenance and rehabilitation can slow or reverse this deterioration, thus extending its service life and reducing life cycle costs.

A typical pavement surface with a suitable base structure will deteriorate slowly for the portion of its life, after which it will typically lose the balance of its life very quickly. When the road surface is repaired regularly with maintenance interventions such as crack sealing, the useful life of the pavement can be extended dramatically. When it is no longer viable to extend the pavement life with maintenance, the road can be re-surfaced. Both timely actions (maintenance and resurfacing) can defer expensive re-construction, which includes the repair of the road base. It may be possible to get 3 or more resurfacings before reconstruction on a well-maintained and well-constructed roadway, depending on subsurface construction and traffic loading.

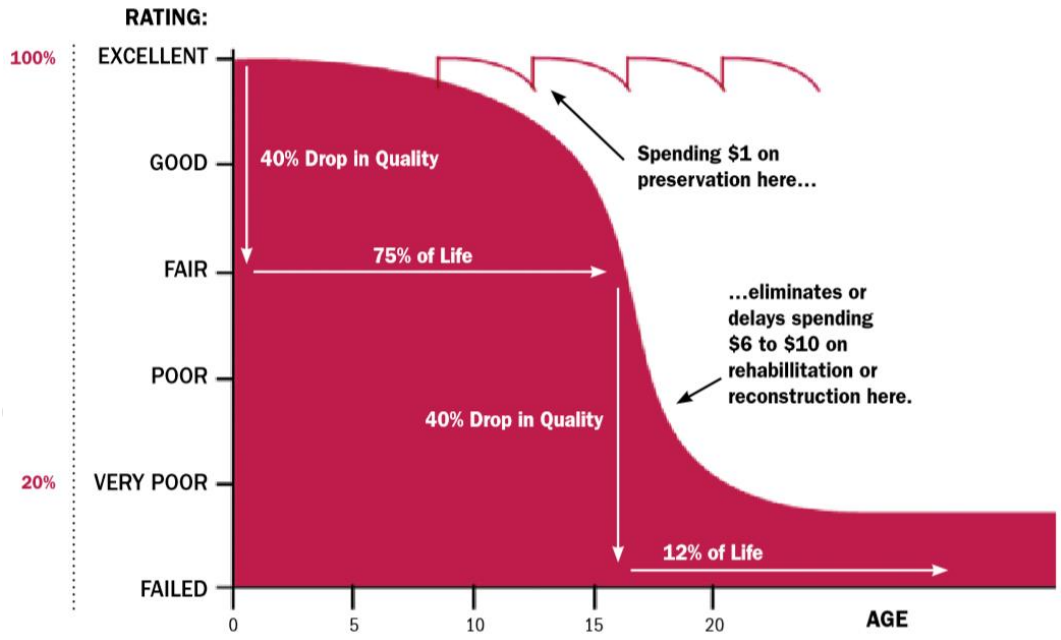


Figure 3.1: Typical Pavement Deterioration Curve (2019 Canadian Infrastructure Report Card)

Some road condition investigations will rely on condensed ratings of roads expressed as Pavement Quality Index (PQI), Pavement Condition Rating (PCR) or other similar systems. These standardized values are useful for providing a broad overall measure of the state of a road network. These calculations typically combine the severity of pavement defects, the density of the defects (i.e. how much of the road surface includes those defects) and other considerations such as potholes and indications of base failure. Developing consistent and accurate ratings for roads using one of these systems is a useful investment, but the effort for that additional level of detail was beyond the scope of this assignment.

4.0 ROAD ASSESSMENT CONSIDERATIONS

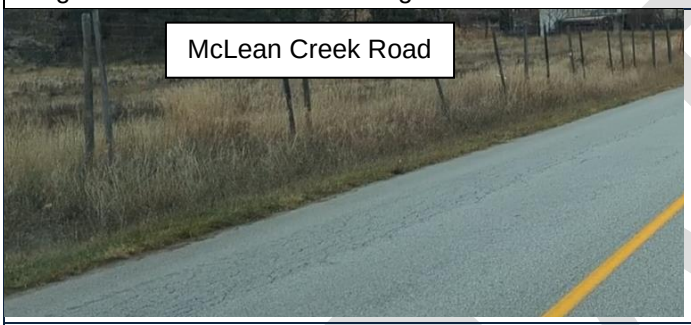
There are several road surface distresses and terminologies employed when considering the condition of roads. This report section provides a summary of some of the terms most relevant to the RIR.

Pavement Surface Distresses

Pavement deteriorates for a broad number of reasons such as materials, thickness, base course, construction quality, design, loading, drainage, weather, and maintenance levels. This deterioration is exhibited through a variety of surface distresses.

Table 4.1 provides a photo and description of some of the more prominent road surface distresses. The example photos are of roads in the RIR study area and the descriptions and causes of the distress are from the MOTI Pavement Surface Condition Rating Manual – Fifth Edition.

Table 4.1: Pavement Distresses & Descriptions

Longitudinal Wheel Path Cracking	
	Cracks which follow a course predominantly parallel to the pavement centreline and are located at or near the centre of the wheel path. Longitudinal Wheel Path Cracking indicate fatigue failure from heavy vehicle loads. Cracks within one foot of the edge can be caused by insufficient shoulder support, poor drainage, or frost action.
Longitudinal Joint Cracking	
	Cracks running in the direction of traffic are longitudinal cracks. Centre line or lane cracks are caused by poor construction of longitudinal joint, frost action on adjacent lanes with variable granular depths, differential frost heave along the centreline caused by the insulating value of snow along pavement edges, moisture changes resulting in swelling and shrinkage
Pavement Edge Cracking	
	Cracks which occur parallel to and within 0.6 meters of the inside and/or outside of the fog line. Cracks may be crescent shaped cracks or other consistent cracks which intersect the pavement edge. Possible causes include: Frost action, inadequate pavement structural support at the pavement edge and/or excessive traffic loading, poor drainage at the pavement edge and shoulder, inadequate pavement width forces traffic too close to the pavement edge.

Transverse Cracking	
	Cracks that are predominantly perpendicular to the pavement centreline and may extend fully or partially across the roadway. Possible causes include surface shrinkage caused by low temperatures, high temperature susceptibility of the asphalt cement binder in asphalt mixes, frost action, reflection cracks and hardening of the asphalt with aging.
Alligator Cracking	
	Cracks which form a network of multi-sided blocks resembling the skin of an alligator. Block size can range in size which indicates the depth of failure taking place. The pattern of cracking is usually longitudinal, originating in the wheel paths, but can occur transversely due to frost heaves or settlement and along the centreline on narrow two-lane roads. Possible causes include areas subjected to repeated traffic loadings. Insufficient bearing support due to poor quality base materials or saturated base with poor drainage, stiff or brittle asphalt mixes at cold temperatures.
Potholes	
	Bowl-shaped holes of various sizes in the pavement surface. Possible causes include: Thin spot in the asphalt layer, localized drainage problems such as water infiltration through poorly bonded pavement structural layers or segregated spots in the asphalt mix where coarse patches allow intrusion of water, asphalt mix design deficiencies.
Utilities within the Road Surface	
	Cracking, swelling, or settling of the road surface around manholes, catch basins or other infrastructure within the road surface. Possible causes include poor compaction of materials around manholes, low spot or inadequate drainage allowing water to pool and weaken surface and surrounding base materials.

Photos taken by Urban Systems Source: MOTI Pavement Surface Condition Rating Manual – Fifth Edition

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Road Base Failure

As part of the assessment, roads that appeared to show signs of base failure were given a lower rating based on a subjective assessment of the extent of base failure compared to the total surface area of the road in each section. Since the RIR was a visual assessment of the road surface and associated road corridor components, we could not definitively determine if the roads have adequate road base, base condition or extent of any base failure.

Crack Sealing, Minor Patching and Spray Patching

In addition to the surface distresses noted above, the condition of crack sealing and patches were considered in the rating of roads.

Surface cracks and potholes allow water to penetrate and weaken the road structure. Once the road structure is weakened, the deterioration of the road increases. To prevent water from entering the road structure it is typically recommended that crack sealing and patching be completed if the road presents limited base failure in the cracking area.

In addition to crack sealing, there is some sections of road that have alligator cracking, which is not practical to address by linear crack sealing methods. In cases where localized base alligator cracking exists and potholes are not occurring it would likely be more appropriate to implement spray patching. It is important to understand that any surface patching treatment of alligator cracking is a temporary fix since alligator cracking is often a sign of failure within the road base; however, patching may lengthen the remaining life of that area temporarily until a proper fix can be budgeted and executed. It is most effective for roads with lower traffic volumes and few heavy vehicles.



Figure 4.1: Example Candidate for Crack Sealing



Figure 4.2: Example of Patching (10th Ave. at Walnut Cres.)

Drainage

Drainage is an important factor to help ensure the integrity and longevity of some of the area's roads. If water can penetrate the road structure, the road can weaken and fail prematurely. Water should be kept below the road gravel structure with the use of open ditches, culverts, or other drainage infrastructure. Water should also be allowed to drain off and away from the road where appropriate such that water is not allowed to pool and so that roadside erosion is minimized.

An area drainage assessment was not part of this assignment. However, it is noted that along many road edges there is little to no drainage infrastructure. For context, Table 4.2 describes the drainage conditions as outlined in the MOTI Surface Condition Rating Manual that should be considered when planning drainage improvements to extend the life of the study area roads.

Table 4.2: Road Corridor - Drainage Condition

ACCEPTABLE
• Cross section and drainage are fully adequate. • Concealed underground storm drains in good repair. • Open ditching with no free-standing water and no silt bottom layer or obstructed culverts, etc. • Open ditching with free-standing water or bull rushes in the ditch and the fill height is greater than 1.5 metres.
BORDERLINE
• If the ditch grade line, cross-section elements and/or culvert and/or ditch capacity are somewhat below the standard that would be provided if the road and ditches were rebuilt. • Roads with acceptable design characteristics, but poorly maintained ditching, requiring work to be brought up to an acceptable level. Work required should generally fall into a category that could be completed by gradual cleaning of ditches, grading of shoulder areas and minor culvert repair.
UNACCEPTABLE
• Free-standing water in ditches, grass and other debris, requiring more than minor work to be brought up to an acceptable standard; granular washout of shoulder areas, etc. • Conditions could impede safe traffic movement. • Areas with lack of grade could possibly flood. • Catch basins are in a very poor state of repair with obvious pavement deterioration and free-standing water. • Water channels onto driven portion of road. • Road drains onto adjacent occupied properties

Source: MOTI Pavement Surface Condition Rating Manual – Forth Edition

5.0 ASSESSMENT FINDINGS

5.1 Pavement Surface Distresses

Although there are high severity distresses and roads needing attention, it should be noted that many of the roads within the area are in acceptable condition.

Map C shows the generalized condition rating for the studied roads, divided into sections as per the BC Digital Road Atlas.

A generalized condition rating of good, fair or poor was assigned considering the overall road condition including surface cracking, patching and visible indications of base failure. As summarized in Table 5.1, most of the roads are currently in fair condition.

Table 5.1: Surface Distress Overview

Generalized Condition Rating		
	Length (km)	Percent (%)
Poor	3.7	11%
Fair	26.2	78%
Good	3.7	11%
Total Length (m)	33.6	

Road Segments Rated as Poor

Roads that have a poor rating have signs of significant base failure and will have to be dealt with more aggressively with full-depth reconstruction or in some cases full-depth reclamation. It is suggested that major capital investment in these roads, particularly the lower traffic roads with less significant distress, should be delayed for as many years as possible, even if it requires some patching in the meantime. This will make budget available to complete higher priority maintenance repairs and resurfacing. In many cases local roads that have some structural failure can still accommodate local traffic without major impacts to vehicles. The reduced level of service, compared to a reconstructed road, may be necessary until the priority overlays, crack sealing and reconstruction of the more severe condition roads is complete.

Some of these roads could potentially provide an acceptable level of service for the next 5 years, especially if spray patching, pothole repair and larger patching activities can extend the life. Some roads have low traffic volumes and few heavy vehicles travel them. However, eventually these roads will require capital investments. Constituents of the Okanagan Falls Incorporation Study area should be made aware that investments in these poor sections of roads will be required in the coming years.

Table 5.2 provides a summary of the comments related to each of these road segments. Appendix B also provides this information as part of the overall summary table.

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Table 5.2: Brief Overview of Field Observations for Paved Roads Rated as Poor Condition

Segment ID	Paved (P) or Gravel (L)	Road Name	Segment Length (m)	Inspection Key Comments
355683	P	10th Ave	19	Poor condition for this small portion of road with edges having base failure and there being poor drainage
59351	P	Allendale Lake Rd	293	Chip sealed road? Volume patching and spray patching may extend the need to complete a full repair to +/-10 years from now
466656	P	Allendale Lake Rd	501	Chip sealed road? Base failure and rough road for first ~200m. The remaining could likely last 5 years. Candidate for full reconstruction in near term, depending on level of service expected for this road.
1946578	P	Allendale Lake Rd	299	Chip sealed road? Base failure and rough road. Could likely last 5 years. Candidate for full reconstruction in near term, depending on level of service expected for this road.
59265	P	Ash St	166	Southern 100 m is in poor condition
60569	P	Cedar St	46	Utility trench and area around it is failed
355675	P	Cedar St	29	Base failure at intersection with 11th Ave.
355679	P	Cedar St	34	Volume patching done and it will likely expand over time
355680	P	Cedar St	47	Cracking and base failure
355669	P	Hawthorne Cres	18	Base failure in front of the cul-de-sac
60098	P	Hody Dr	605	Some portions of this long segment are better than others, but overall it has base issues (edge cracking, alligator cracking drainage eroding the shoulder). Any work on this road should include drainage management. Road likely not a high priority due to low traffic volumes and high additional cost and constraints associated with drainage upgrades being part of the works.
60543	P	Maple St	113	Candidate for full reconstruction
60931	P	Maple St	217	Candidate for full reconstruction
59290	P	McLean Creek Rd	90	Base failure throughout. Road deserves reconstruction in medium term and patching in very short term
60540	P	McLean Creek Rd	95	Northbound lane has extensive base failure, which deserves reconstruction. Southbound lane primarily requires crack sealing.
68936	P	McLean Creek Rd	172	Northbound lane has extensive base failure, which deserves reconstruction. Southbound lane primarily requires crack sealing.
348159	P	McLean Creek Rd	448	Edge failures. Spray patching likely not enough. Should plan for a full depth reclamation or other major road reconstruction for almost all of the length. Southern end is in better condition.
467116	P	McLean Creek Rd	90	Base failure throughout. Road deserves reconstruction in medium term and patching in very short term.
467117	P	McLean Creek Rd	189	Base failure throughout. Road deserves reconstruction in medium term and patching in very short term
1659882	P	McLean Creek Rd	172	Northbound lane has extensive base failure, which deserves reconstruction. Southbound lane primarily requires crack sealing but has some edge failure.
60081	P	Sun Valley Way	48	Extensive base failure at intersection

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The following calculation provides an order of magnitude cost for complete reconstruction of the roads that are in poor condition. As noted above, it is likely that many or all of these roads could remain in service for at least 5 years without needing to complete road reconstruction.

Table 5.3: Road Reconstruction Costs for Paved Roads Rated as Poor Condition

Road Reconstruction Costs - Local Road Standard	
Description	**Cost/m^2**
Cold Milling Asphalt and Offsite Disposal	$10
Common Excavation and Disposal (Assume average of 0.6 m deep)	$15
Subgrade Preparation	$3
Supply and Place Sub-base Gravel (450 mm)	$30
Supply and Place Base Gravel (75 mm)	$10
Prime Coating or Tack Coating	$1
Asphalt Surface (65 mm for local roads)	$40
Sub-Total	$109
30% for Contingency and Miscellaneous Items (Traffic Control, Asphalt Saw Cutting, Utility Adjustments, Boulevard Topsoil and Seeding, Line Painting, Signage, Driveway and Intersection Tie-ins, etc.)	$33
4% Contractor Mobilization, Insurance and Bonding	$4
Sub-Total	$146
10% Engineering (Geotechnical Investigation, Survey, Tendering, Inspection and Testing)	$15
Total (Rounded)	$160

Total length of paved roads rated as poor	3.7 km
Assumed average width of roads	8 m
Average cost of reconstruction	$160/m2
Sub-total	$4,740,000
Allowance for road shoulder and drainage improvements	Varies greatly based on location and expected level of service. This deserves separate review.

Roads like Allendale Road (which was in a condition that suggested it is a chip sealed gravel road and not a paved road) could be pulverized and established as a gravel road if that is the decision of the community. Changing Allendale Road to gravel could reduce almost $1,400,000 from the above costs but results in a gravel road standard and related maintenance.

Reclamation with Addition of Base Material and Repave

It may be possible to do full-depth reclamation instead of the full reconstruction. From our experience full-depth reclamation is between 30-50% less expensive than full reconstruction (if enough area of road undergoes reclamation to help offset the costs of mobilizing the reclamation equipment). However, additional geotechnical review is justified to confirm which roads would be good candidates for full-depth reclamation.

In the case of the RIR roads, McLean Creek Road may be a candidate for reclamation as it is in a rural setting.

Therefore, even if 50% of the cost noted above is assigned to address roads rated as poor, that total cost would be in the order of $2,400,000.

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Road Segments Rated as Fair

Roads with a fair rating are candidate for spot base repairs and surface treatments. No historical maintenance or capital works information about the roads was made available, but the visual assessment indicates that many roads in fair condition are relatively stable, showing minimal signs that a major overlay or reconstruction works are deserved immediately. However some do have extensive cracking and localized base failure. Addressing those issues and the continued degradation with the passing of time will result in some of these roads becoming candidates for capital investment. The majority of that work is not expected to be warranted within the 5 year transition period after incorporation, when MoTI will fund the works, but constituents of the Okanagan Falls Incorporation Study area should be made aware that investments in the roads over time will surely increase given the age and condition of the roads.

It is recommended that core sampling and Benkelman beam testing be done as part of a geotechnical assessment to confirm if milling and overlay is appropriate vs full-depth reclamation and repave where additional base material is needed.

Budgeting should include a minimum of 10% base repair when doing any mill & overlay works to deal with localized issues. Drainage and road shoulder improvement recommendations varied from road to road, but investments in those works should be added as well

For context, if all paved roads rated as fair were to undergo a mill and overlay, the following costs result. It is important to note that most of these investments would not be required within the next 10 years.

Table 5.4: Road Overlay Costs for Paved Roads Rated as Fair Condition

Road Mill and Overlay Costs	
Description	**Cost/m^2**
Cold Milling Asphalt and Offsite Disposal	$10
Tack Coat	$1
Asphalt Overlay Course (50 mm)	$30
Sub-Total	$41
30% for Contingency and Miscellaneous Items (Traffic Control, Asphalt Saw Cutting, Utility Adjustments, Level Course, Line Painting, Signage, Driveway and Intersection Tie-ins, etc.)	$12
4% Contractor Mobilization, Insurance and Bonding	$2
Sub-Total	$55
5% Engineering (Geotechnical Investigation, Survey, Tendering, Inspection and Testing)	$3
Total (Rounded)	$60

Total length of paved roads rated as fair	24.9 km
Assumed average width of paved surface	7 m
Average cost of milling and paving for local, primarily rural roads	$60/m2
Add 10% of road area as base repair	$ 200/m2 for 17,400 m2
Allowance for road shoulder and drainage improvements	Varies greatly based on location and expected level of service. This deserves separate review.
Total Cost	$13,940,000 Almost 20% of that cost is for road base repair. Base repair cost will likely increase over time.
Annual cost if spread over a 20 year period (not accounting for inflation or increased base failure)	$700,000 per year

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Road Segments Rated as Good

Roads rated as good are visibly in a condition that will likely not warrant any paving work for at least 15 years. Note that practically all these roads will likely require crack sealing in the coming years as part of proactive maintenance. Also, some of these roads may deserve shoulder grading or roadside drainage works to reduce the rate of deterioration.

However, no major investments to improve road condition are expected in the next 5 to 10 years. Depending on how these good quality roads degrade over time, as Figure 3.1 promotes, overlays or other minor surface treatments may be good investments to further extend the life of these roads.

5.2 Crack Sealing and Minor Patching

The field assessment indicates that most of the roads within the study area have cracks that have not been filled. Even though some roads are generally in good condition, the existing cracks will allow water to enter the road structure which will speed up the rate of deterioration.

There also exist some localized areas where base failure helps to predict that pothole repairs will continue to be required within the next 5 years. Overall the site conditions indicate that the potholes are being addressed, but as time passes and the base failure continues it is expected that an increase in pothole repairs will result.

The extent of suggested crack sealing and patch conditions were assigned a rating of 1 to 5 to help characterize what might be appropriate investments in those surface treatments to help extend the life of the roads. Generally, a rating of 1 reflects that limited lengths crack sealing and patching were observed while a rating of 5 reflects that extensive cracking exists. It may make sense to employ spray patching in some areas where the density and type of cracks makes that approach more practical.

