REGIONAL DISTRICT OF OKANAGAN-SIMILKAMEEN

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

Wednesday, May 4, 2022
4:30 – 6:30 pm

Via Zoom
https://us02web.zoom.us/j/81258001348?pwd=bEdnMloySW9ZWTdJSEM0dU9OREZ1dz09

PURPOSE From 4:30 pm to 6:30 pm on Wednesday May 4, 2022, the Electoral Area "D" Service and Boundary Configuration Study Committee will meet as part of the study. The Committee will review the proposed boundary options for the survey as well as the draft survey and survey mailout materials.

A. HOUSEKEEPING

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

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B. APPROVAL OF AGENDA

RECOMMENDATION 1
THAT the Agenda for the May 4, 2022 Electoral Area "D" Service and Boundary Configuration Committee be approved.

C. RECEIPT OF THE APRIL 13, 2022 MEETING MINUTES

RECOMMENDATION 2
THAT the minutes of the April 13, 2022 Electoral Area "D" Service and Boundary Configuration Committee be received.

D. PROCESS UPDATE

- service fact sheets (complete)
- public engagement (initiated)
- technical analysis of boundaries (complete)
- committee assessment of technical analysis (complete after this meeting)
- survey of boundaries resulting from technical analysis, providing public evaluation of

technical analysis and additional subjective insights
- committee assessment of survey results and review / revise boundaries
- identify preferred Boundary Option (Recommendation to RDOS BoD)

Note that this meeting is to further review the technical assessment, and that proposed revisions in light of public evaluation of technical analysis and additional subjective insights will be made after survey results are shared

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E. TECHNICAL BOUNDARY OPTIONS REVIEW

Consultants - Sherry Hurst & Allan Neilson
- 'Deep Dive' - Review of boundaries and rationale resulting from technical analysis, for each area and survey option
- Review of updated survey & Overview Materials

F. NEXT STEPS
- Survey timeline and mailout dates
- Additional community meetings during survey period
  - Proposed presentation at OK Falls Community Association meeting
- Discussion of next steps with Province/RDOS – confirm meeting dates

- Next Meeting: Committee to review and assess survey results, and identify any resulting changes for boundaries, and identify a preferred boundary option

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G. QUESTION PERIOD

H. ADJOURNMENT

ATTACHMENTS

The following documents are included in the agenda package for the Committee's review:
- April 13, 2022, Committee Meeting Minutes
- Boundary Overview Mailout (4 pages)
- Draft survey (7 pages)
- Correspondence

- *Note the boundary analysis was provided in the agenda package for the April 13, 2022. Committee members may want to review in advance of this meeting*

Electoral Area "D" Service & Boundary Configuration Study

Boundary Overview – Technical Criteria & Options Rationale

The following overview has been provided as background for the options presented in the Boundary Options Survey. Please note that the options in the survey are a reflection of the initial technical analysis and may not reflect the final boundary that is determined and recommended by the Committee, which will be informed by community input shared through the survey.

Criteria

The information collected from Area "D" has been compared to several criteria to create boundary options to share with Area "D" residents and seek feedback. Several boundary options represent viable options, each with their own rationale, strengths and weaknesses. Community feedback will assist the Committee in recommending a boundary.

In developing the boundary options for an Incorporation Study Area, key criteria include:

Land Use & Development

- Include lands within growth areas identified in the planning policies (Area "D" Official Community Plan and RDOS Regional Growth Strategy)
- Minimize areas such as conservation areas, provincial parks, wildlife preserves that reflect sensitive environments, and do not contribute to the tax base
- Minimize the amount of agricultural land within the boundary
- Ensure the area is large enough to allow for future growth, but compact enough to facilitate efficient and cost-effective servicing

Population

- Population exceeds 1,000, and is sufficient to sustain a resilient community
- Population density and parcel size set the area apart from more rural areas

Infrastructure & Services

- Includes the whole of individual service areas for water and sewer, including areas planned for expansion
- Areas included are within the fire service and recreation service area
- Includes only those local roads necessary for efficient transportation network

Assessment & Tax Base

- Creates an assessment base that is significant in value
- Creates an assessment base that is diverse, including capturing as much industrial and/or business class areas as possible
- Excludes Class 9 farm properties from municipal boundaries, due to loss of tax exemptions

Community Input *(note: this criteria will be fully considered once the survey is complete)*

- Reflects preferences expressed by the community
- Settlement areas or communities are left whole, either inside or outside the boundary
- Communities that identified Issues with governance or services, where incorporation provides a potential solution to those issues, are included in the boundary

Boundary Options

Based on the criteria reviewed thus far, 3 areas have been identified in boundary scenarios to be shared for community input purposes. Some highlights of the rationale for those areas are summarized below.

- Upper Carmi community is not proposed to be included within any of the incorporation boundary scenarios. The area represents a rural area with larger lots, and without urban services. There is

limited if any additional development potential, and the area has the unique distinction of being adjacent to, and accessed primarily through, an existing municipality.

- Okanagan Falls is included in every scenario. This area represents the primary growth area, and the area with the existing urban infrastructure (sewer and water), as well as the mix of property classes and population and development potential necessary to sustain a municipality. The river/waterway has been used as the western boundary, due to the added servicing costs of roads to the west of the river, the fact it is outside the growth boundary and water and sewer service areas, as well as a desire to exclude the existing sx̌ʷəx̌ʷnitkʷ (Okanagan Falls) Provincial Park.
- The more rural and agricultural cluster of homes in the McLean Creek Road neighbourhood has not been included, to minimize the number of farm class properties within the boundary. This cluster is outside the growth area, is not serviced by water or sewer, is primarily in the ALR and almost half of the properties are assessed as farm class properties. If incorporated, farm class properties automatically lose their tax exemption for their residences. Depending on the value of their residence, this can represent a significant impact, and is the primary reason for limiting the inclusion of such properties. Where established wineries (see below) represent existing commercial and/or light industrial tax base identified by BC Assessment, those have been included. The survey will provide additional opportunities for this community to identify if they would prefer to be included in the boundary, despite the impacts of the lost tax exemption that would result.
- Rolling Hills and Sun Valley areas are included in all options, due to the wineries that represent a portion of the light industrial and business tax base, and the existing water infrastructure. Bringing the Sun Valley, Okanagan Falls and Rolling Hills water systems under one jurisdiction is likely to provide some service efficiencies and will enable the application of grants for these smaller water systems.
- Both Eastside Road North (Heritage Hills, Vintage Views and Lakeshore Highlands) and South (Skaha Estates) are designated as secondary growth areas and higher population density. While it is possible to separate the two and consider a scenario that includes Eastside Road South and not Eastside Road North (the opposite would not be feasible) – there is no significant technical rationale to separate Eastside Road North from any scenario that includes Eastside Road South, other a desire to exclude the agricultural (and farm class) properties that bridge the two communities. The survey should provide opportunities for these communities to identify preferences and concerns.
- Vaseux Lake is separated from the remaining community by provincial park and conservation areas, and has virtually no capacity to accommodate additional growth, either in the existing community, nor in the corridor that would "attach" the area to the remaining incorporation study area. The inclusion of this node provides for less efficient servicing of the roads. The area does represent a relatively dense cluster of single-family residential uses distinct from rural areas. Encompassing the Vaseux Lake community would require the inclusion of some conservation land and a provincial park, neither of which would generate any municipal tax revenues for the community. The additional assessment base that would be included if this community were part of the boundary is likely to support the incremental cost in services. The community has been included within some of the options in the survey to solicit additional feedback from this community.

