

City of Kelowna

Regular Council Meeting

AGENDA



Monday, May 7, 2018
1:30 pm
Council Chamber
City Hall, 1435 Water Street

Pages

1. Call to Order

This meeting is open to the public and all representations to Council form part of the public record. A live audio and video feed is being broadcast and recorded by CastaNet and a delayed broadcast is shown on Shaw Cable.

2. Confirmation of Minutes

5 - 10

PM Meeting - April 30, 2018

3. Committee Reports

3.1 Journey Home Task Force – Draft Strategy

11 - 54

To provide Council with an overview of the strategic premise that will provide the framework for the development of the Journey Home Strategy which will be completed in June 2018; and to propose to Council a transition plan designed to support the effective implementation of the Strategy.

4. Development Application Reports & Related Bylaws

4.1 Lakeshore Road 4638, Z17-0077 - Strandhaus Development Inc. – Steve Nicholson

55 - 105

The Mayor to invite the Applicant or Applicant's Representative to come forward.

To consider a Staff recommendation to NOT rezone the subject property that would facilitate the development a four storey mixed use building.

4.2 Sarsons Road 424, Z18-0013 - JK Quest Ltd., Inc.No. BC1108914

106 - 115

To rezone the subject property from RU1 – Large Lot Housing to RU2 – Medium Lot Housing, to facilitate a two-lot subdivision.

4.3	Sarsons Road 424, Z18-0013 (BL11613) - JK Quest Ltd., Inc.No. BC1108914	116 - 116
	To give Bylaw No. 11613 first reading in order to rezone the subject property from the RU1 - Large Lot Housing zone to the RU2 - Medium Lot Housing zone.	
4.4	Dougall Rd 490, Z17-0101 - Jaspreet Sekhon	117 - 131
	To rezone the subject property from RU1 – Large Lot Housing to RU1c – Large Lot Housing with Carriage House zone to facilitate the development of a Carriage House.	
4.5	Dougall Rd 490, Z17-0101 (BL11614) - Jaspreet Sekhon	132 - 132
	To give Bylaw No. 11614 first reading in order to rezone the subject property from the RU1 – Large Lot Housing zone to the RU1c – Large Lot Housing with Carriage House zone.	
4.6	Hubbard Rd 814, Z18-0014, James and Robin Wilson	133 - 138
	To rezone the subject property from RU1 – Large Lot Housing to RU2 – Medium Lot Housing to facilitate a proposed two lot subdivision.	
4.7	Hubbard Rd 814, Z18-0014 (BL11615), James and Robin Wilson	139 - 139
	To give Bylaw No. 11615 first reading in order to rezone the subject property from the RU1 - Large Lot Housing zone to the RU2 - Medium Lot Housing zone.	
5.	Bylaws for Adoption (Development Related)	
5.1	McClain Road 4185, Z18-0009 (BL11580) - Friedrich and Alice Merz	140 - 140
	To adopt Bylaw No. 11580 in order to rezone the subject property from the RR1 - Rural Residential zone to the RR1c - Rural Residential with Carriage House zone.	
5.2	Ziprick Rd 255, Z17-0081 (BL11581) - Gurdeep Chahal and Palwinder Pannu	141 - 141
	To adopt Bylaw No. 11581 in order to rezone the subject property from the RU1 - Large Lot Housing zone to the RU6 - Two Dwelling Housing zone.	
6.	Non-Development Reports & Related Bylaws	
6.1	Kelowna 55+ BC Games – Board of Directors	142 - 146
	To obtain Council approval of the appointment of the Board of Directors responsible for organizing and hosting the Kelowna 2019 55+ BC Games on behalf of the City of Kelowna.	

6.2	2018 Community Social Development Grants	147 - 156
	To provide Council with background information about the Community Social Development Grants, the grant review process and the decision of the Grant Review Committee regarding the distribution of the 2018 program funds.	
6.3	Okanagan Rail Trail - Endorsement	157 - 209
	To enter into an agreement with other Okanagan Rail Trail owners and stakeholders for governance of the use, operation and future development of the corridor.	
7.	Bylaws for Adoption (Non-Development Related)	
7.1	BL11546 - Amendment No.1 to Good Neighbour Bylaw No. 11500	210 - 212
	To adopt Bylaw No. 11546 in order to amend the Good Neighbour Bylaw No.11500.	
7.2	BL11566 - Amendment No. 20 to Bylaw Notice Enforcement Bylaw No. 10475	213 - 223
	To adopt Bylaw No. 11566 in order to amend the Bylaw Notice Enforcement Bylaw No. 10475.	
7.3	Curlew Road (Portion of), BL11557 - Road Closure Bylaw	224 - 225
	Mayor to invite anyone in the public gallery who deems themselves affected by the proposed road closure to come forward.	
	To adopt Bylaw No. 11557 in order to authorize the City to permanently close and remove the highway dedication of a portion of Highway on Curlew Road.	
7.4	BL11583 - Five Year Financial Plan 2018-2022 Bylaw	226 - 231
	To adopt Bylaw No. 11583 in order to approve the Five Year Financial Plan 2018-2022 Bylaw.	
7.5	BL11584 - Tax Structure Bylaw, 2018	232 - 232
	To adopt Bylaw No. 11584 in order to approve the 2018 Tax Structure Bylaw.	
7.6	BL11585 - Annual Tax Rate Bylaw, 2018	233 - 235
	To adopt Bylaw No. 11585 in order to approve the 2018 Annual Tax Rate Bylaw.	
7.7	BL11586 - Development Cost Charge Reserve Fund Expenditure Bylaw No. 2018	236 - 236
	To adopt Bylaw No. 11586 in order to approve the 2018 Development Cost Charge Reserve Fund Expenditure Bylaw.	

7.8 BL11587 - Sale of City-Owned Land Reserve Fund Expenditure Bylaw, 2018

237 - 237

To adopt Bylaw No. 11587 in order to approve the 2018 Sale of City-Owned Land Reserve Fund Expenditure Bylaw.

8. Mayor and Councillor Items

9. Termination



City of Kelowna Regular Council Meeting Minutes

Date: Monday, April 30, 2018
 Location: Council Chamber
 City Hall, 1435 Water Street

Members Present: Mayor Colin Basran, Councillors Maxine DeHart, Ryan Donn, Gail Given, Tracy Gray, Charlie Hodge, Mohini Singh and Luke Stack

Members Absent: Councillor Brad Sieben

Staff Present: Acting City Manager, Joe Creron; City Clerk, Stephen Fleming, Cultural Services Manager, Christine McWillis*; Community Planning Department Manager, Ryan Smith*; Urban Planning Manager, Terry Barton*; Planner Specialist, Adam Cseke*; Divisional Director, Community Planning & Strategic Investments, Doug Gilchrist*; Budget Supervisor, Melanie Antunes*; Financial Planning Manager, George King*; Divisional Director, Financial Services, Genelle Davidson*; Controller, Jackie Dueck*; Director Strategic Investments, Derek Edstrom*; Divisional Director, Corporate & Protective Services, Rob Mayne*; Legislative Coordinator (Confidential), Arlene McClelland

(* Denotes partial attendance)

1. Call to Order

Mayor Basran called the meeting to order at 1:31 p.m.

Mayor Basran advised that the meeting is open to the public and all representations to Council form part of the public record. A live audio and video feed is being broadcast and recorded by CastaNet and a delayed broadcast is shown on Shaw Cable.

2. Confirmation of Minutes

Moved By Councillor Hodge/Seconded By Councillor Gray

R440/18/04/30 THAT the Minutes of the Regular Meetings of April 23, 2018 be confirmed as circulated.

Carried

3. Public in Attendance

3.1 Okanagan Symphony Orchestra

Staff:

- Introduced George Tozer, Board President & Rosemary Thomson, Music Director/Conductor of the Okanagan Symphony Orchestra.

George Tozer, Board President & Rosemary Thomson, Music Director/Conductor of the Okanagan Symphony Orchestra

- Displayed a PowerPoint Presentation summarizing the Okanagan Symphony Orchestra annual activities and responded to questions from Council.

Moved By Councillor Stack/Seconded By Councillor Singh

R441/18/04/30 THAT Council receives, for information, the annual activities presentation from Board President & Music Director/Conductor of the Okanagan Symphony Orchestra, dated April 30, 2018.

Carried

4. Development Application Reports & Related Bylaws

4.1 Casorso Rd 3596 Z18-0012 - Cheryl & Enzo Nanci

Staff:

- Displayed a PowerPoint Presentation summarizing the application and responded to questions from Council.

Moved By Councillor Singh/Seconded By Councillor Hodge

R442/18/04/30 THAT Rezoning Application No. Z18-0012 to amend the City of Kelowna Zoning Bylaw No. 8000 by changing the zoning classification of Lot 18, District Lot 134, ODYD, Plan 20399 located at 3596 Casorso Road, Kelowna, BC from the RU1 – Large Lot Housing zone to the RU1c – Large Lot Housing with Carriage House zone be considered by Council;

AND THAT the Rezoning Bylaw be forwarded to a Public Hearing for further consideration.

Carried

4.2 Casorso Rd 3596 Z18-0012 (BL11608) - Cheryl & Enzo Nanci

Moved By Councillor Gray/Seconded By Councillor Hodge

R443/18/04/30 THAT Bylaw No. 11608 be read a first time.

Carried

4.3 Nickel Road 200, DP17-0095 - James Zeleznik

Staff:

- Displayed a PowerPoint Presentation summarizing the application.

Moved By Councillor Stack/Seconded By Councillor Given

R444/18/04/30 THAT Council authorizes the issuance of Development Permit No. DP17-0095 for Lot 1, Section 27, Township 26, ODYD, Plan EPP73636 located at 200 Nickel Rd, Kelowna, BC subject to the following:

1. The dimensions and siting of the building to be constructed on the land be in accordance with Schedule "A,"

2. The exterior design and finish of the building to be constructed on the land, be in accordance with Schedule "B";
3. Landscaping to be provided on the land be in accordance with Schedule "C";
4. The applicant be required to post with the City a Landscape Performance Security deposit in the form of a "Letter of Credit" in the amount of 125% of the estimated value of the landscaping, as determined by a Registered Landscape Architect;

AND THAT the applicant be required to complete the above noted conditions of Council's approval of the Development Permit Application in order for the permits to be issued;

AND FURTHER THAT this Development Permit is valid for two (2) years from the date of Council approval, with no opportunity to extend.

Carried

5. Non-Development Reports & Related Bylaws

5.1 2018 Financial Plan – Final Budget

Staff:

- Displayed a PowerPoint Presentation summarizing the 2018 Financial Plan and Final Budget submissions.
- Responded to questions from Council.

Moved By Councillor Given/Seconded By Councillor Stack

R445/18/04/30 THAT Council adopts the 2018-2022 Financial Plan;

AND THAT Council approves the formulation of 2018 Property Tax Rates that will raise the required funds in 2018, from General Taxation, in the amount of \$133,481,167, resulting in an average net property owner impact of 2.99 per cent;

AND THAT Bylaw No. 11583 being the 2018-2022 Five Year Financial Plan, 2018 be advanced for reading consideration;

AND THAT Bylaw No. 11584 being the Tax Structure Bylaw, 2018 be advanced for reading consideration;

AND THAT Bylaw No. 11585 being the Annual Tax Rates Bylaw, 2018 be advanced for reading consideration;

AND THAT Bylaw No. 11586 being the DCC Reserve Fund Expenditure Bylaw, 2018 be advanced for reading consideration;

AND FURTHER THAT Bylaw No. 11587 being the Sale of City Owned Land Reserve Fund Expenditure Bylaw, 2018 be advanced for reading consideration.

Carried

5.2 BL11583 - Five Year Financial Plan 2018-2022 Bylaw

Moved By Councillor Hodge/Seconded By Councillor Gray

R446/18/04/30 THAT Bylaw No. 11583 be read a first, second and third time.

Carried

5.3 BL11584 - Tax Structure Bylaw, 2018

Moved By Councillor Gray/Seconded By Councillor Hodge

R447/18/04/30 THAT Bylaw No. 11584 be read a first, second and third time.

Carried

5.4 BL11585 - Annual Tax Rate Bylaw, 2018

Moved By Councillor Given/Seconded By Councillor Donn

R448/18/04/30 THAT Bylaw No. 11585 be read a first, second and third time.

Carried

5.5 BL11586 - Development Cost Charge Reserve Fund Expenditure Bylaw No. 2018

Moved By Councillor Hodge/Seconded By Councillor Donn

R449/18/04/30 THAT Bylaw No. 11586 be read a first, second and third time.

Carried

5.6 BL11587 - Sale of City-Owned Land Reserve Fund Expenditure Bylaw, 2018

Moved By Councillor Stack/Seconded By Councillor DeHart

R450/18/04/30 THAT Bylaw No. 11587 be read a first, second and third time.

Carried

5.7 Financial Statements for the Year Ended December 31, 2017

Staff:

- Displayed a PowerPoint Presentation summarizing the Financial Statements for the December 31, 2017 year end and responded to questions from Council.

Moved By Councillor Donn/Seconded By Councillor Hodge

R451/18/04/30 THAT Council receives, for information, the Report from the Audit Committee dated April 30, 2018 with respect to the Consolidated Financial Statements and Auditor's Report for the City of Kelowna for the year ending December 31, 2017;

AND THAT Council approves the appropriation of \$5,449,122 of surplus generated from all general fund operations in 2017 to reserves and accumulated surplus as detailed in the Report from the Audit Committee dated April 30, 2018;

AND FURTHER THAT the Consolidated Financial Statements and Auditor's Report be reprinted in and form part of the City of Kelowna's annual report.

Carried

5.8 Good Neighbour Bylaw 10500 Amendments

Staff:

- Displayed a PowerPoint Presentation summarizing the Good Neighbour Bylaw Amendments and responded to questions from Council.

Moved By Councillor DeHart/Seconded By Councillor Stack

R452/18/04/30 THAT Council receives for information, the report from the Divisional Director, Corporate & Protective Services, dated April 16, 2018 pertaining to amendments to the Good Neighbour Bylaw No 11500, and the Bylaw Notice Enforcement Bylaw No. 10475;

AND THAT Bylaw No 11546 being Amendment No. 1 to Good Neighbour Bylaw No. 11500 be amended at third reading as outlined in the report;

AND THAT Bylaw No. 11566 being Amendment No. 20 to Bylaw Notice Enforcement Bylaw No. 10475 be amended at third reading;

AND FURTHER THAT enforcement through Section 8 of Bylaw No. 8214 - A Bylaw to Regulate and Control Panhandling, not be enforced until further consultation and education can be completed.

Carried

5.9 BL11546 - Amendment No.1 to Good Neighbour Bylaw No. 11500

Moved By Councillor Singh/Seconded By Councillor DeHart

R453/18/04/30 THAT Bylaw No. 11546 be amended at third reading by removing definitions and additional sections no longer required.

Carried

5.10 BL11566 - Amendment No. 20 to Bylaw Notice Enforcement Bylaw No. 10475

Moved By Councillor Singh/Seconded By Councillor Stack

R454/18/04/30 THAT Bylaw No. 11566 be amended at third reading by removing sections and corresponding fines no longer required.

Carried

6. Bylaws for Adoption (Non-Development Related)

6.1 Portion of Laneway Adjacent to St. Paul St, BL11592 - Road Closure Bylaw

Mayor Basran invited anyone in the public gallery who deem themselves affected by the proposed road closure to come forward.

No one came forward.

Moved By Councillor Stack/Seconded By Councillor DeHart

R455/18/04/30 THAT Bylaw No. 11592 be adopted.

Carried

6.2 BL11602 - Amendment No. 1 to Tax Prepayment Plan Bylaw No. 10685

Moved By Councillor DeHart/Seconded By Councillor Stack

R456/18/04/30 THAT Bylaw No. 11602 be adopted.

Carried

7. Mayor and Councillor Items

Councillor Given:

- Thanked Councillor Singh for a great Vaisakhi Parade on the weekend.

Councillor Donn:

- Acknowledged Shaw employees for their filming of the Civic & Community Awards which will be shown at a later date; as well for filming afternoon Council meetings over the past several years.

Councillor Gray:

- Will be representing Council at the Kelowna Hotel/Motel Association's 1st annual "Heart of Hospitality" awards luncheon on May 3rd.
- Reminder that Remax will be hosting their annual shredding event on Saturday, May 5th; by donation to the Kelowna Food Bank.
- The Okanagan Wine Festival will also be held this coming weekend.

Councillor Hodge:

- Spoke to his attendance at the SILGA Convention in Revelstoke and noted it was a successful event.
- Spoke to his attendance at the Civic & Community Awards.

Councillor Singh:

- Spoke to her attendance at the Vaisakhi Parade and noted how inclusive and apolitical this event is which makes it special in BC.
- Spoke to her attendance on behalf of Mayor and Council at the Annual Day of Mourning.

Councillor DeHart:

- Spoke to her attendance on behalf of Mayor and Council at the Annual Day of Mourning.
- Spoke to her attendance at the Civic & Community Awards; thanked all staff and volunteers who helped make this such a successful event.
- Call out for any corporate sponsors for future Civic Awards.

Councillor Stack:

- Spoke to his attendance at the recent send-off event for the former City Manager, Ron Mattiussi.

Mayor Basran:

- Community reminder for public engagement on the Regional Transportation Master Plan through smarttrips.ca and the Houghton Road Active Transportation Corridor survey.

8. Termination

This meeting was declared terminated at 3:32 p.m.

Mayor Basran

/acm

City Clerk

Report to Council



Date: May 7, 2018

File: 00615-20-02

To: Acting City Manager

From: Co-Chairs, Journey Home Task Force

Subject: Journey Home Task Force – Draft Strategy

Report Prepared by: Social Development Manager, Active Living & Culture

Recommendation:

THAT Council receives, for information, the report from the Task Force Co-Chairpersons, dated May 7, 2018, outlining the draft direction of the Journey Home Strategy.

AND THAT Council approves in principle the strategic premise of the Journey Home Strategy, and direct staff to move to final draft.

AND THAT the 2018 Financial Plan be amended to include up to \$50,000 from the Public Works/Initiative Reserve, to support the transition plan as outlined in the report dated May 7, 2018.

Purpose:

To provide Council with an overview of the strategic premise that will provide the framework for the development of the Journey Home Strategy which will be completed in June 2018; and to propose to Council a transition plan designed to support the effective implementation of the Strategy.

Background:

The Journey Home Task Force is entering the final phase of the development of the Strategy which will be presented to Council in late June of this year. On April 9, 2018, the Journey Home Task Force Co-Chairpersons provided Council with an overview of the nearly 1,700 points of contact through the community engagement processes hosted by the Task Force since January of this year. This high level of participation is a clear indication of the level of importance that the community places on addressing homelessness. This participation has been diverse with input from those with lived experience, stakeholders and interested citizens engaging in the development of the strategy.

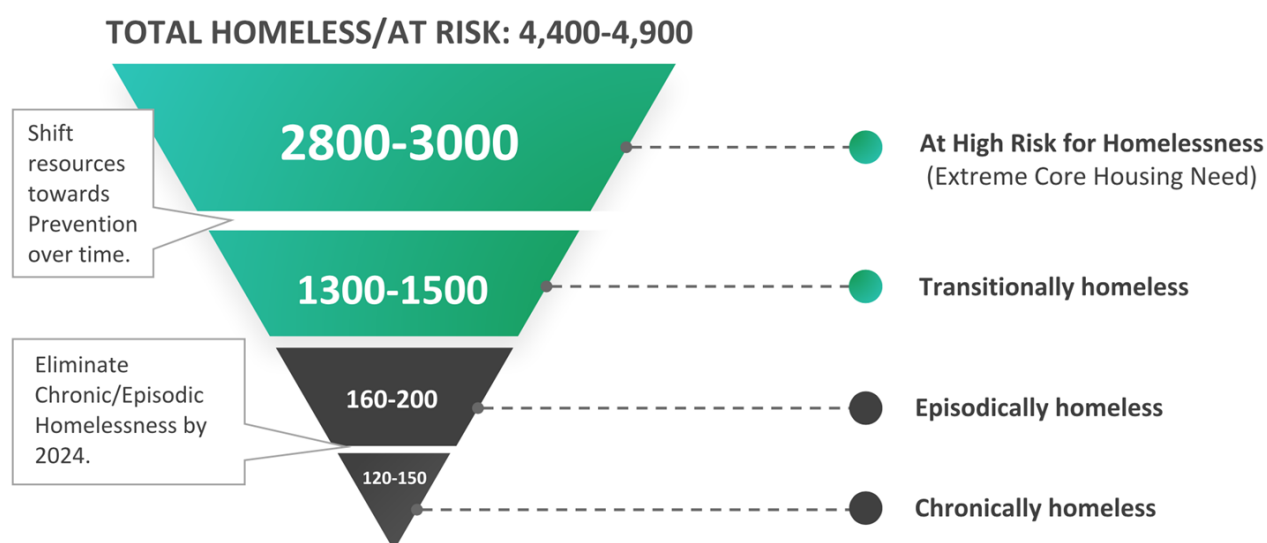
The Journey Home and Healthy Housing Strategies are closely aligned. Journey Home is focused on the development of a long-term strategy to address homelessness and the Healthy Housing Strategy is focused on addressing the affordable housing needs of the community. While Council has approved 3-year funding, designed to support and leverage other funding commitments for the implementation of the Journey Home Strategy; the Healthy Housing Strategy will bring forward City resource requirements, including financial and staff, for endorsement by Council at the end of June. Although the primary funding sources for Journey Home Strategy implementation are expected to be multi-sector including senior government, foundations and private donors; the final strategy will outline additional opportunities that the City may wish to consider supporting. It is important to note that the commitment for City resources for both Strategies should be considered together to ensure that the full housing Wheelhouse has been equitably resourced.

It is important to also note that the Journey Home Strategy is intentionally framed to align with current provincial strategies including the Provincial Poverty Reduction and Homelessness Action Plan that are under development.

Strategy Premise:

The Journey Home Strategy will be presented to Council in June as a five-year strategy, with a plan to review progress in year three. The strategy premise is focused on eliminating chronic (estimated at 120 to 150 people during the course of one year) and episodic (estimated at 160-200 people during the course of one year) homelessness in our community, allowing for a shift in resources towards prevention as the needs of the most vulnerable are met. It is important to note that the original demand estimates presented to Council on January 22, 2018 have been adjusted to accommodate a Task Force decision to focus on Kelowna-specific, rather than regional, population estimates. In addition, there will continue to be some refining of episodic and chronic homelessness numbers based on new Point in Time Count data expected soon from the recently conducted 2018 count.

Current Demand Estimates in the City of Kelowna

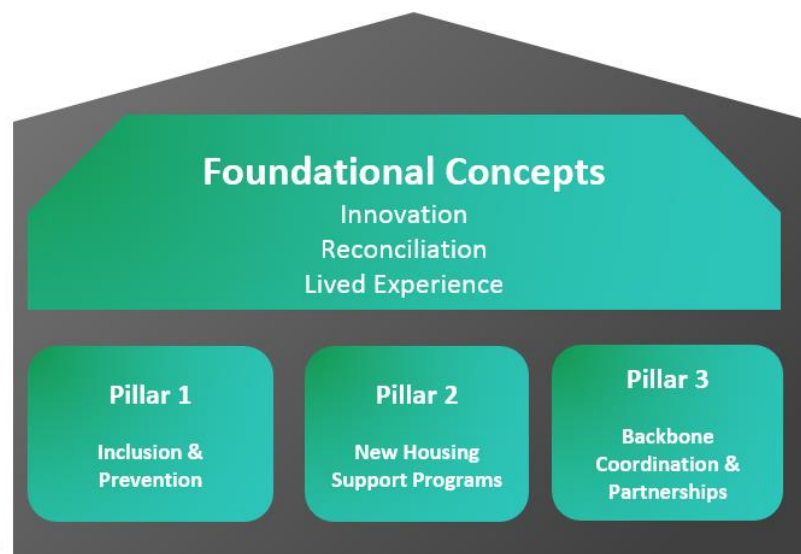


Proposed Strategy Framework:

At the April 10th *What We Heard: Strategic Directions & Input* community feedback session, a framework was proposed, and 119 participants provided feedback. The Lived Experience Circle also provided feedback, along with A Way Home Kelowna and the Community Advisory Board on Homelessness. The April 10th session was also video recorded and made available online. Overall the feedback received was very positive, confirming that the draft Strategy captured the input accurately. See Appendix I for further details on findings from the community feedback session. Areas where the Strategy was seen to need enhancement or adjustment have now been addressed. There was resounding commitment and willingness to adapt to, and advance, community goals in order to support the implementation of the Strategy.

Foundational Concepts:

The proposed Journey Home Strategy framework is grounded in the foundational concepts of Innovation, Reconciliation, and Lived Experience that are woven and embedded in every aspect of the strategy and are critical to its successful implementation. The foundational concepts are supported by three strategic pillars: Inclusion & Prevention, New Housing Support Programs, and Backbone Coordination & Partnerships. The proposed framework will guide the implementation of the Strategy over a 5-year period. This strategic framework is outlined in more detail in Appendix II of this report.



A Way Home Kelowna (AWHK) Youth Strategy

Embedded within Journey Home is a population specific strategy focusing on addressing youth homelessness. Input to guide the AWHK recommendations included community stakeholders and youth with lived and living experience of homelessness in our community. Key proposed recommendations include:

- Addressing stigma/discrimination and challenging expectations and misplaced biases
- Establishing a continuum of housing options for youth
- Providing accessible and timely supports, including a focus on treatment options for youth
- Focusing on prevention - improve school students' awareness of how and where to go for help
- Improving transitions from public systems & addressing Ministry-related barriers to youth supports in policy/practice
- Building healthy community opportunities for youth to facilitate connections and skill building

Strategy Funding Needs – \$47M over 5 years:

The funding of the proposed Journey Home Strategy will require an investment of \$47M over its 5-year implementation period. Identification of potential sources of funding are currently under development and will be included in the final strategy recommendations.

Why invest? There is significant evidence that beyond the human cost of homelessness, the economic cost of homelessness exceeds the overall cost to the social services, health care, and justice systems of caring for a homeless person on the streets when compared to providing housing with supportive services for them.

Based on findings from a number of Canadian studies¹, there is a strong economic argument for investing in solutions to homelessness. Our analysis estimates that keeping people stuck in their current situation comes at a cost of \$100M for the overall cost to police, health, jail, shelters, and bylaw enforcement. On the other hand, the proposed Journey Home investment in housing these same people will see an avoidance of \$50M in spending in those same systems.

Three areas of investment (see Appendix III) are proposed:

1. Capital (\$18M):
 - 300 Supportive Housing Units Needed - Long-term housing in buildings with supports onsite for people with complex needs (addictions, mental health, medical needs):
 - BC Housing has currently committed to development of two buildings/88 units
 - There are ongoing discussions regarding an additional 102 units
 - There are 110 units still required – 3 buildings for \$18M
2. New Housing Support Programs (\$26M):
 - 500 new program spaces including:
 - Assertive Community Treatment
 - Housing First Intensive Case Management
 - Rapid Rehousing
 - Prevention
3. Backbone - System Coordination (\$2.6M):
 - A neutral Backbone Organization is proposed with focus on/and accountability for Journey Home Strategy implementation:
 - Funding Coordination
 - Homeless System Planning
 - Capacity Building

¹ Patterson, Michelle, Julian M. Somers, Karen McKintosh, Alan Sheill and Charles James Frankish. 2008. Housing and Support for Adults with Severe Addictions and/or Mental Illness in British Columbia. Centre for Applied Research in Mental Health and Addiction (CARMHA), Faculty of Health Sciences, Simon Fraser University.

¹ Vancouver Coastal Health. June 2008. Outcome Evaluation Update— Hospital Utilization, Mental Health Supported Housing. Quoted in: <http://www.streetohome.org/wp-content/uploads/2017/08/Streetohome-10-Year-Plan.pdf>
<http://homelesshub.ca/sites/default/files/cs2mq5wn.pdf>

Steve Pomeroy (2005) The Cost of Homelessness: Analysis of Alternate Responses in Four Canadian Cities Ottawa: National Secretariat on Homelessness. Retrieved from: <http://homelesshub.ca/resource/cost-homelessness-analysis-alternate-responses-four-canadian-cities>.

- Leadership and Accountability
- Partnerships and Innovation

The Strategy proposes that a System Planner Organization take the role of a Backbone Organization and that it evolve to full implementation over a 5-year period, with a matching evolution in the funding as outlined below:

- Year 1-2: Kickstart high leverage activities requiring a budget of \$300K
- Year 3-4: Create a cohesive homeless-serving system requiring a budget of \$600K
- Year 5-6: Focus on refining approach for most impact requiring a budget of \$900K at full functioning

This funding program assumes in-kind office space and does not account for any reallocations of existing positions within the community currently that may possibly be aligned with the Backbone Organization implementation.

Transition from Strategy Development to Implementation

The Journey Home Task Force is proposing a Transition Plan be implemented to:

- support the development of the governance structure and implementation of a Backbone Coordination organization;
- to maintain momentum, continue to convene partners and garner commitment to align with and participate in the implementation of the Strategy;
- to secure funding and in-kind support commitments to fund the implementation of Backbone Coordinating organization.

To support the transition period between the completion of the strategy and the full operationalization of the Backbone organization, the Task Force is recommending that City staff provide support for approximately 9 months, including an overlap period while the Backbone settles into its new role. The financial implications related to the City support are outlined in this report.