We recommend a significant focus on crack sealing until the majority of the backlog has been addressed. Then routine (annual) crack sealing and patching should occur to address new cracks and patch locations as they appear. We recommend starting crack sealing the roads with a general surface condition rating of fair to good (see Map C). For roads that are too far deteriorated (rated as poor), crack sealing would not be an effective solution. For those roads spray patching and localized patching activities are still warranted to help delay the investment in major reconstruction works.

Priority should also be placed on cracking areas where roads seem to be more susceptible to based failure due to water intrusion from cracks. It is appreciated that some cracks have likely existed for many years but have not resulted in notable base failure. Thus, it would be overly conservative to recommend that all cracks must be addressed in the short term.

For budgeting purposes, we recommend allocating in the order of $400,000 to address the backlog to crack sealing. This amount can vary greatly depending on continued road degradation, extent of road improvements and the appropriate treatment.

It is important to note that the width and depth of pavement cracks vary. The cost for crack sealing is based on an average crack width and depth. Unit pricing per meter will vary based on the actual volume of sealant required to complete the crack filling. The price does not include routing, which may be required to seal some cracks.

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Table 5.5: Summary of Crack Sealing and Patching Assessment

Crack Density and Severity Rating	Length (km)	Cost Per Metre of Road for Round of Crack Sealing or Spray Patching	Cost
1	4.4	$5	$20,000
2	14.4	$10	$150,000
3	7.6	$15	$110,000
4	1.9	$20	$40,000
5	3.5	$25	$90,000
		Total	$410,000

**In addition to maintenance costs that MoTI currently invests in the area roads*

5.3 Bridge Surface Findings

During our review we noted there were no obvious, visible driving surface deficiencies. We are not able to comment on the major rehabilitation options, timing and cost as each bridge may require work outside of resurfacing.



Figure 5.1: Maple St. Bridge



Figure 5.2: Cedar St. Bridge

5.4 Gravel Roads and Lanes

All gravel roads were deemed to be in suitable condition to meet their assumed service levels (i.e. heavy truck routes are well graded and low volume gravel roads meet the needs of the users). It is expected that little to no capital improvements will be required for these roads in the coming years. It is also assumed that road maintenance activities (grading, gravel resurfacing) are included in the existing MoTI maintenance budget.

Table 5.5: Summary of Gravel Roads

Segment ID	Road Name	Segment Length (m)	Road Rating (Good / Fair / Poor)	Inspection Key Comments
59310	Chapman Rd	272	Fair	Low use gravel/dirt road
355671	Hawthorne Pl	129	Fair	Low quality, low volume road
355656	unsigned	130	Fair	Gravel lane off Cedar St. that parallels the creek
20162015	Weyerhaeuser Rd	470	Fair	Gravel road (used by heavy vehicles)
467454	Weyerhaeuser Rd	452	Fair	Gravel road (used by heavy vehicles) Significant risk of flooding and erosion along this stretch
467455	Weyerhaeuser Rd	113	Fair	Gravel road (used by heavy vehicles)
467456	Weyerhaeuser Rd	184	Fair	Gravel road (used by heavy vehicles)

As noted in Section 2, the new municipality's ownership of Weyerhaeuser Road should be reviewed

There also exist some rear lot lanes in the community. Review of these lanes indicate varied lane standards. It is assumed that, should the area incorporate, minimal changes to the capital and maintenance budget will arise due to lane improvements.



Figure 5.3: Example Rear Lot Lanes in the Community

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Figure 5.3 (continued): Example Rear Lot Lanes in the Community

5.5 Drainage

The following types of drainage issues were noted throughout the area during the road assessment:

- Areas with no natural drainage connectivity
- Roads where surface drainage improvements are needed
    - Gravel and vegetation built up at the pavement edge causing water to pond on the road edge
    - Lack of a crown or crossfall on the road directing drainage off the road
    - Low spots
- Roads where drainage improvements could help extend the life of roads
    - Lack of ditching

- No storm sewer in areas where ditching may not be practical or preferred
- It is assumed that the lack of drainage infrastructure in the core portion of the community is somewhat mitigated by permeable ground conditions in the area, however, standing water was observed during the visual inspection and it had not rained for almost a day

Drainage recommendations:

- **Gravel and vegetation built up at the pavement edge**
  - This was a common drainage issue observed throughout the area. This build up of fine gravels and organic material prevents surface water from draining off the road and enables water to saturate the base gravels of the shoulder and weaken the pavement edge. It is recommended to keep the vegetation and gravels graded off to ensure surface water can drain off the road surface. In some cases, residents may have put effort into their landscaping and may not wish to have their yard disturbed, so communications with those property owners prior to work occurring is recommended if improvements are to be made.

- **Lack of a crown or crossfall on the road top**
  - This issue was observed on some roads This may be caused by building the road top without a crown/crossfall, or loss of the crown/crossfall over time due to settlement. It is recommended that roads be graded to promote surface drainage during rehabilitation works.

- **Roads requiring ditches or other drainage infrastructure**
  - During the field assessment it was found that there are several roads where ditches would need to be established or re-established to enable the effective conveyance of surface water.
  - While these ditching improvements could help extend the life of roads, we understand it is a large undertaking to execute, and recommend starting where ditching issues are evidently causing road base failures, causing flooding, or where road rehabilitation work is planned and ditching improvements are required.
  - Whenever making ditching improvements, it is advised to review the ultimate drainage path to ensure that runoff conveyed by the ditch system can continue downstream of the improved area to its ultimate destination. In some cases this may require establishing drainage easements through private property.
  - The suitability of ditching to handle runoff should be reviewed on a site-specific basis. It is important to consider the following:
    - Ultimate drainage path
    - Grade available to create positive drainage
    - Culverts
    - Soil type, because an area high in gravels or permeable soils may not require ditching to allow runoff to drain
    - The opportunity to install catchbasins that outlet to rock pits to allow for localized drainage without the need for extensive ditching
  - Where ditching is not a suitable drainage solution, underground drainage infrastructure may be a consideration, but that would further increase costs.
  - It is recommended that the overall drainage characteristics and concerns be reviewed in more detail to identify recommended improvements and to balance those investments with desired service levels and impacts to road condition.

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6.0 OTHER ROAD MAINTENANCE COSTS

Routine road maintenance includes the following types of activities:

- Snow clearing
- Road sweeping
- Line painting
- Sign maintenance and replacement
- Minor clean ups (ditch maintenance, dead animal clearing, etc.)
- Inspections of bridges
- Typically road crack sealing and minor patching are classified as road maintenance activities

If Okanagan Falls incorporates, the municipality will also be responsible for those activities.

The new municipality may decide to have the road maintenance activities completed by contracting out the services of private contractors. This is the method employed currently by MoTI for the subject roads.

The new municipality may decide to complete some or all of the road maintenance works without private contractors. That approach would come with investments in equipment, personnel, equipment maintenance, buildings for storage, and repair space and other costs. The cost to adopt that approach is beyond this review. However, by considering MoTI's current annual maintenance investment and considering costs of representative municipalities, constituents of the Okanagan Falls Incorporation Study area can be provided with insights of what maintaining the area roads might cost.

Managing issues due to major drainage routes (e.g. Shuttleworth Creek) may also be the funding responsibility of the new municipality, depending on scale of issue and if there is a risk to public infrastructure. Any such cost has not been quantified in this investigation.

Other public facilities such as parks and the boat launch would also warrant ongoing investments, but estimating the cost of those additional investments is outside the scope of the RIR.



Figure 6.1: Public Boat Launch

DRAFT

Representative Costs – MoTI

MoTI has indicated that the annual maintenance budget is $284,000 for the subject roads. MoTI also indicated that cost is derived by assigning the total, regional road maintenance contract costs to a cost per kilometer and then applying that cost for the length of the subject roads. A breakdown of that cost was not provided, but it includes activities like snow clearing, street sweeper, maintaining signs and line painting and other routine maintenance tasks.

Due to limited crack sealing having happened, it is assumed that little of the historical maintenance has gone towards that task on the subject roads in recent years. Thus, any recommended crack sealing or spray patching work is assumed to be in addition to that cost. However, after the backlog is addressed, that type of work should be included as a routine annual allowance.

Pothole repair patching has been done throughout the road system. It therefore is assumed that the representative cost provided by MoTI has covered that maintenance work. Note however that as roads age such maintenance work will increase. Thus, maintenance budgets for the roads should include an increase in the pothole repair and patching budget over time.

Also, maintaining the subject roads under the broader regional highway maintenance contract does likely result in the cost per kilometer going down compared to having a contract specific for the subject roads. However, that is dependant on the level of service required for the area. For example, the time before roads are plowed after snowfall and how snow can accumulate before roads need to be plowed have major impacts on the snow removal budget.

Representative Costs - Other Communities

Comparing budget requirements from one community to the next can come with challenges. There is not a mandated approach for ensuring that each expenditure is tracked the same from community to community. Also, depending on community layout and expected service needs the costs can vary. However, considering what neighbouring communities spend annually on road maintenance helps to provide an indication of what might be plausible for Okanagan Falls should it incorporate.

The following graph was developed by determining the cost per kilometer of some example communities based on their 2024 operating budgets and then assigning the cost per kilometer to 33.6 km length of roads included in the study area. The value labelled as Okanagan Falls (MoTI) is the amount MoTI notes as the current annual cost per kilometer spent on road maintenance under the current highway maintenance contract and then assigning that cost per kilometer to the 33.6 km of roads included in the study.

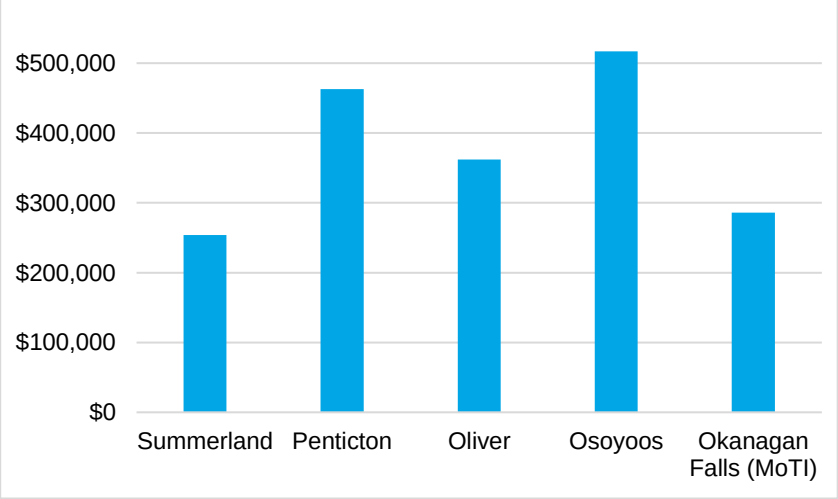


Figure 6.1: Annual Road Operations and Maintenance Budgets for the Study Area if the Cost Per Kilometer Budgets from Other Jurisdictions Were Applied

DRAFT

7.0 SUMMARY

Many of the study area's paved roads are in acceptable condition, requiring minimal works in the coming years. However, there are some roads that are in poor condition.

It is recommended that effort be made on regular and proactive road maintenance to stretch the useful life of the existing roads by lessening the rate of further deterioration. That includes crack sealing, patching and road shoulder works. The lack of a drainage system in some areas also raises concerns about the impacts to the longevity of roads.

Overall, annual investments in the study area roads are summarized as follows:

Table 7.1: Summary of Costs

Investment Description	Annual Allowance
Capital provided by MoTI	$116,000/year
50% of the cost to reconstruct all roads rated as poor (to account for some work perhaps not happening or being less costly)	$2,400,000 (about $500,000/year if spread over 5 years)
Annual cost to mill and overlay all existing roads rated as fair within the next 20 years	$700,000/year
Additional allowance for two bridges or drainage improvements	No included

Investment Description	Annual Allowance
Current maintenance costs, identified by MoTI	$284,000/year
Possible maintenance costs, because the new municipality's costs for contracting the services or to undertake some/all services may be higher. Also, initial equipment and facility investments would be required to build the municipality's resources.	$426,000/year (Assuming a 50% annual cost increase compared to MoTI existing cost estimate)
Additional allowance for crack sealing and spray patching (If conceptual level budget for all that work was completed within 5 years)	$82,000/year

Costs are provided in 2024 Canadian Dollars. Costs should be adjusted for annual budgeting to reflect inflation and market changes. Actual budget will depend on extent of contracted work, amount of equipment to purchase and level of service adopted by the community.

Also note that capital investments in roads could increase over time as roads degrade.

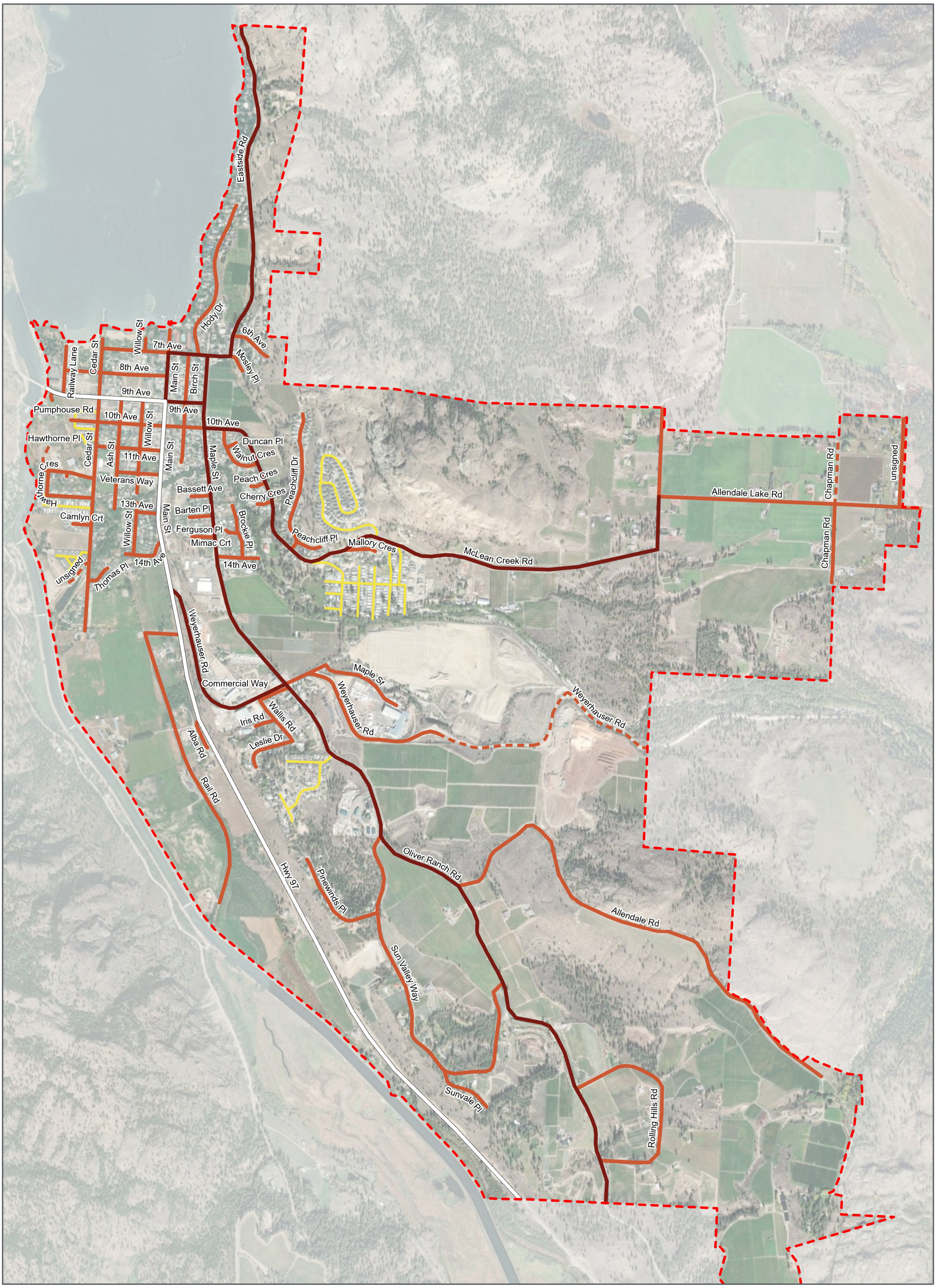
Coordination with Other Infrastructure Works

The priorities provided in this report may be impacted by other capital works in the community. Buried infrastructure construction or other roadway improvements may change road priority timings. For example, if there are plans to install a new watermain and services under a road that is expected to undergo road works, managers should seek to align the road works with the watermain installation.

DRAFT

Appendix A: Maps

Last updated by barnold on Monday, March 4, 2024 2:05 PM Last printed by barnold on Monday, September 25, 2017 11:46 AM



URBAN SYSTEMS

Project #:	4643.0002.01
Author:	BA
Checked:	RC
Status:	Final
Revision:	A
Date:	2024 / 02 / 28

0 200 400 600 800

Metres

Coordinate System: NAD 1983 UTM Zone 11N

Scale: 1:16,000 (When plotted at 11"x17")

Data Sources: Digital Road Atlas and ESRI base maps.

The accuracy & completeness of information shown on his drawing is not guaranteed. It will be the responsibility of the user of the information shown on this drawing to locate & establish the precise location of all existing information whether shown or not.

Legend

Digital Road Atlas

Road Type

- Highway
- Collector Minor (Paved)
- Local (Paved)
- Local (Gravel)
- Strata

Incorporation Study Area

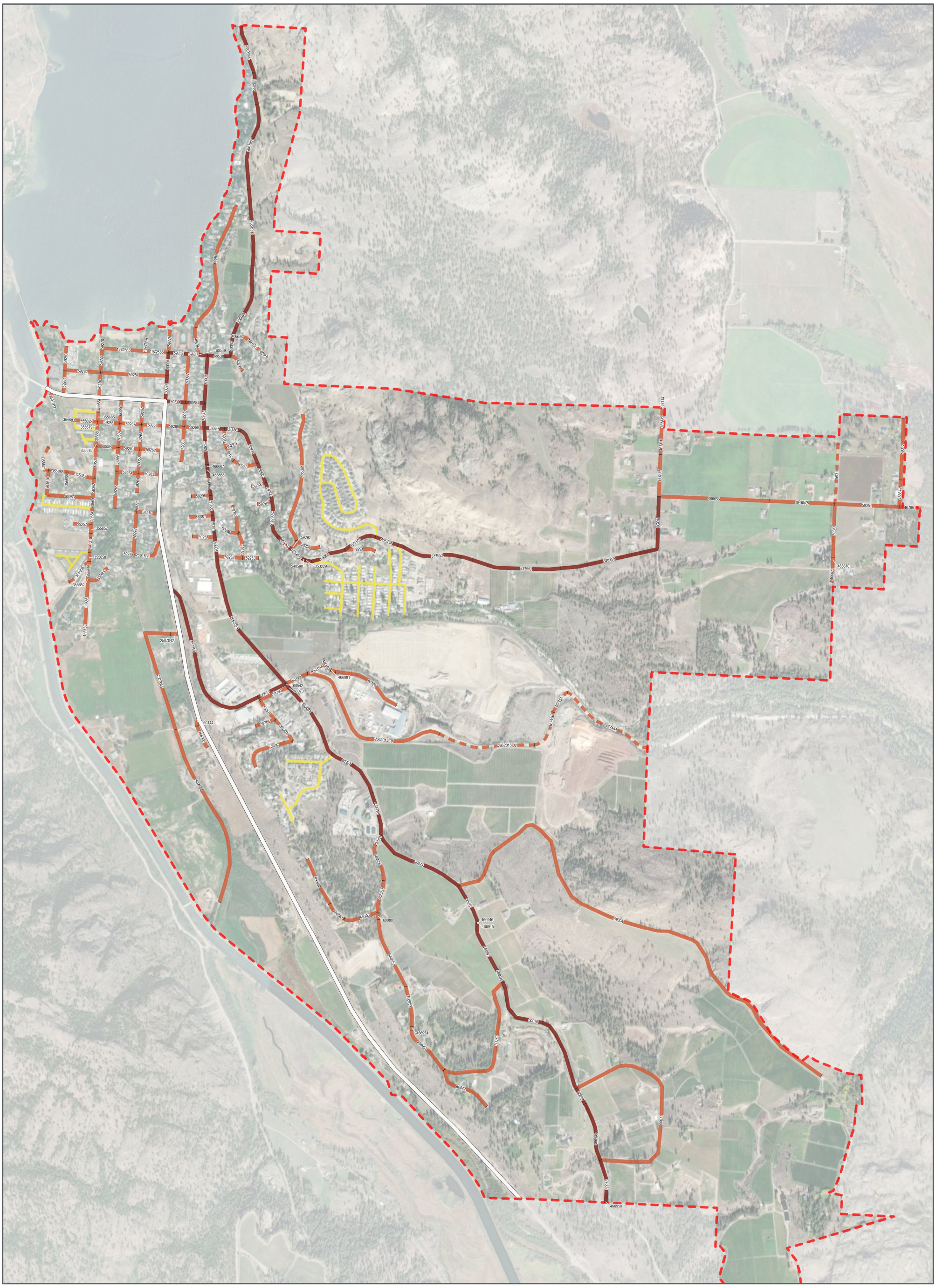
Okanagan Falls Incorporation Study

Road Investment Review

Map A

Summary of Assessed Roads

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Metres

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Coordinate System: NAD 1983 UTM Zone 11N

Scale: 1:16,000 (When plotted at 11"x17")

Data Sources: Digital Road Atlas and ESRI base maps.