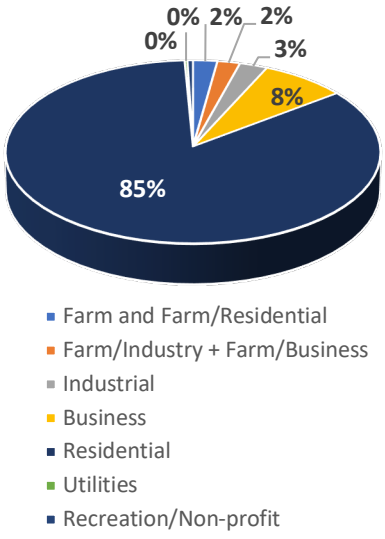
For further information on how each of the Boundary Options in the survey meet the criteria, the more in-depth Boundary Options analysis that was shared with the Committee, together with criteria evaluation charts, can be reviewed at rdosregionalconnections.ca.

The following overview tables reference the Boundary Options illustrated in the survey. For the boundaries of each option, refer to the maps in the survey, or check out the online map at rdosregionalconnections.ca.

OPTION A (Okanagan Falls, Sun Valley, Rolling Hills)

Land Area	970 hectares
Estimated Population	Approximately 2,400
Local Road Length	37.89 km
Infrastructure	• OK Falls sewer service • Okanagan Falls Irrigation District water service • Sun Valley RDOS water service • Rolling Hills Improvement District water service
Total Assessment	$808 million
Growth Potential	Includes primary growth area identified in the Regional Growth Strategy, and the Official Community Plan. Vacant and under-developed sites provide opportunity for additional growth
Environment	Majority of lands are not identified as Hillside/Steep Slope development permit areas. Some environmentally sensitive and important ecosystem lands.

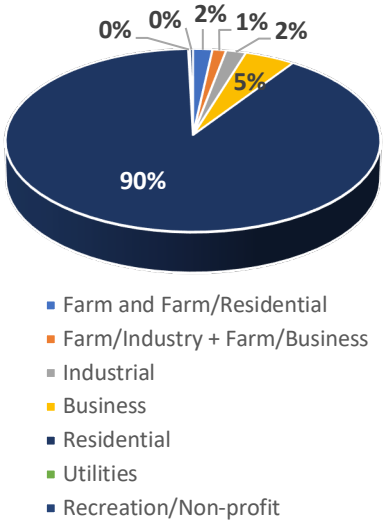
Assessment by Property Class



OPTION B (Okanagan Falls, Sun Valley, Rolling Hills + Eastside Rd North & South)

Land Area	1,351 hectares
Estimated Population	Approximately 3,400
Local Road Length	56.65 km
Infrastructure	• OK Falls sewer service • Okanagan Falls Irrigation District water service • Sun Valley RDOS water service • Rolling Hills Improvement District water service • Skaha Estates Improvement District • Lakeshore Waterworks (private utility) • Vintage Views sewer (private utility)
Total Assessment	$1,399 million ($1.399 billion)
Growth Potential	Includes primary and secondary growth areas identified in the Regional Growth Strategy, and the Official Community Plan. Vacant and under-developed sites provide opportunity for additional growth.
Environment	Much of the Eastside N. and S. lands are identified as Hillside/Steep Slope development permit areas; some environmentally sensitive and important ecos lands on the edges of the communities. Some areas along Eastside Road North noted as a geologic hazard area, with hazard of materials slumping or sliding.

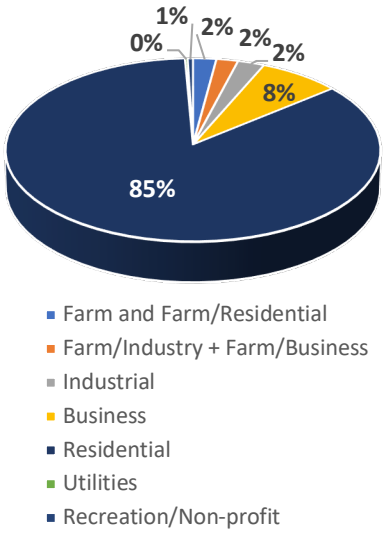
Assessment by Property Class



OPTION C (Okanagan Falls, Sun Valley, Rolling Hills + Vaseux Lake)

Land Area	1,076 hectares
Estimated Population	Approximately 2,500
Local Road Length	39.69 km
Infrastructure	• OK Falls sewer service • Okanagan Falls Irrigation District water service • Sun Valley RDOS water service • Rolling Hills Improvement District water service • Vaseux Lake Improvement District water service
Total Assessment	$844 million
Growth Potential	Includes primary growth area identified in the Regional Growth Strategy, and the Official Community Plan. Vacant and under-developed sites provide opportunity for additional growth. Vaseux Lake has no additional growth potential.
Environment	Majority of lands are not identified as Hillside/Steep Slope development permit areas. Some environmentally sensitive and important ecosystem lands, including all of the Vaseux Lake area

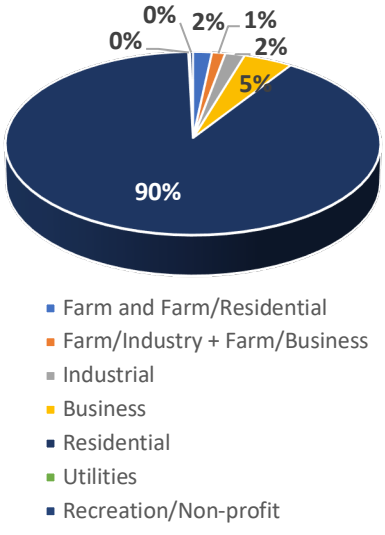
Assessment by Property Class



OPTION D (Okanagan Falls, Sun Valley, Rolling Hills + Eastside Rd North & South + Vaseux Lake)

Land Area	1,457 hectares
Estimated Population	Approximately 3,500
Local Road Length	58.45 km
Infrastructure	• OK Falls sewer service • Okanagan Falls Irrigation District water service • Sun Valley RDOS water service • Rolling Hills Improvement District water service • Skaha Estates Improvement District • Lakeshore Waterworks (private utility) • Vintage Views sewer (private utility) • Vaseux Lake Improvement District water service
Total Assessment	$1,435 million ($1.435 billion)
Growth Potential	Includes primary and secondary growth areas identified in the Regional Growth Strategy, and the Official Community Plan. Vacant and under-developed sites provide opportunity for additional growth. Vaseux Lake has no additional growth potential.
Environment	Much of the Eastside N. and S. lands are identified as Hillside/Steep Slope development permit areas. Some areas along Eastside Road North are noted as a geologic hazard area, with hazard of materials slumping or sliding. Some environmentally sensitive and important ecosystem lands, including all of the Vaseux Lake area

Assessment by Property Class



Electoral Area "D" Service & Boundary Configuration Study
Boundary Options Survey

Welcome to the boundary options survey! This survey is intended to gather feedback regarding possible boundary configurations in the event that a future Incorporation Study is initiated by the province to study the impacts of a portion of Electoral Area "D" incorporating as a municipality. One survey can be filled out by each resident.

Prior to completing the survey you may want to review some of the background materials prepared as part of this study, all of which are available on the website www.rdosregionalconnections.ca, including:

- Boundary Considerations Insights Paper (overview of boundary criteria)
- Boundary Options Overview (overview of the options included in the survey)
- Boundary Options Analysis (details of the boundary criteria and options analysis)
- Incorporation Study Process Insights Paper (overview of the Incorporation Study Process)

Please note that the options in the survey are based on the initial technical analysis and may not reflect the final boundary that is determined and recommended by the Committee, which will be informed by community input shared through the survey.