Month 1 -3	Establish a Transition Committee City support in place to support transition period
Month 3 - 6	Governance – Backbone Board of Directors Secure office space – in-kind Raise funding for Backbone staff and administration costs Hire Backbone Executive Director
Month 6 - 9	Secure additional Backbone staff Formalize partnerships, MOU's, and agreements

Ten Top Actions:

- Establish a neutral Backbone Organization
- Create 500 new Housing First program spaces
- Support development of 300 units of long-term supportive housing units
- Support A Way Home Kelowna to introduce Upstream for Youth
- Support increased access to quality mental health, addictions, and health supports and treatment

- Formalize the continuation of the Lived Experience Circle and Youth Expert Committee
- Support the Truth & Reconciliation Commission of Canada Calls to Actions by partnering with Indigenous communities
- Support solutions to address the criminalization of homelessness
- Launch a Homelessness Innovation Lab
- Ensure a population focus is embedded in Strategy implementation

Summary

Next steps in the Journey Home Strategy development includes the completion of the Strategy which will be presented to Council for consideration at the end of June 2018. The Task Force continues to work on: garnering the commitment of stakeholders and funders to endorse and align with the strategy; supporting the ongoing work of the Lived Experience Circle; planning for the transition to a Backbone organization; and solidifying a transition plan to support moving from strategy development to implementation.

As the work to develop the Journey Home Strategy enters its final phase, the Task Force is confident that addressing homelessness is within our grasp as a community. They have been inspired by the diversity of people and sectors that have come together, and the progress achieved through the number of initiatives already underway. They recognize that the capacity of the community stakeholders to work collectively has been increased significantly and will continue to grow; strengthening our community's ability and resiliency to improve our local system of care. The Task Force is extremely grateful to all those that have contributed in such a meaningful way to the development of the Journey Home Strategy, and they continue to be inspired by the thoughtfulness, caring, and giving spirit within our community.

Financial/Budgetary Considerations: Through the 2018 budget process funding in the amount of \$75,000 in 2018, and \$150,000 in both 2019-2020 was approved to support the implementation of the Journey Home Strategy. To support the transition period between the completion of the Journey Home Strategy and the activation of a Backbone System Coordination organization, the Journey Home Task Force is requesting City support. In addition to the \$75,000 already committed by the City in 2018, the financial cost of the proposed staffing and support will require another \$50,000, funded from the Public Works/Initiative Reserve.

Personnel Implications: To support the transition period ensuring no lapse in the momentum and support continued progress towards implementation of the Journey Home Strategy, the City's Social Development staff will continue to support the work of Journey Home. The Neighbourhood Development Coordinator was temporarily reassigned to provide additional support in late May 2017 for a one-year period and will be returning to the Strong Neighbourhood program as planned at the end of June 2018. The transition plan recommends that a temporary contract Coordinator, a Lived Experience Convener, plus operational funds be available to support the transition-related tasks.

These temporary positions will provide support to the Social Development Manager to focus on transition from Journey Home Strategy development to implementation including: development of a transition committee; design and implementation of a governance structure to oversee the implementation of the Strategy; the transition to a Backbone Coordination organization including securing funding; hiring staff; and partnership agreements. The proposal includes an overlap period to support the development of the Backbone organization in building capacity to take on this new role.

Internal Circulation: Divisional Director, Active Living & Culture; Divisional Director, Financial Services; Divisional Director, Human Resources; Communications Manager; Communications Advisor; Policy and Planning Manager; Sustainability Coordinator

Considerations not applicable to this report:

Legal/Statutory Authority:

Legal/Statutory Procedural Requirements:

Existing Policy:

External Agency/Public Comments:

Communications Comments:

Alternate Recommendation:

Submitted by: Journey Home Task Force Co-Chairpersons

Approved for inclusion: J. Gabriel, Divisional Director, Active Living & Culture

Attachments:

Appendix I – What We Heard: Strategic Directions & Input

Appendix II – Journey Home Proposed Strategy Framework Approach

Appendix III - Journey Home Strategy – 47M Funding over 5 Years

Journey Home – May 7th PowerPoint

Cc: Divisional Director, Community Planning & Strategic Investment
Divisional Director, Strategic Corporate Services
Divisional Director, Financial Services

Does the Journey Home Direction Resonate?

What's Exciting

- Overwhelming support
- Continued high momentum
- Foundation & 3 Pillars
- Tangible Strategy, with logical solution
- Liked flexibility/ adaptability, Strategy as evolution
- Cost breakdown, cost effectiveness
- Data was straightforward & easy to follow
- Neutral backbone & focus on system planning

Task Force

- Journey Home Task Force has done extraordinary work for community.
- How will this continue post June?
- What's the transition time-frame?
- Need to re-think future iteration of Task Force, but see it as continuing.
- Will it stay at advocacy level? Inform and support Strategy implementation?
- **Seen as different than Backbone**

Resounding Commitment to Supporting Implementation as Partner

- Commitment to support and align with Strategy
- Willingness to adapt to advance community goals: flexibility/adaptability
- Willing to be evidence-based to share expertise, resources and information.
- Continuous engagement & improvement
- Support lived experience voice
- Commit to an Annual Community Summit: celebrate success, share learnings, track progress
- Sign MOU to support Strategy
- Re-train staffing on new models
- Education for Reconciliation
- Spreading the word in networks

What's Missing

- Celebrating current work in community
- Where will money come from?
- More discussion on regional partnerships
- How will the Strategy be implemented
- What happens after 5 years?
- Want deeper dive re: different demographics (youth, women, seniors, Indigenous)
- How will we ensure Youth Strategy is implemented with Journey Home?

Backbone

- Need more discussion on new vs established entity, either way - see it as essential
- Cross-section of stakeholders
- What's role of funders vis-a-vis backbone
- Funders need to do more than write cheques
- Creativity re: funding source, ways to bring it in
- Competency-based model
- Needs to be **laser-focused** on Strategy objectives
- Track progress against milestones/targets



What We Heard: Strategic Directions & Input
April 10 | Salvation Army Church

Foundational Concepts



Innovation

Key recommendations:

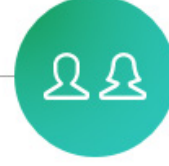
- Launching a Homelessness Innovation Lab
- Developing a local research agenda
- Securing flexible funds to support social innovations and housing development innovations
- Supporting innovative solutions such as a Community Court that addresses criminalization of homelessness



Reconciliation

Key recommendations:

- Recognizing accountability for Truth and Reconciliation Commission Calls to Actions in that Indigenous homelessness is an ongoing form of colonialism
- Ensuring Indigenous leadership is embedded in Strategy governance.
- Embedding a cultural lens throughout support services including: working with Elders, through ceremony, staff training, supports and housing design



Lived Experience

Key recommendations:

- Continuing the Lived Experience Circle (LEC) and Youth Advisory Committee (YAC)
- Formalizing LEC and YAC relationships to Backbone governance
- Ensuring a population focus is embedded in Strategy implementation: youth, Indigenous, women, families, newcomers, LGBTQ2S, seniors, men
- Introducing peer support models, including peer outreach to address community challenges in partnership with business and police

Pillar 1: Inclusion & Prevention



Inclusion:

- Work with Lived Experience Circle to launch a public awareness campaign to address stigma.
- Work with Lived Experience Circle to develop easy to access resource guides.
- Encourage municipal policy shifts to promote affordable housing through bylaw changes, zoning, and grants.



Prevention:

- Work with key ministries to enhance positive housing transitions.
- Launch Upstream for Youth pilot to identify/support youth at risk of becoming homeless.
- Enhance connections to healthy opportunities (community hubs, access to technology, recreation opportunities) to thrive in community.
- Develop formal links with aligning strategies to ensure integration.
- Launch Prevention programs to support people to stay in housing where possible. (Strategy calls for 100 new program spaces for prevention).

Pillar 2: New Housing Support Programs



Support People in Rental Market:

- Support people in the rental market through new programs grounded in the Housing First model and the right to housing including:
 - Rapid Rehousing – 225 program spaces
 - Intensive Case Management – 100 program spaces
 - Assertive Community Outreach – 100 program spaces
 - 20% of spaces will serve youth; this would be tailored to Housing First for Youth programs.
 - Programs serving those fleeing violence tailored to include safety planning.
- Create a Landlord Roundtable to encourage making units available for Housing First programs.



Supportive Housing Buildings:

- Support the addition of 300 units of long-term supportive housing in purpose-built buildings targeted to chronic & episodic homeless people with higher needs.
- Ensure supportive housing specific to youth is developed as part of this investment.
- Work with organizations dedicated to addressing interpersonal violence to ensure program and housing models appropriately serve those impacted by violence.



Wraparound Supports:

- Develop a sector-wide capacity building/training agenda to increase staff effectiveness.
- Support efforts to increase treatment beds, especially for young people.
- Develop a person-centred approach to harm reduction and sobriety on a continuum to meet people where they are at with appropriate supports.
- Apply a population focus to new programs to ensure youth, Indigenous people, women, families, men, couples, seniors, newcomers, LGBTQ2S and other subgroups' needs are effectively met through a person-centred approach.

Pillar 3: Backbone Coordination & Partnerships



Coordination:

- Rollout a Backbone Organization solely dedicated to implementing Journey Home Strategy.
- Coordinate a Homelessness Funders Table to maximize the impact of diverse investments in support of the Strategy.
- Formalize Backbone Organization relationships, including with A Way Home-Kelowna.
- Rollout Coordinated Access & Assessment to ensure consistent process to match clients' needs and choice to access services.



Partnerships:

- Support the creation of an Okanagan Regional Partnership Table to coordinate responses to homelessness.
- Work with the BC10 Community Entities to support a provincial agenda on ending homelessness using Housing First based in a system planning approach.
- Participate in regional, provincial and national learning communities to share and learn best practices and champion preventing and ending homelessness.



Capital Investment

300 Units of Supportive Housing

Support people in dedicated buildings with supports onsite

Long-term housing in buildings with supports onsite for people with complex needs (addictions, mental health, medical needs)

190 Units already committed:

BC Housing:

- Commitment for two buildings in 2018/19 = approx. 88 units
- Ongoing discussions re: approx. 102 units

110 Units still needed:

- 2-3 Buildings (depending on capacity)
- \$18M Capital

\$18M Capital still required



New Housing Support Programs

500 Units of Housing First Supports

Support people in rental units in the community

Intensive supports for individuals with higher needs, longer term, financial & landlord support.

ACT: Assertive Community Treatment - multidisciplinary team wraps around client

Types of Program Spaces Needed:

- Assertive Community Treatment
- Housing First Intensive Case Management
- Rapid Rehousing

\$26M over 5 years



Backbone & Coordination

Neutral organization with focus on, and accountability for, Journey Home Strategy implementation.

Funding Coordination:

Able to bring partners together to coordinate investment in highest impact activities; ensure complementary approach

Capacity Building:

Brings up collective IQ of community, services, developers, researchers, etc. to develop and implement innovative measures and best practices.

Homeless System Planning:

System-level coordination for service providers to support goals, regardless of funding source. Can coordinate with groups/agencies/stakeholders such as BC Housing, CMHA, United Way, COF.

Leadership & Accountability:

Reports to community, stakeholder engagement research & continuous improvement, policy advocacy to keep homelessness a priority, knowledge dissemination.

Partnerships & Innovation:

Builds partnerships across sectors to support Strategy goals.

- Social finance innovation
- Financial and Land Trust Management

\$2.6M over 5 years

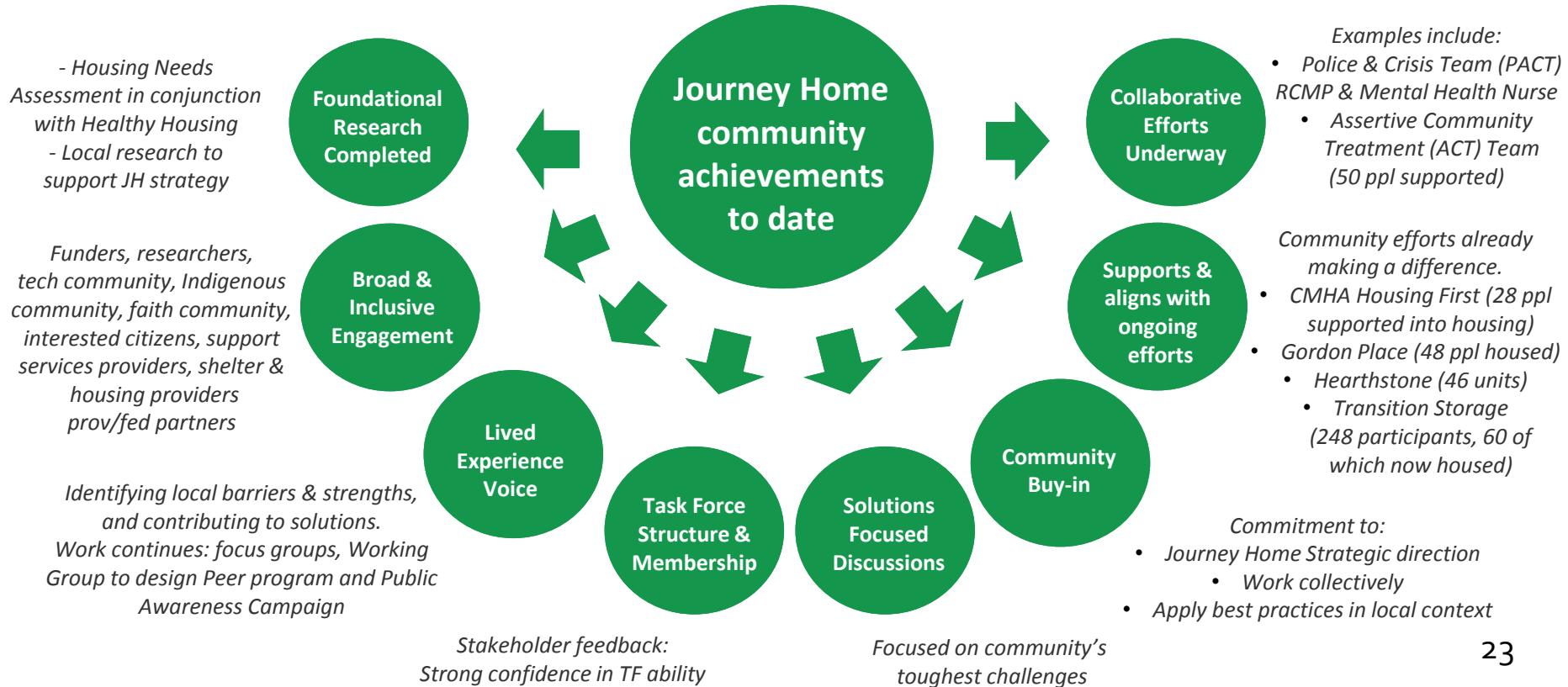
The logo for Journey HOME is displayed in white text on a black rectangular background. The word "Journey" is in a script font, and "HOME" is in a bold, sans-serif font. A white outline of a house roof is positioned above the "HOME" text. The background of the slide features a low-angle shot of a modern building with a blue sky and wooden siding.

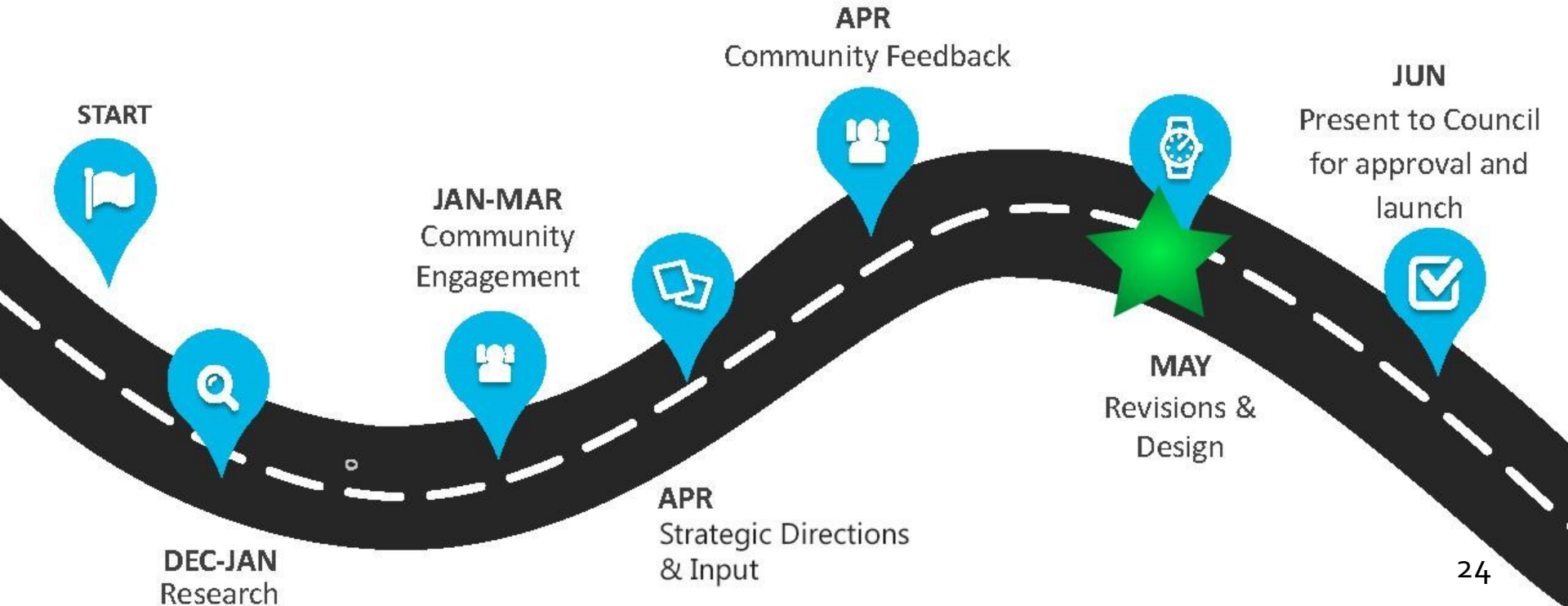
Journey HOME

Journey Home is the strategy to address homelessness in our community with an emphasis on housing first. The goal is to ensure a coordinated and easy-to-access system of care for those in Kelowna who have lost, or are about to lose their home.

“Unless housing funding is specifically targeted to homelessness, homeless people - especially those with complex needs - don’t get housing.”

- Tim Richter - President and CEO, Canadian Alliance to End Homelessness





Community Engagement

By the Numbers
January - April 2018

Journey HOME



High levels of participation:
1,974+ total points of engagement

Broad Diversity of Interest and Participations:

- Persons with Lived Experience,
- Interested Citizens Public
- Homeless Servicing/Housing Stakeholders,
- Businesses, Builders, Developers, Landlords,
- Tech Sector, Academic Researchers,
- Funders (Foundations, Senior Gov't, etc.)
- Faith Community

The messages are clear:

- this is a **high community priority**
- as a community, **we need to do things differently**
- need to be **innovative** in applying evidence-based approaches
- need to build on the current **momentum**
- need to **act now** – recognizing that the journey will be an **evolution**

Strategy Alignment

OUR HOMES TODAY & TOMORROW

A HOUSING NEEDS ASSESSMENT



Healthy
Housing
Strategy

Journey **HOME**
Strategy

Journey Home Strategy Focus

Long-term strategy to address homelessness.
(Youth strategy embedded)

Healthy Housing Strategy

to address broad Affordable Housing needs.

**Link to Provincial Strategies
(i.e. BC Poverty Reduction
Strategy/BC Homelessness
Action Plan)**

to address broader
income/rent support needs,
linked to other strategies. 26

Strategy Premise



5 Year Strategy; strategic review in Year 3



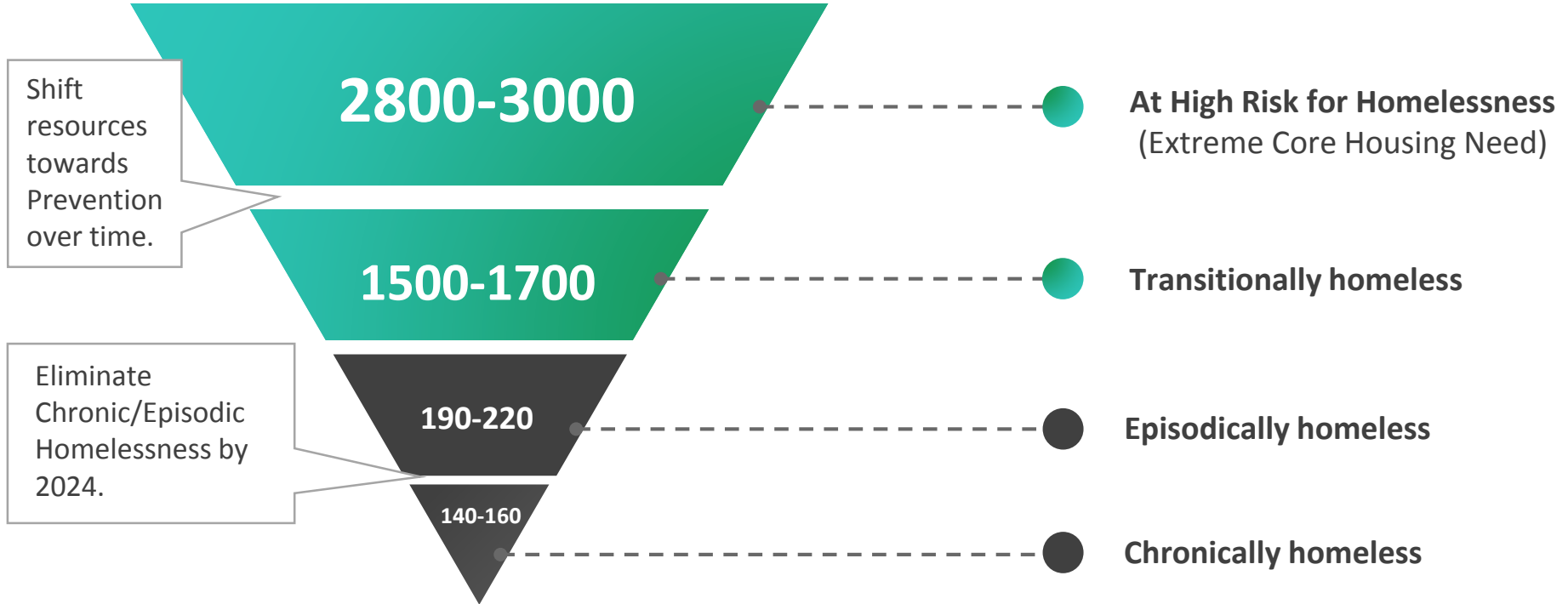
Eliminates chronic/episodic homelessness



Shifts resources to prevention over time

Current Demand Estimates in the City of Kelowna

TOTAL HOMELESS/AT RISK: 4,600-5,100



Foundational Concepts

Innovation
Reconciliation
Lived Experience

Pillar 1

Inclusion &
Prevention

Pillar 2

New Housing
Support Programs

Pillar 3

Backbone
Coordination &
Partnerships

Foundational Concepts



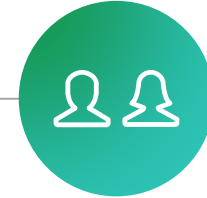
Innovation

1. **Launch a Homelessness Innovation Lab** to partner with tech sector to develop solutions for information management & access, data analysis.
2. **Develop a Research Agenda** in partnership with research community to support Strategy.
3. **Secure flexible funds** to prototype social enterprise, social finance and housing development innovations. This includes lived experience social enterprise incubation support.
4. **Support innovative solutions** to address criminalization of homelessness, such as a Community Court.



Reconciliation

1. **Recognize accountability for TRC Calls to Actions** in that Indigenous Homelessness is ongoing form of colonialism.
2. **Ensure Indigenous leadership** embedded in Strategy governance.
3. **Embed cultural lens in supports** working with Elders, through ceremony, staff training, supports and housing design.



Lived Experience

1. **Continue LivEx Circle and Youth Advisory Committee** and formalize relationships to Backbone governance.
2. **Ensure a population focus is embedded** in Strategy implementation: youth, Indigenous, women, families, newcomers, LGBTQ2S, seniors, men
3. **Introduce peer support models**, including peer outreach to address shelter challenges in partnership with business & police.

LivEx Circle: Innovative Solutions



Pillar 1: Inclusion & Prevention



Inclusion

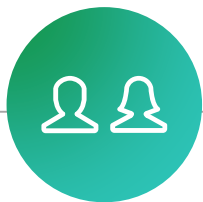
1. **Launch a public awareness campaign** to address stigma on homelessness in Kelowna working with the Lived Experience Circle.
2. **Develop easy to access resource guides** with Lived Experience input to ensure those at risk of or experiencing homelessness know where to go for the right help, fast. This includes support to the families or friends of those in need of help.
3. **Encourage City to explore policy shifts** at the municipal level to promote affordable housing across neighbourhoods through bylaw changes, zoning, and grants.



Prevention

1. **Work with key ministries to enhance positive housing transitions** including MCFD, Justice & Health (& treatment facilities). This includes developing discharge/transition protocols that prevent homelessness.
2. **Launch the Upstream for Youth pilot** in partnership with School District to identify and support youth at risk of becoming homeless.
3. **Enhance connections to healthy opportunities** to thrive in community. Explore leveraging community hubs & enhancing access thru technology.
4. **Develop formal links with aligning strategies** (BC Poverty Strategy, BC Homelessness Plan, Regional Poverty Reduction Strategy) and Healthy Housing Strategy to ensure we are working in an integrated fashion.
5. **Launch Prevention programs** to support people to stay in housing where possible. These will be targeted to those at highest imminent risk for homelessness. Strategy calls for 100 new program spaces for prevention³²

Pillar 2: New Housing Support Programs



Support people in Rental Market

1. Support people in the rental market through new programs grounded in the Housing First model and the right to housing including:
 - Rapid Rehousing – 225 program spaces
 - Intensive Case Management – 100 program spaces
 - Assertive Community Outreach – 100 program spaces
 - 20% of spaces will serve youth; this would include tailored Housing First For Youth programs
 - Programs serving those fleeing violence will be tailored accordingly to include safety planning
2. Create a Landlord Roundtable
to encourage making units available for Housing First programs to house and support people throughout neighbourhoods and buildings.



Supportive Housing Buildings

1. Support the addition of 300 units of long-term supportive housing in purpose-built building targeted to chronic & episodic homeless people with higher needs.
2. Ensure supportive housing specific to young people is developed as part of this investment.
3. Work with organizations dedicated to addressing interpersonal violence to ensure program and housing models appropriately serve those impacted by violence.

Pillar 2: New Housing Support Programs continued



Wraparound Supports

1. **Develop a sector-wide capacity building/training agenda** to increase staff effectiveness in supporting clients with trauma, adverse childhood experiences, dual diagnosis, addiction, mental health, violence.
2. **Support efforts to increase treatment beds**, especially for young people in Kelowna.
3. **Develop a person-centred approach to harm reduction and sobriety** on a continuum to meet people where they are at with appropriate supports.
4. **Apply a population focus to new programs** to ensure youth, Indigenous people, women, families, men, couples, seniors, newcomers, LGBTQ2S and other subgroups' needs are effectively met through a person-centred approach.

Pillar 3: Backbone Coordination & Partnerships



Coordination

1. **Coordinate a Homelessness Funders Table** to maximize the impact of diverse investments from philanthropy, government, faith, and corporate sectors in support of the Strategy.
2. **Rollout a Backbone Organization** solely dedicated to implementing Journey Home Strategy by building community capacity and engaging in systems planning.
3. **Formalize Backbone Organization relationships, including with AWH-Kelowna** to ensure ongoing focus on the Youth Strategy are embedded in community efforts.
4. **Rollout Coordinated Access & Assessment** to ensure consistent process to match clients' needs and choice to access services.



Partnerships

1. **Support the creation of an Okanagan Regional Partnership Table** to coordinate responses to homelessness with Westbank First Nation, City of West Kelowna, Lake Country, and the Regional District to start.
2. **Work with the BC10 Community Entities** to support a provincial agenda on ending homelessness using Housing First and a systems planning approach.
3. **Participate in regional, provincial and national learning communities** to share and learn best practices and champion preventing and ending homelessness.



A Way Home Kelowna Youth Strategy



Youth Focus Group Outcomes

- Address **stigma**/discrimination - challenge expectations/misplaced biases
- Establish a **continuum of housing** for youth including Housing First for youth, foyer/supportive housing, host homes/community homes, rent supports
- Provide accessible and timely supports, including a focus on **treatment** options for youth
- Focus on **prevention** - improve school students' awareness of how and where to go for help
- Support for **Upstream program**
- Improve transitions from **public systems** & address MCFD barriers to youth supports in policy/practice
- Build **healthy community opportunities** for youth to facilitate connections and skill building

Strategy Needs \$47M over 5yrs

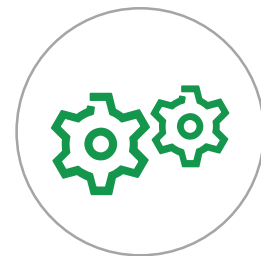
Gap on top of existing/committed programs & housing.