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Legend

Digital Road Atlas

Road Type

- Highway
- Collector Minor (Paved)
- Local (Paved)
- Local (Gravel)
- Strata
- Incorporation Study Area

Okanagan Falls Incorporation Study

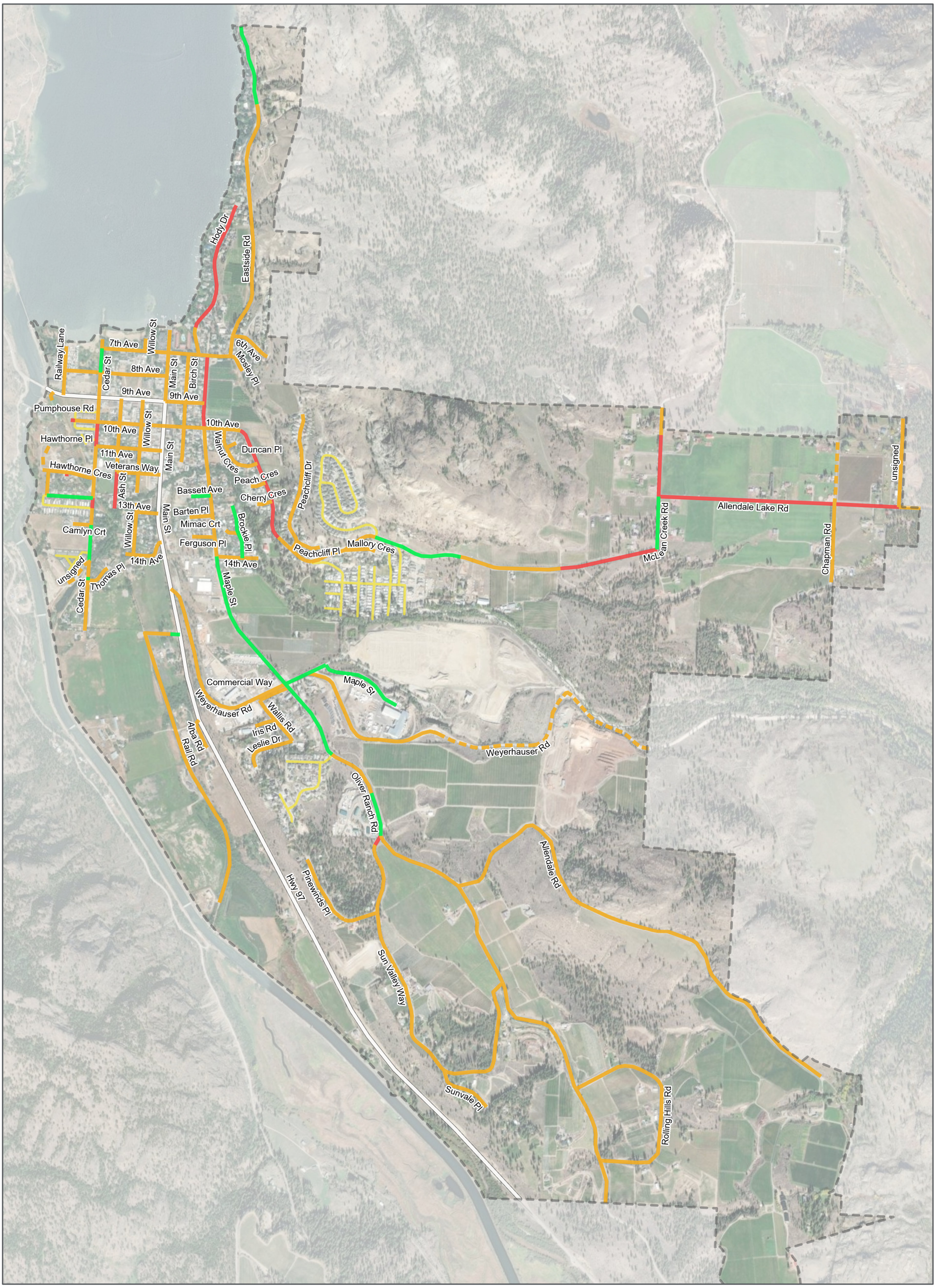
Road Investment Review

Map B

Road Identification Numbers

\\usl.urban-systems.com\projects\Projects_KAM\4643\0002\01\D-Design\GIS\Projects\Pro_Projects\4643_0002_01_RoadAssessment_20240104.aprx\Map B Road ID Nums 11x17 Rev03

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Project #:	4643.0002.01
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Status:	Final
Revision:	A
Date:	2024 / 02 / 28

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Metres

N

Coordinate System: NAD 1983 UTM Zone 11N

Scale: 1:16,000 (When plotted at 11"x17")

Data Sources: Digital Road Atlas and ESRI base maps.

The accuracy & completeness of information shown on his drawing is not guaranteed. It will be the responsibility of the user of the information shown on this drawing to locate & establish the precise location of all existing information whether shown or not.

Legend

Digital Road Atlas

Road Condition

- Good (Paved)
- Fair (Paved)
- Fair (Gravel)
- Poor (Paved)
- Highway
- Strata
- Incorporation Study Area

Okanagan Falls Incorporation Study

Road Investment Review

Map C

Road Ratings

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Appendix B: Road Summary Table

Okanagan Falls - Summary of Road Assessments

Segment ID	Paved (P) or Gravel (G)	Road Name	Segment Length	Road Rating (Good / Fair / Poor)	Cracking Severity and Density (1= Minimal, 5 = Extensive)	Inspection Key Comments
59286	P	10th Ave	100	Fair	2	No cracks have been sealed but there are few issues.
59287	P	10th Ave	98	Fair	2	Crack sealing. Edges are acceptable. Poor drainage at Ash St. intersection is causing base failure around the edges.
59288	P	10th Ave	92	Fair	4	Some wheel path alligator cracking in west bound lane that could be spray patched to extend life, or smaller patches if road is left to degrade further. Other cracking has not been crack sealed.
59289	P	10th Ave	92	Fair	4	No base failure present at cracks, but cracks should still be sealed.
59356	P	10th Ave	102	Fair	3	Base failure at intersection with highway. Some cracking that is resulting in localized failure.
59357	P	10th Ave	92	Fair	2	Extensive cracking at west end intersection, but then it is in good condition. Some patching at east end done but more needed
69186	P	10th Ave	73	Fair	2	Many cracks that should be crack sealed but base failure is minimal
355682	P	10th Ave	103	Fair	2	Base failure at the east edge and after that it is in acceptable condition
355683	P	10th Ave	19	Poor	5	Poor condition for this small portion of road with edges having base failure and there being poor drainage.
59261	P	11th Ave	99	Fair	2	Crack sealing is recommended
59262	P	11th Ave	101	Fair	3	Crack sealing and perhaps some volume patching is recommended.
60085	P	11th Ave	100	Fair	2	Some base failure. Road likely a reconstruction candidate for 5 to 10 year period
59270	P	13th Ave	100	Fair	3	Edge failures both sides and trench cuts present as bumps.
59252	P	14th Ave	117	Fair	2	Cracking should be addressed. There is patching that will continue to be required, especially since there is poor drainage.
59253	P	14th Ave	73	Fair	2	Cracks to seal. East end utility trench patch is holding up well.
59273	P	14th Ave	36	Fair	2	Fine for low volume road.
2661831	P	14th Ave	167	Fair	5	Base failure at east end. To the west there is transverse cracking with no crack sealing done. Some edge failures and could attempt to extend road life with spray patching in some locations.
59280	P	6th Ave	48	Fair	2	Road in fine condition with some crack sealing justified to protect against base failure.
466658	P	6th Ave	99	Fair	3	West end has short extent of base failure. Past that, the road is in fine condition with some crack sealing justified to protect against base failure.
466659	P	6th Ave	45	Fair	4	Base failure at intersection and along south side. A candidate for spray patching in an attempt to extend life.
59354	P	7th Ave	92	Fair	1	Reasonable condition but some small patching areas and cracks to seal.
59355	P	7th Ave	47	Fair	1	Reasonable condition but some small patching areas and cracks to seal.
60538	P	7th Ave	104	Fair	1	Reasonable condition but some small patching areas and cracks to seal.
60539	P	7th Ave	39	Fair	1	Reasonable condition but some small patching areas and cracks to seal.
1972565	P	7th Ave	107	Fair	2	Reasonable condition but some small patching areas and cracks to seal. Some wheel path cracks showing failure.
1972566	P	7th Ave	195	Fair	2	Reasonable condition but north edge parking area allows water to pool, but that is not impacting driving lanes.
59281	P	8th Ave	302	Fair	2	Edges have base failure and there is poor drainage. Addressing edge failure will extend life of this road. Eastern extent is newer road and is in very good condition.
59282	P	8th Ave	162	Fair	3	Crack sealing will delay the full depth mill and repave work that is likely needed in ~10 years. Base failure at intersection with Cedar St.
59314	P	9th Ave	91	Fair	3	Edge failure in places and transverse cracking along the road. Intersection with Birch St. in poor condition.
60544	P	9th Ave	87	Fair	2	Transverse cracking exists with no crack sealing.
60144	P	Alba Rd	32	Fair	2	Edge failures and transverse cracking. This may be a full depth mill and resurface project. Timing to be based on desired level of service for this low volume road, but it is likely not a priority for the next 5+ years.
466990	P	Alba Rd	109	Fair	2	Edge failures and transverse cracking. This may be a full depth mill and resurface project. Timing to be based on desired level of service for this low volume road, but it is likely not a priority for the next 5+ years.
59351	P	Allendale Lake Rd	293	Poor	5	Chip sealed road? Volume patching and spray patching may extend the need to complete a full repair to +/-10 years from now
466656	P	Allendale Lake Rd	501	Poor	5	Chip sealed road? Base failure and rough road for first ~200m. The remaining could likely last 5 years. Candidate for full reconstruction in near term, depending on level of service expected for this road.
1946578	P	Allendale Lake Rd	299	Poor	5	Chip sealed road? Base failure and rough road. Could likely last 5 years. Candidate for full reconstruction in near term, depending on level of service expected for this road.
467851	P	Allendale Lake Rd	99	Fair	2	Chip sealed road? Volume patching and spray patching may extend the need to complete a full repair to +/-10 years from now
59304	P	Allendale Rd	2310	Fair	3	Road seems to be in fine condition. Some edge failures along the road. Some shouldering work and strengthening as shoulders are starting to fall away, but the middle of the road is fine. It's a good width as well for a low volume road. Crack sealing justified in locations. No major work predicted for next 15 years.
59265	P	Ash St	166	Poor	5	Southern 100 m is in poor condition.
59266	P	Ash St	111	Fair	3	Rough road surface and bad drainage. No work recommended on this road unless it includes improving drainage.
60090	P	Ash St	112	Fair	3	Patching likely a routine need near the highway. Poor drainage
60537	P	Ash St	110	Fair	2	Drainage issues but road is better than portion to south within minimal base issues.
60087	P	Barten Pl	104	Fair	2	Poor drainage at intersection. Some cracks to seal and some minor patching, but no significant works expected for many years. Asphalt is older but is holding up.
59298	P	Bassett Ave	88	Good	1	Western portion of road is newer. Except for some cracks to seal on lower portion there is likely no work on this road for ~ 20 years.
59363	P	Birch St	160	Fair	2	Old asphalt but it is in good structural condition. A few transverse cracks to address.
60091	P	Birch St	111	Fair	3	Some edge failure in places and base failure at southern extent at the intersection.
60092	P	Birch St	220	Fair	3	Some localized base failures. Some cracks to seal and some edge failure with poor drainage.
59382	P	Brockie Pl	129	Good	2	Minimal work expected for at least 10 years
59383	P	Brockie Pl	117	Good	2	Minimal work expected for at least 10 years
59257	P	Camlyn Crt	83	Fair	2	No major work expected for +/- 15 years except for crack sealing.
59276	P	Cedar St	42	Fair	2	Some cracks should be addressed to extend life of this road. Otherwise likely minimal work on this road for ~10 years
59277	P	Cedar St	110	Good	1	Minimal cracks should be addressed to extend life of this road. Otherwise likely minimal work on this road for ~10 years
59278	P	Cedar St	113	Fair	2	Some cracks should be addressed to extend life of this road. Otherwise likely minimal work on this road for ~10 years
59352	P	Cedar St	90	Fair	2	Minimal cracks but should address edge failures
59384	P	Cedar St	76	Fair	2	Road quality improves compared to area to north
59386	P	Cedar St	205	Fair	2	Minimal cracks but should address edge failures

Okanagan Falls - Summary of Road Assessments

Segment ID	Paved (P) or Gravel (G)	Road Name	Segment Length	Road Rating (Good / Fair / Poor)	Cracking Severity and Density (1= Minimal, 5 = Extensive)	Inspection Key Comments
60536	P	Cedar St	146	Fair	5	Volume patch was done for most of the middle of the road with additional patching done around the outside. Will require continued patching until major work is done (next 5-7 years?). Road is better near Hawthorne Cr.
60569	P	Cedar St	46	Poor	5	Utility trench and area around it is failed
355652	P	Cedar St	15	Good	2	Minimal cracks but should address edge failures
355655	P	Cedar St	69	Fair	2	Minimal cracks but should address edge failures
355657	P	Cedar St	39	Good	2	Good condition. Drainage seem to collect far enough from road shoulder thus not a concern.
355658	P	Cedar St	40	Good	2	Good condition approaching the bridge
355675	P	Cedar St	29	Poor	5	Base failure at intersection with 11th Ave.
355679	P	Cedar St	34	Poor	4	Volume patching done and it will likely expand over time.
355680	P	Cedar St	47	Poor	4	Cracking and base failure
355684	P	Cedar St	68	Fair	2	Some cracking and edge failure.
355685	P	Cedar St	44	Fair	2	Some cracking and edge failure. Poor drainage at 10th Ave
466738	P	Cedar St	27	Fair	2	More edge repairs and crack sealing
541316	P	Cedar St	88	Good	2	Minimal work expected, but no crack sealing done.
59311	P	Chapman Rd	242	Fair	2	Chip sealed? May last up to 5 years more if it is chip sealed.
466670	P	Chapman Rd	40	Fair	2	Chip Sealed? Seems like a failed chip sealed road.
466671	P	Chapman Rd	73	Fair	2	Chip Sealed? Seems like a failed chip sealed road.
59295	P	Cherry Cres	69	Fair	2	Crack sealing would be appropriate
59299	P	Commercial Way	144	Fair	4	A lot of big/block cracking with base failure where the cracking is concentrated. Crack sealing and spray patching will likely extend life.
59297	P	Duncan Pl	49	Fair	2	Old/worn asphalt but reasonable good condition for a low volume cul-de-sac.
60097	P	Eastside Rd	91	Fair	2	Just some crack sealing and no structural problems. No major work expected for 15 years or so if road degrades in a typical manner.
556041	P	Eastside Rd	146	Good	1	Newly paved road
556048	P	Eastside Rd	343	Fair	2	Wheel path cracking that deserves crack sealing. If crack sealing not done soon or does not solve issues then reconstruction predicted to be needed to +/-10 years. Even with crack sealing, it might require major work in +/-15 years
2661959	P	Eastside Rd	218	Good	1	Newly paved road
2661966	P	Eastside Rd	348	Fair	2	Crack sealing justified. If not done soon then it is predicted that more major work will be required in +/-10 years.
2661967	P	Eastside Rd	396	Fair	2	Crack sealing justified. If not done soon then it is predicted that more major work will be required in +/-10 years.
59251	P	Ferguson Pl	103	Fair	2	Some crack sealing and some smaller patching is deserved.
60083	P	Hawthorne Cres	209	Good	2	Minimal cracks to seal. In reasonably good condition, with some south side tree intrusion to fix at the west end.
355667	P	Hawthorne Cres	126	Fair	2	Some cracks to address. No major base failure except at the intersection with Cedar St.
355668	P	Hawthorne Cres	84	Fair	2	Some cracks to address. No major base failure except at the cul-de-sac.
355669	P	Hawthorne Cres	18	Poor	2	Base failure in front of the cul-de-sac
361626	P	Hawthorne Cres	113	Fair	2	Minimal work but some cracks and trench cuts to maintain over time.
60098	P	Hody Dr	605	Poor	5	Base issues (edge cracking, alligator cracking drainage eroding the shoulder). Any work on this road should include drainage management.
466958	P	Hody Dr	127	Fair	2	Drainage issues should be addressed and the cracks should be sealed. Likely drainage issues will persist unless an improved drainage system is provided.
59365	P	Iris Rd	93	Fair	2	Lots of cracks to fill, but very limited base failure. Just some crack sealing to upkeep this road for now.
72899	P	Leslie Dr	246	Fair	2	~5% of the area has localized base failure, but the remaining area is in reasonable condition.
59275	P	Main St	103	Fair	2	Some cracking but minimal base failure.
60093	P	Main St	115	Fair	2	Transverse cracking and some shoulder work is justified prior to road failure.
60094	P	Main St	106	Fair	2	Edge failure exists.
59291	P	Mallory Cres	140	Fair	2	Road failure at intersection. There is edge failure and crack sealing should occur. Poor drainage and some pot hole repairs to address.
59306	P	Maple St	88	Fair	2	Edge failures, but otherwise in reasonable condition if those locations are addressed.
59307	P	Maple St	98	Fair	2	Edge failures, but otherwise in reasonable condition if those locations are addressed.
59308	P	Maple St	91	Fair	2	Edge failures, but otherwise in reasonable condition if those locations are addressed.
59309	P	Maple St	166	Fair	3	Reduced cracking and reduced edge failure compared to south of bridge, but patching justified in localized areas. Poor drainage at 10th Ave. intersection.
60543	P	Maple St	113	Poor	5	Candidate for full reconstruction.
60931	P	Maple St	217	Poor	5	Candidate for full reconstruction.
466667	P	Maple St	17	Fair	2	Bridge and approaches
466668	P	Maple St	20	Fair	2	Bridge and approaches
466669	P	Maple St	105	Fair	2	Edge failures, but otherwise in reasonable condition if those locations are addressed.
2662019	P	Maple St	678	Good	2	Should be considered high priority for crack sealing. Very minimal base failure. Should complete some shouldering in some locations in order to maintain a solid asphalt road edge. Patching required in some locations on north
60128	P	Maple St	329	Good	1	Newly paved road.
466981	P	Maple St	24	Good	1	Newly paved road.
466982	P	Maple St	33	Good	1	Newly paved road.
59290	P	McLean Creek Rd	90	Poor	4	Base failure throughout. Deserves reconstruction in medium term. Patching in very short term
59360	P	McLean Creek Rd	162	Fair	2	Some cracking but minimal base issues.
60416	P	McLean Creek Rd	240	Good	2	With crack sealing and minor edge repairs the road should remain in reasonable condition for many years.
60540	P	McLean Creek Rd	95	Poor	3	Northbound lane has extensive base failure, which deserves reconstruction. Southbound lane primarily requires crack sealing
68936	P	McLean Creek Rd	172	Poor	3	Northbound lane has extensive base failure, which deserves reconstruction. Southbound lane primarily requires crack sealing
348159	P	McLean Creek Rd	448	Poor	5	Edge failures. Spray patching likely not enough. Should plan for a full depth reclamation or other major road reconstruction for almost all of the length. Southern end is in better condition.
353229	P	McLean Creek Rd	27	Fair	2	Extensive cracking. Perhaps could avoid extensive base failure if crack sealing and spray patching is undertaken.
405378	P	McLean Creek Rd	109	Good	1	Southbound lane is repaved.