***** This survey is also available online. If would like to complete this survey online, you can find the link to the survey on the RDOS regional connections website. www.rdosregionalconnections.ca/area-d-boundary-options-survey.*** **Please fill out one survey per person (either online or hard copy).**

What is an Incorporation Study?
For additional context, an Incorporation Study is a detailed analysis of the impacts to services and governance, including the cost and property tax implications, of a change in governance from the current model (regional district electoral area) to a municipality based on a specific boundary. An Incorporation Study would provide the comparative analysis of the status quo vs. incorporation as a municipality. At the conclusion of an Incorporation Study, the Committee that leads the study recommends whether to hold a referendum. If that referendum proceeds, then residents within the Incorporation Study Area have the opportunity to vote whether they want to incorporate as a municipality or not. The referendum results dictate whether the community (based on the specific boundary proposed) incorporates.

Those who do not live or own property within the Incorporation Study Area boundary will not be included in any incorporation, and would therefore not have the opportunity to vote yes or no in any referendum on incorporation. Identifying a Incorporation Study Area boundary is therefore an important initial step.

For further background on criteria used to determine boundaries, or information about incorporation studies, please refer to the backgrounder papers on Incorporation Studies, and Boundary Considerations available at **rdosregionalconnections.ca.**

Where do I submit a hard copy?
If you prefer to fill out the hard copy of the survey (rather than filling it out online), hard copies are available, and can be dropped off at:

- RDOS Okanagan Falls Community Service office – #1 5350 - 9th Avenue, Okanagan Falls
- RDOS Penticton office – 101 Martin Street, Penticton

Surveys can also be submitted via mail to:

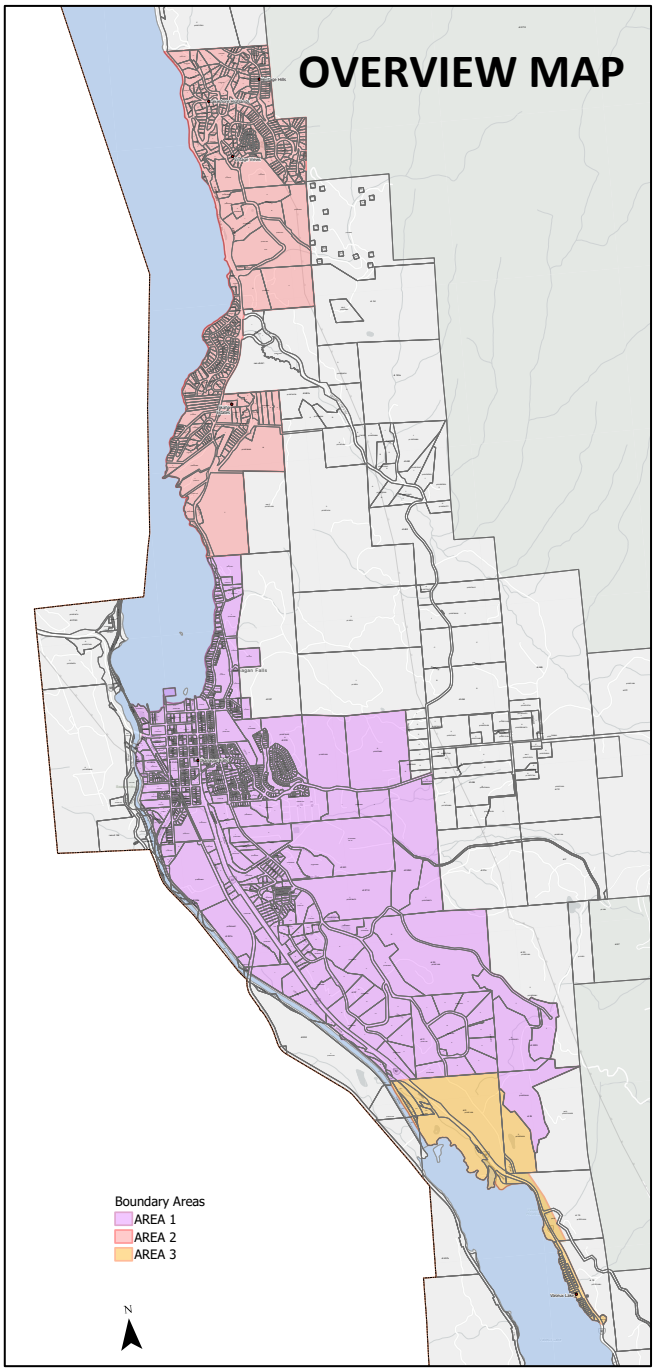
RDOS
c/o Christy Malden
101 Martin Street
Penticton, BC V2A 5J9

1. Which area below best describes where you live and/or own property:

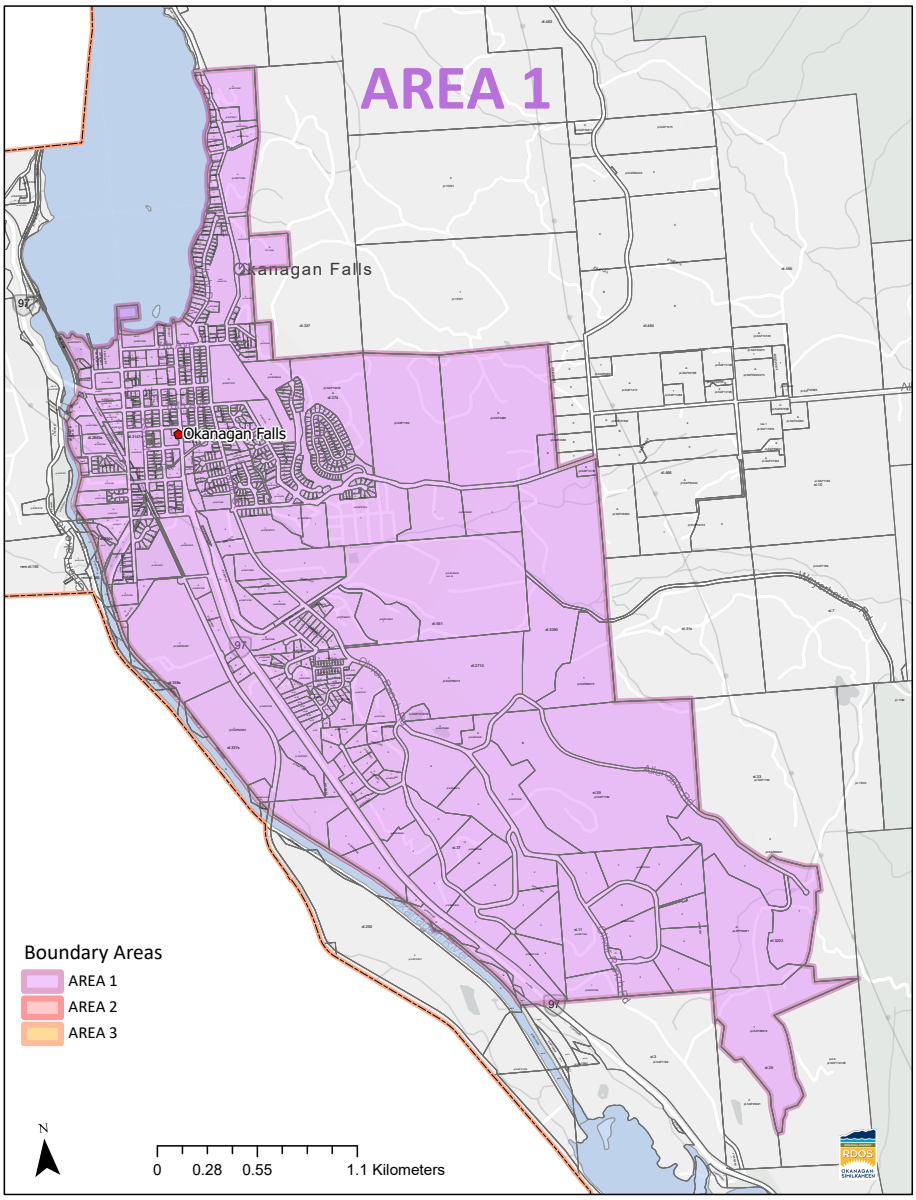
- ☐ Lakeshore Highlands
- ☐ Heritage Hills
- ☐ Vintage Views
- ☐ Parsons Road
- ☐ Matheson Road
- ☐ Eastside Road (North of Skaha Estates)
- ☐ Skaha Estates
- ☐ Eastside Road (South of Skaha Estates)
- ☐ McLean Creek Road
- ☐ Allendale Lake Road/Chapman Road
- ☐ Rolling Hills
- ☐ Sun Valley
- ☐ Allendale Road
- ☐ Vaseux Lake
- ☐ Saliken Road
- ☐ Upper Carmi
- ☐ Okanagan Falls
- ☐ Green Lake Road
- ☐ Old Kaleden Road or Highway 97 (west of the River)
- ☐ Other _____