Capital
Investment
\$18M



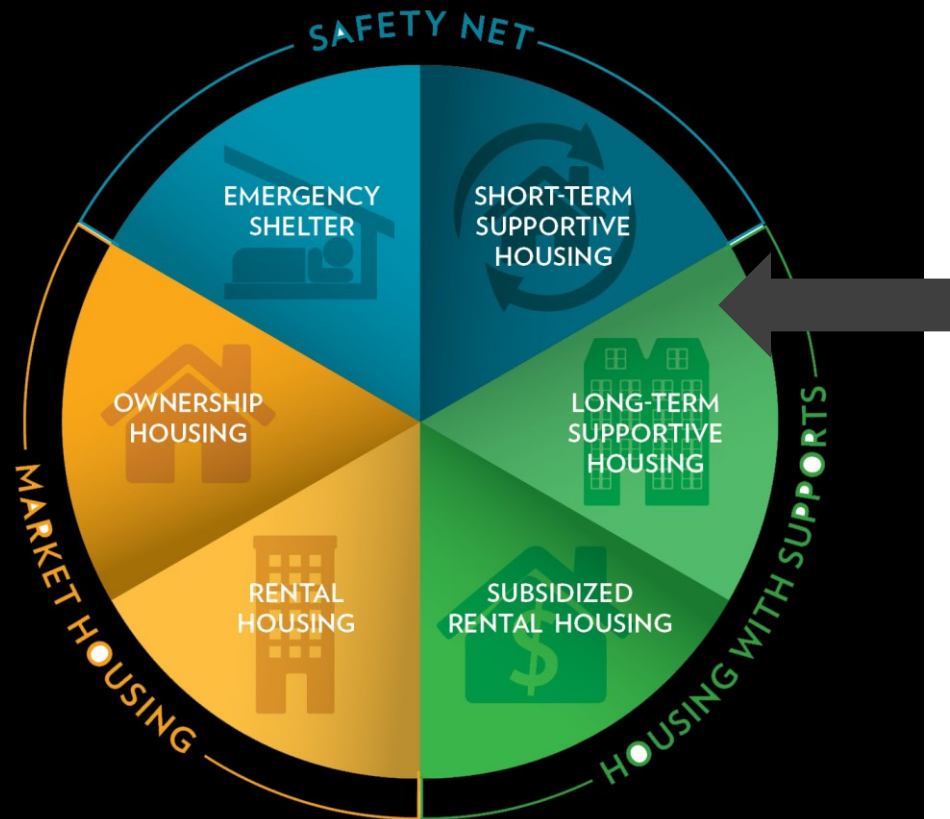
New Housing
Support Programs
\$26M



Backbone &
Coordination
\$2.6M

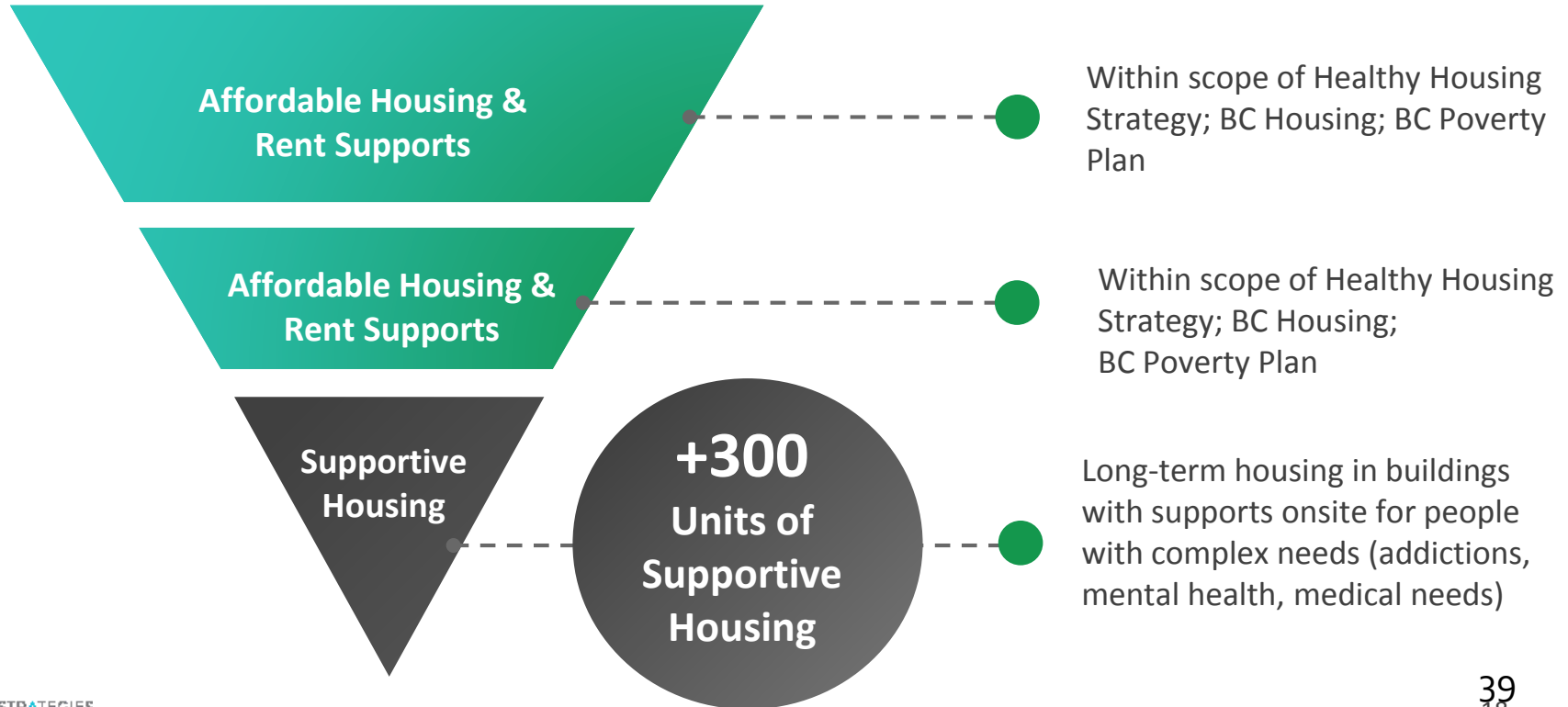


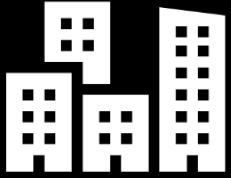
Journey Home Capital Investment Focus



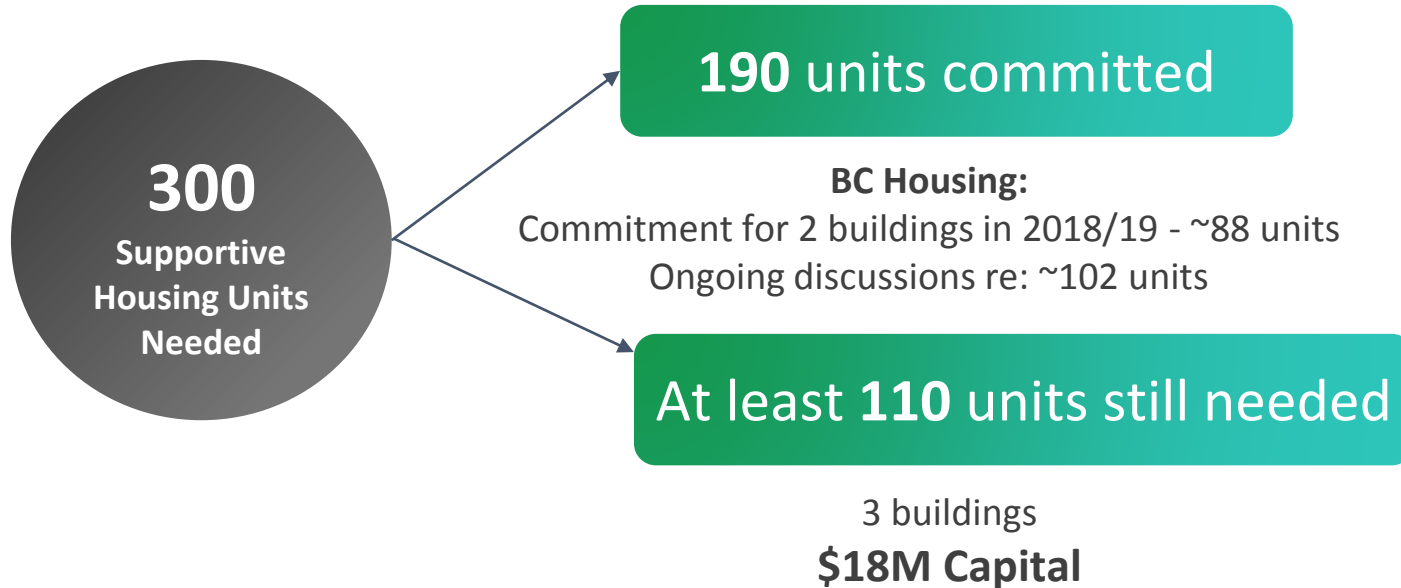
Supportive Housing

Support people in dedicated buildings with supports onsite





Supportive Housing Needs



Local Examples



New Gate



NOW Place Apartments

New Example BCH/John Howard

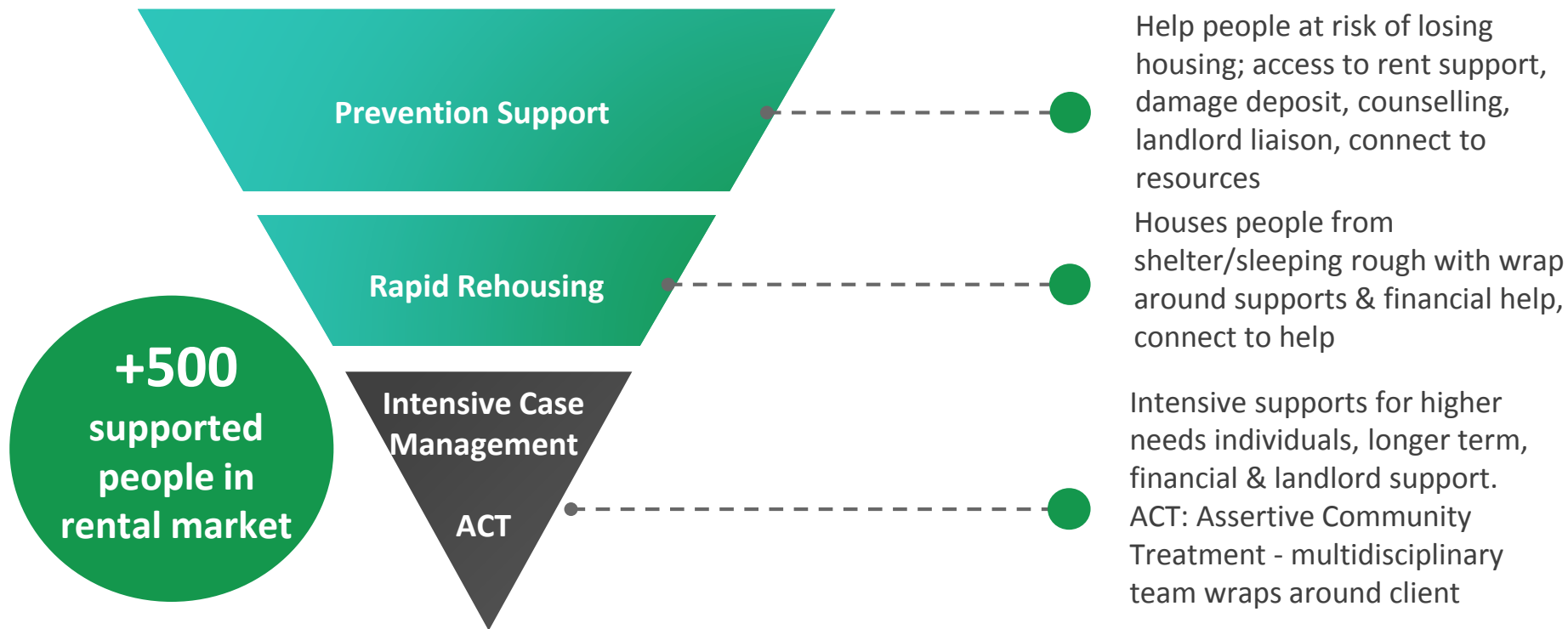
Concept Renderings





Housing First Supports:

Support people in rental units in community



New Housing Support Programs



**500 new
program spaces**

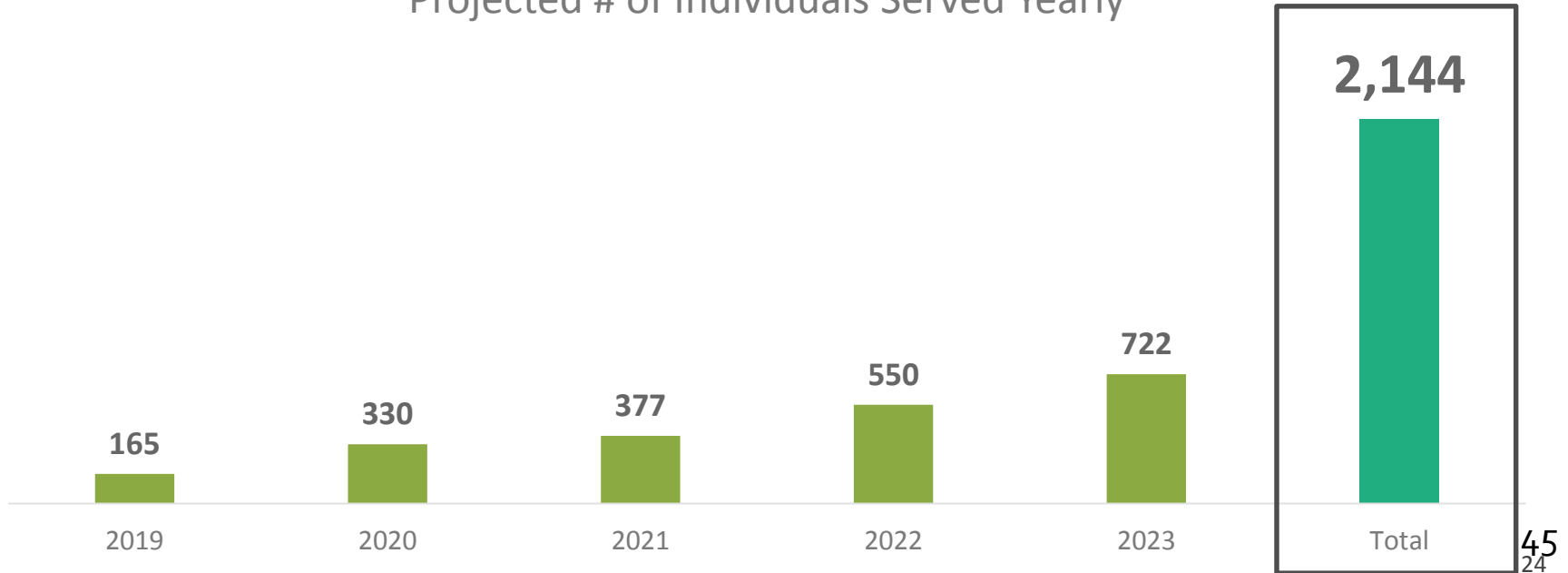
**\$26M
Over 5 years**

Types of program spaces needed:

- Assertive Community Treatment
- Housing First Intensive Case Management
- Rapid Rehousing
- Prevention

2,100+ people will be helped stay or get housed during the course of the Journey Home Strategy.

Projected # of Individuals Served Yearly





Backbone Organization

Funding Coordination

Able to bring partners together to coordinate investment in highest impact activities; ensure complementary approach.

Capacity Building

Brings up collective IQ of community, services, developers, researchers, etc. to develop and implement innovative measures & best practices.

**Neutral org with
focus on &
accountability for
JH Strategy
implementation.**

Partnerships & Innovation

Builds partnerships across sectors to support Strategy goals.
Social finance innovation
Financial and Land Trust Management

Homeless System Planning

Enhances system-level coordination for service providers to support the strategy goals, regardless of funding source. Can coordinate with diverse departments, governments, donors, etc.

Leadership & Accountability

Reports to community, stakeholder engagement research & continuous improvement, policy advocacy to keep homelessness a priority, knowledge dissemination.

Startup

Year 1-2

Kickstart high leverage activities

ACTIVITIES

- Building partnerships
- Knowledge/best practices
- Housing First rollout
- Private sector relationship on new units
- Regional Roundtable
- Advocacy to support Strategy
- Public awareness campaign
- Report to community

Ramp Up

Year 3-4

Create a cohesive homeless-serving system

ACTIVITIES

- Information management system
- Real-time reporting for system performance management
- Coordinated Access
- Rollout of Housing First and Supportive Housing
- Capacity building in sector
- Raise and coordinate funds
- Service quality standards
- Strategy Review & refinement

Full Rollout

Year 5-6

Refine approach for most impact

ACTIVITIES

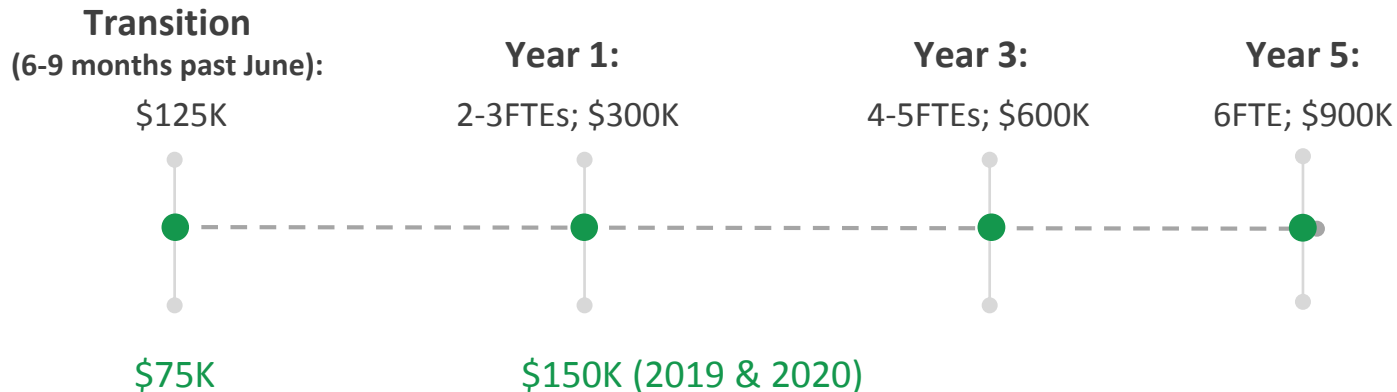
- Continue rollout of Housing First and Supportive Housing
- Monitor performance & make adjustments in real-time
- Transition planning with public systems
- Public policy advocacy
- Review Strategy & recalibrate towards prevention measures pending demand



Future Backbone Organization

\$2.6M
Over 5 years

**Current City
Commitments**



Assumes in-kind office space.

Does not account for any reallocations of positions already in community.

Journey Home Transition Committee

6-9 months after
June 2018



Month 1-3

- Transition Committee selected to support Backbone Organization set-up
- City support for transition period (6-9 months)

Month 3-6

- Set up Governance/Board of Directors
- Secure office space - in kind
- Raise funding for Backbone staff and admin costs
- Hire Executive Director

Month 6-9

- Secure additional staff
- Formalize partnerships, MOUs and agreements

Why invest?

ALBERTA 7 CITIES RESULTS PRE/POST HOUSING

FIRST:



85% fewer days in **jail**;



64% fewer days in **hospital**;



60% fewer interactions with **EMS**;

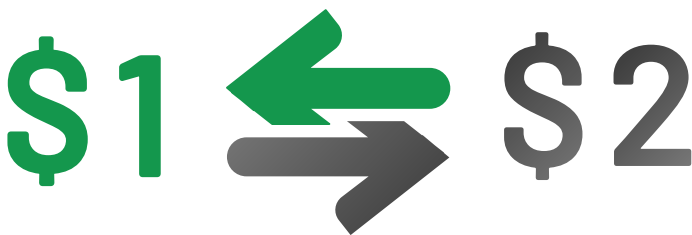


60% fewer **emergency room** visits; and



57% fewer interactions with **police**.

Mental Health Commission of Canada's At Home/Chez Soi



FOR EVERY \$1 INVESTED IN ENDING CHRONIC HOMELESSNESS, AVERAGE SAVINGS WILL BE \$2.

Journey **HOME**

Managing or ending homelessness?

Shelter, jail, hospital:

\$66k-\$120k/yr

VS.

Housing with supports:

\$13k-\$18k/yr

A study of four Canadian cities reports institutional responses to homelessness (Pomeroy, 2005)

SFU 2008 Study in BC

Costs for health/corrections - \$55k/yr

Cost for supportive housing - \$37k/yr

Vancouver Coastal Health 2008:

Supportive housing:

Reduction of -54% psychiatric admissions

Reduction of -58% medical admissions

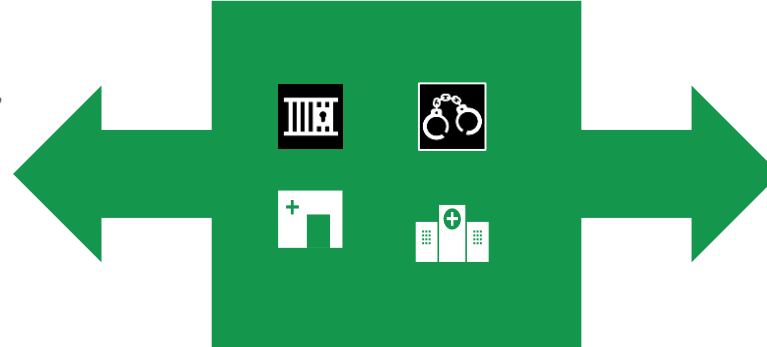
**IT'S CHEAPER TO HOUSE & SUPPORT THAN
TO KEEP SOMEONE HOMELESS**

2008 SFU Study on BC concluded 50%
cheaper to house and support than
serve in emergency response (justice,
health, social service, shelter)

**BETTER USE
OF PUBLIC RESOURCES**

To keep the people helped
by Plan in current situation,
it will cost police, health,
jail, shelters, bylaw about

-\$100M



If we house and support those
same people; police, health, jail,
shelters, bylaw will see a cost
avoidance of about

+\$50M

Top 10 Actions

Establish a neutral Backbone Organization

dedicated to implementing Journey Home Strategy. This organization will take on homeless systems planning, funding coordination, and building partnerships with AWH Kelowna and regional partners inc. Westbank First Nation, City of West Kelowna, Lake Country, and the Regional District to start.

Create 500 new Housing First program spaces

with wraparound support to house and support people in the rental market.

Support development of 300 units of long-term supportive housing units

in purpose-built buildings targeted to people experiencing chronic & episodic homelessness with higher needs.

Support A Way Home Kelowna to introduce Upstream for Youth

pilot in partnership with the School District to identify and support youth while they are in school and at risk of becoming homeless.

Support increased access to quality mental health, addictions, health supports and treatment

for people experiencing homelessness. This includes more training for service providers and partnerships with health.

Top 10 Actions

Continue the Lived Experience Circle and Youth Expert Committee and formalize these relationship to strategy implementation and governance.

Introduce lived experience peer support models, including peer outreach to address challenges related to community concerns in partnership with business & police.

Support the Truth & Reconciliation Calls to Actions by partnering with Indigenous communities

and ensuring that Indigenous leadership is embedded in Strategy governance.

Support solutions to address the criminalization of homelessness

i.e. Community Court and a public awareness campaign to address stigma on homelessness.

Launch a Homelessness Innovation Lab

to develop solutions to homelessness in a Kelowna context.

Ensure a population focus is embedded in Strategy implementation:

youth through A Way Home-Kelowna, Indigenous, women, families, newcomers, LGBTQ2S, seniors, men.

The logo for Journey HOME is displayed in white text on a black rectangular background. The word "Journey" is in a script font, and "HOME" is in a bold, sans-serif font. A white line above the "HOME" part of the logo forms a simple house silhouette.

Journey HOME

Questions?
Comments?

THANK YOU!

REPORT TO COUNCIL



Date: April 23, 2018

RIM No. 1250-30

To: City Manager

From: Community Planning Department (AC)

Application: Z17-0077 **Owners:** 4638 Lakeshore Road Ltd. Inc.
No. BC1079452

Addresses: 4638 Lakeshore Road **Applicant:** Strandhaus Development Inc –
Steve Nicholson

Subject: Rezoning Application

Existing OCP Designation: COMM – Commercial

Existing Zone: C2 – Neighbourhood Commercial

Proposed Zone: C3 – Community Commercial

1.0 Recommendation

THAT Rezoning Application No. Z17-0077 to amend the City of Kelowna Zoning Bylaw No. 8000 by changing the zoning classification of Lot A, Section 25, Township 28, SDYD, Plan 29078 Except Plan H13734 located at 4638 Lakeshore Road, Kelowna, BC from the C2 – Neighbourhood Commercial zone to the C3 – Community Commercial zone NOT be considered by Council;

2.0 Purpose

To consider a Staff recommendation to NOT rezone the subject property that would facilitate the development a four storey mixed use building.

3.0 Community Planning

Staff do not support the proposed rezoning. The existing C2 zone allows for maximum 2 ½ storey commercial buildings which is consistent with the surrounding commercial node on Lakeshore Road and compatible with the single family homes to the west. The proposed C3 zone would permit a four storey mixed-use building as proposed by the applicant. This results in a large building mass as defined with the proposed 1.51 FAR. The Official Community Plan directs mixed-use developments of this scale and height within one of Kelowna's urban centres where it is in context with other similar developments and the density is well supported by surrounding urban services and amenities.

The subject property is within a small neighbourhood commercial area, however it is located well outside an Urban Centre and is within an ALR interface area. The application was considered by the Agricultural Advisory Committee (AAC) on January 25th 2018 to discuss both the rezoning and the proposed landscape buffer reduction. After that meeting, the applicant revised their plans in order to remove the associated variance. However, at the meeting the AAC did not support the landscape buffer reduction nor the proposed rezoning. Neither City policies nor the AAC encourage intensification of land uses in ALR interface areas. It was also noted that the current landscape buffer of 3.0 metres proposed would be inconsistent with the proposed new ALR landscape buffer changes identified within the Agriculture Plan. If the Zoning Bylaw was updated today to reflect the approved Agriculture Plan, then the buffer requirement would be 15 metres and the setback to the building would be 20 m. See Section 4.0 below to read the minutes from the Agricultural Advisory Committee.

Further, the proposal would require a Farm Protection Development Permit (DP) since it is adjacent to the ALR. The objectives of a Farm Protection DP are to:

- Protect farm land and farm operations;
- Minimize the impact of urban encroachment and land use conflicts on agricultural land;
- Minimize conflicts created by activities designated as farm use by ALC regulation and non-farm uses within agricultural areas.

Among other items, Farm Protection DP Guideline 1.3 speaks to establishing and maintaining a landscape buffer along the boundary with agricultural land, consistent with Ministry of Agriculture and ALC guides. For urban residential development adjacent to agricultural land, the Ministry of Agriculture Guide to Edge Planning identifies a 15 m wide landscape buffer (on the urban side) with plant design specifications. As such, the proposed development would not meet Farm Protection DP Guidelines.

An alternative recommendation for supporting the applicant's proposed land use changes has been included in Section 9.0 of this report for Council's consideration.

3.1 Public Notification

To fulfill Council Policy No. 367 for 'Zoning Major' applications, the applicant was required to hold a public information session. The applicant held a public open house on October 5th, 6th, & 7th from 4:00pm to 6:00pm at the subject property. The applicant also completed the neighbourhood notification process by contacting all properties within 50m of the subject properties.

4.0 **Agriculture Advisory Committee**

4.1 Meeting: January 25th 2018

Staff:

- Displayed a PowerPoint presentation summarizing the application before the Committee.
- The property is located in an agricultural interface area.
- Staff would like the Committee to comment on the proposed rezoning and the agricultural buffer design located along the southern parcel boundary.

AAC/Staff Discussion:

- Staff responded to an inquiry regarding the agricultural buffer and the variance.
- Staff clarified the plantings proposed for the landscape buffer.
- Staff clarified the setback for ALR lands facing the commercial properties.

- Staff provided information regarding the setbacks for commercial and residential properties.
- Staff provided information regarding site coverage.

Steve Nicholson, Applicant:

- Displayed a PowerPoint presentation summarizing the rationale for the rezoning and variance.
- Responded to questions from the Committee.
- Provided the rationale for the location of the staircase.
- Advised that the variance along the pedestrian walkway shown in the drawings was done in error and will be removed.
- Provided the rationale for the siting of the building on the subject property.
- Will be erecting signage that the property is next to an active farm and will be registering a covenant on title to indicate it is adjacent to an active farm.
- Provided an overview of the exterior materials being proposed.

Staff/AAC Discussion:

- Responded to questions from the Committee.

Motions:

Moved by Dominic Rampone/**Seconded by** Ed Schiller

THAT the Agricultural Advisory Committee recommends that Council support Rezoning Application No. Z17-0077 for the property located at 4638 Lakeshore Road in order to rezone the subject property from the C2 - Neighbourhood Commercial zone to the C3 - Community Commercial zone.

Defeated

John Janmaat, Yvonne Herbison, Pete Spencer and Jeff Ricketts – Opposed.

Moved by Dominic Rampone/**Seconded by** Pete Spencer

THAT the Agricultural Advisory Committee recommends that Council support Development Variance Permit Application No. DVP17-0181 for the property located at 4638 Lakeshore Road in order to reduce the agriculture buffer width from 3.0m to 2.0m for an 8.0m portion along the southern property line.

Defeated

John Janmaat, Yvonne Herbison and Jeff Ricketts – Opposed.

Anecdotal Comments:

The Agricultural Advisory Committee raised the following concerns with the proposed application as it relates to the proposed rezoning:

- the higher density residential use and taller buildings allowed in the C3 zone will have negative impacts on the adjacent ALR land;
- additional density and residential use creates speculative pressure on ALR land; and
- there is no benefit to agriculture.