Okanagan Falls - Summary of Road Assessments

Segment ID	Paved (P) or Gravel (G)	Road Name	Segment Length	Road Rating (Good / Fair / Poor)	Cracking Severity and Density (1= Minimal, 5 = Extensive)	Inspection Key Comments
405379	P	McLean Creek Rd	159	Fair	2	Some cracking but minimal base issues. Another example of shoulder work needed to allow water to drain away.
467114	P	McLean Creek Rd	5	Fair	4	Some base failure and edge failure.
467115	P	McLean Creek Rd	120	Fair	4	Some base failure and edge failure.
467116	P	McLean Creek Rd	90	Poor	5	Base failure throughout. Deserves reconstruction in medium term. Patching in very short term
467117	P	McLean Creek Rd	189	Poor	5	Base failure throughout. Deserves reconstruction in medium term. Patching in very short term
467170	P	McLean Creek Rd	80	Fair	3	Northbound lane has extensive base failure, which deserves reconstruction. Southbound lane primarily requires crack sealing, but has some edge failure.
537551	P	McLean Creek Rd	462	Fair	2	Small northern length is repaved. Should do crack sealing, address edge failure and do some graveling on both sides for the remainder.
537552	P	McLean Creek Rd	298	Good	1	Southbound lane repaved for first portion and then full width repaved.
540598	P	McLean Creek Rd	18	Fair	4	Extensive cracking. Perhaps could avoid extensive base failure if crack sealing and spray patching is undertaken.
1659879	P	McLean Creek Rd	64	Fair	4	Extensive cracking. Perhaps could avoid extensive base failure if crack sealing and spray patching is undertaken.
1659882	P	McLean Creek Rd	172	Poor	3	Northbound lane has extensive base failure, which deserves reconstruction. Southbound lane primarily requires crack sealing, but has some edge failure.
60086	P	Mimac Crt	61	Fair	3	Base failure at intersection. Cracks throughout but it is holding up. May justify some spray patching in the coming years.
59279	P	Mosley Pl	92	Fair	2	Some edge failures and crack sealing is deserved, but no indication there are base failure concerns.
60073	P	Oliver Ranch Rd	5	Good	1	Minimal cracking.
60074	P	Oliver Ranch Rd	430	Fair	4	More cracking. Some localized base failure. Spray patching likely appropriate in some locations. May need full base repair in ~10 years if degradation keeps up.
60075	P	Oliver Ranch Rd	181	Fair	2	Cracking, but not significant base failure. Completing crack sealing will extend life. South end of section has more cracking and will likely be a mill and overlay candidate within 10 years
60076	P	Oliver Ranch Rd	643	Fair	3	Cracking with some localized areas leading to base failure. Road probably ok for a while (10 yr?) until localized base repairs and mill and overlay or full depth reclamation for at least some of the length.
60077	P	Oliver Ranch Rd	80	Fair	2	Some small patching done at north end. Minimal base failure. Should undergo crack sealing though. With crack sealing the road should require minimal work for 15+ years
60078	P	Oliver Ranch Rd	190	Fair	2	Less cracking than section to the north. Minimal base failure. Should undergo crack sealing though. With crack sealing the road should require minimal work for 15+ years
60542	P	Oliver Ranch Rd	21	Good	1	Minimal crack.
60707	P	Oliver Ranch Rd	261	Fair	2	Minimal cracking. Should grade shoulder down to allow for water to drain away. Some minor edge failure due to west shoulder grading.
466945	P	Oliver Ranch Rd	11	Fair	3	Cracking, but not significant base failure. Completing crack sealing will extend life. Likely be a mill and overlay candidate within 10 years.
466946	P	Oliver Ranch Rd	3	Fair	3	Cracking, but not significant base failure. Completing crack sealing will extend life. Likely be a mill and overlay candidate within 10 years
466947	P	Oliver Ranch Rd	236	Fair	3	Northbound lane there is some base failure. North end thee is more cracking that south end. Likely be a mill and overlay candidate within 10 years
466948	P	Oliver Ranch Rd	59	Fair	2	Cracking - maybe spray patch candidate in some spots.
466949	P	Oliver Ranch Rd	268	Fair	2	Less cracking than section to the north. Minimal base failure. Should undergo crack sealing though. With crack sealing the road should require minimal work for 15+ years
466950	P	Oliver Ranch Rd	7	Fair	2	Less cracking than section to the north. Minimal base failure. Should undergo crack sealing though. With crack sealing the road should require minimal work for 15+ years
467298	P	Oliver Ranch Rd	200	Good	1	Minimal work, just some transverse cracking
2662018	P	Oliver Ranch Rd	363	Good	1	A few transverse crack. Edge failure deserves work at south end. Minor ditching work to do.
59296	P	Peach Cres	68	Fair	2	Crack sealing justified. Perhaps spray patching in some spots. Predicted to require minimal work for the next +/- 15 years if cracks are addressed proactively.
59292	P	Peachcliff Dr	47	Fair	4	Fair to poor condition. Should complete a volume patch or spray patch plus crack sealing to keep this portion in reasonable shape.
405381	P	Peachcliff Dr	594	Fair	2	Edge failures and perhaps 10% of area has base repairs to complete. Poor drainage in many locations. Edge failures are extensive. North of old cul-de-sac the road gets better but should still undergo crack sealing.
59294	P	Peachcliff Pl	116	Fair	2	Crack sealing should be done. Some base failure on the cul-de-sac could be addressed but very low volume, so it's probably going to last 15 years before anything other than a spray patch and crack sealing is justified.
59303	P	Pinewinds Pl	158	Fair	2	Crack sealing is warranted. Trench cuts may deserve repairs over time.
466661	P	Pinewinds Pl	98	Fair	2	Crack sealing is warranted. Trench cuts may deserve repairs over time.
466662	P	Pinewinds Pl	228	Fair	2	Crack sealing is warranted. Trench cuts may deserve repairs over time.
2407982	P	Pumphouse Rd	44	Fair	2	Very low volume road/lane.
2507042	P	Rail Rd	43	Good	1	Good condition.
2507045	P	Rail Rd	578	Fair	1	Good drainage. Asphalt starting to ravel in some places. Low priority for work as low use road. Mill and overlay perhaps justified in 15 or more years as minimal based failure.
2507046	P	Rail Rd	847	Fair	2	Good drainage. Asphalt starting to ravel in some places. Low priority for work as low use road. Mill and overlay perhaps justified in 15 or more years as minimal based failure.
59283	P	Railway Lane	109	Fair	2	Minimal issues except for crack sealing and some pothole patching
59284	P	Railway Lane	113	Fair	2	Minimal issues except for crack sealing and some pothole patching at 8th. Poor drainage at 8th Ave. intersection.
60071	P	Rolling Hills Rd	1030	Fair	1	Is this a chip sealed road? If so it will likely require new pulverizing and chip sealing in 5 to 10 years. If it is a paved road it might last 10-15 years as it is a low volume road. Crack sealing would not be good value due to extent of cracking. However, at least 80% of base seems acceptable
60079	P	Sun Valley Way	636	Fair	3	Extensive cracking, including alligator cracking and edge failures for 100 m north portion. Then road improves, with cracking justifying sealing - likely spray patching in areas - but base failure is limited, except where cracks were never maintained and they are propagating and creating localized base failures.
60080	P	Sun Valley Way	34	Fair	2	Some cracking by no base failure.
60081	P	Sun Valley Way	48	Poor	5	Extensive base failure at intersection
466952	P	Sun Valley Way	333	Fair	2	Road is a bit bumpy, mostly because some of the transverse cracks have localized base failure. Otherwise no base failure. Perhaps a candidate for mill and overlay, but at least +/- 15 years from now if cracks do not lead to more extensive base failures.
466953	P	Sun Valley Way	183	Fair	3	More cracking than southern portion of the road. Some localized base failure.
466954	P	Sun Valley Way	21	Fair	3	More extensive cracking and a trench cut.
466955	P	Sun Valley Way	235	Fair	2	Cracks to seal. Approximately 90 to 95% of the area is in reasonable condition.

Okanagan Falls - Summary of Road Assessments

Segment ID	Paved (P) or Gravel (G)	Road Name	Segment Length	Road Rating (Good / Fair / Poor)	Cracking Severity and Density (1= Minimal, 5 = Extensive)	Inspection Key Comments
466956	P	Sun Valley Way	173	Fair	2	Cracks to seal. Approximately 90 to 95% of the area is in reasonable condition.
466957	P	Sun Valley Way	147	Fair	2	Cracks to seal. Approximately 90 to 95% of the area is in reasonable condition.
60072	P	Sunvale Pl	271	Fair	4	Perhaps this is chip sealed? Base failure at both ends. Middle has cracks to seal but minimal base failure. Low volume road may result in spray patching being sufficient for the coming years.
355650	P	Thomas Pl	114	Fair	2	Approximately 5% base failure along the road and more on the cul-de-sac portion. Should complete crack sealing and spray patching in some portions. Likely 10+ years from requiring any major work.
59312	P	unsigned	279	Fair	2	Off Allendale Lake Rd. near proposed boundary. Very low volume lane.
466672	P	unsigned	123	Fair	2	Off Allendale Lake Rd. near proposed boundary. Very low volume lane.
59263	P	Veterans Way	101	Fair	3	Crack sealing and some edge repairs are justified
59264	P	Veterans Way	97	Fair	2	Some cracks to address
59301	P	Wallis Rd	114	Fair	4	Much of the cracking has localized base failure as it was not addressed. Perhaps a spray patch will work but likely a full depth mill and overlay with some base stabilization will be required in the coming years.
2662017	P	Wallis Rd	124	Fair	4	Much of the cracking has localized base failure as it was not addressed. Perhaps a spray patch will work but likely a full depth mill and overlay with some base stabilization will be required in the coming years. At Leslie Dr. intersection there is base failure.
59387	P	Walnut Cres	87	Fair	2	Minimal base failure
60541	P	Walnut Cres	117	Fair	5	Southern 100 m is like deserving of a volume patch
69187	P	Walnut Cres	68	Fair	2	No cracks have been sealed but there are few issues.
60129	P	Weyerhaeuser Rd	110	Good	1	Being reconstructed (and I assume paved) at time of inspection
60673	P	Weyerhaeuser Rd	140	Fair	1	Old asphalt but in reasonable condition. If well maintained it may justify an overlay in 10+ years depending on impact of heavy vehicles.
467259	P	Weyerhaeuser Rd	781	Fair	3	Alligator patching in places. Some cracks to seal and some spray patching. Less base problems after ~500m from Commercial Rd.
2662016	P	Weyerhaeuser Rd	93	Good	1	Being reconstructed (and I assume paved) at time of inspection
2662015	P	Weyerhaeuser Rd (1st 750m)	750	Fair	3	Likely require full depth mill and overlay in ~10 years, depending on amount of heavy traffic and base strength.
59267	P	Willow St	113	Fair	2	Some patching near highway (poor drainage) and otherwise crack sealing as minimal base failure.
59268	P	Willow St	112	Fair	1	Road is in reasonable condition with some crack sealing to do.
59269	P	Willow St	88	Fair	1	In fine condition with minimal cracking.
59271	P	Willow St	41	Fair	2	Minimal cracking to address.
59272	P	Willow St	194	Fair	4	5-10% base failure/edge failure that could likely be addressed with spray patching.
59353	P	Willow St	110	Fair	2	Patch justified at south end and some limited edge repairs. Crack sealing should be done.
1972567	P	Willow St	57	Fair	2	Road (and parking area) are in reasonable condition. Trench cut may need minor maintenance over time.
59310	G	Chapman Rd	272	Fair		Low use gravel/dirt road
355671	G	Hawthorne Pl	129	Fair		Low quality, low volume road.
355656	G	unsigned	130	Fair		Gravel lane off Cedar St. that parallels the creek
2662015	G	Weyerhaeuser Rd	470	Fair		Gravel road (used by logging trucks)
467454	G	Weyerhaeuser Rd	452	Fair		Significant risk of flooding and erosion along this stretch
467455	G	Weyerhaeuser Rd	113	Fair		Gravel road (used by logging trucks)
467456	G	Weyerhaeuser Rd	184	Fair		Gravel road (used by logging trucks)

Sewage & Utility Services

This Sewage & Utility Services Sheet was developed for presentation to the Okanagan Falls Incorporation Study Committee at its meeting on April 16, 2024. The sheet was prepared using information available at the time of writing. Changes will be made if new information becomes available.

Information presented on the Okanagan Falls Incorporation Scenario is based on the assumptions that:

> *The Okanagan Falls municipality would own and operate the Okanagan Falls sewer service using municipal staff*

> *The Okanagan Falls municipality would contract Septage Disposal service directly with the City of Penticton*

> *The Okanagan Falls municipality would assume responsibility for funding the FortisBC-owned street lights within the municipal boundary*

THE PRESENT

➤ **What service is provided?**

Sewage and utility services in Okanagan Falls Incorporation Study area include:

- operation of a sewage collection and treatment system in the Okanagan Falls area
- septic disposal services provided in Penticton at the City's Wastewater Treatment Plant
- administration of the streetlights within Okanagan Falls

Okanagan Falls Sewer

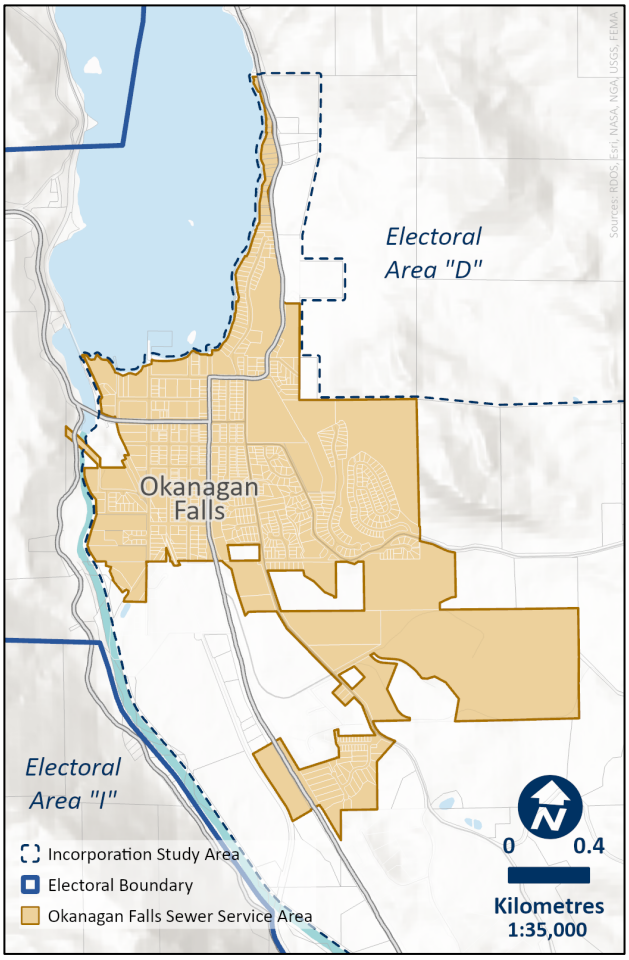
The Okanagan Falls sewage collection, treatment, and disposal works were originally built in the late 1970's. In 2010, a federal/provincial infrastructure grant assisted in funding the construction of a new Level IV biological nutrient removal Wastewater Treatment Plant (WWTP) south of the original treatment facility. The new WWTP began operations in 2013. The sewage collection system consists of three lift stations, pressurized forcemains and gravity sewer mains that deliver sewage to a fourth lift station located at the old facility at 1440 Cedar Street. The Cedar Street lift station pumps the sewage into a forcemain, which travels to the new WWTP along Rail Road. The biological nutrient removal WWTP has an outfall diffuser into the Okanagan River for the treated effluent. The system currently services approximately 1,424 connections within the service area shown in Figure 1.

The WWTP removes the organics and nutrients from the wastewater through biological nutrient removal processes before the effluent is released into the Okanagan River Channel. The treated effluent is also used for treatment plant operations, in toilets at the plant, and for landscape irrigation. The heating and cooling system uses the treated effluent in various ways and during times of the year can provide up to 95 percent of the heating/cooling needs for the building.

As a condition of the grant, the plant was built with the capacity to handle expansion to the Kaleden Lakeshore and Skaha Estates communities. Work has been completed on predesigns for extensions of the system to these two communities:

- In 2017 the RDOS received grant funding to extend the sewer system to Skaha Estates community. A preliminary engineering design and associated cost estimate for extending sewer lines along Eastside Road to Skaha Estates identified a cost of

Figure 1: Okanagan Falls Sewer Service Area



$14.2 million, of which more than $8 million would be needed from residents. The cost was considered prohibitive at that time for the community of fewer than 200 properties, and was not pursued further.

- Grant funds were then used to prepare a preliminary design, complete with Class 'B' cost estimates, to replace the existing and septic systems in the Kaleden lakeshore area with a community sewage collection system and connect into the wastewater system in Okanagan Falls. A referendum in June 2021 was unsuccessful, with 58% of those who cast ballots voting against the proposed sewer service and associated borrowing for the infrastructure extension. No further action is planned at this time.

In 2022 a sewer master plan for the sewer service was initiated, and is expected to be completed in 2024. The new plan will identify infrastructure upgrades needed to accommodate the medium density land uses contemplated in the Okanagan Falls Town Centre Zone, as introduced in the Electoral Area "D" Official Community Plan and zoning bylaw.

Septage Disposal

The RDOS helps fund the disposal facility for receiving septic waste located at the Penticton sewage treatment plant. The plant serves the City of Penticton as well as residents of RDOS. The Okanagan Falls treatment plant does not offer a septage receiving station.

Street Lights

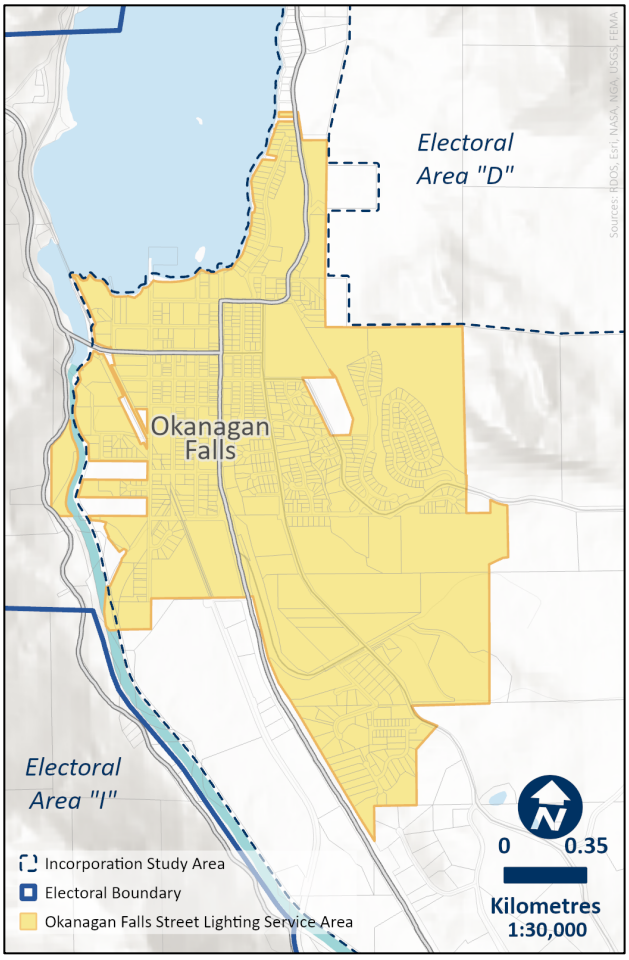
On January 1, 2023, the Okanagan Falls Irrigation District dissolved. At that time, four services were transferred to the RDOS, including the administration of street lighting in Okanagan Falls. FortisBC owns, operates and maintains all street lights within the Okanagan Falls street lighting service area. Approximately 110 lights are within the service area and study boundary. RDOS is responsible for collecting the taxes to operate these lights and has service contracts with FortisBC to maintain this infrastructure. Residents contact RDOS when a light is out; the Regional District passes that information on to Fortis. The Street Light service area is shown in Figure 2.

➤ Who makes decisions?

Okanagan Falls Sewer

The entire RDOS Board makes decisions regarding the Okanagan Falls sewer service, due to the fact that one Electoral Area Director cannot make decisions on a service alone. Decisions are made on the advice of staff, policies and regulations, and in accordance with the approved Liquid Waste Management Plan and applicable legislation.

Figure 2: Street Light Service Area



Septage Disposal

Only the directors from the participating areas — Area "D," "E," "F," and "I" — make decisions regarding the septic disposal facility, with the exception of budget decisions, which are made by the full Board.

Okanagan Falls Street Lighting

As with the sewer service, the Okanagan Street Lighting service decisions are made by all the directors on the RDOS Board, because the service area represents only a portion of one electoral area.

Figure 3: Service Decision-making

SERVICE	DECISION-MAKERS
Okanagan Falls Sewer	Decisions made by the entire RDOS Board because the service is provided to one electoral area only
Septage Disposal	Operating decisions made by the participating Directors (Area D, E, F and I), with the full Board making budget decisions
Okanagan Falls Street Lighting	Decisions made by the entire RDOS Board because the service is provided to one electoral area only

➤ Who delivers the service?

The RDOS owns and operates the Okanagan Falls sewer system and WWTP. The RDOS has three (3) sewer operators directly associated with the OK Falls sewage disposal service that includes operations, maintenance, and 24-hour standby and emergency response service. Several other RDOS staff also spend time on the delivery of both the operations and capital projects related to the service, including the senior Manager of Utilities, engineering technologist, environmental technologist, administration assistant and information services and utility billing clerk. In addition, consultants are hired as required to assist in designs, master plans, or areas that require specific expertise, including services such as maintaining HVAC, electrical and instrumentation equipment, or construction of capital projects.

The septic disposal facility at the City of Penticton's advanced wastewater treatment plant is operated by the City of Penticton. The RDOS has a 22-year contract with the City to deliver the service to RDOS that ends in July 2027.