2. Please share your feedback on each of the options presented, regardless of whether your property is included in that (or any) option. Each of the four options (A, B, C, and D) are comprised of a combination of three areas (Areas 1, 2 and 3) shown on the overview map here. More detailed maps have been included to illustrate the proposed Incorporation Study Area under each of the options.

   After reviewing the survey, if you are unsure whether your property is included within the boundary options, you can also use the RDOS interactive map provided online. To use the interactive map you can either "click" on your property location, or enter in the property address, and the map will confirm whether the property is included within, or is outside of the boundary.
   https://maps.rdos.bc.ca/
   (note in online version that a draft of your answers will be saved until you complete the survey and press "submit.")



a) OPTION A (this proposed Incorporation Study Area includes **AREA 1** shown below):



i) I live in and/or own property within this incorporation study boundary option

- ☐ Yes
- ☐ No

ii) I like this boundary because:

_____

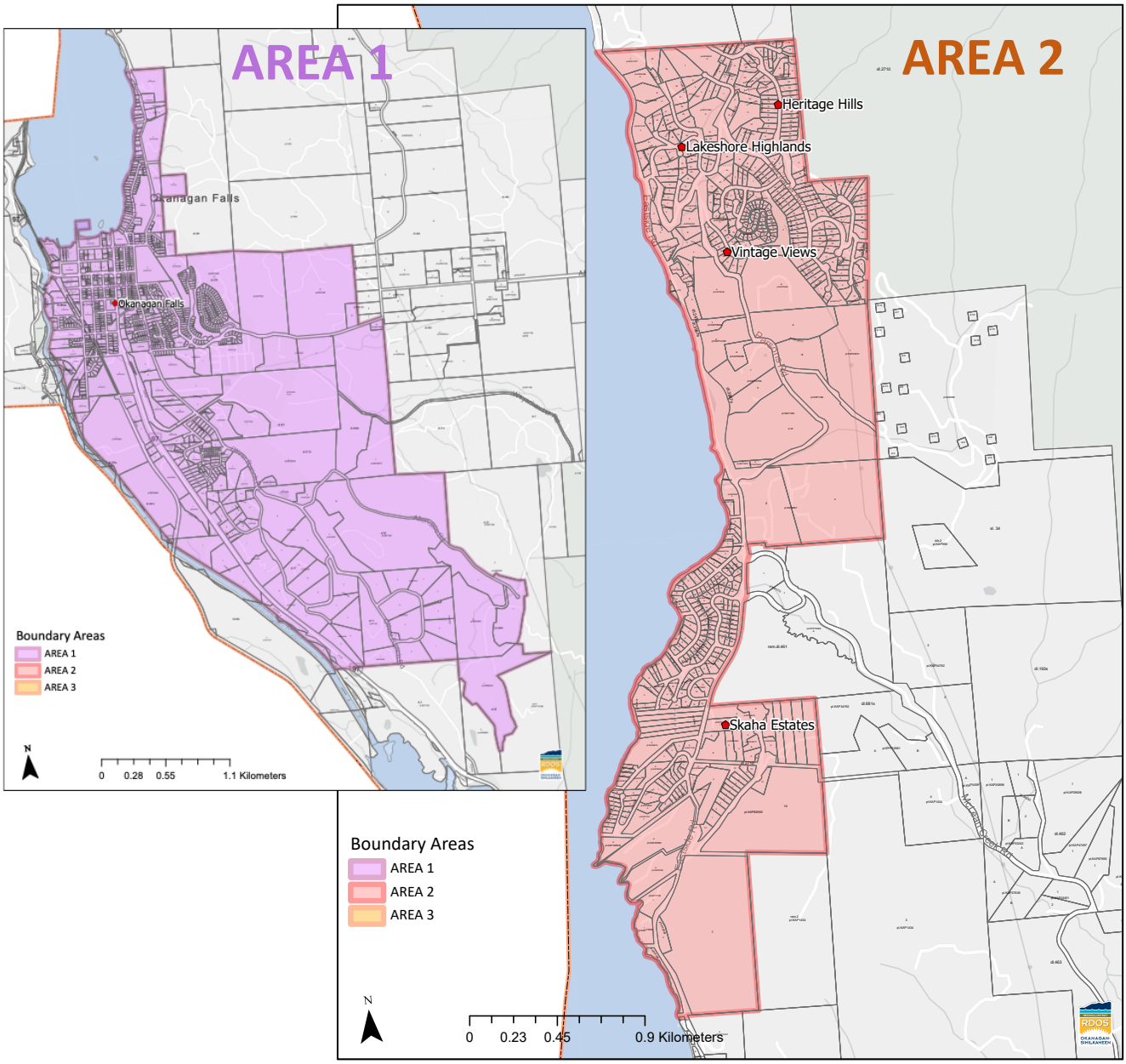
_____

iii) My concerns with this option include:

_____

_____

b) OPTION B (this incorporation study area boundary includes both **AREA 1** from the previous option + **AREA 2** shown below)