The Agricultural Advisory Committee raised the following concerns with the proposed application as it relates the proposed variance:

- increases to buffering in both width and height should be considered;
- a taller building needs a larger buffer;
- the variance would not be necessary if the structure was moved;

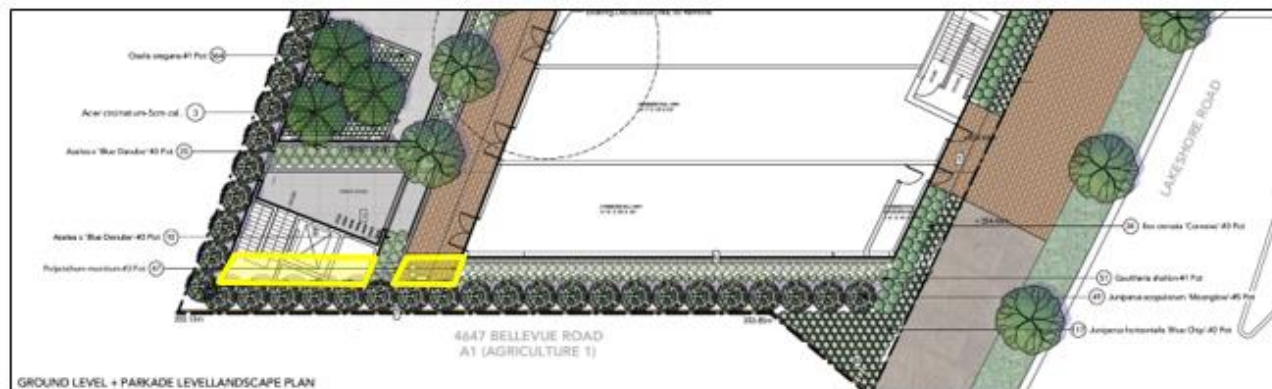
- the proposed buffering needs to be intensified; and
- it is possible that the agricultural use of the adjacent property may change in the future and there appears to be no flexibility for buffering should a change in use occur.

5.0 Proposal

5.1 Project Description

The applicant is proposing to rezone the subject property from the C2 – Neighbourhood Commercial zone to the C3 – Community Commercial zone. The applicant has also applied for a Development Permit to construct 9 residential units above a 10,400 square feet of commercial space and two floors of underground parking. Each residential unit has 3 bedrooms and is approximately 2,000 ft².

A development variance permit was sought to reduce the agriculture buffer width from 3.0m to 2.0m for an 8.0m portion along the southern property line (See Figure 1 below). However, since going to the AAC the applicant has revised their plans and are no longer requesting the landscape buffer reduction variance.



 Variance area for landscape buffer reduction

Should Council support the Rezoning bylaw, Staff will bring forward a detailed report evaluating the design guidelines for the Development Permit for Council's consideration.

5.2 Site Context

The subject property lies at the edge, but within the Permanent Growth Boundary. The surrounding neighbourhood has a mix of commercial, institutional, park, residential, and agricultural land uses. The subject property only borders ALR agricultural land on one side (southern property line). Specifically, the Zoning and adjacent land uses are as follows:

Table 1: Zoning and Land Use of Adjacent Property

Direction	Zoning	ALR	Land Use
North	C2 – Community Commercial	No	Commercial
South	A1 – Agriculture 1	Yes	Agriculture
East	RU1 – Single Detached Housing P3 – Public Parks (with HRA)	No	Park, Commercial & Residential
West	RU1 – Single Detached Housing	No	Residential

Subject Properties Map: 4638 Lakeshore Road



6.0 Current Development Policies

6.1 Kelowna Official Community Plan (OCP)

Goals for A Sustainable Future

Contain Urban Growth.¹ Reduce greenfield urban sprawl and focus growth in compact, connected and mixed-use (residential and commercial) urban and village centres.

¹ Goal 1. (Introduction Chapter 1).

Agriculture Land Use Policies

Protect Agricultural Land.² Retain the agricultural land base by supporting the ALR and by protecting agricultural lands from development, except as otherwise noted in the City of Kelowna Agricultural Plan. Ensure that the primary use of agricultural land is agriculture, regardless of parcel size.

Transitional Uses.³ Consider complementary agricultural land uses such as urban agriculture (as defined in the Zoning Bylaw) along the urban-rural interface that act as a transition between existing urban development and farming operations.

Urban Uses.⁴ Direct urban uses to lands within the urban portion of the Permanent Growth Boundary, in the interest of reducing development and speculative pressure on agricultural lands.

Infrastructure Policies

Objective 7.4: Ensure that densification of existing neighbourhoods happens in a context of directly contributing to enhanced livability.

Urban Centres and Densifying Neighbourhoods.⁵ Allocate resources to ensure civic capital (e.g. signage, street furniture, sidewalks, bike lanes, parks, leisure facilities and other infrastructure investments) is, as a priority, invested in Urban Core Areas indicated on Map 5.3 and areas slated for significant multiple unit infill, with the purpose of making these safe, accessible, high-quality living and working environments so that redevelopment consistent with the OCP Future Land Use map will be encouraged.

Residential Land Use Policies

Sensitive Infill⁶. Encourage new development or redevelopment in existing residential areas to be sensitive to or reflect the character of the neighborhood with respect to building design, height and siting.

Healthy Communities⁷. Through current zoning regulations and development processes, foster healthy, inclusive communities and a diverse mix of housing forms, consistent with the appearance of the surrounding neighbourhood.

6.2 Agriculture Plan

Theme 1: Strengthen local policies and regulations to protect agriculture.

Zoning Bylaw Action 1.3f: Update vegetative buffer specifications as outlined in *Edge Planning White Paper*.

7.0 Technical Comments

7.1 Building & Permitting Department

- Full plan check for Building Code related issues will be done at time of Building Permit applications.

7.2 Development Engineering Department

² Policy 5.33.1 (Development Process Chapter 5).

³ Policy 5.33.4 (Development Process Chapter 5).

⁴ Policy 5.33.3 (Development Process Chapter 5).

⁵ Policy 7.4.1 (Infrastructure Chapter 7).

⁶ Policy 5.22.6 (Development Process Chapter 5).

⁷ Policy 5.22.7 (Development Process Chapter 5).

- See Attachment 'A', memorandum dated October 2nd, 2017.

7.3 Fire Department

- No comments related to zoning.

8.0 **Application Chronology**

Date of Application Received:	July 31, 2017
Date Public Consultation Completed:	Oct 5, 2017
Date of Agriculture Advisory Committee:	Jan 25, 2018

9.0 **Alternate Recommendation**

THAT Rezoning Application No. Z17-0077 to amend the City of Kelowna Zoning Bylaw No. 8000 by changing the zoning classification of Lot A, Section 25, Township 28, SDYD, Plan 29078 Except Plan H13734 located at 4638 Lakeshore Road, Kelowna, BC from the C2 – Neighbourhood Commercial zone to the C3 – Community Commercial zone, be considered by Council;

AND THAT the Rezoning Bylaw be forwarded to a Public Hearing for further consideration;

AND THAT final adoption of the Rezoning Bylaw be considered subsequent to the outstanding conditions of approval as set out in Attachment "A" attached to the Report from the Community Planning Department dated April 23, 2018;

AND FURTHER THAT final adoption the Rezoning Bylaw be considered in conjunction with Council's consideration of a Development Permit for the subject property.

Report prepared by:	Adam Cseke, Planner Specialist
Reviewed by:	Terry Barton, Urban Planning Manager
Approved for Inclusion:	Ryan Smith, Community Planning Department Manager

Attachments:

Attachment 'A' – Development Engineering Memorandum dated November 21, 2017

Draft Permit:

- Schedule 'A & B' – Site Plan and Conceptual Renderings
- Schedule 'C' – Landscaping & Buffers

Attachment 'B' - Applicant Rationale

Attachment 'C' - Agrology Report

Attachment 'D' - Trip Generation (traffic) report

Attachment 'E' – Public Notification Summary



CITY OF KELOWNA
MEMORANDUM

Date: October 2 2017
File No.: Z17-0077

To: Community Planning (AC)

From: Development Engineering Manager

Subject: 4638 Lakeshore Road Collett Road Lot A Plan 29078

Development Engineering Department have the following comments and requirements associated with this Development Permit Agreement. The road and utility upgrading requirements outlined in this report will be a requirement of this development.

The Development Engineering Technologist for this project is John Filipenko ASCT

1. Domestic Water and Fire Protection

- (a) The property is located within the City of Kelowna service area.
- (b) Provide an adequately sized domestic water and fire protection system. The water system must be capable of supplying domestic and fire flow demands of the project in accordance with the Subdivision, Development & Servicing Bylaw.
- (c) The developer's consulting mechanical engineer will determine the domestic and fire protection requirements of this proposed development and establish hydrant requirements and service needs.
- (d) It is apparent that the existing 19mm diameter service and 150mm diameter water distribution system within Lakeshore Road and Collett Road will require upsizing to achieve the required domestic and fire flow requirements. The applicant, at his cost, at his cost will arrange for the required system and service upgrades.

2. Sanitary Sewer

- (a) Our records indicate that this proposed development site is connected to the municipal sanitary system with a 100mm diameter service connection. The developer's consulting mechanical engineer will determine the development requirements of this proposed development and establish the service needs. Only one service will be permitted for this development. The applicant, at his cost, will arrange for the installation of one new larger service with inspection chamber.

3. Storm Drainage

- (a) The developer must engage a consulting civil engineer to provide a storm water management plan for these sites which meets the requirements of the City Subdivision, Development and Servicing Bylaw 7900. The storm water management plan must also include provision of lot grading plans, minimum basement elevations (MBE), if applicable, and provision of a storm drainage service and recommendations for onsite drainage containment and disposal systems.
- (b) Only one service will be permitted for this development. The applicant, at his cost, will arrange for the installation of a drywell and piped drainage system within Collett Road with one new overflow service.

4. Road Improvements

- a) The construction of the Lakeshore Road / Collett Road roundabout is now near completion. The urbanization of Lakeshore Road must be extended for the full frontage length of this development including curb and gutter, 3m mixed-use pathway shall be saw cut concrete that will match the sections already in place, street lights, landscaped boulevards complete with trees and underground irrigation and adjustment and / or re-location of existing utility appurtenances if required to accommodate this construction.
- b) Collett Road urbanization must be extended for the full frontage length including curb and gutter, separate sidewalk, driveway let down, landscaped boulevards complete with trees and underground irrigation, piped storm drainage system, fillet pavement, street lights, and adjustment and/or re-location of existing utility appurtenances if required to accommodate this construction.
- c) Re-locate existing poles and utilities, where necessary.

5. Engineering

Road and utility construction design, construction supervision, and quality control supervision of all off-site and site services including on-site ground recharge drainage collection and disposal systems, must be performed by an approved consulting civil engineer. Designs must be submitted to the city engineering department for review and marked "issued for construction" by the city engineer before construction may begin.

6. Electric Power and Telecommunication Services

- a) All proposed distribution and service connections are to be installed underground.
- b) Make servicing applications to the respective Power and Telecommunication utility companies. The utility companies are required to obtain the City's approval before commencing construction within the road right-of-way.
- c) Street lights must be installed on the road frontage.

7. Design and Construction

- (a) Design, construction supervision and inspection of all off-site civil works and site servicing must be performed by a Consulting Civil Engineer and all such work is subject to the approval of the City Engineer. Drawings must conform to City standards and requirements.
- (b) Quality Control and Assurance Plans must be provided in accordance with the Subdivision, Development & Servicing Bylaw No. 7900 (refer to Part 5 and Schedule 3).
- (c) On examination of design drawings, it may be determined that rights-of-way are required for current or future needs.

10. Geotechnical Report

As a requirement of this application the owner must provide a geotechnical report prepared by a Professional Engineer qualified in the field of hydro-geotechnical survey to address the following:

- (a) Area ground water characteristics.
- (b) Site suitability for development, unstable soils, etc.
- (c) Drill and / or excavate test holes on the site and install pisometers if necessary. Log test hole data to identify soil characteristics, identify areas of fill if any. Identify unacceptable fill material, analyse soil sulphate content, Identify unsuitable underlying soils such as peat, etc. and make recommendations for remediation if necessary.
- (d) List extraordinary requirements that may be required to accommodate construction of roads and underground utilities as well as building foundation designs.
- (e) Additional geotechnical survey may be necessary for building foundations, etc.

11. Subdivision and Other Engineering Comments

- (a) Dedicate sufficient road widening so as to include the fronting roundabout and road widening on Lakeshore Road and Collett Road. (see shaded area on attached map)
- (b) Provide all necessary Statutory Rights-of-Way for any utility corridors required, including those on proposed or existing City Lands.
- (c) If any road dedication affects lands encumbered by a Utility right-of-way (such as Fortis Gas, etc.) please obtain the approval of the utility prior to application for final subdivision approval. Any works required by the utility as a consequence of the road dedication must be incorporated in the construction drawings submitted to the City's Development Manager.

12. Security and Levy Requirements

- a) Bonding To be determined
- b) Bonding amounts are comprised of estimated construction costs escalated to include engineering design and contingency protection. The developer's consulting civil engineer shall provide detailed designs and obtain actual tendered construction costs. Bonding for required off-site construction must be provided and may be in the form of cash or an irrevocable letter of credit, in an approved format.
- c) The owner must also enter into a servicing agreement in a form provided by the City.
- d) An administration charge will be assessed for processing of this application, review and approval of engineering designs and construction inspection. The administration charge is calculated as (3.5% of the Total Off-Site Construction Cost plus GST)

13. Servicing Agreements for Works and Services

- a) A Servicing Agreement is required for all works and services on City lands in accordance with the Subdivision, Development & Servicing Bylaw No. 7900. The applicant's Engineer, prior to preparation of Servicing Agreements, must provide adequate drawings and estimates for the required works. The Servicing Agreement must be in the form as described in Schedule 2 of the bylaw.
- b) Part 3, "Security for Works and Services", of the Bylaw, describes the Bonding and Insurance requirements of the Owner. The liability limit is not to be less than \$5,000,000 and the City is to be named on the insurance policy as an additional insured.


 James Kay, P. Eng.
 Development Engineering Manager
 JF

ATTACHMENT		A
This forms part of application		
# Z17-0077		
Planner Initials	AC	 City of Kelowna <small>COMMUNITY PLANNING</small>

DRAFT Development Permit DP17-0180



This permit relates to land in the City of Kelowna municipally known as

4673 Lakeshore Road

and legally known as

Lot A, Section 25, Township 28, SDYD, Plan 29078 Except Plan H13734

The development has been approved subject to any attached terms and conditions, and to full compliance with the approved plans bearing the stamp of approval and the above described development permit number.

The present owner and any subsequent owner of the above described land must comply with any attached terms and conditions.

Date of Decision: _____, 2018

Decision By: CITY COUNCIL

Issued Date: _____, 2018

Development Permit Area: Comprehensive Development Permit Area

File Manager: AC

This permit will not be valid if development has not commenced within 2 years of the council approved Date of Decision.

Zone: C3 – Community Commercial Zone

Future Land Use Designation: COMM (Commercial)

This is NOT a Building Permit.

In addition to your Development Permit, a Building Permit may be required prior to any work commencing. For further information, contact the City of Kelowna, Development Services Branch.

NOTICE

This permit does not relieve the owner or the owner's authorized agent from full compliance with the requirements of any federal, provincial or other municipal legislation, or the terms and conditions of any easement, covenant, building scheme or agreement affecting the building or land.

Owner: 4638 Lakeshore Road Ltd. Inc. No. BC1079452
Address: 2061 Abbott Street
City: Kelowna, BC
Phone: n/a

Ryan Smith, Community Planning Department Manager
Community Planning & Strategic Investments

Date

1. SCOPE OF APPROVAL

This Development Permit applies to and only to those lands within the Municipality as described above, and any and all buildings, structures and other development thereon.

This Development Permit is issued subject to compliance with all of the Bylaws of the Municipality applicable thereto, except as specifically varied or supplemented by this permit, noted in the Terms and Conditions below.

The issuance of a permit limits the permit holder to be in strict compliance with regulations of the Zoning Bylaw and all other Bylaws unless specific variances have been authorized by the Development Permit. No implied variances from bylaw provisions shall be granted by virtue of drawing notations that are inconsistent with bylaw provisions and that may not have been identified as required Variances by the applicant or Municipal staff.

2. CONDITIONS OF APPROVAL

- a) The dimensions and siting of the building to be constructed on the land be in accordance with Schedule "A";
- b) The exterior design and finish of the building to be constructed on the land be in accordance with Schedule "B";
- c) Landscaping to be provided on the land be in accordance with Schedule "C";
- d) The applicant be required to post with the City a Landscape Performance Security deposit in the form of a "Letter of Credit" in the amount of 125% of the estimated value of the landscaping, as determined by a Registered Landscape Architect

This Development Permit is valid for two (2) years from the Council Date of Decision if applicable, or Community Planning Department Manager approval, with no opportunity to extend.

3. PERFORMANCE SECURITY

As a condition of the issuance of this Permit, Council is holding the security set out below to ensure that development is carried out in accordance with the terms and conditions of this Permit. Should any interest be earned upon the security, it shall accrue to the Permit Holder and be paid to the Permit Holder if the security is returned. The condition of the posting of the security is that should the Permit Holder fail to carry out the development hereby authorized, according to the terms and conditions of this Permit within the time provided, the Municipality may use the security to carry out the work by its servants, agents or contractors, and any surplus shall be paid over to the Permit Holder, or should the Permit Holder carry out the development permitted by this Permit within the time set out above, the security shall be returned to the Permit Holder. There is filed accordingly:

- a) Cash in the amount of \$_____ tbd _____ OR
- b) A Certified Cheque in the amount of \$_____ tbd _____ OR
- c) An Irrevocable Letter of Credit in the amount of \$_____ tbd _____ .

Before any bond or security required under this Permit is reduced or released, the Developer will provide the City with a statutory declaration certifying that all labour, material, workers' compensation and other taxes and costs have been paid.

4. Indemnification

Upon commencement of the works authorized by this Permit the Developer covenants and agrees to save harmless and effectually indemnify the Municipality against:

- a) All actions and proceedings, costs, damages, expenses, claims, and demands whatsoever and by whomsoever brought, by reason of the Municipality said Permit.

All costs, expenses, claims that may be incurred by the Municipality where the construction, engineering or other types of works as called for by the Permit results in damages to any property owned in whole or in part by the Municipality or which the Municipality by duty or custom is obliged, directly or indirectly in any way or to any degree, to construct, repair, or maintain.

**The PERMIT HOLDER is the CURRENT LAND OWNER.
Security shall ONLY be returned to the signatory of the
Landscape Agreement or their designates.**



PROJECT INFORMATION

PROJECT ADDRESS	4698 LAKESHORE ROAD, KELLOWNA BC, V5M1M3
LEGAL DESCRIPTION	PLAN KAP29678 SECTION 15 LOT A TOWNSHIP 28 LAND DISTRICT 54
APPLICABLE ZONING REGULATION	CITY OF KELLOWNA
APPLICABLE BUILDING REGULATION	CURRENTLY G-2, REZONING APPLICATION FOR G-2
BUILDING CODE	BCBC 2012

ZONING ANALYSIS

C3 (PROPOSED REZONING)

NET COVERAGE	
NET AREA	15.9842 AC (110.6222 DAI)
NET AREA CONTRACT ALLOWED (50%)	7.9921 AC (55.3111 DAI)
NET COVERAGE PROPOSED	7.9921 AC (55.3111 DAI)
PROPOSED AREA	
MAX COMMERCIAL P&U, ALLOWED 1/20	11.9842 AC (110.6222 DAI)
PROPOSED NET COMMERCIAL AREA	11.9842 AC (110.6222 DAI)
MAX RESIDENTIAL P&U, ALLOWED	11.9842 AC (110.6222 DAI)
PROPOSED RESIDENTIAL AREA	11.9842 AC (110.6222 DAI)
TOTAL PROPOSED AREA	23.9684 AC (171.2444 DAI)
MAINTAIN TREES AND SETBACKS	
MAINTAIN TREES ALIGHT PROPOSED	43.17' X 10.0' DAI & 3 STORIES
MAINTAIN TREES ALIGHT PROPOSED	43.17' X 10.0' DAI & 3 STORIES
FRONT YARD SETBACK	30' DAI (30' DAI)
FRONT YARD PROPOSED	30' DAI (30' DAI)
REAR YARD YARD SETBACK	40' DAI (30' DAI)
REAR YARD PROPOSED	40' DAI (30' DAI)
REAR YARD YARD SETBACK PLAYING STREET	30' DAI (30' DAI)
REAR YARD PROPOSED	30' DAI (30' DAI)
REAR YARD YARD SETBACK PLAYING STREET RUNZON	23.97' X 10.0' DAI & 1/2 HALF BUILDING
REAR YARD PROPOSED	40.64' X 10.0' DAI
BULKING STORAGE	15.9877

PARKING REQUIREMENTS

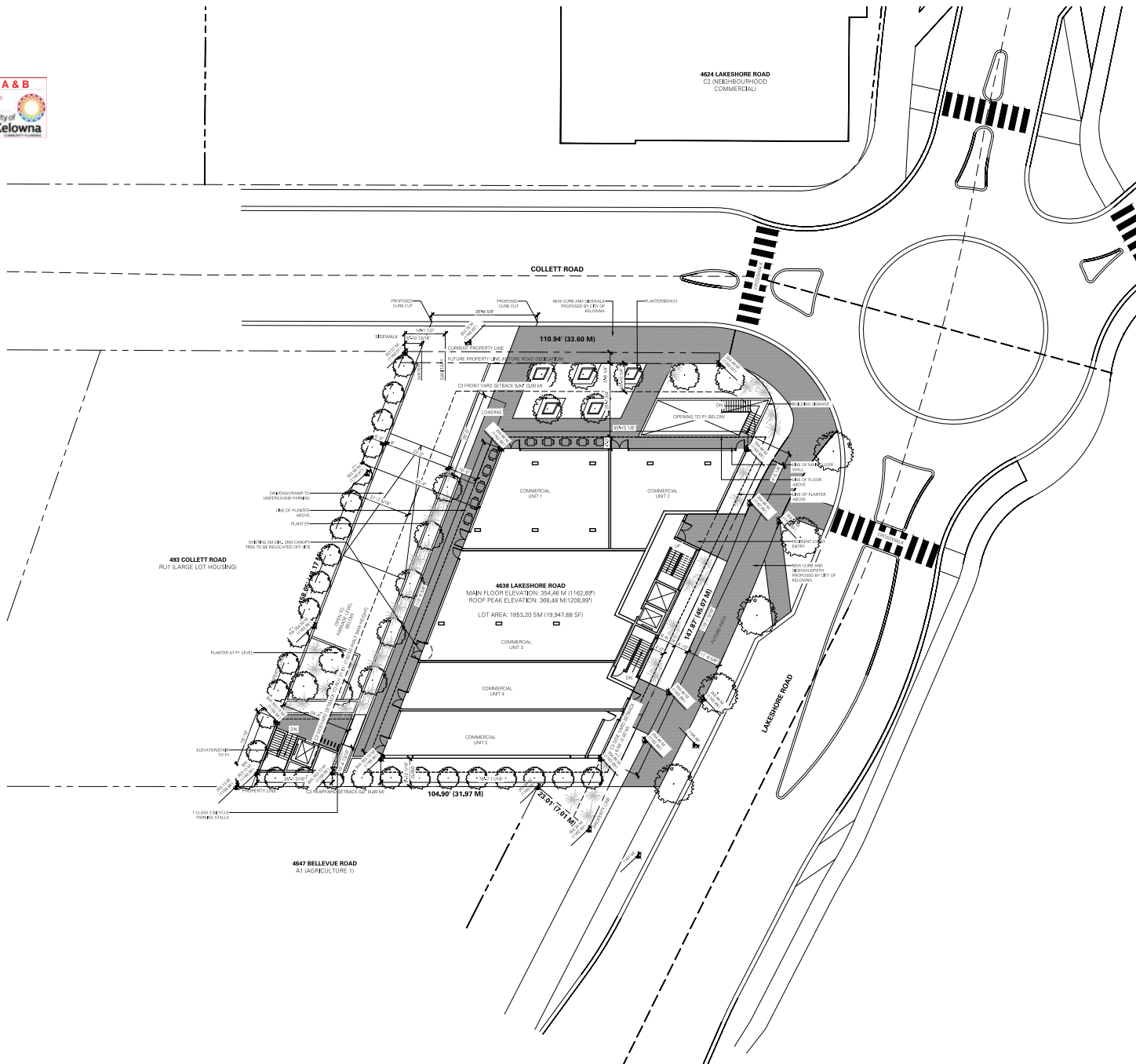
RESIDENTIAL	
APARTMENT HOUSING	1 PER UNIT 1 REFRIG STALL PER 7 UNITS
COMMERCIAL	
FOOD PRIMARY ESTABLISHMENT 1,500 SF OR BEATS	1 PER FEAT 15 STALLS
OTHER (1,000 SF)	1.5 PER 100 SQ SM (100% SF) 2 STALLS
RETAIL/RETAIL SALES (3,000 SF)	3 PER 100 SM (100% SF) 3 STALLS
RETAIL STORE, CONVENIENCE STORE <1000 SM (3,300 SF)	3 PER 100 SM (100% SF) 6 STALLS
DOCTOR'S OFFICE (3,000 SF)	3 PER 100 SM (100% SF) 9 STALLS
REQUIRED REFRIG STALLS	11 STALLS > 2 REFRIG 20 TB < 2 REFRIG
REQUIRED COMMERCIAL PROPOSED COMMERCIAL	37 STALLS 37 TB < 1

LOADING REQUIREMENTS

COMMERCIAL	1 PER 1000 SM (20,451.43 SF)
PROPOSED	1

BICYCLE PARKING REQUIREMENTS

RESIDENTIAL	CLASS 1 (R2 PER DWELLING UNIT) CLASS 2 (R2 PER DWELLING UNIT)
COMMERCIAL	CLASS 1 (R2 PER 100 SM (1076A SF) CLASS 2 (R2 PER 100 SM GLA (1076A SF))
REQUIRED CLASS 1 PROPOSED CLASS 1	7 IS RESIDENTIAL, 2 COMMERCIAL 11 (9 RESIDENTIAL, 2 COMMERCIAL)
REQUIRED CLASS 2 PROPOSED CLASS 2	7 7



D'ARCY JONES ARCHITECTURE INC.

304-175 Broadway East
Vancouver BC V6T 1W2
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F 604 668 2231
www.bentley.com

SCALE:

DATE:

2017-09-19

DRAWN:
BR

CHECKED:
DJ

REVISION:

ISSUE:

REFERENCES

CONSTANT.

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DO NOT SCALE THESE DRAWINGS

All dimensions to be verified by contractor, trades or suppliers. Any discrepancies shall be brought to the attention of the Architect.

LAKE SHORE KELOWNA
4638 LAKE SHORE ROAD
KELOWNA BC

A0.0

SITE PLAN

SCHEDULE A & B	
This forms part of application	
# DP17-0190	
Planner Initials	AC
 City of Kelowna <small>City of Kelowna</small>	



D'ARCY JONES ARCHITECTURE INC.

304-175 Broadway East
 Vancouver BC V6T 1A2
 T 604 669 2226
 F 604 669 2221
 email@dkjarcjones.com

SCALE:
1/16" = 1'0"

DATE:
2017-07-26

DRAWN:
(DJ)

CHECKED:
(DJ)

REVISION:
-

ISSUE:
-

CONSULTANT:
-

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LAKESHORE KELOWNA
 4638 LAKESHORE ROAD
 KELOWNA BC

A0.2

EXISTING SITE CONTEXT

SCHEDULEA & B

This forms part of application
DP17-0180

Planner
Initials

AC

City of
Kelowna

COMMUNITY PLANNING



D'ARCY JONES ARCHITECTURE INC.
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mail@darcyjones.com

SCALE:

1/16" = 1'0"

DATE:

2017-07-26

DRAWN:

DATE:

2017-07-26

CHECKED:

DATE:

2017-07-26

REVISION:

DATE:

2017-07-26

ISSUE:

DATE:

2017-07-26

CONSULTANT:

DATE:

2017-07-26

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LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

A0.3

AERIAL CONTEXT



LAKESHORE STREETSCAPE
SCALE: N/A



COLLETT STREETSCAPE
SCALE: N/A

D'ARCY JONES ARCHITECTURE INC.

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Vancouver BC V6T 1V2
T 604 669 2226
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SCALE:

1/16" = 1'0"

DATE:

2017-06-12

DRAWN:

CJ

CHECKED:

REVISION:

ISSUE:

CONSULTANT:

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LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

A0.4b

STREETSCAPE

SCHEDULE

A & B

This forms part of application

DP17-0180

Planner Initials

AC

City of Kelowna

COMMUNITY PLANNING



SOUTH EAST CORNER
JUNE 21, 9:00AM



WEST FACING BALCONIES
JUNE 21, 3:00PM

D'ARCY JONES ARCHITECTURE INC.

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Vancouver BC V6T 1Y9
T 604 689 2225
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mail@darcyjones.com

SCALE:

1/16" = 1'-0"

DATE:

2017-07-26

DRAWN:

01

CHECKED:

02

REVISION:

ISSUE:

CONSULTANT:

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All dimensions to be verified by contractor, trades or suppliers. Any discrepancies shall be brought to the attention of the ARCHITECT.