Street lights, and maintenance of them, are provided by Fortis BC. The RDOS administers the service and refers calls to Fortis regarding outages.

➤ What is spent by RDOS on the service?

The 2023 budgeted service operating costs are shown in Figure 4. Capital items for 2023 and 2024 are highlighted in Figure 5. In addition to the annual service costs, there are operating and capital reserve accounts created for the services, shown in Figure 6. The DCC Reserve account must be used for WWTP DCC projects only.

Okanagan Falls Sewer

Annually, the operations of the Okanagan Falls sewer service costs approximately $1.27 million, including debt financing for the construction of the treatment plant. In 2023 the service included $385,000 in staff salaries and wages, and $49,569 in RDOS administrative costs allocated to the service.

The $1.27 million amount does not include any capital works. In 2023, $120,000 in capital works were planned, including an upgrade to a lift station as well as a master sewer plan, both of which were funded from the Community Works Fund (gas tax). In addition a $2 million dewatering solids processing upgrade was completed at the wastewater treatment plant in 2023, as well as a $1 million polishing wetland project in 2022.

In 2024, about $1.1 million in capital upgrades are planned, including an upgrade to the WWTP Ultraviolet disinfection system, back-up generator for a lift station and design and construction of priority sewer projects in the town centre area. Funding for the projects is from a combination of provincial grants (Growing Communities Fund), Community Works Fund (gas tax), and development cost charge reserves.

Septage Disposal

The septage disposal service is in a surplus situation, so no funds are required through tax requisition. Those who use the service pay tipping fees at the time of use. Tipping fees are $36/m^3.

Okanagan Falls Street Lighting

The cost of the street lighting service was $27,846 in 2023, not including the associated administration allocation of $741.

Figure 4: Service Operating Costs (2023)

SERVICE	COST[1]	USER/TAX
OK Falls Sewer	$1,270,150	$1,184,153
Septage Disposal	N/A	N/A
Ok Falls Street Lighting	$27,846	$27,846
Total	**$1,297,996**	**$752,611**

[1] *Cost and tax requisition figures are from RDOS 2023 budget). Administration allocation is included for OK Falls Sewer, but not for Street Lighting.*

Figure 5: Service Capital Costs (2023)

SERVICE	CAPITAL ITEMS	COST
OK Falls Sewer (2023)	Master Plan and Lift Station #3 upgrades	$120,000
OK Falls Sewer (2024)	Lift Station #3 Generator	$250,000
	WWTP UV system upgrade	$210,000
	Valve actuator upgrades	$100,000
	Priority sewer upgrades	$500,000

Figure 6: Service Reserves (2022)

SERVICE/RESERVE	TOTAL[1]
OK Falls Sewer	$103
OK Falls DCC Reserve	$317,079
OK Falls Sewer Capital Reserve	$963
OK Falls Sewer Operating	$200
Septage Disposal	$99,105

[1] *Reserve totals are as at the end of 2022*

➤ How are the costs recovered?

The cost of the Okanagan Falls sewer is primarily recovered through user fees, and to a lesser extent extension, installation and connection fees. In 2023 user fees paid for approximately 93% of the service costs. The service also receives an annual Sewage Facilities Assistance grant from the Okanagan Basin Water Board. The annual user fee for a single-family residential property is $957, as shown in Figure 7.

The RDOS has a development cost charge (DCC) for the Okanagan Falls sewer treatment plant, which is paid by anyone constructing new residential or non-residential buildings or creating new residential lots through a subdivision. The DCC allows development to contribute to the capital costs of WWTP projects that benefit growth. The DCC for every new single-family lot created in the sewer area is $5,900. Apartment units pay $4,200 per unit, commercial and industrial development pay $19 per square metre of gross floor area, institutional $17 per square metre, and RV parks pay $2,400 per site or lot. The DCCs accrue in a reserve account and are used to contribute to capital costs of the WWTP. At the end of 2022 the DCC reserve was $317,079. The DCC funds were planned to be used for upgrades in 2024.

Septage Disposal
This service is recovered in part through tipping fees provided by the users at the time of disposal ($36 per m^3 at the time of disposal). A portion of the cost was previously recovered by tax requisition; however, the service is in a surplus position and therefore no longer needs to recover funds through taxation.

Street Lighting
The streetlighting costs are recovered through a parcel tax. At the time the service was transferred to the RDOS, BC Assessment had not yet completed the parcel tax roll, so the cost shown in Figure 7 represents a rough estimate based on approximately 1,000 parcels. The 2023 amount will therefore be collected in 2024 (making the amount almost double in that year), but the annual operating parcel tax is shown here. The service area is based on the previous Okanagan Falls Irrigation District boundaries.

➤ What is the cost to a typical residence?

The cost of the Okanagan Falls sewer service is recovered from taxpayers that own properties connected to the sewer system through a $957 user fee ($813 for an apartment). This user fee includes a portion allocated to capital projects, and a portion for operating costs. Properties not serviced by the OK Falls sewer system would only pay fees associated with septic disposal as needed. The costs to a typical residential property assessed at $500,000 are shown in Figure 7.

Figure 7: Cost Impact on a Typical Residence (2023)

SERVICE	RES RATE	OWING[1]
OK Falls Sewer	n/a	$957.00
Septage Disposal	n/a	n/a
OK Falls Street Lights [2]	n/a	$27.85

[1] *Impact is calculated on a home assessed at $500,000. Amount excludes 5.25% Surveyor of Taxes fee charged in unincorporated areas*

[2] *OK Falls Street Lights is recovered through a parcel tax. The total parcels has not yet been confirmed, but is estimated at 1,000 parcels.*

INCORPORATION

➤ What impact would incorporation have on these services?

Incorporation would transfer the ownership of, and authority and responsibility for, the sewer system, along with the responsibility for the street lighting and septage disposal services. There would not be any requirement, as a result of incorporation, to extend sewer services beyond the current service area. The service would continue to be funded by the users of the system.

At the conclusion of the contract between the RDOS and the City of Penticton for septage disposal (ends in 2027), septage disposal services for the Okanagan Falls

Figure 8: Changes in Authority due to Incorporation

SERVICE	BEFORE INCORPORATION (CURRENT)	AFTER INCORPORATION
OK Falls Sewer System	RDOS	Municipality
Septage Disposal	RDOS (Agreement with City of Penticton)	Municipality
OK Falls Street Lighting	RDOS (Owned and maintained by FortisBC)	Municipality (Owned and maintained by FortisBC)

municipality would be negotiated directly between the new municipality and the City of Penticton. Since the majority of the properties withn the municipality are connected to the municipal sewer system, any contribution beyond tipping fees is expected to be minimal.

Street light service in Okanagan Falls would be administered by the new municipality; the lights would continue to be owned and maintained by FortisBC.

➤ How would decision-making change?

Decisions regarding the three services would be made by the municipal council of an Okanagan Falls municipality.

➤ How would incorporation impact service delivery?

A new municipality could choose to have its own municipal staff deliver the sewer service through a public works or engineering department. Alternatives to this approach are to contract with an engineering firm to provide some or all of the maintenance and operations of the service, or to contract the regional district to continue providing the service. Typically, municipalities provide the infrastructure themselves if there is sufficient work to warrant full-time employees. Where a municipality does not have a need for full-time sewage treatment utility operators, it may be more cost-effective to have either a consultant or contract through the regional district.

The RDOS currently has three (3) certified operators involved in the operations of the OK Falls sewer service. The RDOS does not operate any other sewage treatment plants, although it does own and operate a collection system servicing the Gallagher Lake area. It is assumed, therefore, that the Okanagan Falls municipality would want its own dedicated engineering/utility staff to plan, maintain and operate its sewage treatment plant, and that there would be no obvious economies of scale to having the system operated by RDOS.

Upon incorporation, a total of three (3) municipal operators are assumed to be associated with this service, as well as the support of a utility clerk, engineering technologist, part-time manager of capital projects and the Director of Engineering (each shared with water, roads and sewer divisions). The inclusion of the supporting positions is estimated to reflect a similar service level to the support and redundancy currently provided at the RDOS. The assumed FTE at the municipality, with support positions included, totals 4.15. These positions can be accommodated in the same budget, assuming the existing amount that recovered for RDOS administration allocation ($50,000 recovered through the service) would instead be associated with service-related staffing costs. Where the municipality lacked relevant in-house expertise or capacity, the municipality would contract out those elements — examples are long-term planning, and asset management. It is anticipated that with the transfer of the service to the new municipality, all existing equipment associated with, and purchased through the service, would transfer to the municipality.

The administration of any contract with the City of Penticton regarding septage, as well as the monitoring of any outages or referring calls to Fortis BC regarding street lighting would be captured in overall administration costs. Such tasks would not impact staffing capacity significantly.

➤ How would service costs change?

The cost of operating the OK Falls sewer service, particularly given the addition of $50,000 in administration allocation towards staffiing, would not be expected to result in significant changes as a result of the transfer of responsibility to the municipality. The RDOS currently attributes the costs of operating the service to the service area; those costs, given that the service is entirely contained within the municipal boundary, are not expected to change significantly due to a change in the operator. Where cost increases may occur is in capital cost estimates associated with the delivery and management of capital projects, given the need to rely upon contractors and consultants for that work, and the reduced capacity within the smaller municipal department relative to that of the RDOS. The estimated staff complement of 4.15 FTE includes an engineering technologist and capital projects manager, shared among the sewer, water and roads services. The combined 2023 salary and wages allocation of $435,000 (including $50,000 from the administration costs), based on competitive salary and union rates should be sufficient to accommodate the added FTE.

While the RDOS has applied for and received many grants for the OK Falls system, the municipality may also benefit from having the authority to apply for infrastructure grants directly, or apply eligible Gas Tax funds to capital upgrades, in accordance with the municipality's infrastructure priorities, without having to consider other priorities within the broader region. The sewer service would continue to be paid through user fees paid by those who are connected to the system. Generally, utilities such as water and sewer are funded through self-financed utilities, in which user fees are designed to pay for the service, including operations and capital costs, with funds for growth-related projects funded in part through DCCs.

It is assumed that the new municipality would negotiate a septage disposal arrangement with the City of Penticton directly after the 2027 expiry of the current agreement through the RDOS. Given that the service was in a surplus position, and that the residents of Okanagan Falls (as part of Area D) already contributed to that surplus, no costs would be associated with the service until the 2027 conclusion of that contract. Beyond 2027, however, the municipality could have its own contract with the City of Penticton (or conversely, could provide a septage disposal option at the municipal sewage treatment facility). Because the majority of the municipality is connected to the sewer system, any contract cost for the municipality would be expected to be minimal.

The street lighting service, because it provides a service to the core of the municipality, would likely be funded through general revenues, rather than as a local service area.

SUMMARY OF TAX IMPACTS

Figure 9 presents the tax impact of the two scenarios – the current situation (RDOS) and incorporation (MUNICIPAL). It is useful to note that the OK Falls street light amount referenced in the RDOS scenario currently only applies to properties within the service boundary. In the Municipal scenario, the reduced amount would apply to the entire municipality — a change that would result in a reduction for most Okanagan Falls residents, but an increase of $13.38 for those who do not currently contribute.

Figure 9: Tax Comparison of Regional District and Incorporation Scenarios

SERVICE	RDOS[1]	MUNICIPAL[1]
OK Falls Sewer	$957.00	$957.00
Septage Disposal	n/a	n/a
OK Falls Street Lights	$27.85	$13.38
Total	**$984.85**	**$970.38**

[1] *Impact is calculated on a home assessed at $500,000.*

Okanagan Falls
Incorporation Study

DRAFT SERVICE SHEET
April 2024

Water Services

The Water Services Sheet was developed for presentation to the Okanagan Falls Incorporation Study Committee at its meeting on April 16, 2024. The sheet was prepared using information available at the time of writing. Changes will be made if new information becomes available.

Information presented on the Okanagan Falls Incorporation scenario is based on the following assumptions:

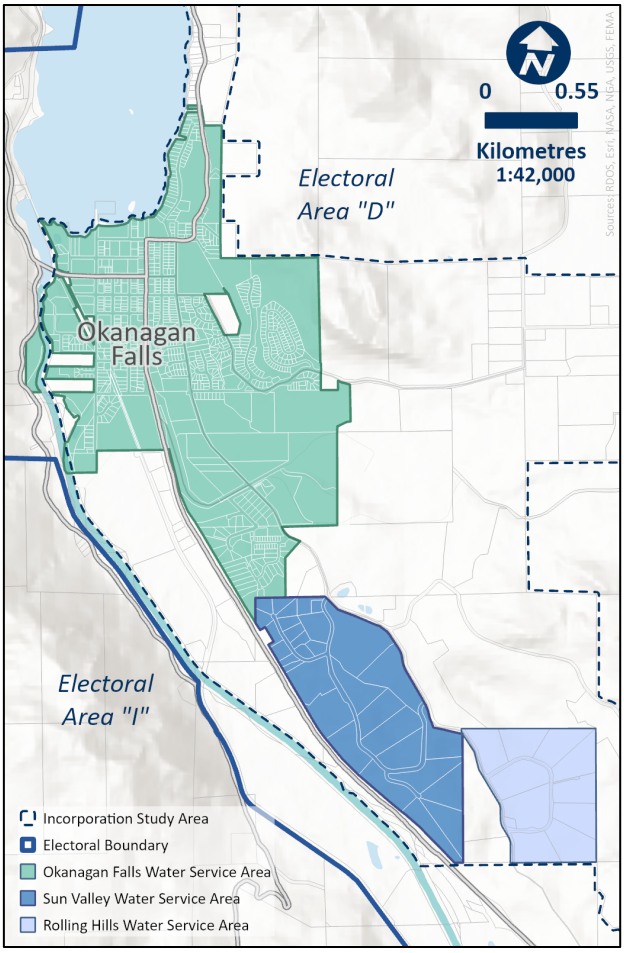
- *The Rolling Hills Waterworks District would be dissolved; the new municipality would assume responsibility for owning, administering and operating the service as a local area service (exsiting reserve funds would be transferred and maintained for the purpose of funding the local area service)*
- *The Okanagan Falls municipality would assume ownership and responsibility for delivering the existing Okanagan Falls and Sun Valley water services (the systems would continue to be paid for by the users of the systems)*
- *The Okanagan Falls municipality would continue to participate in the Okanagan Basin Water Board service through RDOS*

THE PRESENT

➤ What service is provided?

Within the Incorporation Study Area, the Regional District of Okanagan-Similkameen (RDOS) currently provides domestic and irrigation water to the Okanagan Falls water service area, which services approximately 2,200 people (approximately 1,100 connections), as well as 28 connections in the community of Sun Valley through the Sun Valley system. Both of the RDOS water systems are identified in Figure 1.

Figure 1: Water Systems Map



There is one Improvement District — the Rolling Hills Waterworks District — that provides irrigation and drinking water to 27 hectares of agricultural land and 10 homes, adjacent to the Sun Valley water system. While not an RDOS-owned or -operated system, it is included in this Service Sheet because it is within the Incorporation Study Area, and would become owned

by an Okanagan Falls municipality were incorporation to proceed. The Rolling Hills Waterworks District service area is also shown on Figure 1.

The residents and businesses in the study area that are not connected to either of the RDOS water systems or Rolling Hills receive their water from other providers, including private wells, private utilities, and strata corporations.

In addition to owning and administering the water systems for Okanagan Falls and Sun Valley, the RDOS facilitates Area "D" participation in the Okanagan Basin Water Board (OBWB).

Okanagan Falls Water System

The Okanagan Falls water system was formerly owned and operated by the Okanagan Falls Irrigation District (OFID). The Irrigation District was dissolved, and its assets were transferred to the RDOS, in 2023. A Water Master Plan prepared in 2021 for the OFID summarized the main challenges for the system, including quality issues in the lower pressure zone, a deficit in the storage capacity and a lack of redundancy in the system. It was noted at that time that the water source was appropriate for the current demands but did not have capacity to accommodate significant growth. The Master Plan outlined projects needed to resolve the system's challenges.

The system dates back to 1934, when OFID was created, but only began providing potable water for residential use in the 1950s. The system now has 17.94 km of water mains, five wells (drilled between 1968 and 2014), two reservoirs (built in 1977 and 1997), and one pressure-reducing valve to separate the pressure zones.

The majority of the pipes in the system are PVC, with some asbestos cement (AC), and galvanized steel pipes. The oldest documented distribution mains still in place were built in 1960, with many upgrade projects since that time. No pipes are known to be over their typical lifespan, based on the 2021 assessment.

OFID provided fire flow at 60 litres per second with 55 public hydrants and a number of yard hydrants (standpipes) in the water system. Based on hydrant inspection reports in 2020, the majority of hydrants are in good working order. There are some hydrants that do not have the required one meter of spacing to operate effectively and are being hindered by various retaining walls, landscaping and/or fences. A few hydrants require extensions. The 2021 Master Plan identified several mains in the system that are inadequately sized to provide fire flow to the existing hydrants, and included the upgrades in the recommended projects.

The 2021 Master Plan report identified the following deficiencies:

- lack of centralized filing system and detailed record-keeping
- elevated manganese content in Well #2
- insufficient contact time for lower zone chlorine treatment
- inability to use existing cascade valve without diluting chlorine residual in lower zone
- insufficient storage capacity in both pressure zones
- insufficient pumping capacity in lower zone
- insufficient number of meters on services
- dead-end lines that require frequent flushing
- various undersized pipes for fire flows
- some pipes, service connections, and hydrants nearing the end of their typical lifespan

To address these concerns, a program was recommended with 17 capital projects to be completed between 2021 and 2025. The projects were estimated, at that time, to cost approximately $4.6 million. It was also recommended at the time to create a Capital Expenditure Charge (similar to a Development Cost Charge) to enable new development projects to contribute to the growth related portion of those projects.

In 2023 the RDOS began operating the water system and applied increased standards to the system, including changes to the fire flow requirements. All

parcels that have anything above a single-family dwelling are required to have increased fire flows (minimum of 150 litres per second); industrial use requirements are required to have 225 litres per second. With the changes in demand requirements, upsizing is required for several replacement projects. Some of the projects have been initiated; upgrades are expected to continue for several years. The Okanagan Falls water system is planned for an estimated $4.8 million in upgrades in 2024 and 2025, funded through a combination of a senior government grant, Community Works Fund (gas tax) funds and capital reserves.

Sun Valley Water System

The Sun Valley Water System is a former improvement district that was transferred to RDOS in 2017. The water system consists of a combination of different sized pumps and a 246 m^3 concrete reservoir. The system supplies 28 connected properties with water for residential and irrigation use. The current connections consume the full allotment of licensed water from the well; no further connections are able to be added.

Rolling Hills Waterworks District

Rolling Hills Waterworks District is an improvement district that covers a small area adjacent to the Sun Valley water system. The District has 10 connected properties. The subdivision and private utility were established in 1972; the system was owned and operated by the developer of the subdivision. In 1980 Letters Patent were issued and the system was converted to an improvement district. The system's water source is a deep well (52.4 m deep), with a 113 m^3 underground concrete storage tank. The system relies upon a 3,000 L/minute pump with a 100 HP motor, and includes five hydrants. The pump system was computerized approximately 5 years ago. The system has had no water quality or quantity issues.

Okanagan Basin Water Board (OBWB)

The RDOS is a partner in the OBWB. The OBWB was created in 1970 as a collaboration of the three Okanagan regional districts (North Okanagan, Central Okanagan and Okanagan-Similkameen) to provide a coordinated approach to water management and water issues that span the basin. The OBWB's overall purpose is to undertake strategic projects and programs at the Basin scale that meet the collective needs of Okanagan citizens for long-term sustainable water supplies while supporting the capacity of member jurisdictions to meet their own water management goals. OBWB promotes best water management practices by supplying science, information, grants and other incentives with a focus on projects and programs that benefit the Okanagan watershed as a whole. The OBWB also undertakes advocacy, and has a communication and coordination role to reduce fragmentation in policy and planning, and to improve links between local and senior governments.

The OBWB's three main programs are focused on collaborative water management, water quality improvement and aquatic weed/milfoil management, with the overall objective of supporting sustainable water supplies, clean water for drinking, and healthy lakes and streams.The OBWB is not a regulatory agency, and does not enact or enforce law.

Within the RDOS the municipalities of Penticton, Summerland, Osoyoos and Oliver, as well as all of Electoral Areas C, E, F, and parts of Areas A, D, G, H and I participate in, and contribute to the Okanagan Basin Water Board. Penticton Indian Band is also a contributing partner. All of Okanagan Falls Incorporation Study area is within the OBWB service area.

➤ Who makes decisions?

Decisions regarding water supply and distribution for both the Okanagan Falls and Sun Valley water systems are made by the full RDOS board, because the services are only provided to one Electoral Area. Decsisions are made on the advice of staff, policies and regulations, and are in accordance with the permits issued by Interior Health Authoroity and provincial legislation.