i) I live in and/or own property within this incorporation study boundary option

- ☐ Yes
- ☐ No

ii) I like this boundary because

_____

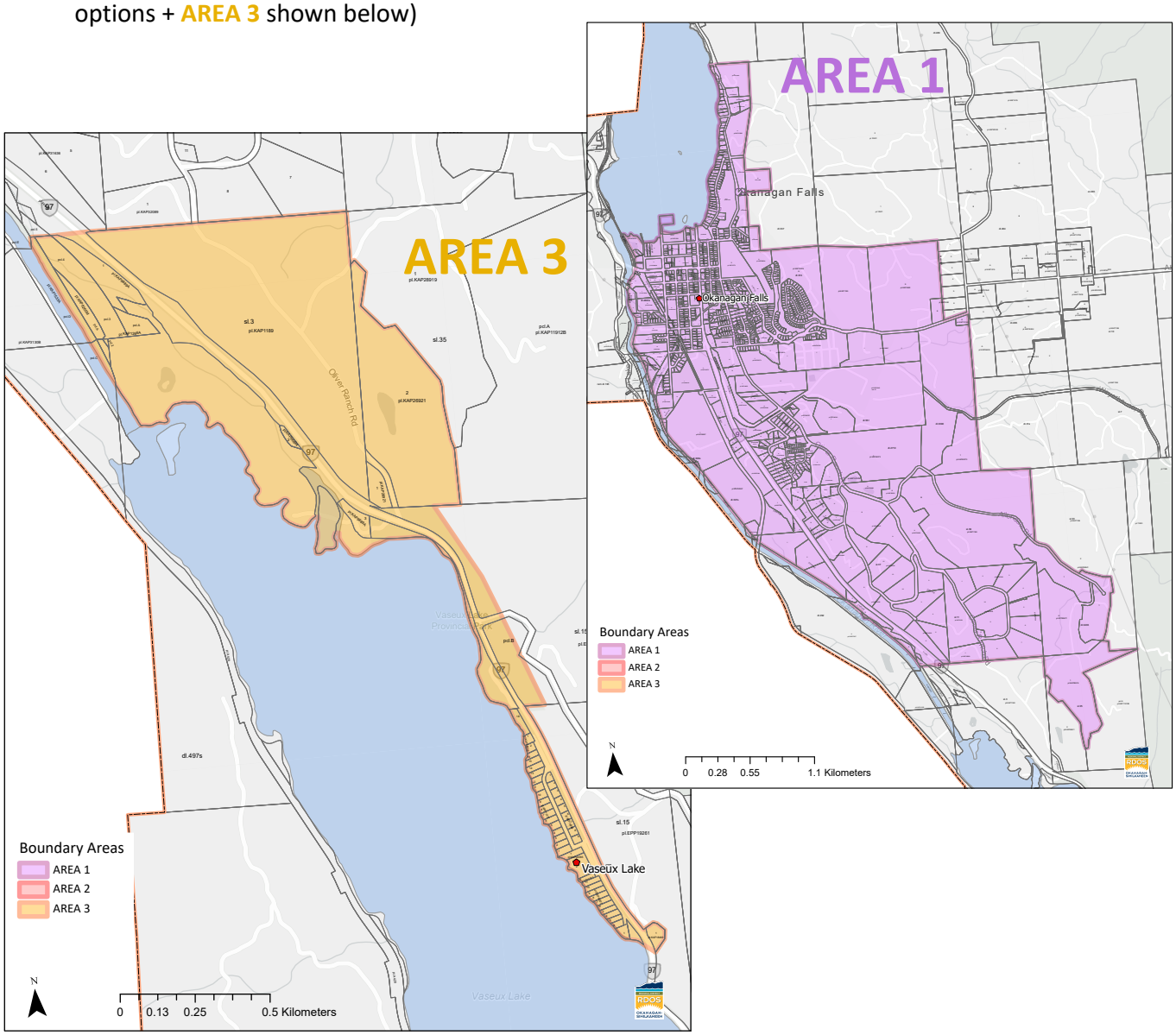
_____

iii) My concerns with this option include

_____

_____

c) OPTION C (this incorporation study area boundary includes both **AREA 1** from the previous options + **AREA 3** shown below)



i) I live in and/or own property within this incorporation study boundary option

- ☐ Yes
- ☐ No

ii) I like this boundary because

_____

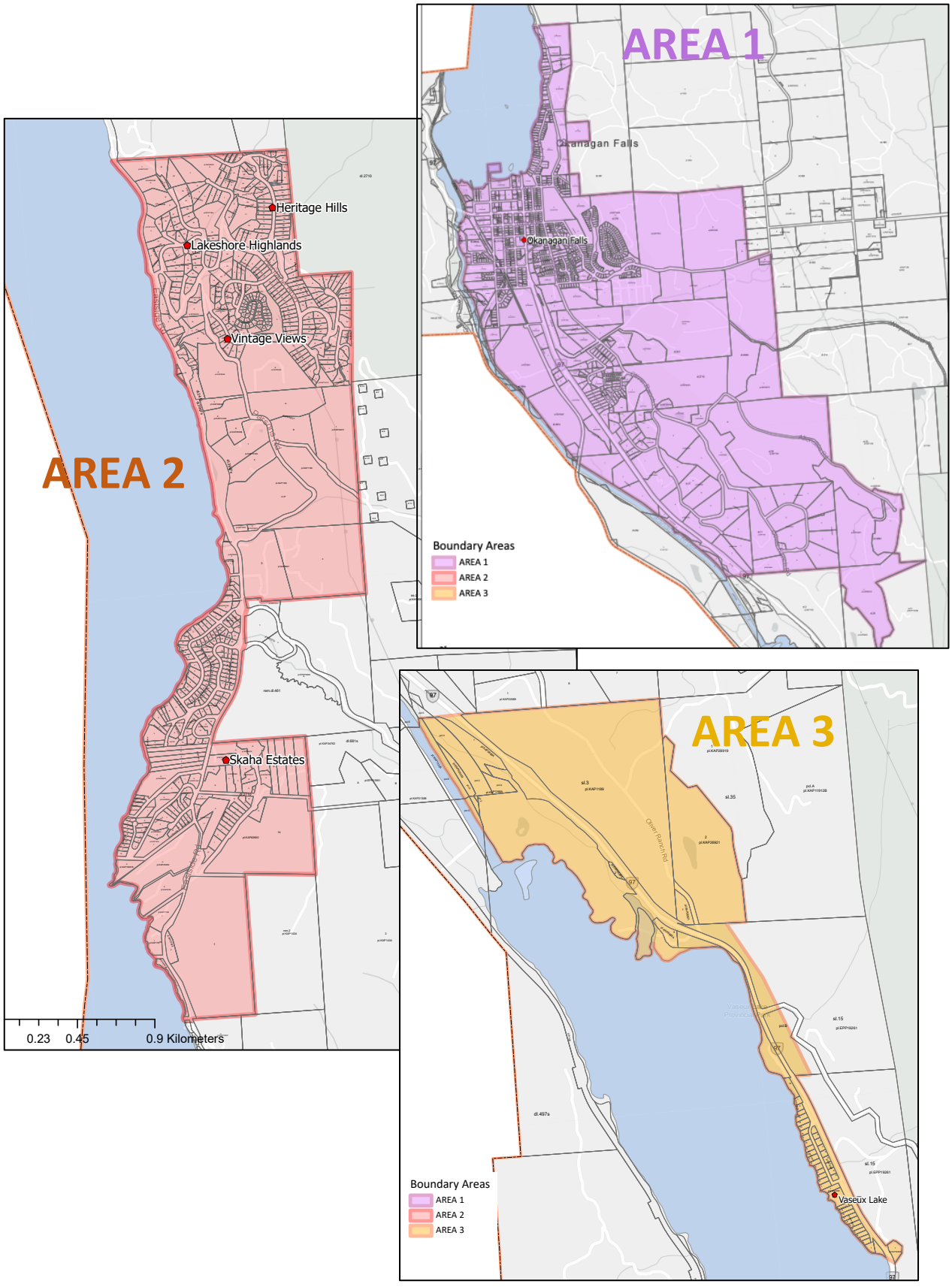
_____

iii) My concerns with this option include

_____

_____

d) OPTION D (this incorporation study area boundary includes all three areas – **AREA 1** from the previous options, as well as both **AREA 2** and **AREA 3** shown in the maps below)



i) I live in and/or own property within this incorporation study boundary option
   - ☐ Yes
   - ☐ No

ii) I like this boundary because

_____

_____

iii) My concerns with this option include

_____

_____

3. Please rank the following Options from 1 to 5, in your order of preference, with 1 being your most preferred option:

___ An Incorporation Study based on Option A (Area 1)

___ An Incorporation Study based on Option B (Area 1 + Area 2)

___ An Incorporation Study based on Option C (Area 1 + Area 3)

___ An Incorporation Study based on Option D (Area 1 + Area 2 + Area 3)

___ I would prefer that an Incorporation Study **not** proceed

4. Please share reasons why you ranked the options in that order in Question 3.

_____

_____

5. If your property was not included in any of the Options, and is outside of all four Boundary Options, please indicate the following:

   - ☐ I live in an area that borders at least one of the proposed boundary options, and would like to be included within an Incorporation Study Area
   - ☐ I live in an area that does not border any of the proposed boundary options, but I would like to be included within an Incorporation Study Area
   - ☐ I am happy to be outside of the proposed Incorporation Study Area options

6. If you indicated in Question 5 that you would like to be included within an Incorporation Study Area, please note any reasons why your property/neighbourhood should be included.