Any errors or omissions on this drawing shall be reported to D'ARCY JONES ARCHITECTURE INC. for identification and revision

LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

A0.5

RENDERINGS

SCHEDULE A & B	
This forms part of application # DP-17-0180	
Planner Initials	AC
City of Kelowna COMMUNITY PLANNING	



NORTH WEST CORNER
JUNE 21, 7:30PM

D'ARCY JONES ARCHITECTURE INC.
204-178 Broadway East
Vancouver BC V6T 1Y6
T 604 689 2235
F 604 689 2231
mjd@darcyjones.com

SCALE:
1/16" = 1'-0"

DATE:
2017-07-25

DRAWN:
DJ

CHECKED:
DJ

REVISION:
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ISSUE:
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CONSULTANT:
-

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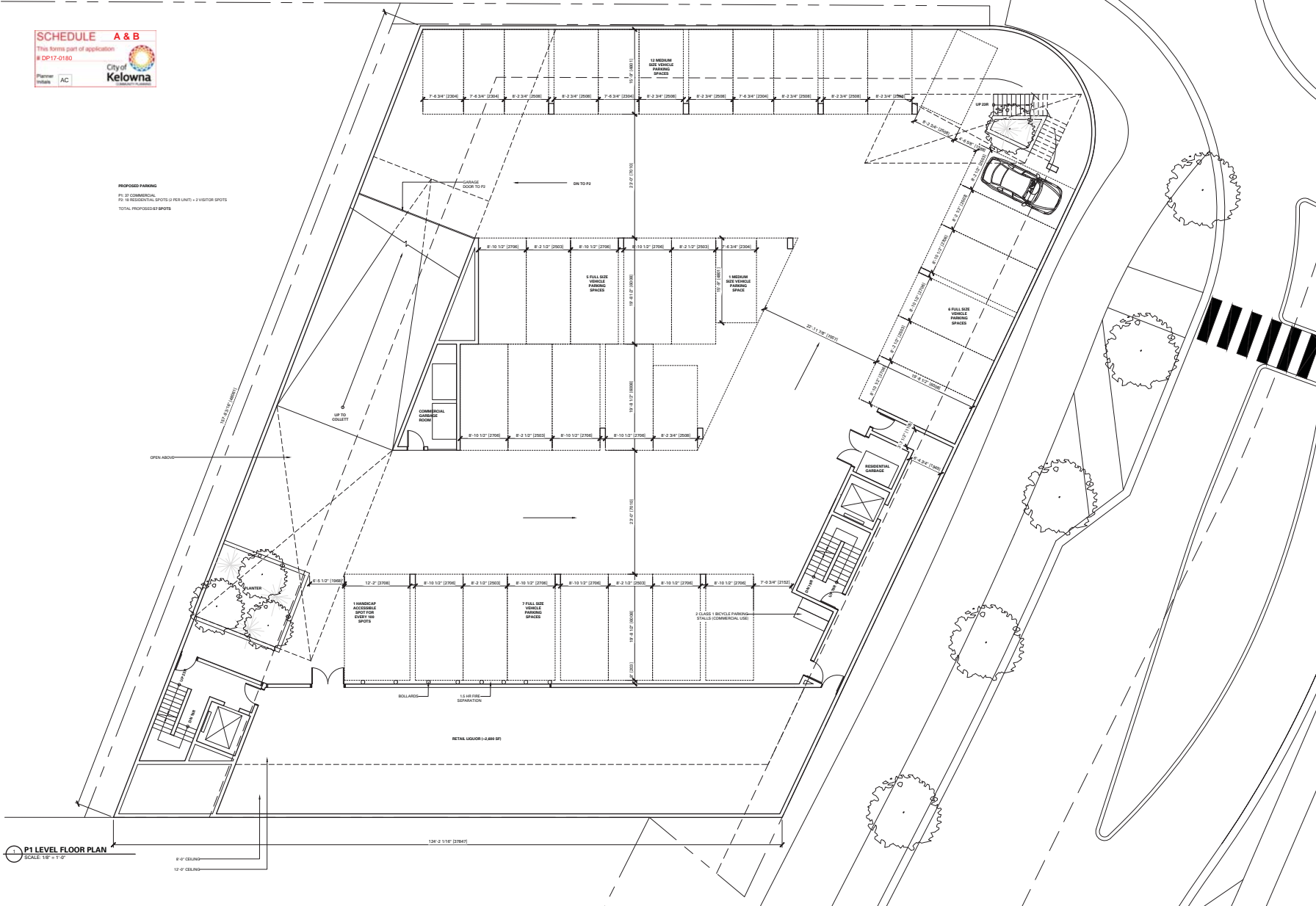
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LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

A0.6
RENDERINGS



PROPOSED PARKING
P1 OF COMMERCIAL
P1 16 RESIDENTIAL SPOTS (2 FULL LENGTH + 14 VISITOR SPOTS)
TOTAL PROPOSED SPOTS



P1 LEVEL FLOOR PLAN
SCALE: 1/8" = 1'-0"

8'-0" CEILING
12'-0" CEILING

D'ARCY JONES ARCHITECTURE INC.

304-175 Broadway East
Vancouver, BC V6S 1K2
T: 604 689 2255
F: 604 689 2251
m: 604 689 2251

SCALE:
1/8" = 1'-0"

DATE:
2018-01-14

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BR

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DJ

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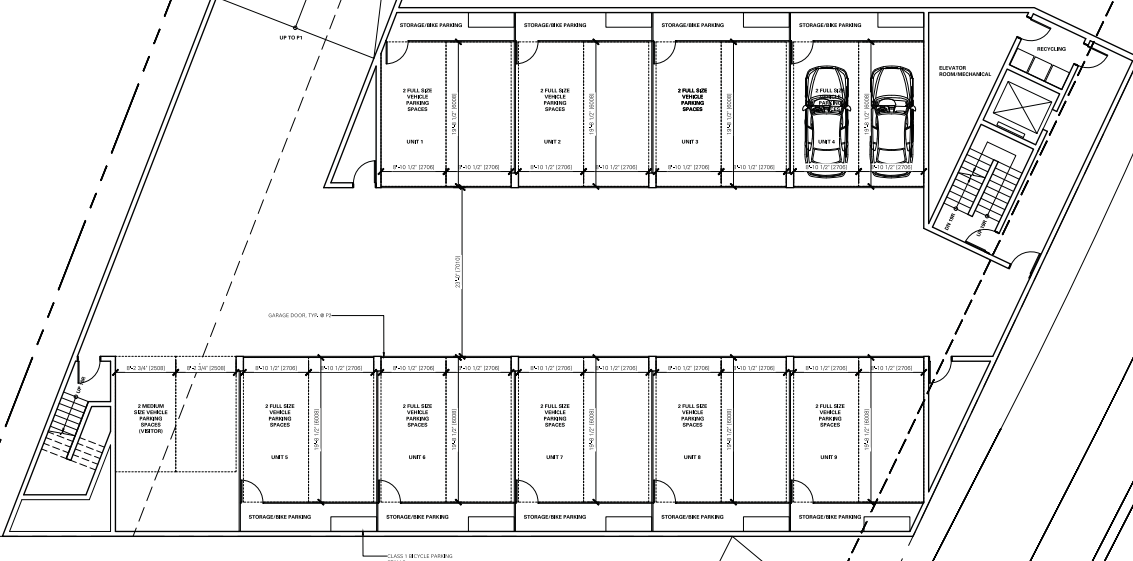
LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

A2.1

PARKING LEVEL 1



PROPOSED PARKING
P1: 50 COMMERCIAL
P2: 100 RESIDENTIAL SPOTS @ 1000 UNIT = 2 RESIDENT SPOTS
TOTAL PROPOSED BY SPOTS



P2 LEVEL FLOOR PLAN
SCALE: 1/8" = 1'-0"

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304-175 Broadway East
Vancouver BC V6T 1A2
T: 604 669 2255
F: 604 669 2251
info@dkjarc.com

SCALE:
1/8" = 1'-0"

DATE:
2017/07/26

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JL

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DJ

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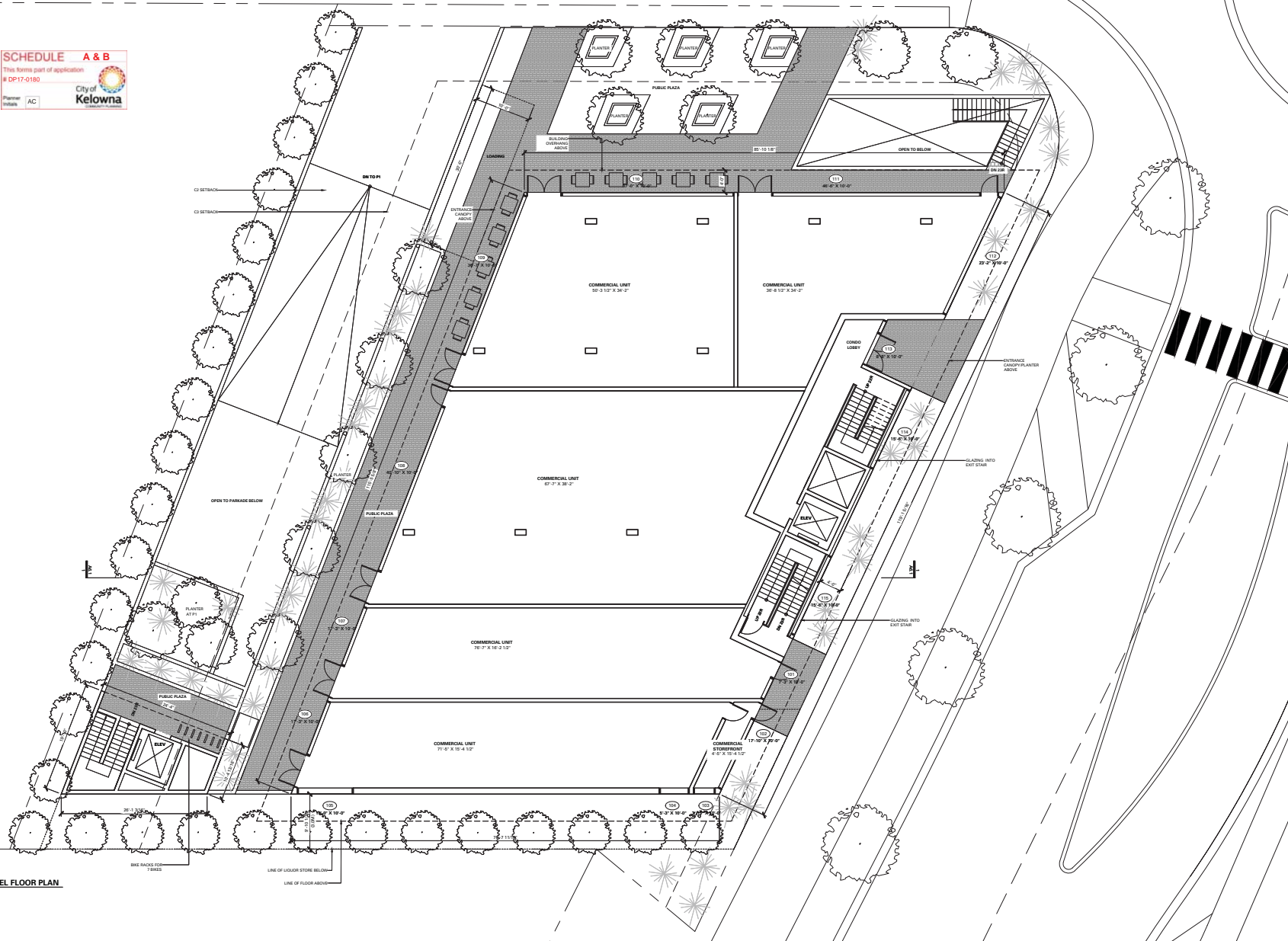
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LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

A2.2
PARKING LEVEL 2



GROUND LEVEL FLOOR PLAN
SCALE: 1/8" = 1'-0"

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304 - 175 Broadway East
Vancouver, BC V6S 1K2
T 604 689 3235
F 604 689 2251
mail@darcyjones.com

SCALE:
1/8" = 1'-0"

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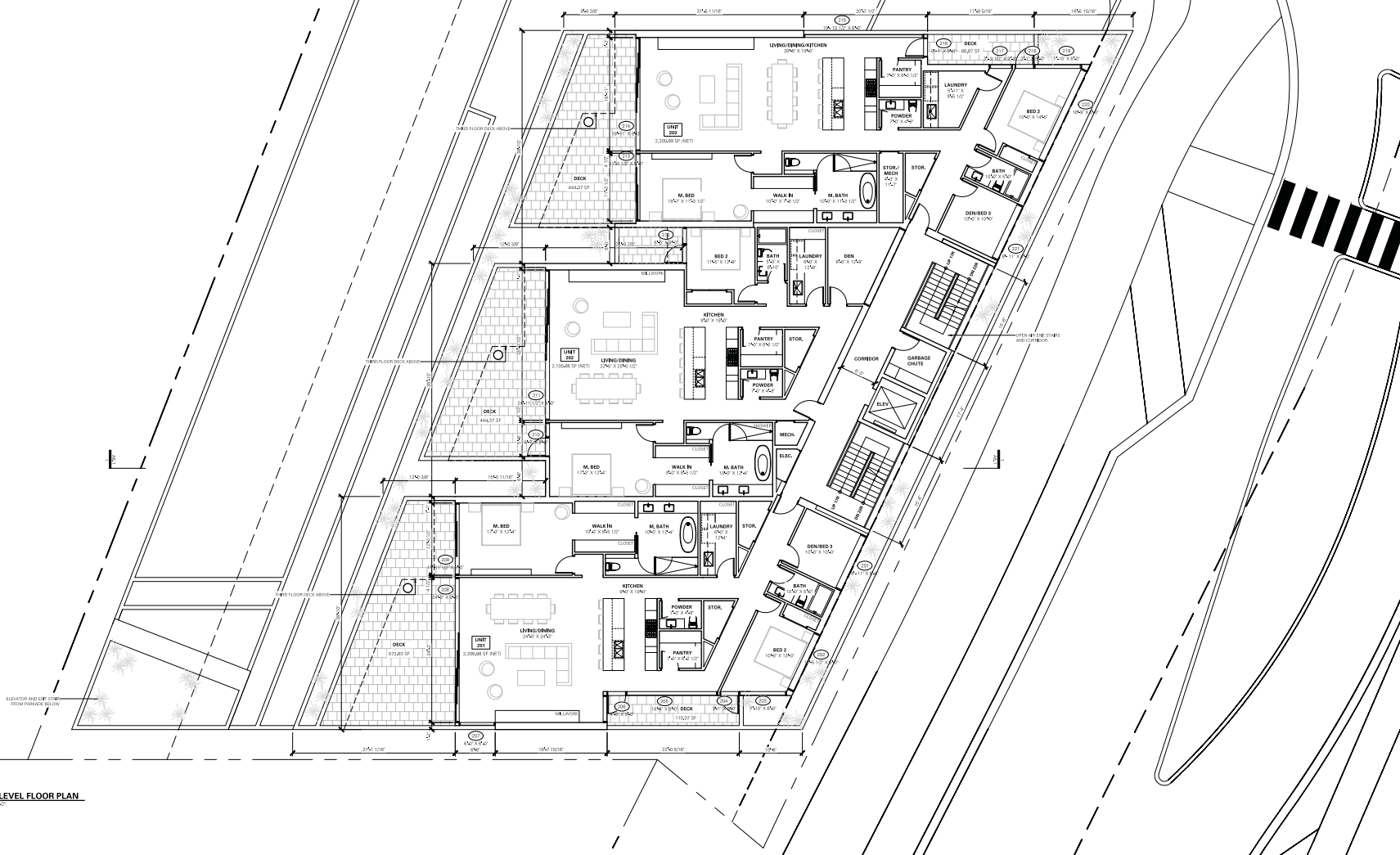
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LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

A2.3
GROUND LEVEL



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 Vancouver BC V6T 1A2
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SCALE:
 1/8" = 1'-0"

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 2017-07-25

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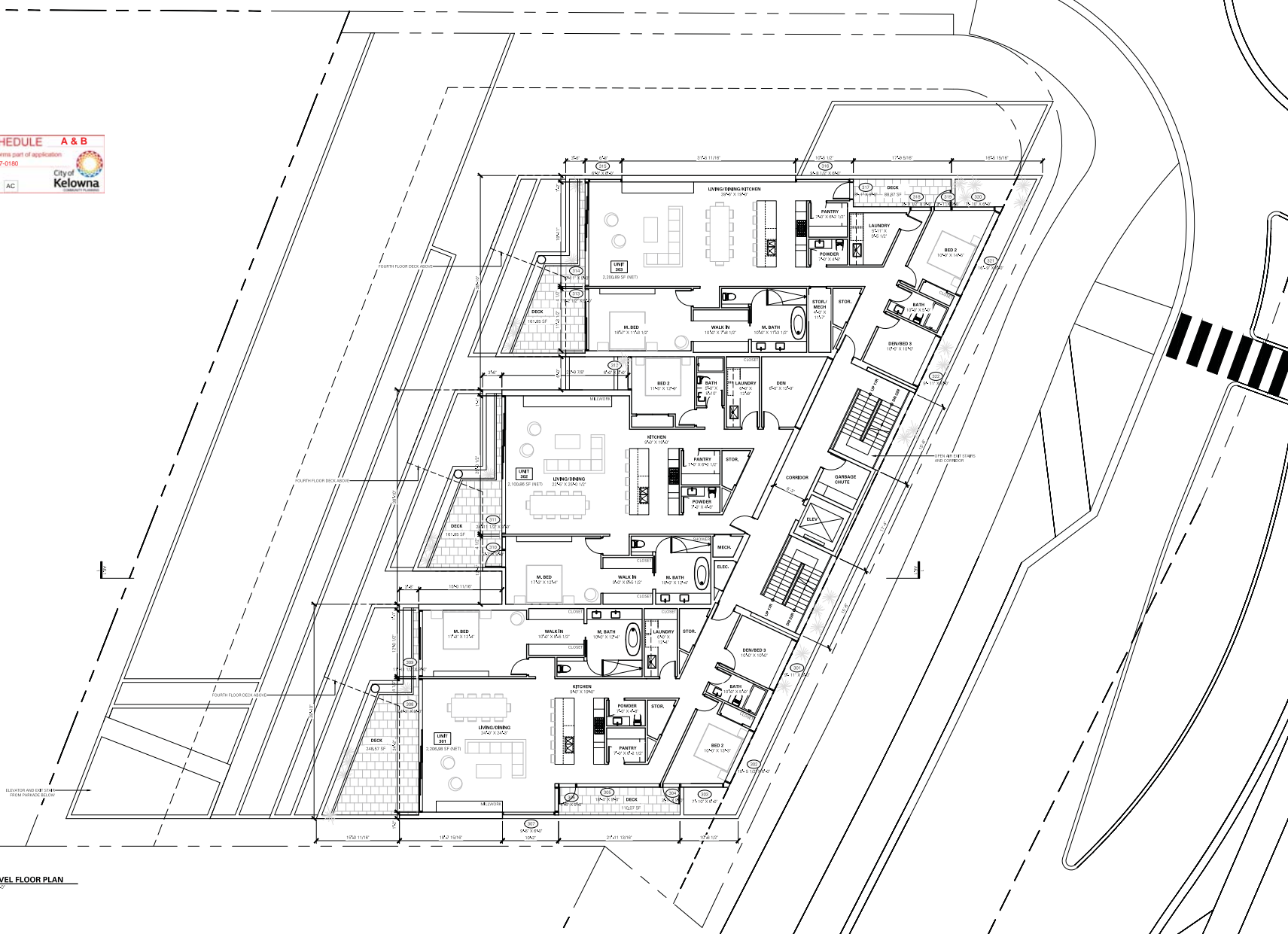
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LAKESHORE KELOWNA
 4638 LAKESHORE ROAD
 KELOWNA BC

A2.4
 SECOND LEVEL

SCHEDULE A & B
This form part of application
DP17-0180
City of Kelowna
Planner Initials AC



THIRD LEVEL FLOOR PLAN
SCALE: 1/8" = 1'-0"

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info@darcyjones.com

SCALE:
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DJ

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ISSUE:
-

CONSULTANT:
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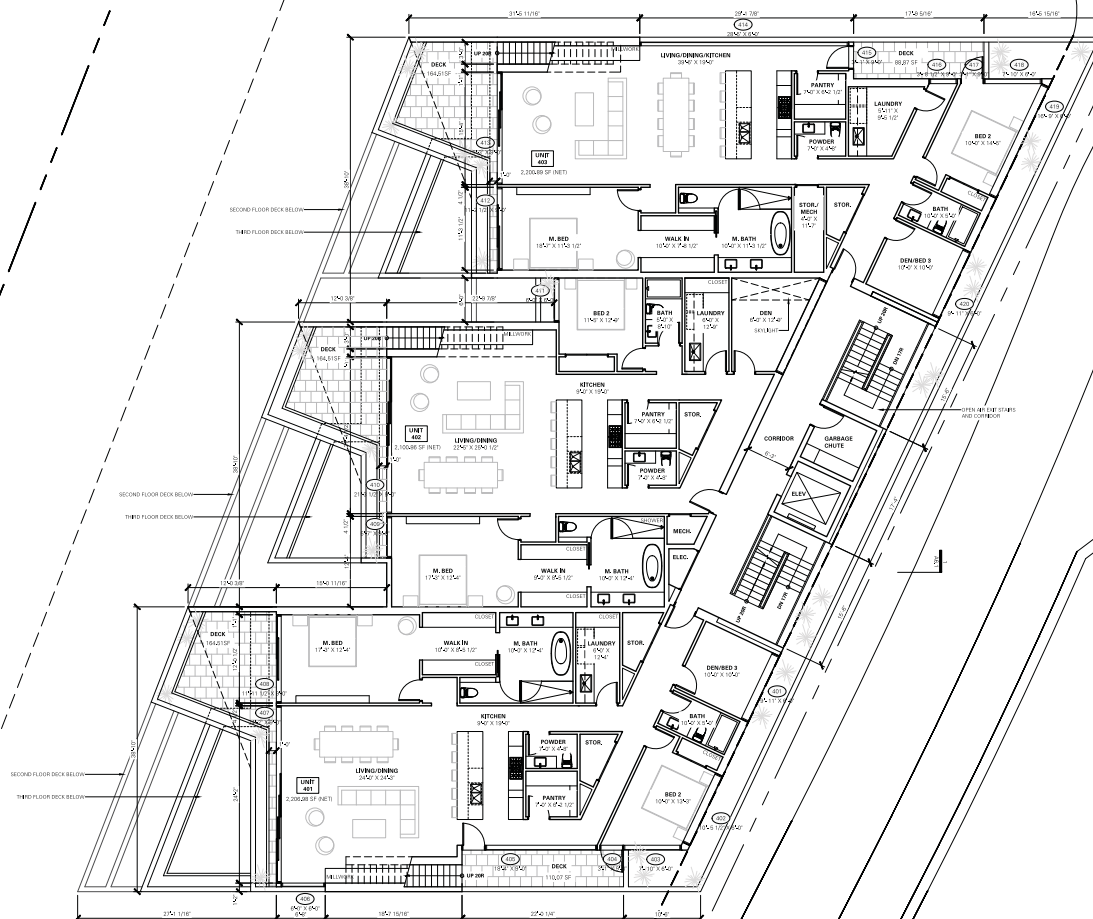
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LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

A2.5

THIRD LEVEL



FOURTH LEVEL FLOOR PLAN
SCALE: 1/8" = 1'-0"

D'ARCY JONES ARCHITECTURE INC.

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Vancouver BC V6T 1A2
T: 604 699 2255
F: 604 699 2251
info@darcyjones.com

SCALE:

1/8" = 1'-0"

DATE:

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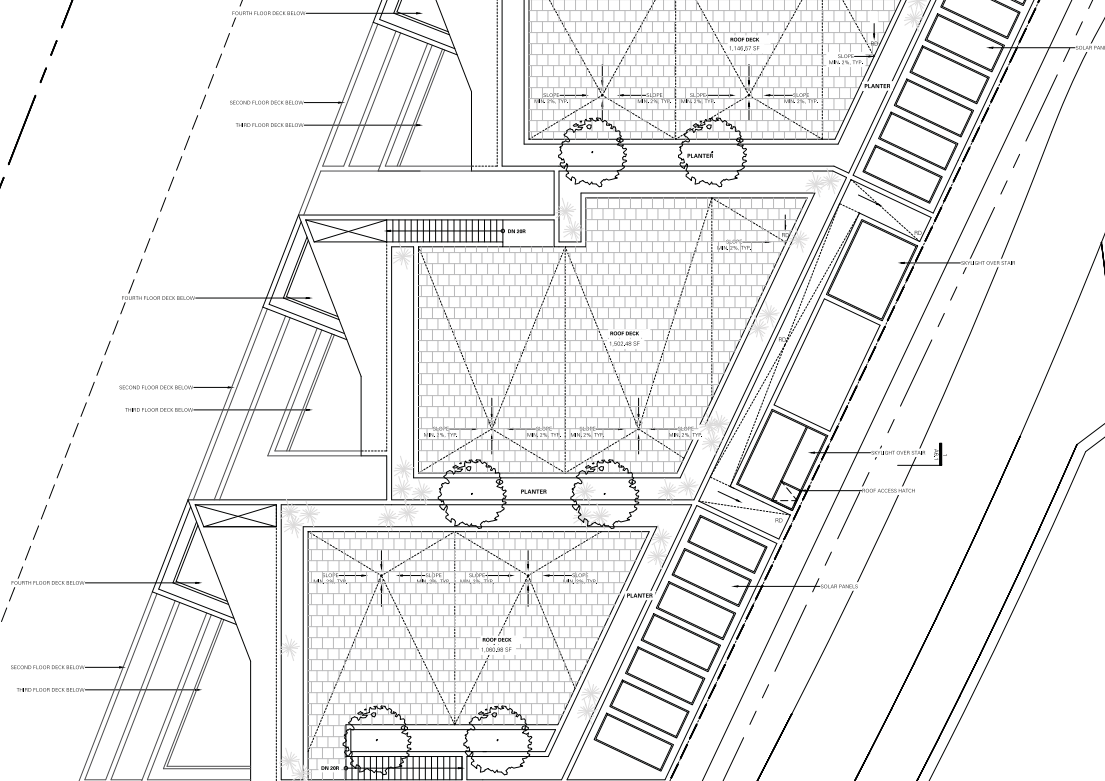
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LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

A2.6

FOURTH LEVEL



ROOF LEVEL FLOOR PLAN
SCALE: 1/8" = 1'-0"



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3054-175 Broadway East
Vancouver BC V6T 1A2
T 604 609 2255
F 604 609 2251
info@djarcyjones.com

SCALE:
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LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

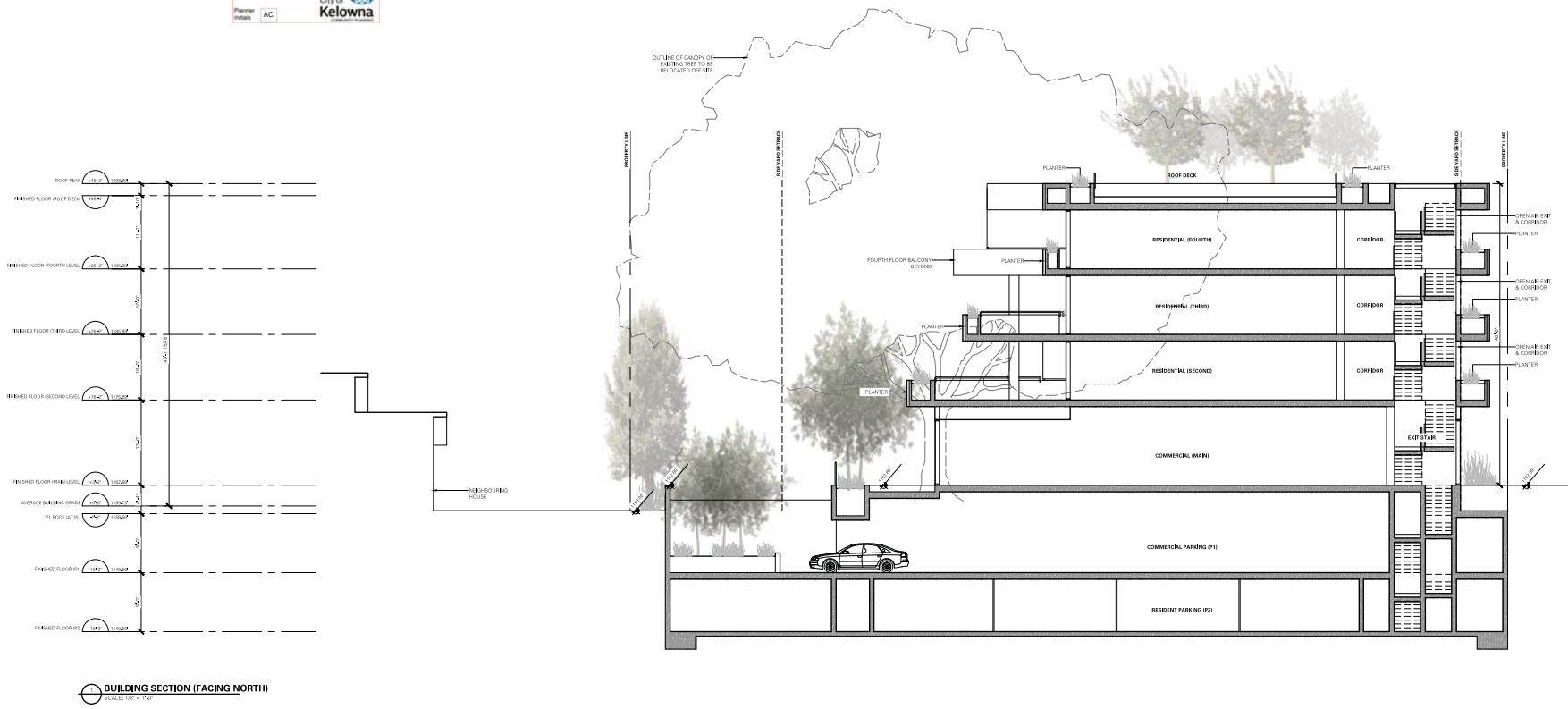
A2.7
ROOF LEVEL

SCHEDULE A & B

This forms part of application
DP17-0180

Planner Initials AC


City of
Kelowna



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304-175 Broadway East
Vancouver BC V6T 1A2
T 604 609 2255
F 604 609 2251
info@darcyjones.com