Decisions regarding the operation of the OBWB and expenditure of its budget are made by the 12-member

OBWB Board that includes three representatives from RDOS. The three Okanagan regional districts appoint three directors each. The Board also includes representatives from the Okanagan Nation Alliance, the Water Supply Association of BC, and the Okanagan Water Stewardship Council. The Water Stewardship Council is a 33-member advisory body to the OBWB and a local source of technical expertise. The Stewardship Council includes representatives from diverse water stakeholders, including the RDOS.

Each OBWB Board member has an equal vote on decisions (one director, one vote). On financial matters, only the representatives of the regional districts are able to vote. The Board also relies on advice from the Watershed Stewardship Council. The Board does not have regulatory power, but seeks to improve water management by providing a basin-wide perspective and improving communications between regions to reduce fragmentation in policy and planning.

The OBWB also works to improve links between local and senior governments, participating as a partner in Okanagan water research and infrastructure funding. The OBWB does have taxation authority, and can therefore determine an appropriate budget and taxation rate to be recovered through the participating areas of each of the regional districts (RDNO, RDCO, RDOS). Operational procedures for the OBWB require unanimous approval by the three regional districts.

Decisions for water in the Rolling Hills Waterworks District are made by the three-member Board of Trustees, elected by property owners that are serviced by the district. The Board of Trustees makes resolutions, enacts bylaws, and assesses and collects taxes in accordance with legislation.

Private utilities are regulated through the Comptroller of Water Rights, under the *Water Utility Act* and the *Utilities Commission Act*. The Province's Utility Regulation Section ensures that water systems are properly designed and constructed prior to the sale of lots and that utilities provide safe and adequate water service at rates that are fair, reasonable and sufficient to operate their water systems sustainably. All of the water systems — including those owned and operated by the RDOS, the improvement districts and private utilities — must meet the requirements of the *Drinking Water Protection Act* as enforced by Interior Health.

Figure 2: Service Decision-making

SERVICE	DECISION-MAKERS
Okanagan Falls Water	Decisions made by the entire RDOS Board because the service is provided to one electoral area only
Sun Valley Water	Decisions made by the entire RDOS Board because the service is provided to one electoral area only
Okanagan Basin Water Board	Decisions are made by the OBWB Board. Operational procedures require unanimous approval by the 3 regional districts.
Rolling Hills Waterworks	Decisions made by the Board of Trustees for the service.

➤ Who delivers the service?

The RDOS delivers 10 water systems throughout RDOS; currently Sun Valley and Okanagan Falls are the only ones located within the Okanagan Falls Incorporation Study boundary (and the only ones in Area "D"). RDOS utilities staff deliver the service, including operations, maintenance, and 24-hour per day standby and emergency response, with a combined FTE of 2.75 associated with the operation of the two services. In addition, the services are supported by other RDOS departments, including the engineering division, which provides capital infrastructure upgrades for water, for full service delivery.

The OBWB service is delivered by OBWB staff. The Water Board has nine staff, including an executive director, water stewardship director, deputy administrator, communications director, policy and planning director, office and grants manager and milfoil control crew members.

The Rolling Hills Waterworks Improvement District delivers that system to its users. It has no full-time employees — volunteers undertake the sampling and testing every 4 to 6 weeks, arrange for hydrant inspections, and system maintenance as needed to meet the *Drinking Water Protection Act* and Interior Health regulations. The system's trustees prepare financial information, collect the taxes and host an annual general meeting.

➤ What is spent by RDOS on the service?

Figure 3 shows the 2023 budgeted cost for the operations of the Okanagan Falls water system, Sun Valley water system, OBWB and the 2022 expenses for the Rolling Hills Waterworks District. Unlike in other services, the OK Falls and Sun Valley system administration allocation — $22,310 and $2,754 respectively — is included. The distinction is due to the fact that the services are delivered to and recovered from distinct service areas, and would continue to be recovered from those service areas (and not the entire municipality) after an incorporation.

The amount referenced for the OBWB reflects the total cost allocated to the RDOS (minus the administration allocation, which is accounted for in the *Administration Services Sheet*), including the cost associated with all participating areas in the region (four municipalities and portions of eight electoral areas). The operating costs have the administration allocation removed.

In addition to the service cost, there are capital projects associated with the services, as well as reserve accounts created for each of the water services. The capital items planned for 2023 for the Okanagan Falls water system (Figure 4) were to be paid for through a grant, transfers from the capital reserve, as well as $500,000 in borrowing. The Okanagan Falls Water System is anticipated to require an additional $3.5 million over 2024 and 2025 for priority capital upgrade projects. No capital items were planned for Sun Valley for 2023, but a back-up generator is planned for 2024 and 2025 (totalling $540,000), if funding can be obtained through a grant. The reserve account status (as at the end of 2022) is shown in Figure 5.

Figure 3: Service Operating Costs (2023)

SERVICE	COST[1]	USER/TAX
OK Falls Water	$767,532	$758,470
Sun Valley Water	$80,829	$80,629
OBWB	$752,611	$752,611
** Rolling Hills Waterworks [2]	$19,300	$19,200

[1] *Cost and tax requisition figures are from RDOS 2023 budget for entire service area (not just OK Falls or Area D). Administration allocation is not included.for OBWB*

[2] *Rolling Hills is an Improvement District not a RDOS Service*

Figure 4: Service Capital Costs (2023)

SERVICE	CAPITAL ITEMS	COST
OK Falls Water System	Watermain and Cascade valve upgrade, operational and safety upgrades, utility truck, scada system (2023)	$2,091,440

Figure 5: Service Reserves (2022)

SERVICE/RESERVE	TOTAL[1]
OK Falls Asset Replacement	$628,585
OK Falls CEC	$536,397
OK Falls Capital Reserve	$106,723
Sun Valley Reserve	$75,912
OBWB Operating	$35,852
Rolling Hills Waterworks [2]	$65,000
Total	$1,448,469

[1] *Reserve totals are as at the end of 2022*

[2] *Rolling Hills is an Improvement District, not an RDOS Service*

➤ How are the costs recovered?

User fees are the primary source of funding for the Okanagan Falls, Sun Valley and Rolling Hills water systems. The Okanagan Falls system's revenues reflect a combination of tolls and taxes per parcel for unmetered users, and usage rates for metered users. Sun Valley user fees are based on a flat per parcel rate, plus a variable rate depending on the dole valve size. User fees are supplemented by reserve funds if operational costs fluctuate in a given year.

Other fees include metering, new service connection fees, inspection fees, valve turn requests, and others. The Sun Valley water system has a capital expenditure charge (CEC) of $1,000 per lot, which would be paid when new lots are created; however, the Sun Valley system does not currently have the infrastructure capacity to add new users to the system. The Okanagan Falls system has a capital expenditure charge for all new users of the system — a single-family lot under 2,000 m^2 pays a CEC of $6,573. CECs are placed into dedicated reserve accounts (see earlier in Figure 5) limited to funding capital upgrades that benefit growth within the respective water systems.

The OBWB service is recovered through property tax levied on all properties within the participating areas.

➤ What is the cost to a typical residence?

Rates vary for Okanagan Falls water system users depending on size of the lot and use (grade, group category). The rate shown in Figure 6 is based on a single-family residence on a lot between 558 and 930 m^2 (Grade C). Sun Valley water user fees include a base user fee, plus a rate depending on the dole valve size. Only the base rate for properties connected to the Sun Valley water system is shown in Figure 6.

The cost of the OBWB service is recovered from Okanagan Falls taxpayers on the basis of property assessments. In 2023 a residence assessed at $500,000 in Okanagan Falls paid approximately $11, as shown in Figure 6.

The Rolling Hills Waterworks District also has a base rate plus extra fees associated with different uses, such as a residence, suite, winery, yard and acreage. The base rate for a parcel with a residence, yard and average acreage is shown (i.e., no suite, winery or extra acreage).

Figure 6: Cost Impact on a Typical Residence (2023)

SERVICE	RES RATE	OWING[1]
OK Falls Water	n/a	$742.78
Sun Valley Water	n/a	$1,748.00
OBWB	0.0228	$11.39
** Rolling Hills [2]	n/a	$2,090.00

[1] *Impact is calculated on a home assessed at $500,000. Amount excludes 5.25% Surveyor of Taxes fee charged in unincorporated areas*

[2] *Rolling Hills is an Improvement District, not a RDOS Service*

INCORPORATION

➤ What impact would incorporation have on these services?

Incorporation would transfer the ownership of, and authority for, all three of the water systems (Okanagan Falls, Sun Valley and Rolling Hills). The new municipality would become a participant in the OBWB service currently provided through the RDOS.

Figure 7: Changes in Ownership and Authority due to Incorporation

SERVICE	BEFORE INCORPORATION (CURRENT)	AFTER INCORPORATION
OK Falls Water	RDOS	Municipality
Sun Valley Water	RDOS	Municipality
Rolling Hills Water	Rolling Hills Waterworks Improvement District	Municipality
OBWB	RDOS	RDOS

New municipalities automatically become the owners of, and assume responsibility for, any water systems provided by either the RDOS or by improvement or irrigation districts that are wholly contained within the new municipal boundary. Those systems provided by private utilities would not change as a result of incorporation, and could continue to be provided privately. There would be no obligation for the municipality to acquire or deliver those water systems.

The Rolling Hills Waterworks District would be dissolved, letters patent revoked, and transferred to the new municipality within four years of incorporation.

➤ How would decision-making change?

Decisions regarding the three water systems would be made by the municipal council after incorporation. Council would be responsible for making all major decisions, including those related to the water services, service levels, user fees and delivery models, the establishment of new services and programs, and the passing of the annual financial plan (i.e., budget).

➤ How would incorporation impact service delivery?

Although a new municipality would become responsible for providing water services, municipal staff would not necessarily deliver the service. The most common arrangement, however, is for municipalities to have their own municipal staff deliver and maintain the water systems owned by the municipality through a utilties, public works or engineering department. Alternatives to this approach are to contract with a private engineering firm to provide all or a portion of the maintenance and operations of the service, or to contract the RDOS to continue providing the service.

Typically, municipalities provide the infrastructure maintenance and capital works themselves where there is sufficient work for full-time employees within that department, and where there is a desire to provide the service locally and build the local knowledge and expertise for the systems within the community. Where a municipality does not have a need for full-time employees with specific specialties and qualifications, it may be more cost-effective to deliver using consultants, or to contract delivery through the regional district. The case for using of the regional district may be particularly strong when the regional district operates a number of similar-sized systems and has the expertise in house.

While the RDOS does operate 10 water systems, and is therefore well-suited to provide water services with some economies of scale, the new municipality would have three systems within its own borders, including the relatively large Okanagan Falls system with its long history of being managed and provided locally by the former Okanagan Falls Irrigation District. Establishing its own dedicated engineering/utility operations staff to operate and maintain the large Okanagan Falls water system in house is assumed to be the preferred model for the municipality, particularly given that the municipality would also have responsibility for the sewer system (thereby providing additional rationale and economies of scale for a broader complement of staff with civil engineering expertise as well as water and wastewater operator training). The qualified resources that service the Okanagan Falls water system would also benefit the two smaller systems (Sun Valley and Rolling Hills) which, on their own, would not warrant a full-time staff member. Having all three systems owned and operated by the municipality would help inform broader water servicing strategies that focus on local needs and priorities.

As noted, incorporation would change the ownership and delivery of the Rolling Hills water system. As a municipal asset, monitoring and maintenance would no longer be performed by volunteers. Instead the monitoring and maintenance would be provided by municipal water operators (or contractors, as required).

The RDOS indicated that 2.5 FTE are associated with basic operations of the Okanagan Falls water system, including operators and support; the needs of the Sun

Valley system add a further 0.25 FTE. A total of 2.75 FTE staff, therefore, are assumed to be required to provide basic service. Several other RDOS staff also spend time managing the water systems, including the senior manager of utilities, other water operators, engineering technologist, environmental technologist, administration assistant, and information services. The RDOS noted that each individual water system benefits from the broader complement of water operators that work on the 10 systems within the region, as well as the support provided by GIS and technicians, the separate engineers that focus on capital works and upgrades, as well as long-term planning for the systems. Arguably, therefore, the full range of expertise and level of service currently available to the water system is not captured in the 2.75 FTE.

In total, including the administration portion (utilities clerk), 3.75 FTE are assumed to be needed to fulfill the municipal water operations, including water operators, and shared time of a utilities clerk, the Director of Engineering, an engineering technologist and a manager of capital works. The staff complement is intended to replicate the current service level at the RDOS, in part through the addition of a engineering technologist and a position to help oversee capital works, with costs shared by sewer, water and the roads department. The resulting staffing complement is higher than when OFID owned and maintained the water system prior to 2023. OFID employed 2 full-time water operators, as well as some part-time coverage (2 to 3 hours per week). Administration support was provided by a full-time corporate officer (who also oversaw the street lighting, cemetery and centennial park) and occasional bookkeeping (twice per month).

The Town of Oliver provides another comparison. In 2022 the Town had a combined 5.0 FTE of water and sewer (utilities) operators, plus an engineering technologist, operations director and operations deputy director that oversaw the 50 km of sanitary sewer mains and treatment plant, and delivered water to approximately 2,400 residential customers, 174 industrial/commercial customers and irrigation water to more than 600 agricultural connections. The estimated total of 3.75 FTE for an Okanagan Falls municipality, (when taken together with the proposed sewer staffing, provides a similar staffing level.

In cases where expertise is not available in house, consultants or contractors would be used. While a manager of capital works has been added (shared with water, sewer and roads), it is expected that the municipality could contract out certain elements of the services, such as project management for long-term planning and managing capital projects and asset management, as required given the staff complement.

➤ How would service costs change?

Given the above analysis, to provide a similar level of service to that which is enjoyed today, the new municipality would incur a similar base cost to operate the Okanagan Falls and Sun Valley water services, but a face a slight increase in overall operating costs to address long-range planning needs and other projects. Extra staffing resources that would be required would be shared proportionally amongst the three water systems, and would result in an estimated 3.6% increase to user fees for each system.

There would also be the need to obtain some equipment and SCADA software to support the utility operations. All existing equipment, and all existing obligations (e.g., leases, debt) with the system today would be transferred to the new municipality.

The costs of providing the Rolling Hills Waterworks system would be expected to change under an incorporation scenario. Once owned by the municipality, monitoring and sampling work would no longer be performed by volunteers. The system would instead be allocated a portion of a municipal water staff wages based on the time spent on the system. The amount of annual operator and support time, at least initially, would not be significant. Furthermore, some costs may decrease as part of a municipal system — Rolling Hills budgeted $5,800 for insurance in 2023, whereas the larger adjacent Sun Valley system budgeted only $2,121 in insurance as part of the RDOS. Over time there may be different standards applied to the system once operated by a municipality, including

requirements for SCADA and telemetry systems, fire flow requirements, metering, or money set aside in reserves for eventual upgrades or replacement of the system (particularly given the age of the distribution system). Some of the associated capital costs may be offset through the muncipality's access to provincial and federal grants, as well as access to low long-term borrowing rates through the Municipal Finance Authority.

Prior to the transition of any private or improvement district water system, local governments typically require an engineering assessment to determine the condition of the assets, ability to meet municipal standards and cost estimates for capital improvements associated with the system. Provincial grants are available to help assess the infrastructure prior to transfer, and potentially to assist in coordinating the administration involved with transferring the service. Although the Rolling Hills is a relatively small system, a condition assessment would help a new municipality plan for the asset, inform decisions on whether any changes are needed, and potentially secure funding for any necessary upgrades prior to transfer. It is anticipated that support for the improvement district conversion would be included as part of the Provincial Offer of assistance to help prepare the municipality for this transition. With only 10 users, it will be important for the ratepayers of that system to understand the potential impacts of any rate increases or need to build reserves. The ability to average increases over the transition or period of time, as well as the ability to borrow funds at significantly lower MFA rates, would help to mitigate any impacts on exisitng ratepayers.

One of the advantages of having the systems under municipal authority is the fact that the municipality would have the ability to apply for infrastructure grants (rather than applying as part of the RDOS which may have other competing priorities), or apply eligible Gas Tax funds to capital upgrades, in accordance with the municipality's infrastructure priorities. As an improvement district, the Rolling Hills system is not today eligible for any infrastructure grants.

As utilities that are only provided to a subset of the municipality, each of the water services would continue to be budgeted separately as local area services, with only the benefitting users contributing to the service. These services would continue to be paid by user fees (or parcel taxes); only properties connected to the systems would pay. It is assumed that the current practice of budgeting and recovering the costs for each water system separately as local services, would continue at least in the short to medium term at the municipality. In the future there may be opportunities for a municipality to consider restructuring water rates in order to provide for all users, regardless of the water system they are connected to, to pay the same rates to receive domestic water (with different categories for types of use, volume incentives, and other matters).

SUMMARY OF TAX IMPACTS

Figure 8 presents the tax impact of the two scenarios – the current situation (RDOS) and incorporation (MUNICIPAL).

It is useful to note that the water costs referenced in the scenarios only apply to properties that currently receive the individual water services and are within the service boundary (Figure 1). The Sun Valley, Okanagan Falls and Rolling Hills water services would continue to be paid directly by the water users. Without the same scale and range of expertise involved in the service delivery through the smaller staff complement, increases to contracting and/or staff costs are anticipated, which would result in modest increases (3.6%) to the utility rates as a result of incorporation. For the Rolling Hills system, the increase does not take into account any upgrades associated with meeting any different standards that may be prescribed by the municipality, based on the results of a condition assessment. Given that the transition from the improvement district would not occur immediately, there would be time to better assess the condition of the system, and the costs and potential funding sources to address identified needs.

Figure 8: Tax Comparison of Regional District and Incorporation Scenarios

SERVICE	RDOS[1]	MUNICIPAL[1]
OK Falls Water	$742.78	$769.16
Sun Valley Water	$1,748.00	$1,810.09
OBWB	$11.39	$11.39
** Rolling Hills [2]	$2,090.00	$2,164.24

[1] *Impact is calculated on a home assessed at $500,000.*

[2] *Rolling Hills is an Improvement District, not a RDOS Service*

Police Services

The Police Services Sheet was developed for presentation to the Okanagan Falls Incorporation Study Committee at its meeting on April 16, 2024. The sheet was prepared using information available at the time of writing. Changes will be made if new information becomes available.

Information presented on the Okanagan Falls Incorporation scenario is based on the following assumption:

> *That an Okanagan Falls municipality would continue to be served by the RCMP through the Penticton detachment*

THE PRESENT

➤ What service is provided?

Under the *Police Act*, the provincial government must provide policing and law enforcement to all unincorporated areas, and to municipalities with fewer than 5,000 people. Service is delivered by the Royal Canadian Mounted Police (RCMP) pursuant to the Province's Provincial Police Service Agreement (PSSA) with the federal government.

Under the terms of the agreement, the provincial government pays 70% of the base cost; the federal government pays the remaining 30%. The Province recovers a portion of its costs from local taxpayers through the Police Tax. This tax covers a portion of the cost required to fund the RCMP Provincial Service's "general duty" and "general investigative" services.

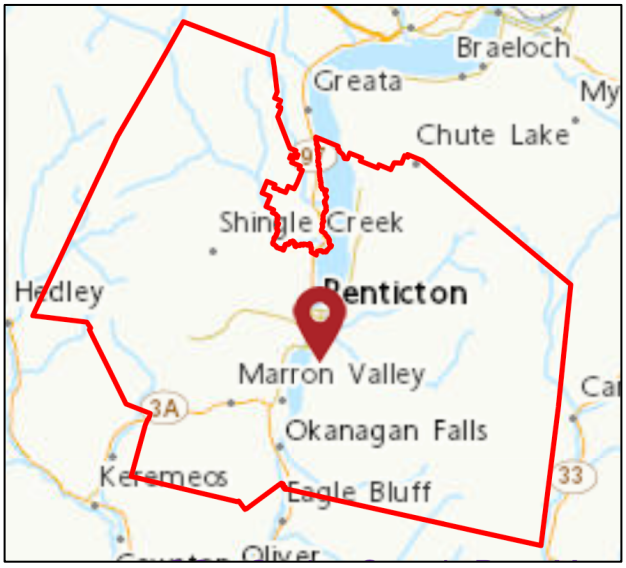
The RCMP Provincial Service can be broken into two main categories:

- **Detachment Policing** - This category delivers local police services to municipalities under 5,000 population and unincorporated areas by means of uniformed patrols, response-to-call duties, investigative services, community-based policing, traffic enforcement, and administrative support to provincial detachments.

- **Provincial Police Infrastructure (PPI)** - PPI provides services to the entire Province, including RCMP-policed municipalities and municipalities with their own police departments. The PPI has the capacity and expertise to resolve high risk incidents; target organized crime, gang violence, and serial crimes; respond to existing and emerging crime trends; and provide security and policing services for large scale, community events and emergencies. The PPI also includes capital-intensive items such as boats and aircraft.

Okanagan Falls is served by the Penticton RCMP detachment, which has eight provincially funded rural police officers to serve a population of 12,587 (2022 numbers).