_____

_____

7. Other comments:

_____

_____

Thank you for your feedback!

From: **judy garner** judy_garner@hotmail.co.uk
Subject: Boundary Study questions
Date: April 15, 2022 at 7:48 AM
To: MATT Taylor m-taylor403@shaw.ca

JG

Hi Matt

Here is my e-mail to Sherry and Alan. Please review critically to see if it makes sense and is respectful. I am struggling with explaining some of the concepts (I could probably use better words if I could think of them). Perhaps I am rambling too much. And I certainly don't want to be disrespectful to the work Sherry and Alan have done.

Thanks Judy

Dear Sherry and Alan

Thank you for looking at my thoughts and questions when I am not a member of the Committee. Your presentation on Wednesday evening was very interesting and helpful, but the results were surprising to me. Perhaps this is a result of the criteria selected and the rating methodology.

In your preamble to the criteria ratings, you discussed the strength of OK Falls town which is why it is the core of any future municipality. You didn't discuss Skaha Estates (SE) and Heritage Hills (HH) in detail (just why they should be considered together), but you did discuss the issues relating to Vasseux Lake (VL).

The results of the criteria ratings indicate that adding SE/HH (Option B creates a stronger municipality. It indicates that just adding VL (Option C) does not contribute to the municipality, but when SE/HH are also added to VL (Option D) it creates a stronger municipality than just OK Falls town. This is confusing - the question becomes why is it better to have VL in the municipality with HH/SL when its's not better to have it on its own? It may be the ratings methodology that is creating this result and is not reflective of the actual factors in each community.

Overall, I am still trying to understand why Okanagan Falls town would want to include in the municipality:
a) Vasseux Lake with approx. just over 100 people in two separate areas that are on septic and one on wells for water, with a gap of approx 7 km from the town of OK Falls
b) Skaha Estates with approx. 400 people and Heritage Hills with approx 600 people with SE on septic and a gap of approx 10 km to HH. HH is only 1km closer to OK Falls than to the south side of Penticton. It is several Km closer to the Penticton boundary.

One of the criteria you mentioned during the open houses was having the most

One of the criteria you mentioned during the open houses was having the most people included with the least roads. In the open houses there was a lot of discussion about Ease Side Road and how after 5 years it would be a municipal road. But I didn't see the distances between the communities and how the municipality would need to look after not only the satellite communities but also the gaps between the communities reflected in the criteria.

There also doesn't seem to be criteria that assess future known needs and the potential risks associated with the different communities.

Dark blue dots are as follows:

Option A - 8
Option B - 13
Option C - 6
Option C - 11

As Alan said at the meeting his reason for believing that options B and D are preferable is because they have the most dark blue dots. I think this is how most people will look at this (ie. just count the dots) and if just for example Option B is not selected, the folks in SE and HH may be quite upset because it looks as if that option should be the one selected. So how each criteria is evaluated and reflected in the dots becomes really important. Also, what criteria are included or not included is also very important . As you said in the meeting, not all criteria have the same importance to the municipality. But if we are assessing the strenth of the municiple choice by only counting the dark blue blue dots each criteria has the same weighting on the results.

Intuitively, these results don't seem right. My sense is that OK FAlls as a town should show the strongest position for incorporation. Option D appears to be stronger because it is getting all the benefits of the OK Falls ratings without any of the specific negatives that were mentioned in the preamble being applied.

I realize it is difficult to assess and then show the criteria in a way that is easy to follow, but I am concerned that the dots as they are presented are misleading. I don't know if would make sense to rate each community on it's own and then make an assessment on that criteria whether having this community in the municipality will contribute, be neutral (really not relevant in the decision) or be a negative factor?

My questions on individual criteria are the following.

1st criteria - is "includes the primary growth area". All Options have dark blue dots - fully meets criteria. But the only reason that options B, C, and D have dark blue dots on this criteria is because OK Falls is includeded in each of these options. To someone just looking at this chart it will appear that all of these areas meet this criteria on their own merit and it will not be clear that the other areas are not contributing to this criteria. I am not sure how to address this; perhaps it's making this criteria Not Appplicalbe for options B, C, and D because they don't contribute to the criteria. Somehow it needs to be clearer that OK FAlls on its own will be carrying this criteria for the whole municipality, however it is configured.

2nd criteria - is "includes the secondary growth area". Options A and C are clear dots - do not meet the criteria

2nd criteria - is "includes the secondary growth area" Options A and C are clear dots - do not meet the criteria while options B and D are dark blue dots. This perhaps presents a mis-leading picture of OK Falls because if an area is a primary growth area, by default it should also meet the secondary growth area criteria and should have a dark blue dot. Option B meets the criteria and so it makes sense that it has a dark blue dot. But it doesn't make sense that Option D has a dark blue dot while Option A shows up as not meeting the criteria when Vasseux Lake is not contributing to the criteria at all. It gets a dark blue dot for this criteria because SE and HH are included in Option D. Can you see the anomaly here that doesn't make sense? All options get the dark blue dot for criteria 1 based on OK FAlls, but then OK Falls looks like it is deficient on criteria 2 and doesn't get a dark blue dot while HH/SE and VL get dark blue dots.

3rd criteria - is " minimizes the amount of conservation areas that do not contribute to the tax base..." options A and B are rated with medium blue dots - as partially meets the criteria and Options C and D are rated with light blue dots - as minimally meets the criteria. If SE and HH are adding to the amount of conservation areas, which I think they are, should Option B not be reflected as a decrease from how option A is rated, and be the same as options C and D? This would be consistent with the methodology used for criteria 4.

4th criteria- is "minimizes the amount of agricultural land within the boundary". Options A iand C are medium blue, while options B and D are clear. I think I understand your methodology which is if an area creates a significant negative impact on an overall option, then the option is downgraded.

5th criteria- is " represents area large enough to allow for future growth, but sufficiently compact to facilitate efficient and cost-effective servicing. Options A and B are dark blue and options C and D are medium blue. I don't understand why adding SE and HH into option B which are a total distance of 10 km down Eastside Road doesn't reduce the strength of Option B to be consistent with how Options C and D are rated. I would perhaps expect Option C to be medium blue and Option D to be light blue as this is the greatest area and distance between HH and VL.

6th criteria- is "existing settlement areas are kept whole and within the boundary . Options A and C are medium blue and options B and D are dark blue. Is this criteria even relevant if none of the communities have a natural and existing connection to each other? I believe the open house survey's did not indicate that any of the communities felt signficantly connected to each other. Just intuitively I think HH especially feels much closer to Penticton than OK Falls. If this is the case, does it make sense to rate Option B dark blue and then Option D tags along on the basis of Option B's rating?

7th criteria - is "population within the boundary exceeds 1000 and is sufficient to sustain a resilient community, including long-term options for municipal candidates and representation." Options A and C are medium blue and options B and D are dark blue. OK Falls has over 1000 residences and 2200 people. I don't understand why it is not dark blue and then following your methodology in criteria 1 all options become dark blue. This criteria doesn't give OK Falls the credit for having the largest population.