SCALE:
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2017/06/29

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DJ

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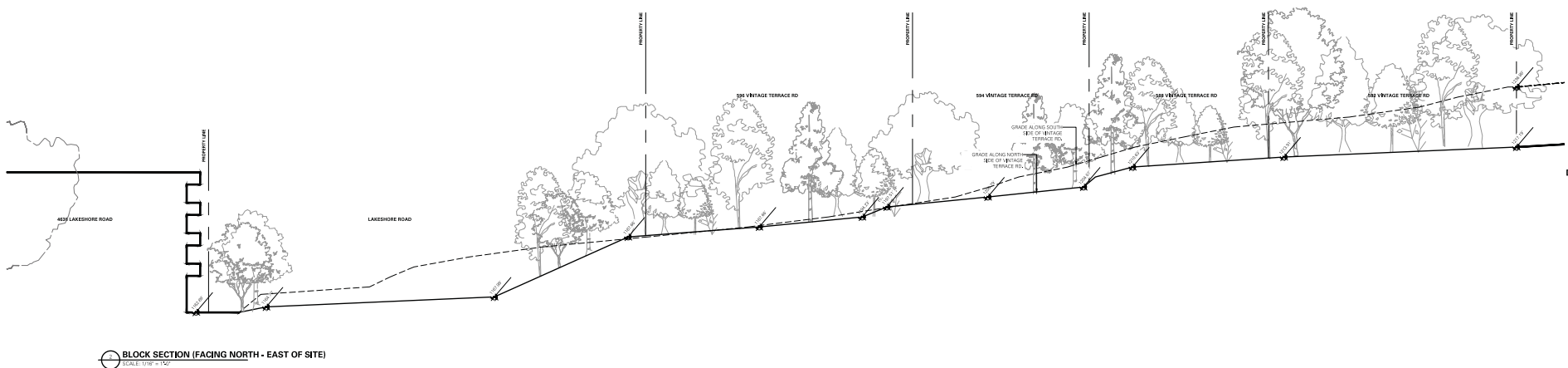
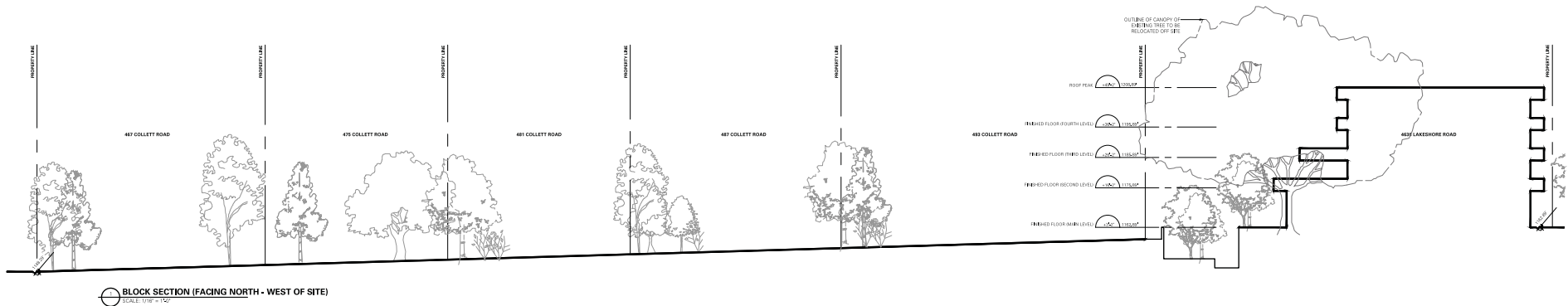
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LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

A6.1

BUILDING SECTION



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Vancouver BC V6T 1A2
T 604 609 2255
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info@darcyjones.com

SCALE:
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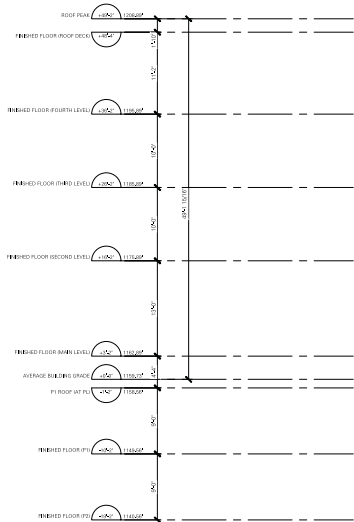
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4638 LAKESHORE ROAD
KELOWNA BC

A6.2
SITE SECTIONS

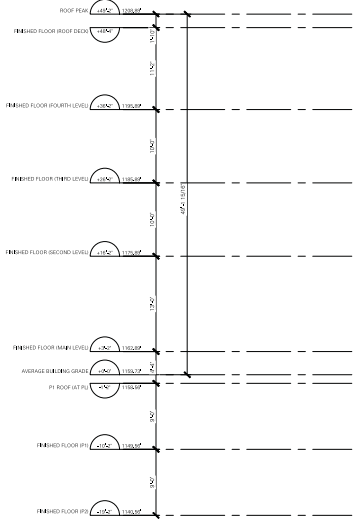




- MATERIALS**
- 1 EXPOSED CONCRETE
 - 2 CLAY BRICK (RED)
 - 3 METAL PANEL (CHARCOAL)
 - 4 ALUMINUM FRAME WINDOWS (CHARCOAL)
 - 5 STEEL GUARD (CHARCOAL)



WEST ELEVATION
SCALE: 1/8" = 1'-0"



- MATERIALS**
- 1 EXPOSED CONCRETE
 - 2 CLAY BRICK (RED)
 - 3 METAL PANEL (CHARCOAL)
 - 4 ALUMINUM FRAME WINDOWS (CHARCOAL)
 - 5 STEEL GUARD (CHARCOAL)



EAST ELEVATION
SCALE: 1/8" = 1'-0"



D'ARCY JONES ARCHITECTURE INC.

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Vancouver BC V6T 1W2
T: 604 689 2235
F: 604 689 2231
info@darcyjones.com

SCALE:

1/8" = 1'-0"

DATE:

2017-07-25

DRAWN:

by

CHECKED:

DJ

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LAKESHORE KELOWNA
4638 LAKESHORE ROAD
KELOWNA BC

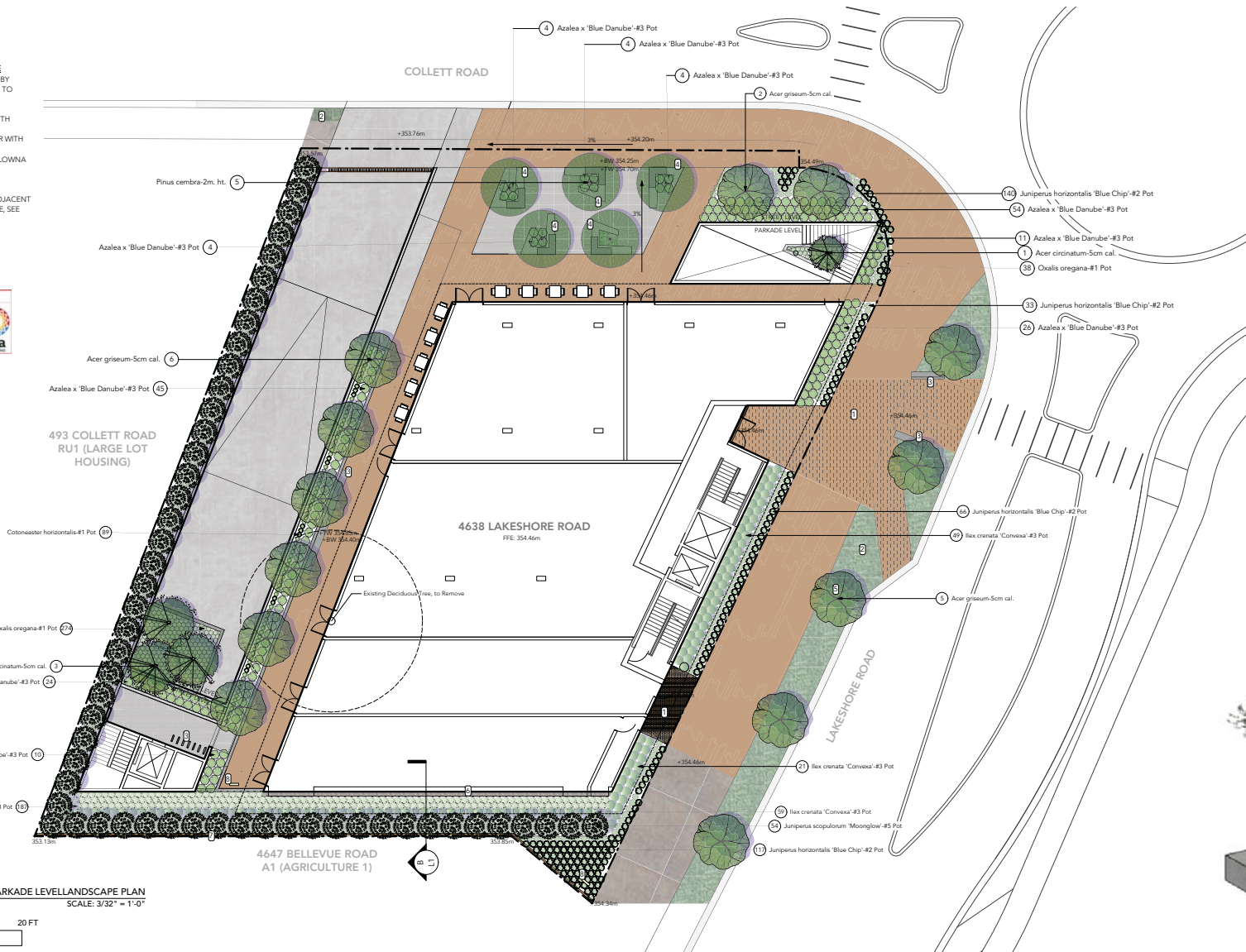
A7.2
ELEVATIONS

GROUND LEVEL LANDSCAPE

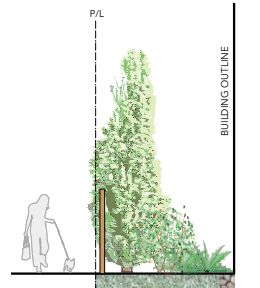
1. PROMENADE™ PLANK PAVEMENT BY UNILOCK, CUSTOM COLOURS TO MATCH BUILDING FACADE
2. SODDED LAWN
3. CIP CONCRETE SEAT WALL WITH WOOD TOP
4. CUSTOM CONCRETE PLANTER WITH WOOD BENCH TOP, SEE B/L1
5. STREET TREES TO CITY OF KELOWNA STANDARDS
6. GRAVEL STRIP
7. 6' HT CEDAR FENCE
8. BUFFER SIGN TO INDICATE ADJACENT AGRICULTURAL LAND RESERVE, SEE A/L1



1 GROUND LEVEL + PARKADE LEVEL LANDSCAPE PLAN
SCALE: 3/32" = 1'-0"



A SAMPLE BUFFER SIGN



B SOUTH BUFFER SECTION LOOKING WEST



C CUSTOM CONCRETE PLANTER WITH WOOD BENCH TOP



B REISSUE FOR REZONING 18-2-16
A REISSUE FOR REZONING 17-12-13

4638 LAKESHORE ROAD
Landscape Design
4638 Lakeshore Road
Kelowna, BC

4638 LAKESHORE RD LTD.
17090
Rezoning
June 2017

L1
CONCEPT PLAN - LEVEL 1

202-175 East Broadway, Vancouver, British Columbia, V5T 1W2, www.ennsgauthier.com

PLANT LIST

	Quantity	Latin Name	Common Name	Scheduled Size	Spacing	Notes
TREES:						
	19	Acer griseum	Paperbark Maple	5cm cal.		B&B Specimen, Multistem.
	4	Acer circinatum	Vine Maple	5cm cal.		B&B Specimen, Multistem.
CONIFERS:						
	5	Pinus cembra	Swiss Stone Pine	2m. ht.		B&B Specimen, Twisted shape
	49	Juniperus scopulorum 'Moonglow'	Moonglow Juniper	#5 Pot		
SHRUBS:						
	264	Arctostaphylos uva-ursi	Bearberry, Kinnikinnick	#1 Pot	1'0" o.c.	
	955	Azalea x 'Blue Danube'	Blue Danube Azalea	#3 Pot	2'0" o.c.	
	1151	Cotoneaster horizontalis	Rockspray or Rock Cotoneaster	#1 Pot	1'0" o.c.	
	51	Gaultheria shallon	Salal	#1 Pot	1'6" o.c.	
	73	Ilex crenata 'Convexa'	Japanese Holly	#3 Pot	2'0" o.c.	
	356	Juniperus horizontalis 'Blue Chip'	Blue Chip Juniper	#2 Pot	1'6" o.c.	
GROUNDCOVERS / FERNS:						
	402	Oxalis oregana	Rewood Sorrel	#1 Pot	2'0" o.c.	
	47	Polystichum munitum	Western Sword Fern	#3 Pot	1'8" o.c.	

NOTES:

1. ALL PLANT MATERIAL AND LANDSCAPING PRACTICES SHALL BE COMPLIANT WITH THE LATEST EDITION OF THE BCNA NURSERY STANDARD
2. IN CASE OF DISCREPANCY BETWEEN PLANT INFORMATION ON THE LIST AND ON THE PLAN, THE LATTER SHALL PREVAIL
3. FINAL SOFTSCAPE AND GRADING LAYOUTS AS WELL AS LOCATION AND SPACING TO BE APPROVED BY LANDSCAPE ARCHITECT IN THE FIELD PRIOR TO INSTALLATION
4. ALL PLANT MATERIAL TO BE MANUALLY WATERED FROM START OF INSTALLATION THROUGH THE END OF THE WARRANTY PERIOD
5. INSTALL TREE PROTECTION FENCING AROUND ALL EXISTING TREES TO CITY STANDARDS, INSTALL TREE PROTECTION FENCING ON NEW PLANTING IF PHASED INSTALLATION IS REQUIRED.

PLANT PRECEDENTS



Pinus nigra
Austrian pine



Acer circinatum
Vine Maple



Acer griseum
Paperbark Maple



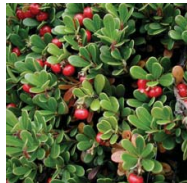
Azalea 'Blue Danube'
Evergreen Azalea



Juniperus scopulorum 'Medora'
Medora Rocky Mountain Juniper



Oxalis
Wood Sorrel



Arctostaphylos uva-ursi
Akebono Yoshino Cherry



Juniperus horizontalis 'Blue Chip'
Creeping Juniper



Cotoneaster horizontalis
Rock Cotoneaster



Ilex crenata 'Convexa'
Convex-Leaf Japanese holly

MATERIAL PRECEDENTS



BIKE RACK — STAINLESS STEEL



CONCRETE BENCH WITH WOOD TOP



UNILOCK PAVER

Mayor and Council
City of Kelowna

July 26, 2017



Your Worship and Council,

This letter is to substantiate our Rezoning and Development Permit application for a proposed four storey mixed use development at 4638 Lakeshore Road, to amend the site's zoning from the current C2 Neighbourhood Commercial Zone to the C3 Community Commercial Zone.

PROJECT INTRODUCTION

The project will be comprised of nine strata residential dwelling units on three floors and 10,598.4 square feet of ground commercial space. The three bedroom residential units will each be approximately 2,000 square feet. Each residential unit will have its own two-vehicle parking garage with dedicated bicycle storage. The ground level commercial units vary in size. The largest unit will be approximately 2,000 square feet. These intentionally small commercial floor areas will attract professional services, boutique retail and locally owned food and beverage tenants. The commercial units at grade and in parking level P1 will be serviced by 37 customer parking spaces.

The parcel is irregular in shape and has an uncommonly varied context. It is flanked by a major arterial route to the east, ALR land to the south, a single-family residential neighbourhood to the west, and existing commercial buildings to the north. The challenges of the site have been optimistically embraced as opportunities, to create a development that will be a lively civic focal point by combining small commercial spaces with gracious residential units "above the shops". The proposed project successfully meets three important goals: The privacy and massing of the of the adjacent single-family residential neighbourhood has been deferred to, a symbiotic relationship with the existing commercial uses at the corner of Collette Road and Lakeshore Road is strengthened, and the natural beauty of the adjacent ALR lands will inspire a lushly landscaped development that functions as community gateway between the country and the city.

CONFORMITY TO OFFICIAL COMMUNITY PLAN

The proposed development will be aligned with the City of Kelowna's Official Community Plan (OCP) and its vision. A new, low-rise mixed use development in this location will support the key goals of the OCP to contain urban growth by reducing urban sprawl and developing great neighbourhoods. To achieve this, the City of Kelowna is aiming to balance the projected need for approximately 20,100 housing units by 2030, by directing this growth to the Urban Core and its supporting Urban Centres.

The City of Kelowna is projecting the need for an additional 3,000,000 square feet of commercial space by 2030 to accommodate and service the projected population growth within the city. Much of this new commercial growth is projected to be in the Urban Centres, supported by policies that aim to ensure that these Centres develop as vibrant commercial nodes. However, small amounts of commercial space are expected in suburban areas to facilitate the development of complete suburbs.

An underlying theme of the OCP is to create compact communities served by transportation routes, to encourage active living, and to invest in efficient infrastructure. The OCP has policies to support resource allocations in the Urban Core with the purpose of making safe, accessible, high-quality living and working environments, as seen in the recent extension to the Lakeshore Road Multi-use Corridor and roundabout at Collette Road and Lakeshore Road.

The proposed site is located at this new roundabout, so the proposed project is ideally situated to support the OCP's growth objectives:

1. By design, the proposed residential units will be family-oriented in size and layout. Suited to young families or seniors, this accessible development will provide appealing multifamily housing choices in the area, which is an essential element for a vibrant, mixed-use community centre.
2. Daily destinations are nearby at Sunshine Market, Quality Greens, T-Bones and the new Public/Private Partnership with Worman at the Surtees Property. Lake Okanagan and the Bellevue Creek Linear Park is a short walk away.
3. The site is located directly adjacent to sustainable transportation options for residents, including a well-developed sidewalk, a public transit corridor on Lakeshore Road that directly links to major regional destinations, the Abbott St/Lakeshore Road Multi-use Corridor, the Mission Creek Greenway and Kelowna's growing bicycle network. Lastly, Lakeshore Road is a Priority One Snow Clearance Route.
4. The proposed development follows several other residential developments located on Lakeshore Road, which have been well received by their communities and provide location-efficient housing for families. The proposed development will help to meet this demand while helping support the growth of the emerging Community/Village Centre between Bellevue Creek and Collette Road.

PROJECT GOALS

The goal for this proposed development is to create a unique and high-quality contemporary mixed use project that meets the OCP's built form goals for the area, which includes *(m)ulti-unit buildings up to four storeys, including attached residential and apartments on arterial and secondary arterial roads to serve more than one neighbourhood*. Additionally, the proposed design references the City of Kelowna's zoning guidelines in detail, meeting and exceeding the Urban Design Development Permit Guidelines. The proposed design's key intention is to *convey a strong sense of authenticity through urban design that is distinctive for Kelowna while providing a scale and massing of commercial buildings that promotes a safe, enjoyable living, pedestrian, working, shopping and service experience*.

The proposed design will orient each unit to respect the private space of neighbouring units within the development and between the proposed development and the mature single-family neighbourhood to the west. By balancing the goals for privacy and civic gathering, the proposed development will bring visual interest and community vibrancy to this corner of Collette Road and Lakeshore Road.

The unique shape of the lot provides the opportunity for each unit to have a significant amount of street orientation, providing "eyes on the street" while contributing to a sense of participation in the public realm.

The adjacent natural beauty of the ALR land to the south of the proposed project is woven into the project. Carefully placed pine and maple trees, lush balconies and roof gardens will create a park-like setting, softening and almost completely surrounding the proposed development's low slung four storey massing with greenery.

DESIGN HIGHLIGHTS

1. High-quality concrete construction, finished with traditional red brick.
2. Brick red sidewalks and public plazas create a strong sense of place on a busy roundabout.
3. Public plaza with built-in wood seating is softened with evergreen landscaping.
4. Evergreen plantings soften four wrap-around balcony and roof overhangs at all floor levels.
5. Horizontal massing makes the building appear smaller and lower.
6. Stepped massing on the west elevation transitions the 4 storey massing on Lakeshore Road to the single family massing of the neighbour to the west.
7. Exit stairs and the residential common hallways are exposed and open to Lakeshore Road, enlivening the public face of the proposed development, in lieu of a blank wall. Combined with the landscaped planters, the building will quietly fit in with the other buildings on the roundabout.

ATTACHMENT B	
This forms part of application # Z17-0077	
Planner Initials	AC
 City of Kelowna COMMUNITY PLANNING	

8. The commercial units are almost completely surrounded by glass, making the ground level open and transparent. From any perspective, the commercial units will add an inviting civic presence to the roundabout.
9. In a hot summer climate, overhangs and locating the largest plaza north on the site will allow community users to find shade. The plaza on the west will be a quiet and sunny alternative for the spring and fall.
10. The entire plaza is lushly landscaped, where even the parking ramp is softened with vines and shrubs.
11. A commercial retail unit located in the P1 parking level brings life and activity to the entrance zone at the bottom of a landscaped ramp.
12. The commercial spaces at grade are served by 37 parking stalls inside a uniquely landscaped P1 parking level provides ample parking in a safe, covered and pleasing space. The P1 parking level has two landscaped light wells and high ceilings, turning a space that is typically dark and cramped into an inviting "foyer".
13. Residential parking is on a partial P2 level, where each unit will have a private secure garage with combined bike storage. The residential units will share 2 guest parking spaces.
14. 7 bicycle stalls will be provided at the street level to accommodate a growing "car-lite" lifestyle.
15. Architectural detailing and guardrails made with dark metal will simulate traditional wrought iron.
16. Dark framed windows will simulate traditional commercial steel windows.
17. Mature street trees bring the landscape of the ALR land into the site, and down into the parking levels.
18. Glass guardrails require constant upkeep to stay clean and hinder the privacy of occupants and neighbouring sites. This proposed development incorporates low brick parapet guardrails with landscaped planters at all locations, to create a feeling of solidity and permanence. Sightlines into and outward from the proposed development are fine-tuned for privacy, natural light, and to impede headlight pollution into the residential units on Lakeshore Road.
19. Shading for the residential units is provided by the balcony above. Each unit's outdoor balcony space has a balance of full sun and full shade.
20. Planters in front of all west facing windows control the overlook between residential units, creating complete internal privacy.
21. A roof deck with mature trees softens the top floor massing from the surrounding area and from Lakeshore Road. 4th floor residential units will use these private rooftop deck areas in addition to their private west-facing balconies.
22. Solar panels on the roof will contribute electricity back into the grid, to operate common area lighting.

CONTRIBUTING TO KELOWNA'S SUSTAINABILITY

The proposed project acknowledges that a growing city must encourage environmental and economical stewardship to be truly sustainable.

According to recent community input, the citizens of Kelowna want a city where the economy is growing, vibrant and attracting new business. To create a sustainable city, environmental protection, economic growth, social development and cultural vibrancy need to be balanced. In any city, measuring the number of businesses with employees provides a snapshot of the efforts to attract and retain business. According to real estate data provider CoreNet Global, in 2017 North American workplaces average 151 square feet per employee. The proposed development will provide 10,598.4 square feet of new commercial space, with a net gain of 7,000 square feet compared to the current restaurant building on the site. This will create the space to generate at least 100 new full and part-time jobs in the community.

Reducing automobile trips is a significant component of reducing greenhouse gas emissions. The proposed development's central location is a short walk to shopping, transit routes and bicycle facilities to ensure that living a "car-lite" lifestyle is not only possible, but a significant economic, lifestyle and convenience advantage for the proposed development's residents. The proposed development's design assumes that walking, cycling and transit will be the primary transportation options for residents, supplemented by private two-car parking garages for residents whose jobs and lives require vehicle transportation.



Respecting the natural environment is a priority and the proposed development's objective is to protect and enhance natural areas, including expanding the open space network that protects sensitive ecosystems and links important habitat areas. This proposal will provide frontage upgrades to the Lakeshore Road Multi-use Corridor, the future Collette Road Multi-use Corridor as well as relocate the existing overhead transmission lines underground. A much-loved mature London plane tree will be moved by a professional arborist to the adjacent ALR land, where it will continue to be a neighbourhood icon.

A healthy natural environment positively impacts quality of life and economic vitality. To preserve the biodiversity and ecological landscape from development pressures, the proposed development will be replacing the entire existing tree canopy at the perimeter of the property for the benefit of the entire City of Kelowna, not just the private residents, owners and commercial tenants. The proposed development will provide an integrated ecosystem management approach to ensure that the environment is afforded a high priority in land use related decisions.

The proposed development will also feature residential living spaces with significant western exposure, ensuring bright, healthy outdoor space for each unit with solar gain benefits that will reduce the building's overall energy demand. The proposed development will create a net housing area gain, a net commercial space gain with no environmental degradation.

SUMMARY

The proposed development will be a positive, attractive and inspirational project that will help to support and create a vibrant neighbourhood node. This type of high-quality sensitive infill development is consistent with existing land uses and will represent positive, incremental change in the neighbourhood, providing additional infill housing in a location where it makes perfect sense.

Thank you for your consideration.

Sincerely,

Steve Nicholson
Strandhaus Developments Inc.



D'Arcy Jones
Architect AIBC
D'Arcy Jones Architecture Inc.

ATTACHMENT		B
This forms part of application		
# Z17-0077		
Planner Initials	AC	 City of Kelowna COMMUNITY PLANNING

The Magic of Tree Lined Streets.



The Magic of Tree Lined Streets. Our ancestors, who hadn't yet invented air-conditioning or automobiles, understood this. They knew that city building and tree planting went hand in hand. Thus, long before the introduction of zoning codes, cities passed laws requiring trees to be planted along the public rights-of-way.³

As any orchard farmer knows, trees are an investment. As Kelowna grows, its right-of-ways

are not being consistently planted or re-planted with trees, making our public domain hotter, less pedestrian-friendly and less beautiful.

The Bellevue will plant 12 mature trees adjacent to Collette and Lakeshore, bringing the natural beauty of the adjacent farmland and treed grassland right into public plaza with 17 more mature shade trees along the property lines will protect and enhance The Bellevue's

adjacent neighbour's privacy.

Once complete, The Bellevue's combination of traditional red brick and mature trees will create an ambience that comfortably seems like it was always there.

This community hub will be enjoyed by the whole neighbourhood in every season.

³ Sarah Kobos, strongtowns.org

Parking should be for people, not just for cars.



Surface parking lots create cities that are hostile to pedestrians and neighbourhoods. Parking lots are lifeless, hot in the summer, cold and windy in the winter, and unsafe after dark. When commercial uses are next to residential areas, surface parking lots are the blight no one wants to live near.

Current urban planning guidelines, virtually unchanged since the 1950's, continue to allow and encourage these parking craters¹ to disrupt urban life, deadening our beautiful Okanagan environment.

Parking creates a vicious cycle, when more parking was provided, more people drove. This has a huge impact on a city's health.²

If we want Kelowna's future to include small-scale incremental developments that encourage walking, boost our economy and improve our existing neighbourhoods, we need to ensure that our zoning codes enable high-quality architecture and design to happen. If we care about our neighbourhood's futures, we need to care about parking.

The Bellevue will reverse the trend of surface parking lots that overwhelm Kelowna. Its hidden parking lot will be enlivened by a commercial unit, will have high ceilings and will have two beautiful courtyards full of lush plants bathed in natural light. Which will leave lots of space at the corner of Collette and Lakeshore for the best kind of city life to happen.

¹ Angie Schmitt, usa.streetsblog.org

² Norm Garrick, University of Connecticut

To: Jason Monteleone, RM Kelowna, BC TR 0721

From: Lynn Lashuk, P.Ag
Manager, Agriculture Kelowna, BC TR 0721

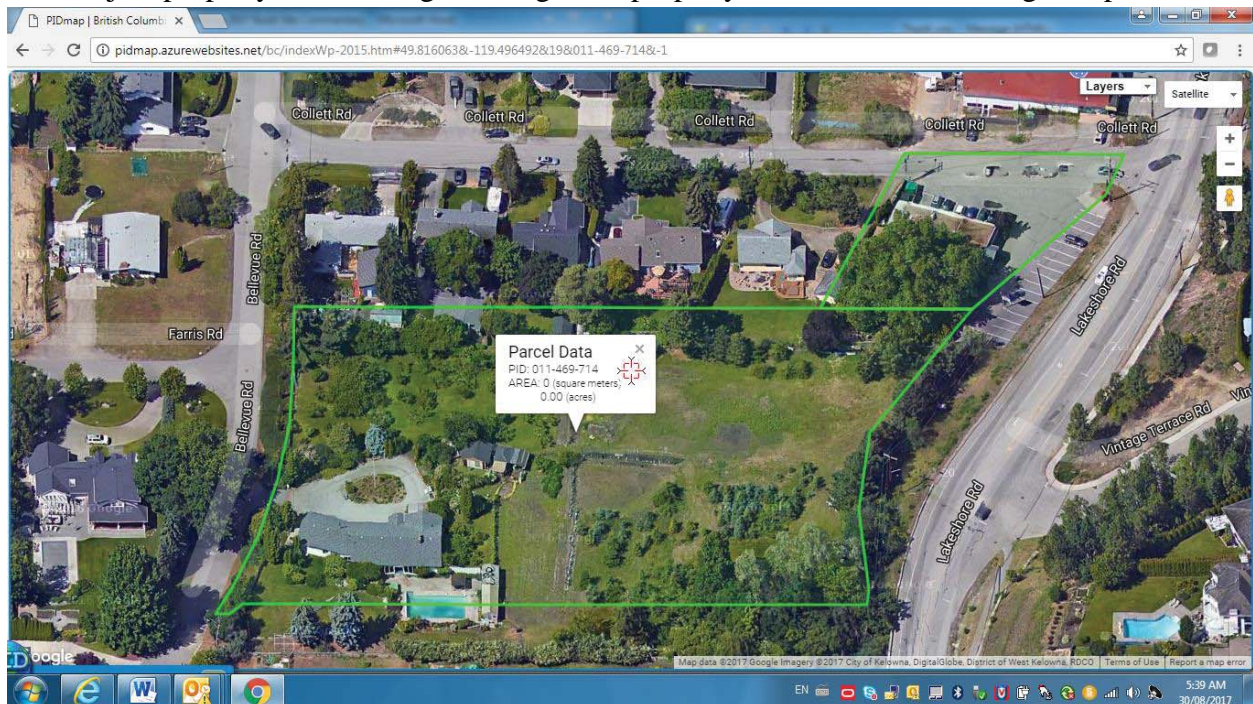
Date: August 29, 2017

COMMENTARY: STEVE NICHOLSON BUILD SITE
4638 Lakeshore Road, Kelowna, BC

This Agriculture Manager Commentary has been prepared in response to a request by CAM Jason Monteleone on Thursday, August 24, 2017 for client support for a commercial building project adjacent to ALR land in Kelowna, BC. There may be a perceived conflict of interest with a BMO Agrologist opinion, so this commentary is to serve as a guideline only to the developer for future discussions with a 3rd party Agrologist and/or City of Kelowna Staff and Council.