Figure 1: Penticton RCMP Detachment Service Area



In addition to the provincially funded police officers, the RDOS funds a Crime Stoppers and Community Policing officer working out of the Penticton RCMP detachment. The RDOS also provides subsidies for Victim Services programs, as noted and accounted for in the Emergency Services Service Sheet.

➢ Who makes decisions?

The Officer in Charge (OIC) of Penticton South Okanagan Similkameen regional detachment meets with the RDOS Board of Directors on a quarterly basis, and provides information on areas of interest in the region. This information includes regional statistics and detachment priorities. The OIC provides oversight to the six RCMP detachments within the RDOS, including the Penticton Detachment.

The RDOS can lobby for a specific number of Provincial police officers; however, it is the Province that determines the appropriate number assigned to each detachment.

Decisions about priorities and day-to-day policing
RCMP provincial police services are governed by the *Police Act* and the PPSA. The Solicitor General is responsible for ensuring that adequate and effective policing services are maintained throughout BC. The Solicitor General also has the authority to set overarching priorities, goals and objectives for the Provincial Police Service; the Commanding Officer of the BC RCMP is required to implement them. Day-to-day decisions and operational matters are under the internal management and control of the RCMP.

While the Minister is responsible for setting police priorities, the RCMP is expected to consult with local leaders. Specifically, Detachment Commanders are expected to engage Indigenous and local governments within the detachment service area in establishing local policing priorities.

Decisions about resource levels
Decisions on resource levels and "authorized strength" for unincorporated areas, and for municipalities with fewer than 5,000 people, involve the RCMP and Province, but are driven by the RCMP's analyses of workloads and needs. The RCMP maintains internal processes for local detachments to request adjustments to authorized strength for unincorporated areas, and for municipalities with fewer than 5,000 people. These requests are forwarded to BC RCMP Headquarters to be evaluated and considered by the Province in the broader context of the entire Provincial Police Service. Options available to the RCMP include:

- determining that the provincial detachment is resourced adequately to meet its workload needs
- proposing a re-allocation of resources from within the Provincial Police Service to augment the unit
- proposing an increase in resources for the unit

Any changes to the organizational structure of the Provincial Police Service, including changes to provincial detachment units, requires agreement between the BC RCMP and the Solicitor General, as per the PPSA.

➢ Who delivers the service?

The RCMP provides policing personnel. Civilian staff (municipal and federal public employees, and volunteers) support police operations.

➢ What is spent on the service?

The rural Police Tax is set and collected by the Province. The total rural Police Tax collected from Okanagan Falls incorporation study area for 2023 was estimated at $92,533. In addition, RDOS funds victim services programs, which were outlined in the *Emergency Services Sheet*.

➢ How are the costs recovered?

The cost of police service for Okanagan Falls is paid

70% by the Province and 30% by the federal government. A portion of the provincial funding is recovered through the Police Tax from local property owners; a separate portion is recovered from the rural tax. The provincial policy was updated in 2023, with the Province setting police tax target to collect 33% of previous year's costs of front-line policing after deductions. Revenues go into the Province's Consolidated Revenue Fund.

➢ What is the cost to a typical residence?

Figure 2 shows the cost of the police tax on a residence within Okanagan Falls valued at $500,000.

Figure 2: Cost Impact on a Typical Residence (2023)

SERVICE	RES RATE	OWING[1]
Police Tax	0.0889	$44.45
	Total	**$44.45**

[1] *Impact is calculated on a home assessed at $500,000. Amount excludes 5.25% Surveyor of Taxes fee charged*

INCORPORATION

➢ What impact would incorporation have on these services?

For a new Okanagan Falls municipality, little would change with the delivery of police services in the short term. The municipality's population (estimated at 2,760) would not exceed 5,000 in the foreseeable future; thus, the municipality would not be responsible for providing and paying for policing within its municipal boundaries. Services would continue to be provided from the Penticton Detachment; Okanagan Falls would not be expected to receive its own detachment building.

The RCMP would need to regularly update and consult with the Municipal Council, and discuss policing priorities with the Council, rather than just the RDOS. Sharing priorities would not necessarily change, however, how the service is provided, or the number of officers involved in delivering the service. The municipality would be able to advocate for service changes and could propose, for instance, added resources for the municipality (i.e. offer to fund additional officers); but ultimately the decision would not be the municipality's to make.

➢ How would decision-making change?

As noted, with respect to decision-making, the RCMP would be expected to consult the Mayor and Council of the new municipality on the development of the local Annual Performance Plans. The municipality's policing priorities would be reflected in these plans. While the municipality could advocate for changes, the municipality would not have the authority to make decisions regarding the service, including the number of officers allocated to policing in the community (i.e., authorized strength).

➢ How would incorporation impact service delivery?

There would be no changes in service delivery. The service would continue to be provided through the RCMP.

➢ How would service costs change?

Although the RCMP would continue to service the new municipality from the Penticton detachment, the amount of police tax recovered from the Okanagan Falls area would change slightly as a result of incorporation. Specifically, a higher municipal rate for the Police Tax would be applied in place of the rural rate. Unincorporated areas receive a $0.10 per $1,000 assessed value reduction in the Police Tax, known colloquially as the "rural dime" tax rate reduction. This reduction reflects the fact that unincorporated areas

also pay the provincial rural area tax, some of which could be considered a contribution to rural police services. The increase would not result in additional revenues to the Province; rather, the amounts collected from unincorporated area would decrease slightly. Property owners in OK Falls would therefore see a minimal increase in police tax (about $8,800 for the entire area based on the 2023 tax data). This amount would translate into an increase of approximately $4.24 on a residential property assessed at $500,000.

Future Considerations

More significant changes related to policing would occur when the municipality reached a population of 5,000. Once the Canada Census determined that the 5,000 mark had been met, the new municipality would become responsible for paying for police services. At that time, as per the *Police Act*, the municipality would have the option of providing its own police department, contracting with an adjacent municipality's existing municipal department, or entering into an MPUA with the Province to contract the RCMP as the municipal police service. If the municipality chose to enter into the MPUA to contract the RCMP, the federal government would pay 30% of the RCMP cost-base to the municipality's 70%. The impact of the 30% community share would depend on the authorized strength and many other factors. In all instances, however, exceeding the 5,000-person threshold would represents a significant increase to the contributions paid through the Province's police tax.

Once over the 5,000 person threshold, the municipality would be responsible for 100% of certain costs, such as the detachment building, holding cells, furniture and civilian support staff. Municipalities with more than 5,000 people that are policed by municipal police department, or that contract with the municipal department in an adjacent municipality, must pay 100% of all policing costs.

It is worth noting that BC Stats projects a growth rate of approximately 1.33% for the unincorporated areas of RDOS between 2020 and 2046. If that rate were applied to the Okanagan Falls Incorporation Study Area, the area would not exceed a population of 5,000 until 2068. Typically municipalities monitor growth, and know when they will exceed the threshold, allowing them to prepare through the establishment of reserves to support the transition. Oliver passed this threshold in the 2021 Census for the first time and began paying for policing in 2022. Oliver had set aside money for the transition since 2018.

SUMMARY OF TAX IMPACTS

Figure 3 presents the tax impact of the two scenarios – the current situation (RDOS) and incorporation (MUNICIPAL).

Figure 3: Tax Comparison of Regional District and Incorporation Scenarios

SERVICE	RDOS[1]	MUNICIPAL[1]
Police Tax	$44.45	$48.69
Total	**$44.45**	**$48.69**

[1] *Impact is calculated on a home assessed at $500,000.*

Administration Services

The Administration Services Sheet was developed for presentation to the Okanagan Falls Incorporation Study Committee at its meeting on April 16, 2024. The sheet was prepared using information available at the time of writing. Changes will be made if new information becomes available.

Information presented on the Okanagan Falls Incorporation scenario is based on the following assumptions:

> *That an Okanagan Falls municipality would provide its own administration, projects funding and grants-in-aid service*

> *the Municipality would continue to contribute to regional administration services provided to all jurisdictions*

> *that Okanagan Falls municipal Council would be comprised of four (4) Councillors and one (1) Mayor*

> *that Okanagan Falls administration would employ six (6) staff, and would lease or purchase space to accommodate staff*

THE PRESENT

➤ What service is 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, and
- Rural Projects

Together these services include all 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.

The RDOS allocates a portion of the administration costs to each service or function, in accordance with the *Local Government Act*. The RDOS Board has a policy regarding how to best allocate those costs.

Over the course of the Incorporation Study, all administration costs allocated to the individual services and paid by property owners were removed from the service cost calculations in the individual Service Sheets. These costs are brought together here and accounted for in this *Administration Services Sheet*. This approach has been taken to allow for a more direct comparison of the administration costs under the Incorporation (municipal) scenario and the RDOS scenario.

An additional administration function provided to electoral areas is the collection of local property taxes. In British Columbia, all property taxes levied in electoral areas are collected by the Surveyor of Taxes, a provincial government office. The cost of the service is added by the Province to the tax notices sent to property owners.[1]

[1] The RDOS is pursuing taxation authority in 2024 through an Order in Council to provide this service themselves.

➤ 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 cases decisions regarding policies and spending are made by the full Board. Decisions on other services that apply only to electoral areas (such as electoral areas administration), are made by the Board members representing the participating areas (i.e., electoral area representatives).

Figure 1: Service Decision-making

SERVICE	DECISION-MAKERS
General Government	Decisions made by the entire RDOS Board because the service is provided to all jurisdictions
Electoral Area Administration	Operating decisions made by the participating jurisdictions (all Electoral Area Directors)
Area "D" Rural Projects	Decisions made by the entire RDOS Board, on the advice of the Area "D" Director, because the service is provided to one electoral area only
Area "D" Grants in Aid	Decisions made by the entire RDOS Board, on the advice of the Area "D" Director, because the service is provided to one electoral area only

➤ Who delivers the services?

General government and administration services are delivered primarily by RDOS staff under the direction of the Chief Administrative Officer (CAO). The RDOS CAO is supported by a senior management team comprised of nine positions: Managers of Legislative Services, Human Resources, Finance, Information Services, Engineering, Operations, Community Services, Planning and Building & Bylaw Enforcement. A tenth senior management position — Manager of Protective Services — is planned for 2024. The senior management team oversees a total complement of approximately 100 full- and part-time staff.

The departments that are involved in administration of general government, electoral area administration and rural projects services for all RDOS electoral areas total an estimated 33.0 FTE. It is estimated that services provided directly to Area "D" equate to 4.42 FTE for the total complement.

➤ What is spent on the service?

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

- the 2023 budgeted cost for RDOS general government
- the 2023 budgeted cost of electoral area administration services
- the 2023 budgeted cost for services unaccounted for through other services, such as grants in aid and rural projects in Area "D"
- a total of the administration allocation recovered from services provided to Okanagan Falls
- the Surveyor of Taxes fee for collecting the regional district's taxes

Total budgeted costs for 2023 are shown in Figure 2. The amounts in the figure represent the total cost of and requisition for these services, and not just the portion contributed by Okanagan Falls.

As noted earlier, all electoral area residents pay a fee to the office of the Surveyor of Taxes to cover the cost of collecting regional district 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. The amount shown in Figure 2 represents the 5.25% charge on the tax requisition that relates to all taxes collected from the electoral areas for all RDOS services. The amount that relates to the study area specifically is estimated at $93,000.

Figure 2: Service Operating Costs (2023)

SERVICE	COST[1]	TAX REQ.
General Government	$2,062,587	$1,512,546
EA Administration	$2,913,953	$2,496,099
Area "D" Rural Projects	$71,322	$32,672
Area "D" Grants In Aid	$17,000	$7,000
Corporate Facilities	$422,520	$0
Finance	$173,910	$0
Human Resources	$204,818	$0
Legislative Services	$530,207	$0
Information Services	$1,123,630	$0
Surveyor of Taxes	$898,431	$898,431
Administration Allocation	$729,386	$729,386
Total	**$9,147,764**	**$5,676,134**

[1] *Cost and tax requisition figures are from RDOS 2023 budget for entire service area (not just OK Falls or Area D).*

➤ How are the costs recovered?

As noted earlier, Corporate Facilities, Finance, Human Resources, Legislative Services and Information Services are recovered as administrative overhead based on Board policy.[2] There is a combined standard administration overhead charge, as well as a base rate that reflects the level of administrative services required for the service. Capital projects are also charged administrative overhead.

The result is that several of these services are not paid directly through tax requisition, but instead are recovered from the individual services. Amounts that are recovered from individual services already referenced in other *Service Sheets*, are not included here.[3]

General government, electoral area administration, rural projects and grant in aid services are recovered in part through property taxes on the basis of converted assessment, including land and improvements. Other revenue sources for general government and electoral area administration include small portion of grants in lieu of taxes, provincial grants, interest income and miscellaneous revenue.

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 3.

Figure 3: Service Reserves (2022)

SERVICE/RESERVE	TOTAL[1]
General Gov't Feasibility Fund	$99,715
General Government Capital	$316,050
General Gov't - Economic Development	$15,816
General Gov't - Carbon Neutral Initiative	$127,863
Rural Area Feasibility Fund	$819
Information Systems Renewal	$88,948
GIS	$49,456
General Gov't Operating	$426,506
Electoral Area D - Rural Proj Operating	$463
Grants in Aid Area D Operating	$34,138
Comm Gas Tax Area D	$897,066
Total	$2,056,840

[1] *Reserve totals are as at the end of 2022*

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 the assessed value. This amount is shown in this *Sheet*, but has not

[2] The RDOS Board has an Administrative Overhead Policy, last amended in August 2022.

[3] The only services where administration allocation is included in *Service Sheets* is the refuse disposal (landfill) and garbage collection services, as well as the water and sewer services because these services are recovered from user fees, not from taxes, and therefore complicate the identification and calculation of the amount associated with the administration portion.

been included in the RDOS rates referenced in other individual *Service Sheets* to avoid double counting.

➤ What is the cost to a typical residence?

Figure 4 provides the cost to a typical Okanagan Falls residence valued at $500,000 for general administration services. The 2023 property tax impact of administration services provided by RDOS to Okanagan Falls is approximately $410,000, which translates into $197 on a home assessed at $500,000.

Figure 4 also shows the Surveyor of Taxes fee that is calculated on the total amount of regional district taxes collected from unincorporated areas (for all services, not just administration). User fees, such as those paid for water and sewer services, are not collected by the Province, and thus are not subject to the added fee. Similarly, no fee is added onto taxes that are collected and retained by the Province (provincial rural rate, police tax).

Figure 4: Cost Impact on a Typical Residence (2023)

SERVICE	RES RATE	OWING[1]
General Government	0.0407	$20.36
EA Administration	0.2282	$114.10
Area "D" Rural Projects	0.0158	$7.91
Area "D" Grants In Aid	0.0034	$1.69
Service Administration (all of OK Falls)	0.1053	$52.64
Service Administration (subset of OK Falls)	0.0011	$0.57
Surveyor of Taxes*	n/a	$42.31
	Total	$239.58

[1] *Impact is calculated on a home assessed at $500,000.*

INCORPORATION

➤ What impact would incorporation have on these services?

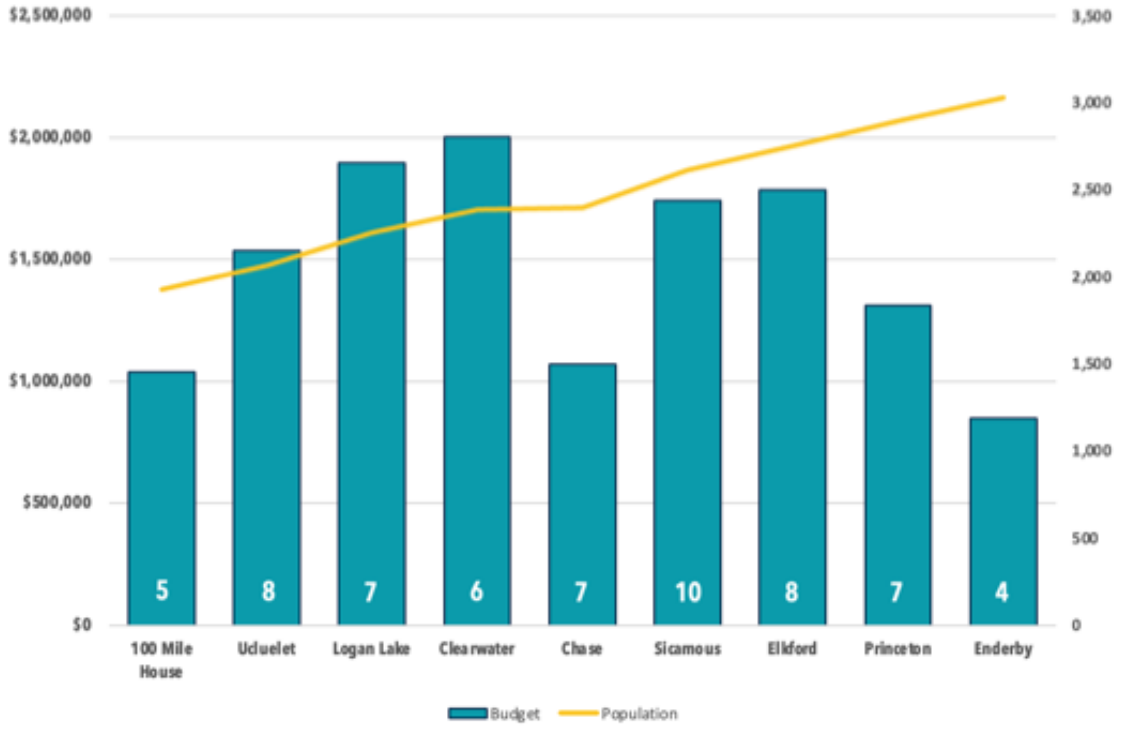
A newly incorporated municipality would establish its own administration to manage the municipal services, and support Council. Residents would no longer pay into the RDOS electoral area administration function.

To determine the size and scope of the administrative staffing complement, it is useful to take into account the number of services that the municipality would be overseeing, and to consider the practices in other similar-sized municipalities. There are several services that have been identified through a series of *Service Sheets* that are assumed to be transferred to a new municipality. These services (in addition to administration) are reiterated below as context for the administration complement that would be needed to oversee that combination of staff and services:

- Planning
- Economic Development
- Parks
- Recreation
- Building Inspection
- Bylaw Enforcement
- Roads
- Water (Ok Falls, Sun Valley and Rolling Hills)
- Sewer
- Fire Protection
- Street lights
- Cemetery

Figure 5 provides a sample of some similar sized municipalities (with populations just under 2,000 to 3,000), including staffing positions and administration budget, as reported in the respective 2023 financial plan for each jurisdiction. The yellow line and secondary axis on the right side of the graph shows the population of each municipality; the columns represent the total administration or general government budget, and the white numbers at the bottom of each bar reference the number of employee positions in the general government/administration department, which typically includes the CAO, corporate services, human resources, finance and administration support. Note that each municipality oversees a different complement and complexity of services, and is dealing with different circumstances, which can affect the number of staff, and the size of the budget. All but one of the municipalities examined have administration budgets in excess of $1.0 million (the average is close to $1.46 million); the number of administration staff ranges from 5 to 10 FTE.

Figure 5: Comparative Administration Budget Figures from BC Municipalities with Similar Populations



Based on the scope of services, and size of municipality, and given the consideration of similar sized jurisdictions, the administration of this range of services for an Okanagan Falls municipality is assumed to require a total of 6.0 FTE including:

- Chief Administrative Officer (CAO)
- Finance (Chief Financial Officer)
- Accounting clerk
- Corporate officer
- Administration assistants/recording secretary/reception (2)

Once incorporated, residents would continue to contribute to the RDOS General Government costs shared among all the RDOS municipalities and electoral areas, but would no longer contribute to electoral area administration, RDOS Area "D" grants in aid or RDOS Area "D" rural projects. The same types of grants and projects could be funded through the new municipality, as desired by Council. Municipal residents would contribute to the costs of the Okanagan Falls municipal administration, which would support a council of 5 members[4], rather than the shared cost of the Area "D" electoral area director.

➤ How would decision-making change?

Decisions regarding administrative services would be made by the municipal Council of an Okanagan Falls municipality. A municipal Council member would represent the municipality as a municipal Director on the RDOS Board to participate in discussions and decisions regarding regional services in which the

[4] A municipal council of 5 members has been assumed, with council stipends estimated at $12,500 for councillors, and $24,000 for the Mayor.

municipality participated. Changes in the authority for the administrative services is referenced in Figure 6.

Figure 6: Changes in Authority due to Incorporation

SERVICE	BEFORE INCORPORATION (CURRENT)	AFTER INCORP
General Gov't	RDOS	RDOS
EA Admin.	RDOS	Municipality
Rural Projects	RDOS	Municipality
Grants In Aid	RDOS	Municipality

➤ How would incorporation impact service delivery?