8th criteria - is "population density sets the area apart from it's rural surroundings, and allows for the development of efficient infrastructure." Options A and C are medium blue and Options B and D are dark blue. I don't understand this rating, as

medium blue and Options B and D are dark blue. I don't understand this rating as OK Falls is a fully developed town centre which none of the other communities have. There are large rural areas surrounding the other communities and between Ok FAlls and these communities. Also there will be signifiant issues and costs in getting further infrastructure to SE and VL.

9th criteria - is " includes the whole of individual local service areas for water and sewer." Options A and C are medium blue and Options B and D are dark blue. This implies that Options B and D are better choices which again doesn't make sense. OK Falls has the water and sewer .While these services could be provided to the other communities this criteria does not take into account the additional costs that will be incurred to bring Sewer and water to SE and VL.

10th criteria- is "areas included are within the fire service area". All options are dark blue which implies that there is no difference between them. This is accurate but doesn't take into consideration the difference between providing fire services in the town of OK Falls and servicing a municipality that is 17km in length. It also doesn't consider the costs of both HH and VL wanting their own fire trucks.

11th criteria - is " Includes entire local recreation service area". All options are dark blue. There are parks in both SE and HH, but all recreation services are provided in OK Falls. Again all communities are getting the dark blue dot based on OK FAlls and are not contributing to this criteria. This also doesn't take into consideration that the other communities will want their own recreation facilities in future.

12th criteria - is" includes areas that have potential for sewer expansion". Options A and C are medium blue and Options B and D are dark blue. I don't understand the value of this criteria. OK Falls and HH have sewer systems. SE and VL don't which gives Options B and D dark blue dots, which implies that these are a better choice. I don't understand why that would be.

13th criteria - is "includes only those local roads necessary for efficient transportation network". All options are dark blue. While the roads may only be necessary for efficient transportation is not a more relevant criteria , how efficient will it be to provide road maintenance for the community population given the distance from OK Falls. Given the discussion on road costs and maintenance, I don't understand how options B,C and D rate as highly as OK Falls.

14th criteria - is "minimizes orphan roads". All options are dark blue. I don't know what orphan roads are, so can't comment.

15th criteria- is "includes properties that together cover a range of property assessment classes. All options are dark blue. Again Options B,C, and D achieve this rating based on OK Falls. This criteria does not show how the other communities will contribute to the municipality.

16th criteria -is "creates an assessment base that is significant in value". Option A is light blue, Option B is dark blue, Option C is med blue and Option D is dark blue. Option B only gets a dark blue dot because it also includes OK Falls. And Option D shows up as a preferred option without any consideration of how much

those 100 properties will be contributing to the municipality.

17th criteria - is "creates an assessment base that is significant in diversity including capturing as much industrial and or business class areas as possible". Option A is dark blue, Option B is light blue, Option C is medium blue and Option D is clear. You appear to have changed your methodology on this criteria. Following other criteria, once OK FAlls was rated fully met, the other options would be fully met because they include OK Falls. You seem to have rated these options on their own merit without considering OK Falls.

18th criteria- is "excludes Class 9 farm properties from municipal boundaries".Option A is medium blue, Option B is light blue, Option C is medium Blue and Option D is light blue. it appears that Options B and D are getting rated lower because SE and HH are negatively impacting the options that include them.

Thank you once again for considering my questions. And I apologize if any of these are due to a lack of understanding on my part.

Kind regards, Judy

From: **Sherry Hurst** shurst@leftside.ca
Subject: Fwd: Boundary Study questions
Date: April 24, 2022 at 1:16 PM
To: judy garner judy_garner@hotmail.co.uk
Cc: Matt Taylor m-taylor403@shaw.ca, bob and sheila daly bandsdaly@shaw.ca, Allan Neilson aneilson@neilsonstrategies.ca

Hi Judy,

Our apologies for the delay — we didn't receive your questions until the end of day Wednesday (I believe Matt thought he had already forwarded them). Thank you for your thoughtful questions — we are grateful that you are going through the materials so thoroughly!

I think the most important thing to emphasize, and I think we tried to highlight this for the Committee the other day (but will definitely reiterate it again at the next meeting, and when the Committee reaches the point where they discuss making recommendations) - the evaluation provided at this point is based on the technical criteria that were laid out in this analysis, and referenced previously in the Boundary Considerations Insight paper. It is NOT an exercise of adding up the dots, which I think is the point we made (or were trying to make!). I believe the takeaway from the analysis is that there is no one option that meets every criteria, and that there will always be trade offs, and that it is not something where you can just add up the dots to find a "winner". The other important thing to consider is that all 4 options recommended for inclusion in the survey are viable. The high level evaluation was intended to take each option separately, look at that boundary configuration, and compare it to the criteria that were referenced. We recognize that by doing that we are not always reflecting the relative merits of one option compared to another … or capturing the nuances of a more detailed comparison … but that was not the intent of this high level "dot chart". Once we have feedback from the community we anticipate a more robust discussion with the Committee about the relative merits of the various boundaries, what some of the pros/cons of different configurations or of individual criterion. As you've noted, in many cases the dot is just an indicator of whether the option is meeting the criteria or not, so it does not imply that it is meeting that criteria "better" than any other option. Whether fully meeting the criteria makes an option a "better" choice … is not something that is explored in this part of the technical analysis … just that it meets it, whereas others may not fully meet that same criteria. Whether or not that is "better" may depend on your perspective. That is something I suspect we will delve into a little closer when it comes down to making recommendations, and when we have a broader picture of the community feedback.

That said, I've tried to highlight some of the reasoning for the evaluation ratings:

Land use and development:

- some of these criteria are either met or not — either they have included the primary growth area or they have not. Any scenario that did not, for instance, include the primary growth area, or only included part of it, would have a different score. That is not the case for any of the options
- secondary growth areas — again, either these are included or not. It is not "worse" to have included the secondary growth areas AND another … it's just a yes/no criteria.
- minimize conservation areas — the two areas that encompass some conservation trust areas, provincial park and wildlife reserves are Okanagan Falls and Vaseux Lake (areas 1 and 3). The Area 2 (Skaha Estates and Heritage Hills areas) does not add any conservation lands to the boundary. Given that Area 1 (Okanagan Falls) is in each scenario … the two scenarios that also have Vaseux Lake receive a lower "score" on that criterion because there is a greater amount of conservation and provincial park lands
- same for the agricultural areas as above — all scenarios include considerable ALR land in the area just south of Okanagan Falls. Area 2 (heritage hills & Skaha Estates) also has a chunk of agricultural land, so the options that include that area (in addition to the air land in area 1) score lower on that criterion
- large enough to allow for growth but compact enough to allow for efficient servicing. It is true that adding Area 2 adds some road length, but this area as a whole has the population density that is similar (and based on rough estimates of population) possibly slightly greater than that of the Area 1. So they have the population density (and assessment) that makes the area feasible to service, and these areas also have opportunities for further infill growth (that helps to make the area more compact and servicing to be even more efficient). The scoring here is a reflection of the fact that Area 3 has neither the population nor the compact areas, nor the potential for infill to facilitate growth and efficient servicing. The community of Vaseux Lake has no growth opportunities, and is located a distance from Okanagan Falls, and in the area between, the lands are already purchased by conservation trust, and represent provincial park lands - neither of which provide opportunities for infill or cost sharing of infrastructure. That is why the two options that include Vaseux Lake are noted as lower on this scale.
- keeping communities whole - the "scoring" is more the reflection of the inclusion of settlement areas.