The Ag Manager visited the subject property on Tuesday, August 29, 2017 with the client. The owner, Mr. Steve Nichol, explained the development and provided background on the site and the neighbourhood. The Ag Manager walked the property and viewed the neighbouring agricultural land over the fence.

The subject property and the neighbouring ALR property are shown in the GoogleMap below.



Lynn Lashuk, P.Ag

ATTACHMENT C	
This forms part of application # Z17-0077	
Planner Initials	AC
 City of Kelowna COMMUNITY PLANNING	

The larger parcel, shown below the subject property is 4647 Bellevue Road, a 2.822 acre property which is included the Agricultural Land Reserve. The land is currently assessed at \$4,740 which indicates that BC Assessment Authority has concluded that the revenue from the farm for agricultural products grown on site meets or exceeds the current criteria for farm land (\$2,500 per year). It is unclear to me at this time how this parcel meets the farm status criteria.

The developer reported that the City of Kelowna has requested a setback from the neighbouring ALR land to provide a buffer that will allow for agricultural activities and mitigate conflict between the development and any agricultural uses, now or in the future.

I contacted Mr. Carl Withler, BC Ministry of Agriculture Tree Fruit and Grape Specialist, former Resource Agrologist with the BC Ministry of Agriculture to enquire about recent changes to bylaws and/or pending changes for development on lands adjacent to farmland within the City boundaries. Carl did not know of any bylaw changes but did state that the City of Kelowna staff has been working on protecting farmland and that there may be new requirements for developers. The current Resource Agrologist has been seconded to work at the Provincial Emergency Response Centres.

I also spoke with Councillor Mohini Singh, a strong advocate for Agriculture, and Ms. Singh also stated that there had been no recent bylaw changes to her knowledge, that would dictate buffer zone set back distances for developers.

The developer is challenged with explaining how the project will not incur negative impact to the neighbouring farm's activities.

In my opinion, at this point in time, from an agronomic perspective with consideration for air, soil and water quality, and the economics of farming the neighbouring parcel, given the type of farm, there will be no negative impacts to the neighbour farm's activities, regardless of buffer zone size.

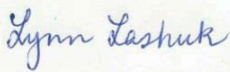
As for the future, there are too many variables and unknowns to allow for a meaningful opinion on the impact of neighbouring properties on farmland. The concepts/buzz words of "food security" and "grow local" are great taglines, seemingly replacing "sustainability" and "environmentally" in the popular lexicon. The meaning of the buzz words and the impact of their interpretation need to be clearly defined and communicated before public policy and land use decisions are based these concepts.

- The depth of the water table and potential for contamination from agricultural uses due to run-off and irrigation.

- The proximity of neighbours and contamination from chemical drift using normal farm practises (for example, with air blast sprayers) for high value horticultural production.
- The smells from agricultural activities (for example, manures, vegetative waste products or growth room exhaust).
- The sounds from agricultural activities (equipment, animals, pest deterrents for starlings and crows)
- The light from potential greenhouse operations.
- The farm access requirements for shipping and receiving on agricultural land.
- The overall economics of farming on a small parcel of land.

Please feel free to call/email me to discuss.

Respectfully submitted by,



29-August-2017

Lynn Lashuk, P.Ag

Manager, Agriculture, BC Division

ATTACHMENT C	
This forms part of application # Z17-0077	
Planner Initials	AC
 City of Kelowna COMMUNITY PLANNING	

October 04, 2017
 02-17-0048

Steve Nicholson
 Standhaus Developments Inc.
 1839 – 3151 Lakeshore Road
 Kelowna, BC, V1W 3S9



Dear Steve,

**Re: 4638 Lakeshore Road Mixed Use Development
 Trip Generation Comparison**

Standhaus Developments Inc. are proposing to undertake a mixed-use development at 4638 Lakeshore Road, Kelowna, BC. The proposed development includes nine (9) residential units and approximately 10,400 sqft of various commercial uses. The existing site has a 3,800 sqft restaurant which is not currently operational.

The purpose of this letter is to provide Standhaus Developments with a high level comparison of anticipated trip generation from the existing restaurant use and the proposed mixed-use development.

The trip generation rates used in this comparison are based on the ITE Trip Generation Manual, 10th Edition. The exception is for the proposed bakery as a suitable rate from ITE was not available. The rate used in this exercise is based on observations and professional judgement. The pass by rate is based on the ITE Trip Generation Handbook. The Internal Capture rate is based on the procedure in the NCHRP 684 report.

The anticipated trip generation for the restaurant use is contained in Table 1 below.

Table 1 Restaurant Trip Generation

ITE Land Use	Size (ksqft)	Period	Rate	Split In	Split Out	Trips Total	Trips In	Trips Out	Internal Capture	Subtotal	Pass By	Total
ITE 932 High Turnover (Sit Down) Restaurant	3.8	AM	9.94	55%	45%	38	21	17	0%	38	43%	21
		PM	9.77	62%	38%	37	23	14	0%	37	43%	21

42 Total Trips Daily

The anticipated trip generation for the mixed-use development is contained in Table 2 below.

Table 2 : Trip Generation Proposed Development

ITE Land Use	Size (ksqft)	Period	Rate	Split In	Split Out	Trips Total	Trips In	Trips Out	Internal Capture	Subtotal	Pass By	Total
ITE 932 High Turnover (Sit Down) Restaurant	1.5	AM	9.94	55%	45%	15	8	7	16%	12	43%	6
		PM	9.77	62%	38%	15	9	6	18%	12	43%	6
ITE 221 Mid Rise Apartment	9	AM	0.36	26%	74%	3	1	3	16%	2	0%	2
		PM	0.44	61%	39%	4	3	2	18%	3	0%	3
ITE 630 Clinic	2	AM	3.69	78%	22%	7	6	2	16%	5	0%	5
		PM	3.28	29%	71%	7	2	5	18%	5	0%	5
ITE 710 General Office Building	2.3	AM	1.16	86%	14%	3	2	1	16%	2	0%	2
		PM	1.15	16%	84%	3	1	2	18%	2	0%	2
ITE 880 Pharmacy / Drugstore without Drive Through Window	2.6	AM	2.94	65%	35%	8	5	3	16%	6	53%	2
		PM	8.51	49%	51%	22	11	11	18%	18	53%	8
Specialty Bakery (Observation)	1	AM	6	50%	50%	6	3	3	16%	5	25%	3
		PM	3	50%	50%	3	2	2	18%	2	25%	1
				Total AM		42	26	17		32		20
				Total PM		53	27	27		41		24

This analysis indicates that the anticipated trip generation from the previous restaurant use and the proposed mixed-use development are similar in both the AM and PM peak periods.

44 Total Trips Daily

Yours truly,
Bunt & Associates



Jason Dunn, P.Eng
Senior Transportation Engineer

JD/jd

ATTACHMENT D

This forms part of application
Z17-0077

Planner Initials

AC



City of Kelowna
COMMUNITY PLANNING

NEIGHBOURHOOD CONSULTATION

June 25, 2016

- Initial conversations with immediate neighbours (493 Collett) regarding our rough development idea. Subject of their potential desire to sell and discussed Terms and Pricing.

June 29, 2016

- Followup conversations with immediate neighbours (493 Collett) regarding our rough development idea. Subject of their potential desire to sell.

March 14, 2017

- Initial conversations with immediate neighbours started with Ben Smit living on Collett Rd. Rough ideas provided

June 29, 2017

- Followup conversations with immediate neighbours (493 Collett) regarding our development concept. Subject of their potential desire to sell and discussed potential of swap of a different property.

July 21

- Meeting with Owners of 493 Collett Rd to review proposal and discuss Landscape Plantings, replacement of the Fence and Privacy Screening. Agreed to a budget to provide Landscape Plantings and a New Pergola at our expense should we be successful in our application. Full application package provided.

Aug 1

- Meeting with Shane Worman to review proposal at MacDonald Realty Offices - at this time indicated something to the effect of Not Opposed and Competition is Good. Full application package provided
- Meeting with Shane Styles (Multiple Addresses McClure Road) to review proposal. Supported Full application package provided
- Meeting with Ownership of Tbones (Collett Road) to review proposal. Not Opposed. Full application package provided

Aug 23

- Meeting with Barbara from Barnaby Road review proposal. Full application package provided

Aug 25

- email correspondence from Mike and Lizzy's to confirm C3 as an appropriate use of the site. Full application package provided

ATTACHMENT D	
This forms part of application # Z17-0077	
Planner Initials	AC
 City of Kelowna COMMUNITY PLANNING	

Aug 26

- Meeting with Owners of both 462 and 467 Collett to review a concept model for the rezoning to C3. Full application package provided

Aug 27

- Meeting with Mike Geddes of 4627 Bellevue to review a concept model for the rezoning to C3. Full application package provided. Discussed arrangements for relocating London Plain Tree.
- Meeting with Owners of both 481 Collett to review a concept model for the rezoning to C3. Full application package provided.
- Meeting with Gordie Sandhu of Sun City Cherries to discuss Development Proposal. Full Package of Application Drawings provided.

Sept 5

- Meeting with Owners of both 462, 467, 481 Collett to review a concept model for the rezoning to C3. Full application package provided and follow up with images of proposal from residences backyards.

Sept 7

- Meeting with Chris Persic of 4647 Bellevue to review a concept model for the rezoning to C3. Full application package provided.

Sept 15

- **thebelleuve.ca launched to provide easy access to project information with the ability to provide directly feedback.**

Sept 20

- **Development Proposal Signage Posted on Lakeshore Road Frontage and attached to building on Collett Rd Frontage. (attached)**

Sept 21

- **Hand Delivered 65 Notice of Public Open House Invitations to all Properties on Collett Rd, Bellevue Rd, Farris Rd and Fuller Road (attached)**
- **Hand Delivered 9 Notice of Public Open House Invitations to Properties on Vintage Terrace**

Sept 22

- Meeting with Rafael Perini of Lakeshore Place (Mike and Lizzy;s UPick) to review concept model and provided Full Application drawings.

Sept 26

- Meeting with owners of 409 Collett Rd for to review concept model and provided Full Application drawings.

Oct 5, 6, 7

- **Public Open House from 4:00 - 6:00 each day. Full Application Package Available with all supporting documents. Petition of Support made available**
 - **41 Supported**
 - **7 Opposed**
 - **1 Undecided**

Letters of Opposition: 2

Letters of Support 12

Web - Have your Say

13 respondents

ATTACHMENT D	
This forms part of application # Z17-0077	
Planner Initials	AC
 City of Kelowna COMMUNITY PLANNING	

Website:

1947 Unique Visitors

Month	Unique visitors	Number of visits	Pages	Hits	Bandwidth
Sep 2017	578	714	2,699	11,003	3.19 GB
Oct 2017	625	747	2,804	12,566	3.10 GB
Nov 2017	142	178	527	2,210	491.95 MB
Dec 2017	148	184	417	1,605	964.19 MB
Jan 2018	148	187	455	1,880	482.18 MB
Feb 2018	231	266	592	2,900	495.94 MB
Mar 2018	75	85	221	857	145.00 MB
Total	1947	2361	7715	33021	8.81 GB

ATTACHMENT E

This forms part of application
Z17-0077

Planner Initials AC

City of Kelowna
COMMUNITY PLANNING



Neighbour Consultation Form (Council Policy No.367)

A summary of neighborhood consultation efforts, feedback and response must be provided to City staff, identifying how the efforts meet the objectives of this Policy. This form must be filled out and submitted to the File Manager a minimum of 20 days prior to initial consideration by Council.

I, Steve Nicholson, the applicant for Application No. DP17-0180
Z17-0077

for Four Storey Mixed Use Commercial/Residential Building
(brief description of proposal)

at 4638 Lakeshore Road have conducted the required neighbour
(address)
consultation in accordance with Council Policy No. 367.

- ☐ My parcel is located outside of the Permanent Growth Boundary and I have consulted all owners & occupants within a 300m radius
- ☒ My parcel is located inside of the Permanent Growth Boundary and I have consulted all owners & occupants within a 50m radius

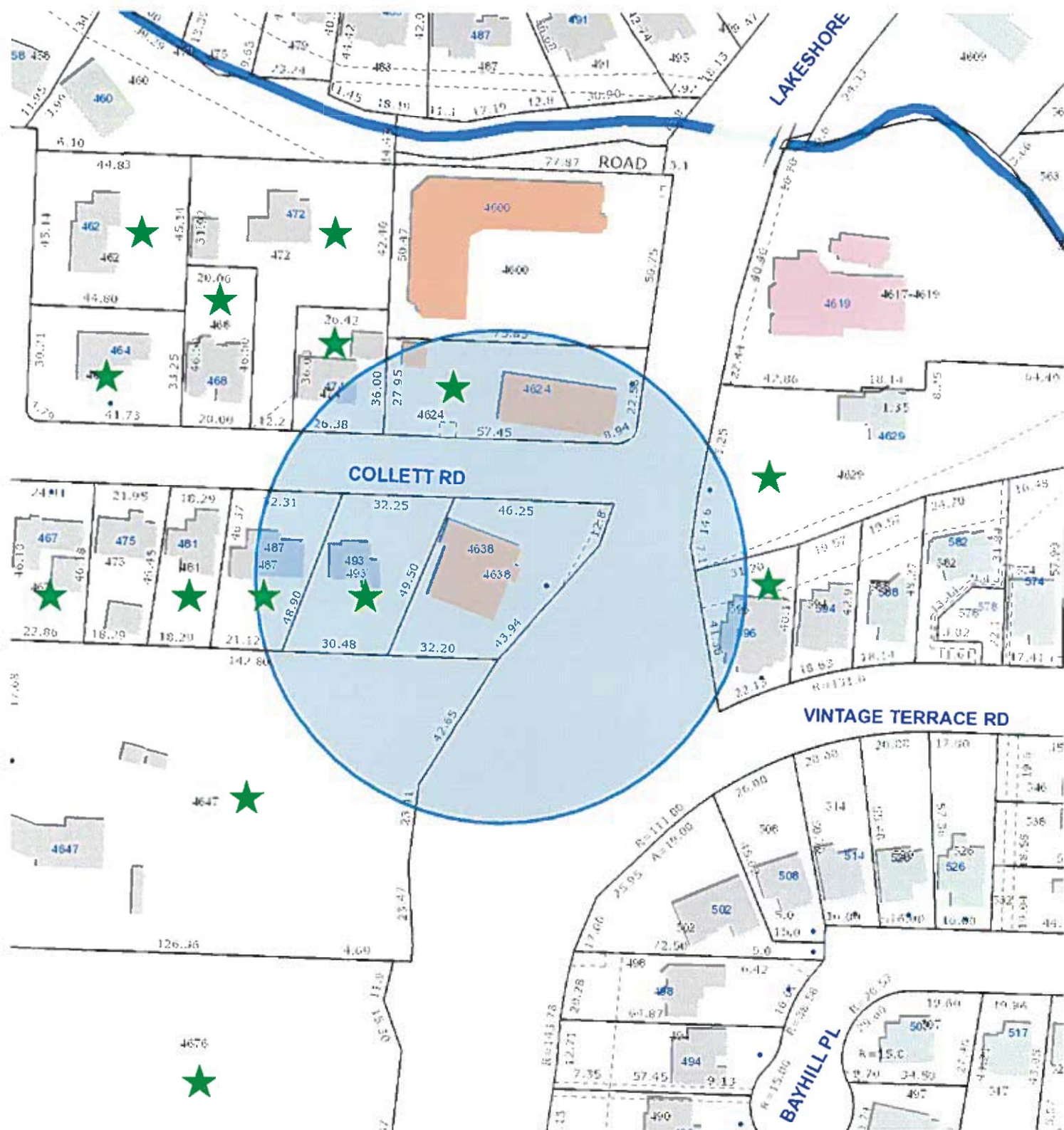
I have consulted property owners and occupants by doing the following: Meeting in person the
neighbors immediately adjacent to our Parcel and within 50M, held a neighborhood information
open house Oct 5 - 7, and made available online at thebellevue.ca a description of our proposal.

Please initial the following to confirm it has been included as part of the neighbour consultation:

- SH Location of the proposal;
- SH Detailed description of the proposal, including the specific changes proposed;
- SH Visual rendering and/or site plan of the proposal;
- SH Contact information for the applicant or authorized agent;
- SH Contact information for the appropriate City department;
- SH Identification of available methods for feedback.

Please return this form, along with any feedback, comments, or signatures to the File Manager 20 days prior to the anticipated initial consideration by Council date. On the back of this form please list those addresses that were consulted.

City of Kelowna
1435 Water Street
Kelowna, BC V1Y 1J4
TEL 250 469-8600
FAX 250 862-3330
kelowna.ca



ATTACHMENT E

This forms part of application

Z17-0077

Planner
Initials AC





Development Proposal THEBELLEVUE.CA

An application to re-zone from C2 (Neighbourhood Commercial) to C3 (Community Commercial) has been made by Strandhaus Developments Inc. to permit a terraced 4-storey residential mixed use building consisting of 9 residential condominium units with 6 commercial retail/office units at grade and 57 underground parking spaces.

PUBLIC OPEN HOUSE:

Oct 5 through Oct 7 from 3:00 - 6:00

STATUTORY PUBLIC MEETING:

Information will be posted once meeting is scheduled.



File # Z17-0077

For information contact:

Steve Nicholson, strandhaus™
250-212-2010
steve@strandhaus.ca

Loretta Nicholson, strandhaus™
250-212-8182
loretta@strandhaus.ca

POSTED BY
KEVIN @
SIGN EXPOSURE
SEPT 20/17
Sh

REPORT TO COUNCIL



Date: May 7, 2018

RIM No. 1250-30

To: City Manager

From: Community Planning Department (BBC)

Application: Z18-0013

Owner: JK Quest Ltd., Inc. No.
BC1108914

Address: 424 Sarsons Road

Applicant: Urban Options Planning &
Permits

Subject: Rezoning Application – Z18-0013

Existing OCP Designation: S2RES – Single / Two Unit Residential

Existing Zone: RU1 - Large Lot Housing

Proposed Zone: RU2 – Medium Lot Housing

1.0 Recommendation

THAT Rezoning Application No. Z18-0013 to amend the City of Kelowna Zoning Bylaw No. 8000 by changing the zoning classification of Lot 17, District Lot 167, Osoyoos Division, Yale District, Plan 8049, located at 424 Sarsons Road, Kelowna, BC from the RU1 – Large Lot Housing zone to the RU2 – Medium Lot Housing, be considered by Council;

AND THAT the Rezoning Bylaw be forwarded to a Public Hearing for further consideration;

AND THAT final adoption of the Rezoning Bylaw be considered subsequent to the outstanding conditions of approval as set out in Attachment "A" from the Development Engineering Department dated February 13, 2017;

AND FURTHER THAT final adoption of the Rezoning Bylaw be considered subsequent to the issuance of a Preliminary Layout Review Letter by the Approving Officer.

2.0 Purpose

Community Planning supports the proposed rezoning from RU1 – Large Lot Housing to RU2 – Medium Lot Housing, to facilitate a two-lot subdivision.

3.0 Community Planning

Community Planning supports the proposed rezoning from RU1 – Large Lot Housing to RU2 – Medium Lot Housing, to facilitate a two-lot subdivision.

The property is located within the Permanent Growth Boundary in the Mission neighbourhood of Kelowna. The parcel is designated as S2RES - Single/Two Unit Residential in the Official Community Plan (OCP). The application to rezone the parcel meets the OCP urban infill policy of supporting the densification of neighbourhoods through appropriate infill development, including the use of smaller lots. The modest increase in density is supported by local amenities such as parks, schools, transit and recreational opportunities in the immediate area. Recently a similar rezoning application to facilitate a two-lot subdivision on an adjacent lot to the subject property was supported by Council.

To fulfill Council Policy No. 367, the applicant submitted a Neighbour Consultation Summary Form to staff on February 20, 2018, outlining that the neighbours within 50 m of the subject property were notified.

4.0 Proposal

4.1 Project Description

The proposal is to rezone the parcel from the existing RU1 – Large Lot Housing zone to the RU2 – Medium Lot Housing zone. Should the rezoning be successful, the applicant is planning to subdivide the parcel into two parcels to facilitate the development of one single family dwelling on each of the two new lots.

Should the rezoning be supported by Council, the applicant could proceed with the subdivision application and then directly to building permit applications to construct a single family dwelling on each of the lots. The Zoning Bylaw Development Regulations and parking requirements would be reviewed at time of Building Permit application to ensure compliance.

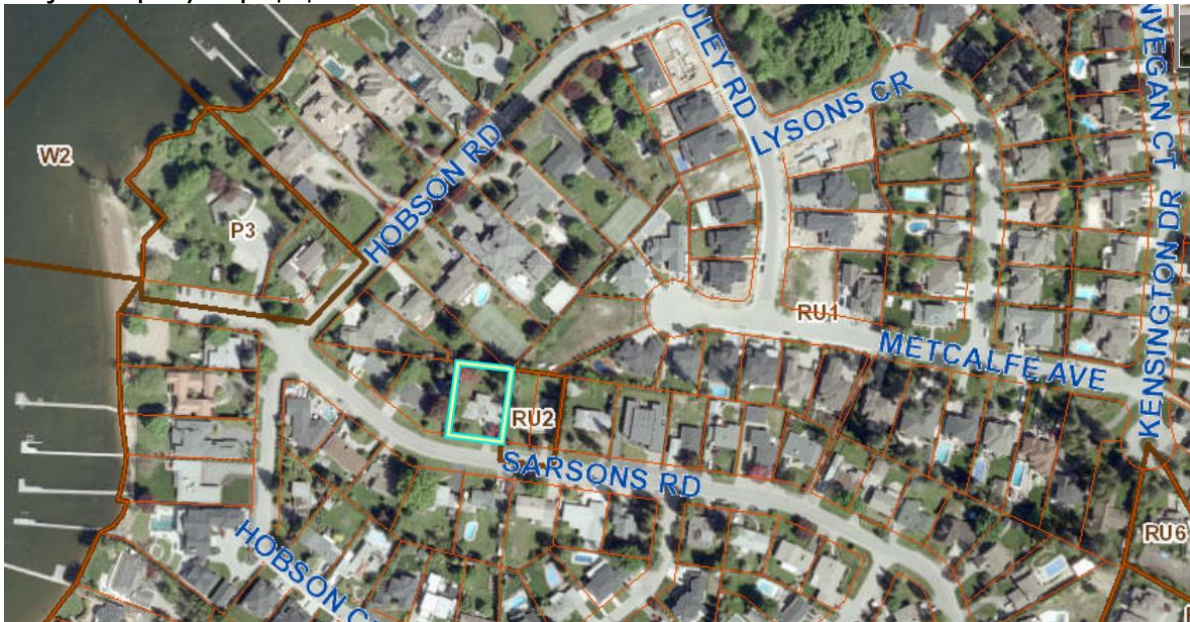
4.2 Site Context

The subject property is located near the corner of Sarsons Road and Hobson Road within the North Mission City Sector. The area is characterized primarily by single family dwellings, with several parks within walking distance, including a park accessing the Okanagan Lake located within 100 m to the west.

Adjacent land uses are as follows:

Orientation	Zoning	Land Use
North	RU1 – Large Lot Housing	Single Dwelling Housing
East	RU1 – Large Lot Housing P3 – Parks and Open Spaces	Single Dwelling Housing Park Area
South	RU1 - Large Lot Housing	Single Dwelling Housing
West	RU2 – Medium Lot Housing RU1 - Large Lot Housing	Single Dwelling Housing

Subject Property Map: 424 Sarsons Road



5.0 Current Development Policies

5.1 Kelowna Official Community Plan (OCP)

Development Process

Compact Urban Form.¹ Develop a compact urban form that maximizes the use of existing infrastructure and contributes to energy efficient settlement patterns. This will be done by increasing densities (approximately 75 - 100 people and/or jobs located within a 400 metre walking distance of transit stops is required to support the level of transit service) through development, conversion, and re-development within Urban Centres (see Map 5.3) in particular and existing areas as per the provisions of the Generalized Future Land Use Map 4.1.

Sensitive Infill.² Encourage new development or redevelopment in existing residential areas to be sensitive to or reflect the character of the neighbourhood with respect to building design, height and siting.

6.0 Technical Comments

6.1 Building & Permitting Department

- No Comment

6.2 Development Engineering Department

- Please see attached Development Engineering Memorandum (Attachment A).

¹ City of Kelowna Official Community Plan, Policy 5.2.3 (Development Process Chapter).

² City of Kelowna Official Community Plan, Policy 5.27.6 (Development Process Chapter)

7.0 Application Chronology

Date of Application Received: January 17, 2018
Date Public Consultation Completed: February 20, 2018

Report prepared by: Barbara B. Crawford, Planner
Reviewed by: Terry Barton, Urban Planning Manager
Approved for Inclusion: Ryan Smith, Community Planning Department Manager

Attachments:

Attachment A – Development Engineering Memorandum
Attachment B – Applicant’s Rationale Letter

CITY OF KELOWNA
MEMORANDUM

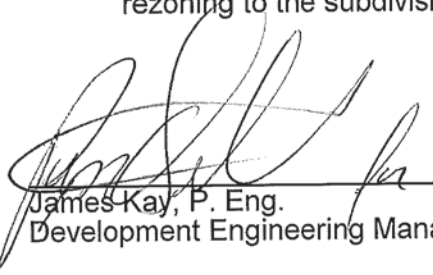
Date: February 13, 2018
File No.: Z18-0013
To: Community Planning (BC)
From: Development Engineering Manager (JK)
Subject: 424 Sarsons Road RU1 to RU2

Development Engineering has the following comments and requirements associated with this application.

1. General

Road frontage improvements are triggered by this rezoning application. The requirements include curb and gutter, storm drainage system and pavement widening. Also required is a landscaped boulevard, street lighting and the re-location or adjustment of utility appurtenances if required to accommodate the upgrading construction. The cost of this construction is at the applicant's expense.

The proposed redevelopment includes the subject parcel being subdivided into two lots. A subdivision application will require service upgrades that include the installation of additional services. The work will require road cuts and boulevard and pavement restoration. Development Engineering is prepared to defer the requirements of the rezoning to the subdivision stage.


James Kay, P. Eng.
Development Engineering Manager

JA

CITY OF KELOWNA

MEMORANDUM

Date: February 13, 2018
File No.: S18-0011
To: Community Planning (BC)
From: Development Engineering Manager (JK)
Subject: Subdivision Application – PLR Requirements (REVISED)

LOCATION: 424 Sarsons Road
APPLICANT: JK Quest Ltd.
LEGAL: Lot 17 Plan 8049

WORKS AND SERVICES REQUIREMENTS

The City's Development Engineering Department will handle the Works & Services requirements identified below between time of Preliminary Layout Review (PLR) and application for Subdivision Approval. Arrangements for construction must be made before making application for Final Approval of a subdivision plan. The Development Engineering Technologist for this project is Jason Angus. The following Works & Services are required for this subdivision:

.1) General

The postal authorities must be contacted to determine whether or not a "community mailbox" will be utilized. Please contact the Canadian Post Corporation, Delivery Services, P.O. Box 2110, Vancouver, B.C. V6B 4Z3 (604) 662-1381 in this regard.

.2) Geotechnical Report

- (a) Provide a geotechnical report prepared by a Professional Engineer competent in the field of hydro-geotechnical engineering to address the items below: NOTE: The City is relying on the Geotechnical Engineer's report to prevent any damage to property and/or injury to persons from occurring as a result of problems with soil slippage or soil instability related to this proposed subdivision.
- (b) The Geotechnical reports must be submitted to the Development Services Department (Subdivision Approving officer) for distribution to the Development Engineering Branch and Inspection Services Division prior to submission of Engineering drawings or application for subdivision approval.

- (i) Area ground water characteristics, including any springs and overland surface drainage courses traversing the property. Identify any monitoring required.
- (ii) Site suitability for development.
- (iii) Site soil characteristics (i.e. fill areas, sulphate content, unsuitable soils such as organic material, etc.).
- (iv) Any special requirements for construction of roads, utilities and building structures.
- (v) Recommendations for items that should be included in a Restrictive Covenant.
- (vi) Recommendations for roof drains, perimeter drains and septic tank effluent on the site.
- (vii) Any items required in other sections of this document.

.3) Water

- a) The property is located within the City of Kelowna service area. The existing PVC water service will need to be upgraded to a 19mm copper service.
- b) Two new water services can be provided at the applicant's cost prior to subdivision approval. **The applicant will be required to sign a Third Party Work Order for the cost of the new service requirements.** For estimate inquiry's please contact Jason Angus at jangus@kelowna.ca or phone 250-469-8783. Or arrange for lot connections before submission of the subdivision plan.