If Okanagan Falls were to be incorporated, service delivery of administration would shift from the RDOS to the new municipality. The municipality would have its own administration to undertake statutory requirements, support Council priorities and manage municipal staff. The *Community Charter* requires that the responsibilities of corporate administration and financial administration be assigned to one or more of the municipal officers (they can be assigned to the same person).

A municipal hall would be needed, both for the purposes of hosting Council meetings, as well as to provide office space for municipal staff. It is assumed that the municipal hall would be located within the Okanagan Falls incorporation study area. Office requirements, it is anticipated, could be met through a combination of municipally-owned assets, such as the RDOS Community Services Office (former OFID office), and leased or purchased commercial space. Community spaces within Okanagan Falls such as the Okanagan Falls Gym or Recreation Centre Activity Room, or the Okanagan Falls Seniors Centre could be used to accommodate Council meetings until a more permanent Council chambers could be secured. An amount to account for either leasing space or paying a mortgage has been included in the administration budget.

➤ How would service costs change?

To provide a similar level of service to that which is currently provided by the RDOS, it is assumed that the municipality would employ six (6) administration team members.

The municipal administration costs would be recovered through general taxes paid by the entire municipal tax base. Municipal administration costs are not assigned to each specific service in the same way as costs are allocated within the regional district.[5] To help compare the two approaches, the administration allocation applied to each of the RDOS services has been removed from the individual services, and added to this *Administration Service Sheet*. After incorporation, residents would no longer contribute to the administration costs associated with services that are transferred to the municipality; municipal taxpayers would, however, continue to pay towards the administration costs associated with individual services that continue to be provided to the through the RDOS, such as emergency planning, regional growth strategy, waste management, etc.

Municipal taxpayers would contribute to the costs of having a municipal Council. Based on the compensation provided by other municipalities, it is assumed that the remuneration for Okanagan Falls' Council would be $12,500 for each councillor, and $24,000 for the Mayor. The closest and perhaps most relevant comparable is Princeton, which has a population of 2,894 (2021 Census), and is located within the RDOS. In 2022 Princeton's councillors received $12,451 and the Mayor received $24,902 before expenses.

To help offset municipal administrative costs, a new municipality would receive an annual provincial Small Community Grant from the Province (just as regional

[5] The exception is for utilities which may include an allocation that represents a portion of administration costs.

districts receive a grant for administration costs). This amount has been estimated by the Province to be $400,000. The new municipality would also have access to a few different funds that are not available to regional districts, including a 1% utility tax and an operating agreement/franchise fee for natural gas distribution lines. These amounts can range quite substantially based on revenues earned by Fortis, as well as the existence of utilities in each municipality. In 2023 Princeton received more than $180,000 combined Fortis fee and utility taxes. Osoyoos received more than $200,000 combined. A more conservative estimate of $140,000 has been assumed in the administration budget, based on figures from other similar-sized municipalities.

Finally, 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 taxes and remitting any amounts to the appropriate authorities (RDOS, Province, etc.). As noted earlier in this *Service Sheet*, in 2023 residents of the study area contributed approximately $93,000 to the Surveyor of Taxes for that service.

In addition to the operational costs, the newly incorporated municipality would receive a proportion of the RDOS reserves established for the services that Okanagan Falls residents contribute toward, but that as an incorporated community would no longer receive. The proportion would be based on the proportion of tax base represented by the Incorporation Study Area. As an example, based on the Area D Gas Tax (Community Works Fund) reserve amount at the end of 2022, the Okanagan Falls municipality would receive close to half that amount, or approximately $452,000.

An overview budget for administration services at a new Okanagan Falls municipality is shown in Figure 7.

Figure 7: Municipal Administration Operating Budget

ADMINISTRATION OPERATING BUDGET	
Expenses	
Council Remuneration	$74,000
Council Expenses	$25,000
Staff Salaries, Wages & Benefits	$700,000
Municipal Hall Lease/Mortgage	$50,000
Operating Expenses	$244,000
Total	**$1,093,000**
Revenues	
Small Communities Grant	-$400,000
1% Utility Tax + Franchise Fee	-$140,000
Total	**$553,000**

SUMMARY OF TAX IMPACTS

Figure 8 presents the tax impact of the two scenarios – the current situation (RDOS) and incorporation (MUNICIPAL).

Figure 8: Tax Comparison of Regional District and Incorporation Scenarios

SERVICE	RDOS[1]	MUNICIPAL[1]
General Government	$20.36	$20.36
EA Administration	$114.10	$265.64
Rural Projects	$7.91	$7.91
Grants In Aid	$1.69	$1.69
Service Administration	$52.64	$7.02
Service Admin. (subset of OK Falls)	$0.57	$0.00
Surveyor of Taxes	$42.31	$0.00
TOTAL	**$239.58**	**$302.62**

[1] *Impact is calculated on a home assessed at $500,000.*

Okanagan Falls
Incorporation Study

Communications & Community Engagement Strategy

Okanagan Falls Incorporation Study

Fall 2023 – Early 2025



Purpose

This Communications & Community Engagement Strategy lays out a plan for communicating with and engaging residents regarding the Okanagan Falls Incorporation Study.

This Strategy includes background on the project, key messages, a list of audiences, and communication/engagement tactics that will be used to reach Study Area residents throughout the duration of the Study.

Background

Okanagan Falls is currently situated within Electoral Area "D" of the Regional District of Okanagan Similkameen (RDOS). The RDOS is the local government responsible for providing most of the local services on which residents depend, including water, fire response, planning and building inspection, parks and recreation, bylaw enforcement and several others.

RDOS has 9 electoral areas, with each area represented by one elected official, the Area Director, on the RDOS Board (9 electoral area Directors). Okanagan Falls is represented by the Area "D" Director. There are also 11 Municipal Directors that represent municipalities within the RDOS, for a total of 20 directors on the board, each representing their own jurisdictions/electoral areas.

Incorporation is the process through which an area transitions from an unincorporated community to a municipality (village, town, city, or district, depending on its geographic size and population). The possibility of incorporation has been discussed in Okanagan Falls for some time.

Incorporation was last voted on and rejected by residents in 1989. Since then, residents have been grappling with how best to guide services, renew infrastructure, resolve community issues, and ensure local interests are paramount. Recently, following the results of a Services and Boundary Configuration Study, the RDOS and Ministry of Municipal Affairs have supported an Incorporation Study to consider incorporation once again.

The Okanagan Falls Incorporation Study is being conducted between summer 2023 and early 2025. The Study sets out to assess what a decision by electors to incorporate would mean for local services, governance and property taxation in Okanagan Falls. The Study will give electors within the Study Area the information they need to make an informed decision about incorporation, should the Study Committee and RDOS Board of Directors recommend that a referendum on incorporation be held.

Communication with Indigenous Communities

Consultation with Indigenous communities is being undertaken by the Province of B.C. and is not addressed in this document.

Timeline of Governance Discussions

- **1989**: failed Area "D" referendum on incorporation
- **2015/16**: Area "D" Governance Study (identified options to address community concerns within the regional district framework, including dividing Area "D" to create an additional electoral area
- **2018**: Area "D" divided into two electoral areas (what was Area "D" became areas "D" and "I" to address representation and service issues)
- **2021/22**: Area "D" Services and Boundary Configuration Study (committee recommended that RDOS proceed with a request to the province for an incorporation study)
- **Fall 2022**: RDOS requests Provincial approval for an Incorporation Study
- **Spring/Summer 2023**: RDOS appoints Incorporation Study consultants and community advisory Committee
- **Fall 2023**: Incorporation Study begins
- **Early 2025**: Incorporation Study ends

Communications Vision

To inform Okanagan Falls residents within the Incorporation Study Area in a clear and neutral way about how regional districts and municipalities are different, and how incorporation would be expected to affect Okanagan Falls in terms of local services, governance and property taxation.

To distribute this information throughout the Study timeline and in locations and at times that make sense to reach Area residents where they are at.

Creative Theme

The following logo/wordmark will be used on all project materials.

Okanagan Falls
Incorporation Study

The logo incorporates the RDOS logo with the name of the study adjacent in blue font. The logo will provide visual continuity throughout the project timeframe.

The phrase: "**The Incorporation Study will affect the future of Okanagan Falls. Be informed. Be involved**." will be used on some documents where a call to action is desired.

Note: "Okanagan Falls" is the preferred term and will be used on all material as long as readers will have adequate time to read the text. "OK Falls" will only be used for any highway signage or materials where readers have very limited time to view the text.

Key Messages

Key messages are the most important information about the project. They are as the backbone of all communications material that gets developed to ensure we are saying things consistently and driving towards the most important points.

1. There are different ways that communities in B.C. are defined and governed.
2. An unincorporated area, or Electoral Area, is comprised of communities outside of municipal boundaries. Electoral Areas are represented by one Area Director on the Board of the local regional district.
3. Incorporation is the process through which an unincorporated area becomes recognized as a municipality (village, town, city, or district). As a municipality, the community elects its own Mayor and Council and makes its own decisions about most local services and taxation.
4. At present, Okanagan Falls is an unincorporated community of 2,760 people within RDOS Electoral Area "D."
5. Residents in Okanagan Falls have been interested in incorporation for many decades.
6. An Incorporation Study is underway to assess how incorporation would affect Okanagan Falls' services, taxation, and governance.

7. The Incorporation Study runs from fall 2023 to early 2025. The first half of the study is underway and will continue to summer 2024 - it consists of technical research about the implications of incorporation. The second half of the study begins in spring 2024 and will last until the end of that year - it will focus on sharing information with the community about incorporation.
8. The Study is being led by independent consultants that are doing detailed assessment to determine costs, benefits, and impacts of incorporation. The consultants are also working with the Incorporation Study Committee to communicate the Study process and findings to Okanagan Falls residents.
9. The Study is being guided by an impartial 10-person Incorporation Study Advisory Committee made up of community members that live within the Incorporation Study Area. The Committee is a neutral group tasked with reviewing Study findings and engaging the community on the findings.
10. Consultation and engagement with Indigenous communities regarding the Incorporation Study is being undertaken by the Province of B.C. and the Regional District of Okanagan-Similkameen.
11. When the Study is complete, the Committee will advise the RDOS Board whether it recommends holding a community referendum (vote) on incorporation.
12. After hearing from the Committee, the RDOS Board will make a recommendation on a referendum to the Minister of Municipal Affairs. The Minister will decide if a referendum should be held.
13. If a referendum (vote) is held, electors within the Study Area will decide if they wish to incorporate as a new municipality or remain as an unincorporated community within RDOS Electoral Area "D."
14. The Incorporation Study is important and will affect the future of Okanagan Falls.
15. All Study information will be posted as it becomes available on the RDOS Incorporation Study webpage at www.rdosregionalconnections.ca.
16. Between spring and fall 2024, numerous community events will be held to discuss incorporation. During this time period, information will also be mailed to property owners within the Study Area.

Call to Action

In material where a call to action is desired, the following phrase will be used: "The Incorporation Study will affect the future of Okanagan Falls. Be informed. Be involved."

Audiences

An audience is a specific person or group of people that we want to communicate with. The primary audience of this Communications Strategy is **electors who own properties within the Study Area**. Electors are defined as Canadian Citizens who are over the age of 18. This large group can be broken down into several sub-audience groups (in no particular order):

- Resident electors
- Non-resident property owners
- Okanagan Falls Community Association
- Royal Canadian Legion Branch 227 (Okanagan Falls)
- South Okanagan Chamber of Commerce
- Okanagan Falls Skaha Lake Winery Association
- Okanagan Falls Community Partners
- People living along the border of the Study Area who do not know if they are included
- The RDOS Board, including the Area Director
- The Ministry of Municipal Affairs
- Residents who prefer to get information online
- Residents who prefer to get information in hard copy or in person
- Residents who prefer details
- Residents who prefer summaries

For clarity: Indigenous groups are not listed as an audience because consultation and engagement with Indigenous communities is being undertaken by the Province of B.C.

Visual and Graphic Strategy

In order to create a compelling narrative that supports the communications vision, the following visual or graphic products will be developed:

- A **visual theme**, which will be consistent across all communications material (the Study logo and consistent use of colour and font)
- Two **explainer videos** (one focused on the project process and timelines; the other focused on key findings from the Study and how the process concludes)
- **Process** illustration
- Study **participants** illustration

Communication Plan

The table below identifies the communication actions and activities that will be used through the Study to share information with Study Area residents.

What	Timeframe	Audience Focus
RDOS Regional Connections webpage This webpage will be advertised as the single main place for RDOS and Committee documentation through the process. The page will be updated at a minimum bi-weekly, but at times more often. There is a place on the page where residents can post questions and have them answered by members of the project team. The website has the ability to send newsletters to anyone subscribed to the Incorporation Study topic. The newsletter function will be used periodically to push updates to followers regarding key dates, new information, or upcoming events.	**Ongoing** through the duration of the Study	• Electors within the Study Area • Residents who like access to background documents and detailed information • Residents who prefer to access information online
RDOS social media RDOS' social media channels (Facebook, X, Youtube) will be used roughly bi-weekly though the project timeframe to generate awareness about the Incorporation Study and share key details. Posts will typically link back to information on the RDOS Regional Connections project webpage.	**Ongoing** through the duration of the Study	• Electors within the Study Area • Residents who prefer to access information online
Monthly advertisements in Skaha Matters Advertisements will highlight different aspects of the Study. • October: Study is underway • November: Study timeline • December: Study participants • January: Study is underway • February: Study timeline • March: Study is underway • April: How to submit a question to the project team • May: • June: • July: • August: • September: • October: • November: • December: • January:	**Ongoing** through the duration of the Study	• Electors within the Study Area

What	Timeframe	Audience Focus
Monthly editorials in Skaha Matters Editorials will be submitted under the name of the Committee Chair • October: About the Study and Committee • November: Decision-making in regional districts and municipalities • December: What the consultants are doing in the research phase • January: Why the Committee is neutral/unbaised • February: Review of finalized and upcoming service sheets • March: Spring update, review of completed service sheets • April: Focus of April Committee meeting • May: • June: • July: • August: • September: • October: • November: • December: • January:	**Ongoing** through the duration of the Study	• Electors within the Study Area
Presentations to local clubs or associations • (complete) September 26, 2023: Residents' Association town hall • (complete) December 13, 2023: showed explainer video at Okanagan Falls Community Partners meeting • (to come) Will request presentations with: Okanagan Falls Community Association, South Okanagan Chamber of Commerce, Okanagan Falls Skaha Lake Winery Association, Okanagan Falls PAC, and the RDOS Parks and Recreation Committee	October 2023 – Early 2025 (the conclusion of the Study)	• Electors within the Study Area • Existing community groups
Electoral Area D Community Office The community office will have copies of process diagram, participants diagram, and all service sheets as they are finalized	October 2023 – Early 2025 (the conclusion of the Study)	• Electors within the Study Area • Residents who prefer to access information in hard copy
Posters Posters will be used to generate awareness about the Study and advertise information meetings • (complete) Poster 1: September 2023: Study is underway, QR code to website • (complete) Poster 2: Advertising April 16 Committee meeting & postponement of March meeting • (complete) Poster 3: How to submit a question to the project team Posters will be distributed around the community by Committee members. Ideal locations for posters are bulletin boards at: • Belich's AG Foods • The Post Office	As needed through the duration of the Study	• Electors within the Study Area • Residents who may not otherwise seek out information • Residents who prefer to access information in hard copy

What	Timeframe	Audience Focus
• Pharmasave • KJ's Coffee • The Library • Tickle Berries		
Poster Boards Poster boards will be used in multiple settings, such as public information meetings and community group meetings	TBD – summer 2024	• Electors within the Study Area • Residents who may not otherwise seek out information • Residents who prefer to access information in hard copy
Pop-up Informational Booth One (1) pop-up info booth will be set up at a community event and staffed by the consultants. Potential events include: • Wednesday evening car enthusiast gatherings (https://www.facebook.com/OKFallsgathering/) • Music and Market in the Park (dates for 2024: June 23, July 1, July 14, July 28, August 11, August 25) – to book, contact Tara Henderson at canadiangirl1106@hotmail.com • RDOS Canada Day event	TBD – summer 2024	• Electors within the Study Area • Residents who may not otherwise seek out information • Residents who prefer to access information in hard copy
Public Information Meetings Two (2) public information meetings will be held and staffed by the consultants. 1 meeting will be held on a weekday evening. 1 meeting will be held mid-day on a weekend (consider holding at a school where kids could play at playground). If a third meeting is scheduled, to be held on a Friday evening. Meetings will include poster boards for drop-in participants and a scheduled presentation with time for Q&A.	TBD – summer and fall 2024 (consider late August and late September)	• Electors within the Study Area • Residents who like detailed information • Residents who prefer in-person events
Incorporation Discussion Panel One (1) discussion panel will be hosted by the Committee and facilitated by the consultants. This will be a combined virtual and in-person event. The panel is proposed to include representatives from Blind Bay/Sorrento and Salt Spring Island (communities that voted no to incorporation), as well as recently incorporated communities to present	TBD – fall 2024 Kea suggests doing on weekday evening while school is in session	• Electors within the Study Area • Residents who like detailed information • Residents who prefer in-person events

What	Timeframe	Audience Focus
a balanced discussion on the pros and cons of incorporation from the perspective of different communities. The objective of the panel will be to provide Okanagan Falls residents with an appreciation of varying points of view and any lessons learned.	(June or September)	
Household Mailouts Two (2) mailouts will be sent to all households within the Study Area: 1. Summary of what has been done to date, information about upcoming events 2. Summary of key findings of the Study (may contain portions of the Impact Briefs, referenced below) and next steps	May or June 2024 October 2024	• Electors within the Study Area
Incorporation Impact Briefs Four (4) Incorporation Impact Briefs – these briefs will be distilled from the *Preliminary Report* and will share information about four topics in small, digestible pieces for residents: • Service Impacts of Incorporation • Representation Impacts of Incorporation • Property Tax Impacts of Incorporation • How Incorporation Happens (e.g. logistics of incorporation vote, who can participate, what happens after the vote) The briefs will be distributed through advertising and the Regional Connections website and will be available in hard copy at the Electoral Area Community Office and at public events.	TBD - fall 2024	• Electors within the Study Area • Residents who like detailed information
Information Releases Information releases will be issued by RDOS at significant milestones through the duration of the Study.	Ongoing as appropriate through the duration of the Study	• Electors within the Study Area • Residents living near the Study Area who aren't sure whether they are included • Anyone in the area who is generally interested
Videos Two (2) short explainer videos will be produced that focus on: 1. The Study process and timeframe 2. Study findings and ways to get information	November 2023 (complete) May/June 2024	• Electors within the Study Area • Community groups (who can show the video to their members) •

What	Timeframe	Audience Focus
		Residents who prefer summaries
Communication Summary Report A summary report will be prepared to list all communications and engagement activities conducted throughout the Study, along with any input received, and findings/recommendations. The engagement summary will be included as part of the Incorporation Study *Final Report* and will be submitted to the Committee, RDOS, and the Ministry of Municipal Affairs in draft before being finalized.	Late 2024/Early 2025	• Electors within the Study Area • Community Committee • RDOS Board • Ministry of Municipal Affairs
Next Steps Communication At the conclusion of the Study, a next steps communication will be prepared to thank the community for its participation in the Study process, summarize what input was received, and inform them what to expect next. This will include: • A news release • Advertisement in Skaha Matters • Social media post	Early 2025	• Electors within the Study Area • RDOS Board

Deliverables & Accountabilities

The Consultants are responsible for:

- Developing the Communications and Engagement Strategy.
- Developing materials (content and graphic design) needed to implement the Strategy.
- Maintaining the RDOS Regional Connections Incorporation Study webpage.
- Providing social media language & graphics for RDOS to post.
- Creating and booking newspaper advertisements and editorials and submitting digital files.

RDOS is responsible for:

- Advertising Committee meetings and Incorporation Study community events on the RDOS website.
- Handling all logistics, including online feed, at all community in-person meetings and events.
- Printing posters & household mailouts for distribution.
- Printing documents to be displayed at the Area “D” Community Office.
- Providing timely approval for materials developed by the consultants.
- Posting to social media as requested by the consultants.
- Distributing Information Releases.

The Communications & Community Engagement Sub-Committee is responsible for:
(copied from the sub-committee's Terms of Reference for clarity)

- Reviewing and providing input on the Communication & Engagement Strategy developed by the consultants.
- Providing input on key audiences and how best to reach them.
- Providing input on the timing and location of community information events.
- Reviewing and providing input on select written materials developed by the consultants to help ensure that community questions and interests are addressed.
- Championing and assisting with distribution of Incorporation[1] Study information within the community.

The Sub-Committee will not:

- Write material to put forward
- Edit material (feedback is preferred)
- Direct the consultants or assign work to the consultants
- Speak on behalf of the Incorporation Study Committee

[1] The Sub-Committee will be asked to review more significant written materials, such as household mailout(s), information sheets, and video script(s). Some communications are fast-paced in nature and may not have time for group review, such as media releases, social media posts, and newspaper advertisements. The consultants are responsible for determining which products require Sub-Committee review.