Population

- While it is true that the criterion reiterated here mentions "over 1,000" … the principle here that larger populations are generally more sustainable for a municipality. 1,000 is a minimum, but as explained in our Incorporation Insights (Boundary Considerations) paper … "larger populations are generally associated with economic viability and resiliency" … so while we have noted that each of these options are viable, with respect to this criterion, the options that create municipalities that have a higher population translate to a higher score.
- Population density sets the area apart from its rural surroundings, and allows for the development of efficient infrastructure - this is about whether the areas with the highest population density have been captured. Again, the scenarios without Area 2 are still ok … and their scores reflect that, but Options B and D capture more of the areas that are identified as "densely populated areas." Remember that in each of these cases Area 1 isn't just Okanagan Falls … it includes quite a large rural area south of Okanagan Falls that has a lower population density. When that area is taken as a whole … the population density is quite similar to that provided in the Skaha Estates/Heritage Hills area.

Infrastructure and Services

Infrastructure and Services

- includes the whole of individual service areas — you indicated that there were different colour dots for this one … but in fact all options have the same (dark blue) rating. No service areas are split (I'm not sure if you misunderstood this criteria? It is about making sure that a boundary does not divide a service area, so that (for instance) you would have a water service that provides service to some properties within a boundary, and some without)
- nowhere is outside the fire area, so all received the same score
- none of the options includes the entire recreation area. You could argue that some options include MORE of the recreation area … in which case those that include larger areas (D would receive the highest mark, and Option A the lowest) … but that wasn't how the criterion was worded. The issue with the recreation service area is whether or not you will have properties that are likely to be benefitting from your recreation services that lie outside the municipality … and the answer is yes in all cases.
- Sewer expansion - the sewer system was built with capacity to handle a larger service area … a municipality will only want to extend sewer services to properties that they have control over (so those within the municipality). If there are plans to expand the service, or indeed properties that could help to contribute to the costs of the treatment plant (that was designed to benefit them) then that is one consideration. That is why the criteria is there.
- Transportation — care was taken in all cases to exclude roads when they weren't absolutely necessary, and to minimize orphan roads (where we have left portions of roads for the province to service the end of dead-end roads). That is why they all have the same score.

Assessment

- they all have a range of property classes
- significant in value — this is a case where the score increases the "more" assessment value an option has — options B and D are significantly higher than A and C
- diversity — the Okanagan Falls option A has the greatest diversity, although adding Vaseux Lake only marginally makes it less diverse (by adding only residential assessment). Adding Area 2 adds significant value, but it is almost exclusively residential property class, so again, it decreases the diversity.
- excluding farm class properties — none of the scenarios does a great job of excluding farm class properties. That said, the two options that add the Area 2 farm class properties between Heritage Hills/Skaha Estates have a greater number of farm class properties included than the other two options.

I'm not sure that explains anything better or makes it any clearer Judy! Perhaps the Boundary Considerations Insights paper might also help to explain why the criteria are there. As we mentioned, each of these options is viable, which is why they are proposed for consultation purposes. We look forward to hearing how residents weight the various options, and their reasons why!

You state that you think intuitively the option that focusses on Okanagan Falls alone seems to be the one that makes the most sense to you … and that is a totally legitimate perspective, and may be due in
part to how you weight different criteria. I'm sure you can also appreciate that someone else might place value on having a larger population, including all the more "urban" neighbourhoods together, and creating a greater tax base for the municipality … in which case perhaps the options that include "Area 2" make more sense to them. Both are legitimate perspectives, and each have their trade-offs and benefits. So I wouldn't focus too much on adding up the dots … but rather to think about the characteristics of each option, and how you think they change or add to a community as a whole. What are the trade offs for having more people? More assessment value to contribute to services? In what ways might smaller be better? We encourage you to share all your preferences and reasoning in the survey!

Lastly, remember that at this point it is really a technical exercise based on data inputs like service boundaries, infrastructure, bc assessment, property classes, etc. You have made reference to a few points that aren't taken into account or nuances captured … and some of those points are well beyond the information we are using to create options at this stage (i.e. where different communities might want recreation services in the future, or extra fire trucks, for example). That may be knowledge that residents share about how the options meet their needs or when they explain their preferences in the survey, but it isn't the level of detail we have gathered thus far or used to create boundaries for the survey.

We look forward to your input in the survey!
Cheers,
Sherry

Sherry Hurst, M.Pl., MCIP, RPP (she, her)

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> Begin forwarded message:
>
> **From:** judy garner <judy_garner@hotmail.co.uk>

From: **Kelvin Hall** va7kph@shaw.ca
Subject: Okanagan Falls Incorporation Proposal
Date: April 15, 2022 at 8:39 AM
To: Matt Taylor m-taylor403@shaw.ca
Cc: Ron Obirek robirek@rdos.bc.ca

KH

Matt

With respect to the proposed incorporation boundary configuration of Okanagan Falls, I was surprised and upset that the portion of McLean Creek Road from Synchromesh Vineyards to the North end of McLean Creek Road has been excluded from the study. It appears that there was zero consultation with the property owners on this portion of the road. From what I have heard “farm land” is not viable as a part of the proposed incorporated area but vineyards are acceptable. If the consultants had fully surveyed the area they would have noticed that most of the “farm land” is transitioning to vineyards. The five acre parcel abutting my property is a vineyard and currently building a tasting room. Perhaps the committee should take a tour of the area, I would be willing to guide them.
Property owners in this area have children attending the school in Okanagan Falls, shop in Okanagan Falls and support local businesses. We are also a part of the Okanagan Falls Fire protection area and have retired fire department members residing in the now excluded area.
Cities such as Surrey, Langley, Richmond and Abbotsford have “farm land” within their boundaries – why is Okanagan Falls different?
I am at a loss as to why we are excluded from the proposed incorporation study and would appreciate a detailed response from the committee.

Regards

Kelvin Hall

Cell: 250 462-8376
E-mail: va7kph@shaw.ca

Sent from my iPad Pro

From: **Kelvin Hall** va7kph@shaw.ca
Subject: Okanagan Falls Incorporation Proposal
Date: April 28, 2022 at 8:52 AM
To: Matt Taylor m-taylor403@shaw.ca
Cc: Ron Obirek robirek@rdos.bc.ca

KH

Matt

Further to my email of April 15, 2022 I have been in touch with families on and adjacent to McLean Creek Road and have the following points that need to be considered:

There are closer ties between McLean Creek Road properties/families and Okanagan Falls than between Heritage Hills, Upper Carmi, Vaseux Lake and Okanagan Falls. Most people from Heritage Hills and Upper Carmi go to Penticton as it's closer while people on McLean Creek Road travel through Okanagan Falls and shop in the Falls.

Look at the history of the Thomas and McLean families with Okanagan Falls. These were/are the families that are at the heart of Okanagan Falls.

McLean Creek Road properties do not require municipal type services as most are on private wells and septic systems. However, we would like to have the ability to direct any issues to a local government rather than a Regional District government. For us this would be more effective and efficient.

Farm land vs Vineyards – both are under ALC, so no significant differences as to property taxes. A number of properties are in the process of replacing their current crops with grape vines. Both contribute to the greater community.

The Consultants were very dismissive when I approached them. They gave me the sense that I was more of a bother and did not know what their scope of work was. Having retired from the Federal Government after 30 years of service and having managed or been involved in RFPs for community plans or major construction projects I found their attitude unacceptable.

Numerous people living on McLean Creek Road have contributed to Okanagan Falls as members of the local fire department, school committees, parks and recreation groups as well as various community programs and events. Children of families in the area have attended the local elementary school and consider themselves a part of Okanagan Falls. To exclude these people from the process is a slap in the face after everything they have given to Okanagan Falls.

On the RDOS web site the Electoral Area D Service & Boundary Configuration Study does not mention or include McLean Creek Road and area in ANY of the meetings, I would like to know WHY?

Regards

Kelvin Hall

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Sent from my iPad Pro