.4) Sanitary Sewer

- a) The existing 100mm diameter service will be utilised to service one of the proposed lots.
- b) A new sanitary service can be provided at the applicant's cost prior to subdivision approval. **The applicant will be required to sign a Third Party Work Order for the cost of the new service requirements.** For estimate inquiry's please contact Jason Angus at jangus@kelowna.ca or phone 250-469-8783.

.5) Drainage

- a) The property is located within the City of Kelowna drainage service area. The Subdivision, Development and Servicing Bylaw requires that each lot be provided with an individual connection; however, the City Engineer may permit use of individual ground water disposal systems, where soils are suitable. For on-site disposal of drainage water, a hydrogeotechnical report will be required complete with a design for the disposal method (i.e. trench drain / rock pit). The Lot Grading Plan must show the design and location of these systems for each lot.
- b) The development is required to contain and dispose of site generated storm drainage on the site by installing a ground recharge system

designed by the consulting civil engineer. The existing lots do not presently have storm drainage services.

.6) Roads

- a) Sarsons Road frontage must be upgraded to a full urban standard including curb, gutter, sidewalk, fillet pavement, street lights, storm drainage, and adjustment and/or re-location of existing utility appurtenances if required to accommodate this construction.

.7) Power and Telecommunication Services and Street Lights

- a) If the existing area is served by overhead wiring, the service connections may be provided overhead provided that there are no new poles required and service trespasses will not be created. If either of these conditions is not satisfied, then underground service will be required for that lot.
- b) Streetlights must be installed on all roads.
- c) Make servicing applications to the respective Power and Telecommunication utility companies. The utility companies are required to obtain the City's approval before commencing construction.
- d) Before making application for approval of your subdivision plan, please make arrangements with Fortis for the pre-payment of applicable charges and tender a copy of their receipt with the subdivision application for final approval.
- e) Re-locate existing poles and utilities, where necessary. Remove aerial trespass (es).

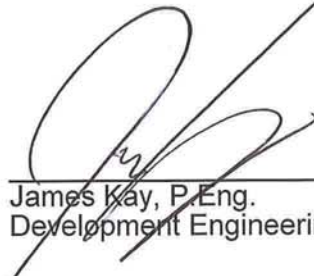
.8) Other Engineering Comments

- a) Provide all necessary Statutory Rights-of-Way for any utility corridors required, including those on proposed or existing City Lands.
- b) If any road dedication affects lands encumbered by a Utility right-of-way (such as B.C. Gas, etc.) please obtain the approval of the utility prior to application for final subdivision approval. Any works required by the utility as a consequence of the road dedication must be incorporated in the construction drawings submitted to the City's Development Manager.
- c) Only the service upgrades must be completed at this time. The City wishes to defer the remainder of the upgrades to Sarsons Road fronting this development. Therefore, cash-in-lieu of immediate construction is required and the City will initiate the work later, on its own construction schedule.

Item	Cost
Drainage	\$4,804.00
Curb &Gutter	\$3,048.00
Sidewalk	\$3,810.00
Street Lighting	\$1,410.00
Landscape Boulevard	\$1,143.00
Road Fillet	\$3,200.00
Total	\$17,415.00

.9) Charges and Fees

- a) Development Cost Charges (DCC's) are payable
- b) Fees per the "Development Application Fees Bylaw" include:
 - i) Survey Monument Fee: **\$50.00** (\$50.00 per newly created lot GST exempt).
 - ii) Survey Monument, Replacement Fee: \$1,200.00 (GST exempt) – only if disturbed.
- c) A hydrant levy charge of **\$250.00** (250.00 per new lot).
- d) New water services for the lots; **to be determined.**
- e) New sanitary service for the new lot; **to be determined.**
- f) The City wishes to defer the construction of frontage improvements on Sarsons Road which is premature at this time. Therefore, cash-in-lieu of immediate construction is required and the City will initiate the work later, on its own construction schedule. The cash-in-lieu amount is determined to be **\$17,415.00**



James Kay, P.Eng.
Development Engineering Manager

JA



January 15, 2018

City of Kelowna
Planning Department
1435 Water Street
Kelowna, BC

RE: Rezoning/Subdivision at 424 Sarsons Road

Dear Urban Planning Department:

This application seeks to rezone the property at 424 Sarsons Road to the RU2 – Medium Lot Housing zone to facilitate a two-lot subdivision. The property is located within the Permanent Growth Boundary with an recently rezoned example of the RU2 – Medium Lot Housing zone next door.

The property is large enough to meet the frontage and area requirements for the RU2- Medium Lot Housing zone. The proposed subdivision is an even division of the land resulting in two 15.27m wide lots with an area of 629.4m². The existing dwelling will be demolished to allow the plans to proceed.

Many of the Official Community Plan objectives are met with the planned project, including:

- Contributing housing stock for growth projections for this city sector
- Compact infill
- Sensitive design

Given the proximity of Sarsons Beach park and schools, this area will continue to be a desirable family neighbourhood. The area has seen many new single-family dwellings and renovations of the existing housing stock as the previous land owners age and move out. The proposal is a good fit for the area as there is a diversity in built forms and property sizes and it adds much needed housing stock.

Sincerely yours,



Birte Decloux

CITY OF KELOWNA

BYLAW NO. 11613

Z18-0013 – 424 Sarsons Road

A bylaw to amend the "City of Kelowna Zoning Bylaw No. 8000".

The Municipal Council of the City of Kelowna, in open meeting assembled, enacts as follows:

1. THAT City of Kelowna Zoning Bylaw No. 8000 be amended by changing the zoning classification of Lot 17, District Lot 167, ODYD, Plan 8049, located at Sarsons Road, Kelowna, BC from the RU1 – Large Lot Housing zone to the RU2 – Medium Lot housing zone.
2. This bylaw shall come into full force and effect and is binding on all persons as and from the date of adoption.

Read a first time by the Municipal Council this

Considered at a Public Hearing on the

Read a second and third time by the Municipal Council this

Adopted by the Municipal Council this

Mayor

City Clerk

REPORT TO COUNCIL



Date: May 7, 2018

RIM No. 1250-30

To: City Manager

From: Community Planning Department (LK)

Application: Z17-0101 **Owner:** Jaspreet Singh Sekhon

Address: 490 Dougall Road N. **Applicant:** Urban Options

Subject: Rezoning Application

Existing OCP Designation: MRM – Multiple Unit Residential (Medium Density)

Existing Zone: RU1 – Large Lot Housing

Proposed Zone: RU1c – Large Lot Housing with Carriage House

1.0 Recommendation

THAT Rezoning Application No. Z17-0101 to amend the City of Kelowna Zoning Bylaw No. 8000 by changing the zoning classification of Lot 17 Section 26 Township 26 ODYD Plan 3476, located at 490 Dougall Road North, Kelowna, BC from the RU1 – Large Lot Housing zone to the RU1 c– Large Lot Housing with Carriage House zone, be considered by Council;

AND THAT the Rezoning Bylaw be forwarded to a Public Hearing for further consideration;

AND THAT final adoption of the Rezoning Bylaw be considered subsequent to the outstanding conditions of approval as set out in Attachment “A” attached to the Report from the Community Planning Department dated November 20, 2017.

2.0 Purpose

To rezone the subject property from RU1 – Large Lot Housing to RU1c – Large Lot Housing with Carriage House zone to facilitate the development of a Carriage House.

3.0 Community Planning

Community Planning Staff support the proposed rezoning application from RU1 – Large Lot Housing to RU1c – Large Lot Housing with Carriage House zone to facilitate the development of a Carriage House on the subject property.

The Official Community Plan (OCP) Future Land Use designation of the subject property and neighbouring properties is MRM- Multiple Unit Residential (Medium Density). To achieve this vision will require the

assembly of multiple properties and consolidation and none along this street has been achieved to-date. The requested modest increase in density to allow a carriage house is viewed by staff as relatively minor, and should not prevent the longer-term OCP vision to be achieved.

Council Policy No. 367 with respect to public consultation was undertaken by the applicant and all neighbours within 50 m radius of the subject parcel.

4.0 Proposal

4.1 Background

The subject property has an existing modest size single storey dwelling and garage. Both structures are dated and would be demolished to allow for the construction of a new single family dwelling and carriage house.

4.2 Project Description

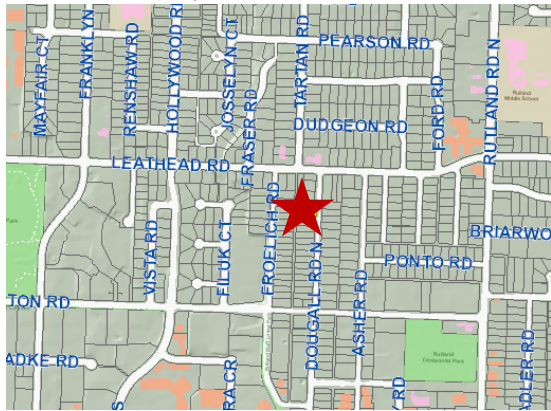
The applicant has provided preliminary plans for a new single family dwelling and a 1 ½ storey carriage house. The owner has a home based business – major (aesthetics) which will operate out of one room located on the main floor of the house. The business will be owned and operated by two family members and will not employ additional staff. All parking requirements for both the business and residences have been met through the provision of four parking stalls. Two parking stalls are within the carriage house and two at-grade stalls are provided in tandem beside the carriage house with access from the rear lane. The proposal for the dwelling, carriage house and home based business meets all of the Zoning Bylaw regulations and does not require any variances.

4.3 Site Context

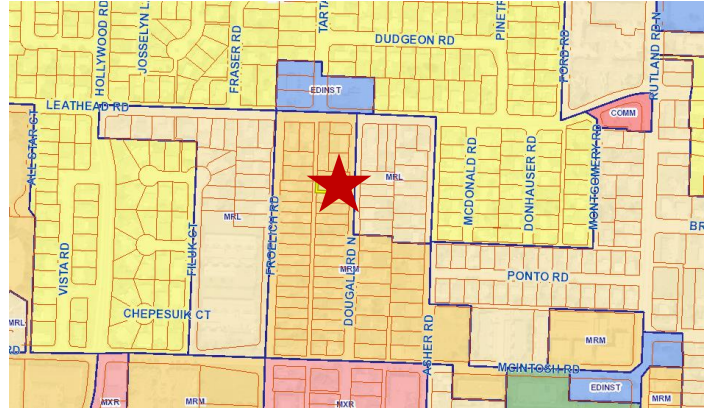
Specifically, adjacent land uses are as follows:

Orientation	Zoning	Land Use
North	RU1 – Large Lot Housing	Single Dwelling Housing
East	RU1 – Large Lot Housing	Single Dwelling Housing
South	RU1 – Large Lot Housing	Single Dwelling Housing
West	RU1 – Large Lot Housing	Single Dwelling Housing

Site Context Map:



Future Land Use:



Subject Property Map: 490 Dougall Road



5.0 Current Development Policies

5.1 Kelowna Official Community Plan (OCP)

Development Process

Complete Suburbs:¹ Support a mix of uses within Kelowna's suburbs (see Map 5.1 - Urban Core Area), in accordance with "Smart Growth" principles to ensure complete communities. Uses that should be present in all areas of the City (consistent with Map 4.1 - Future Land Use Map), at appropriate locations, include: commercial, institutional, and all types of residential uses (including affordable and special needs housing) at densities appropriate to their context.

¹ City of Kelowna Official Community Plan, Policy 5.2.3 (Development Process Chapter).

Compact Urban Form.² Develop a compact urban form that maximizes the use of existing infrastructure and contributes to energy efficient settlement patterns. This will be done by increasing densities (approximately 75 - 100 people and/or jobs located within a 400 metre walking distance of transit stops is required to support the level of transit service) through development, conversion, and re-development within Urban Centres (see Map 5.3) in particular and existing areas as per the provisions of the Generalized Future Land Use Map 4.1.

Sensitive Infill.³ Encourage new development or redevelopment in existing residential areas to be sensitive to or reflect the character of the neighborhood with respect to building design, height and siting.

Carriage Houses and Accessory Apartments.⁴ Support carriage houses and accessory apartments through appropriate zoning regulations.

Entrepreneurial Initiatives.⁵ Continue to encourage self-employment initiatives, including home-based business, while ensuring neighbourhood fit through the zoning regulations, and work with pertinent agencies to raise awareness of these opportunities.

6.0 Technical Comments

6.1 Building & Permitting Department

- Development Cost Charges (DCC's) are required to be paid prior to issuance of any Building Permits.
- A third party work order may be required with the Development Engineering Department for an upgraded water line and sewage connection. These requirements are to be resolved prior to issuance of the Building Permit.

6.2 Development Engineering Department

- Refer to Attachment 'A'. dated November 20, 2017.

6.3 Fortis BC - Electric

- There are FortisBC Inc (Electric) ("FBC(E)") primary distribution facilities along Dougall Road N and within the lane adjacent the subject's west property line. Based on the plans provided the proposed carriage house appears to be outside the safe limits of approach for the adjacent overhead line in the lane. Notwithstanding, it is recommended that FBC(E) be contacted as soon as possible to ensure the proposed building height meets with overhead design requirements. The design as presented should NOT be approved until this is confirmed.
- The applicant is responsible for costs associated with any change to the subject property's existing service, if any, as well as the provision of appropriate land rights where required.

6.4 Fire Department

- No comments relevant to Rezoning.

² City of Kelowna Official Community Plan, Policy 5.3.2 (Development Process Chapter).

³ City of Kelowna Official Community Plan, Policy 5.22.6 (Development Process Chapter).

⁴ City of Kelowna Official Community Plan, Policy 5.22.12 (Development Process Chapter).

⁵ City of Kelowna Official Community Plan, Policy 5.22.12 (Development Process Chapter).

6.5 Rutland Water District

- Refer to Attachment 'B'.

7.0 **Application Chronology**

Date of Application Received: October 30, 2017
Date of Amended Drawings Received: March 8, 2018
Date Public Consultation Completed: March 27, 2018

Report Prepared by: Lydia Korolchuk, Planner

Reviewed by: Terry Barton, Urban Planning Manager

Approved for Inclusion: Ryan Smith, Community Planning Department Manager

Attachments:

Attachment A: Development Engineering Memorandum
Attachment B: Rutland Water District Letter
Schedule A: Site Plan & Floor Plans
Schedule B: Elevations

**CITY OF KELOWNA**
MEMORANDUM**Date:** Nov 20, 2017**File No.:** Z17-0101**To:** Community Planning Management (LK)**From:** Development Engineering Manager (JK)**Subject:** 490 Dougall Rd N

RU1 to RU1c

Development Engineering has the following comments and requirements associated with this application to rezone from RU1 to RU1c to facilitate the development of a carriage house. The servicing requirements outlined in this report will be a requirement of this development.

1. Domestic Water and Fire Protection

The property is located within the Rutland Water District (RWD) service area. The water system must be capable of supplying domestic and fire flow demands of the project in accordance with the Subdivision, Development & Servicing Bylaw. The developer is responsible, if necessary, to arrange with RWD staff for any service improvements.

2. Sanitary Sewer

- a) Our records indicate that this property is currently serviced with a 100mm-diameter sanitary sewer service which is adequate for this application.
- b) This property is located within Sewer Specified Area #20. 1 Single Family Equivalent (SFE) is paid for annually with property taxes and is required to be paid in full as part of this rezoning application in addition to 0.5 SFE for the proposed carriage house. The total sewer Specified Area fee in 2017 will be calculated based on 1.5 SFE at \$2045.50 per SFE = **\$3068.25**

3. Development Permit and Site Related Issues

- a) Direct the roof drains onto splash pads.
- b) Maximum driveway width permitted is 6m.

4. Electric Power and Telecommunication Services

It is the applicant's responsibility to make a servicing application with the respective electric power, telephone and cable transmission companies to arrange for service upgrades to these services which would be at the applicant's cost.

James Kay, P. Eng.
Development Engineering Manager
agm



106 – 200 Dougall Road North
Kelowna, BC V1X 3K5
www.rutlandwaterworks.com

p: (250) 765-5218
f: (250) 765-7765
e: info@rutlandwaterworks.com

December 8, 2017

Jaspreet Sekhon
1828 Split Rail Pl
Kelowna, BC V1X 3K5

RE: Lot 17, Plan 3476 – 490 Dougall Rd N (Zoning)
File # Z17-0101, RWD File 17/23

In response to City of Kelowna request for comment the following is a summary of Rutland Waterworks District requirements:

1. Capital Expenditure Charges	<u>\$2,200.00</u>
Total Fees Payable	\$2,200.00

Water service for the carriage house is to be extended from the existing single family dwelling (through the existing water meter).

Any outstanding accounts must be brought to current status.

Upon receipt of these fees, a water certificate will be issued.

Should you have any questions or require further information, please contact the undersigned.

Sincerely,

Kevin Reynolds
Manager

c. Lydia Korolchuk (City of Kelowna)

CODE AND STANDARDS

ALL WORKMANSHIP IS TO BE OF A STANDARD EQUAL IN ALL RESPECTS TO GOOD BUILDING PRACTICE.

AT THE TIME OF PREPARATION, THIS PLAN WAS DRAWN IN ACCORDANCE WITH THE CURRENT EDITION OF THE NATIONAL BUILDING CODE. IT IS THE RESPONSIBILITY OF THE BUILDER TO INSURE THAT CHANGES MADE TO THE CODE ARE COMPLIED WITH AND ALL AMENDMENTS ARE INCORPORATED IN THE CONSTRUCTION OF THIS PLAN. ALL WORK SHALL CONFORM TO THE LOCAL BUILDING CODES AND BYLAWS WHICH TAKE PRECEDENCE.

PRIOR TO PROCEEDING WITH CONSTRUCTION, THE BUILDER MUST VERIFY ALL INFORMATION, DIMENSIONS AND SPECIFICATION OF THIS PLAN.

GENERAL NOTES - ARCHITECTURAL

ROOF SPACE VENTILATION - PROVIDE UNIFORM VENTILATION TO 1/300 OF INSULATED CEILING AREA c/w TWO-WAY VENTING

ROOF SPACE - VENTS - PROVIDE UNIFORM DISTRIBUTION OF VENTS WITH 25% MIN. IN THE EAVES AND 15% IN THE ROOF TOP

ROOF SPACE INSULATED - SHALL BE 1" MIN. DISTANCE BELOW THE TOP OF JOISTS

GLASS DETAILS

- WINDOW FRAMES TO BE THERMALLY BROKEN
- GLASS IN SIDELIGHT WITHIN 36" OF THE DOOR LOCKS TO BE SAFETY GLASS
- WINDOWS IN THE ENTRANCE, SHOWER AND SLIDING DOORS TO BE SAFETY GLASS
- WINDOWS IN BEDROOMS TO BE 4'-11" MAX. ABOVE FLOOR AND TO HAVE A MIN. OPENING DIMENSION OF 15" WITH AN AREA OF 3/75 SFT
- PROVISION FOR SAFETY GLASS SKYLIGHT IN THERMALLY BROKEN ALUMINUM FRAME

WALL ASSEMBLY INSULATION - MIN. R-VALUE OF R-14 FOR WALLS, R-28 FOR FLAT OR VAULTED CEILINGS AND R-40 FOR ATTICS

WALL ASSEMBLY - WATERPROOF WALLBOARD IS REQUIRED AS TILE BASE AROUND ALL TUBS AND SHOWERS.

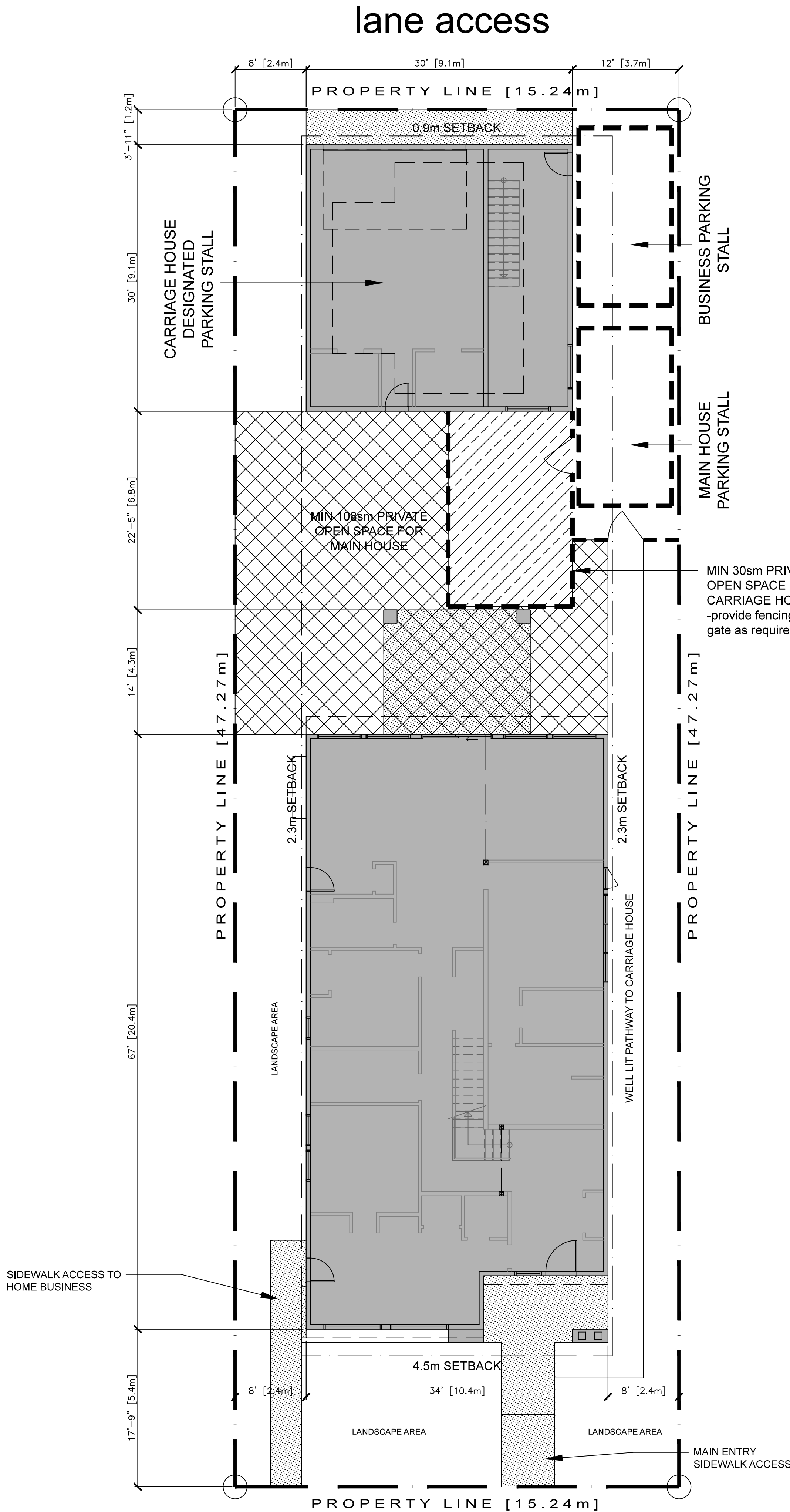
CEILINGS - MIN. 5/8" GWB THICKNESS WHERE THE SPACING MEMBERS IS GREATER THAN 16" O.C.

VENTILATION

- NATURAL VENTILATION TO ALL ROOMS
- AIR SHALL BE MECHANICALLY EXHAUSTED FROM KITCHENS, LAUNDRY AND BATHROOMS THAT HAVE NO VENTED WINDOWS
- ALL DOORS SHALL BE UNDERCUT 1/2" FOR AIR FLOW

RESIDENTIAL STRUCTURAL NOTES

- CONCRETE FOOTINGS MUST BE PLACED ON UNDISTURBED SOIL AT AN ELEVATION BELOW FROST PENETRATION.
 - PAD AND STRIP FOOTINGS ARE TO BE CENTERED UNDER COLUMNS AND WALLS ABOVE UNLESS OTHERWISE SHOWN. STEPS IN FOOTINGS ARE TO BE A MAXIMUM OF 24" HIGH AND A MINIMUM OF 24" APART. FOOTINGS ARE TO BE PLACED BELOW FROST LINE AS PER CODE, OR ON FIRM BEARING SOIL, WHICHEVER IS DEEPER
- TO BE VERIFIED BY GEOTECHNICAL ENGINEER.
 - FOUNDATION WALLS SHALL NOT BE BACK FILLED UNTIL THE CONCRETE HAS REACHED A MINIMUM 14 DAY COMPRESSIVE STRENGTH AND ALL STRUCTURAL FRAMING, INCLUDING PLYWOOD SUB FLOOR, REQUIRED TO PROVIDE LATERAL SUPPORT TO THE FOUNDATION WALLS, IS COMPLETE, FULLY NAILED AND ANCHORED.
 - ALL FOUNDATION WALLS OVER 8'-0" IN HEIGHT MUST BE DESIGNED BY A CERTIFIED STRUCTURAL ENGINEER.
- ALL PAD FOOTINGS TO BE SIZED AND DESIGNED BY A STRUCTURAL ENGINEER



DRAWING LIST

- | | |
|-------|---------------------------------------|
| A2.01 | SITE PLAN & WALL ASSEMBLY RSI VALUES |
| A3.01 | MAIN FLOOR & UPPER FLOOR PLAN |
| A3.02 | DETACHED GARAGE & CARRIAGE HOUSE PLAN |
| A3.03 | ROOF PLAN |
| A4.01 | FRONT & REAR ELEVATIONS |
| A4.02 | SIDE ELEVATIONS ELEVATIONS |
| A4.03 | DETACHED GARAGE/CARRIAGE HOUSE ELEVS |
| A5.01 | BUILDING SECTIONS & DETAILS |

DOUGALL RD NORTH

1 SITE PLAN
A2.01 SCALE: 1/8" = 1'-0"

defined by lines
PARM HUNDAL CONCEPTS

WWW.HUNDALHOMES.COM
parm@hundalhomes.com

(250)899 0504

SCHEDULE A

This forms part of application
Z17-0101

Planner Initials LK

City of Kelowna
COMMUNITY PLANNING

PROJECT
SEKHON HOUSE
490 N. DOUGALL RD, KELOWNA, BC

DRAWING NUMBER
A2.01

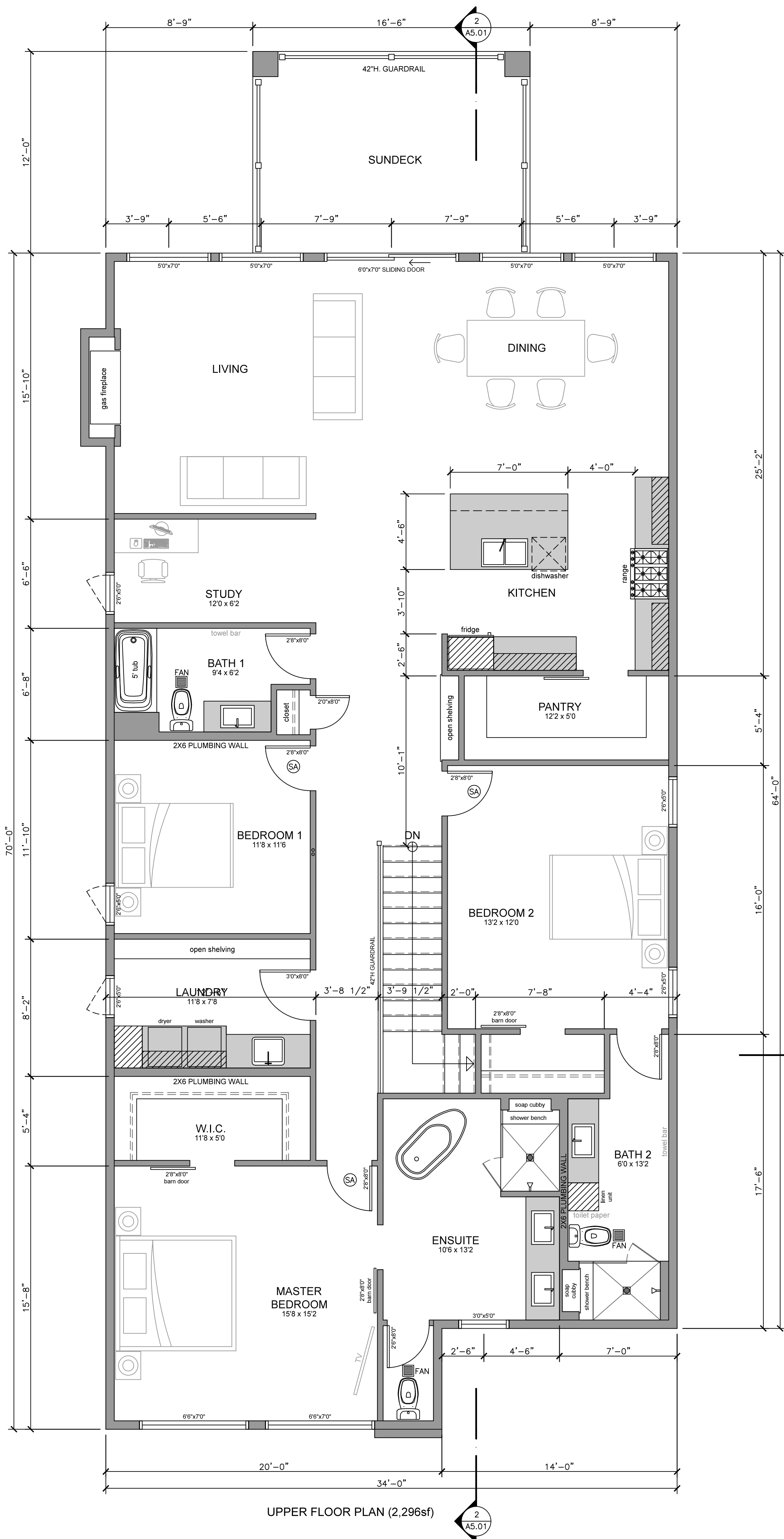
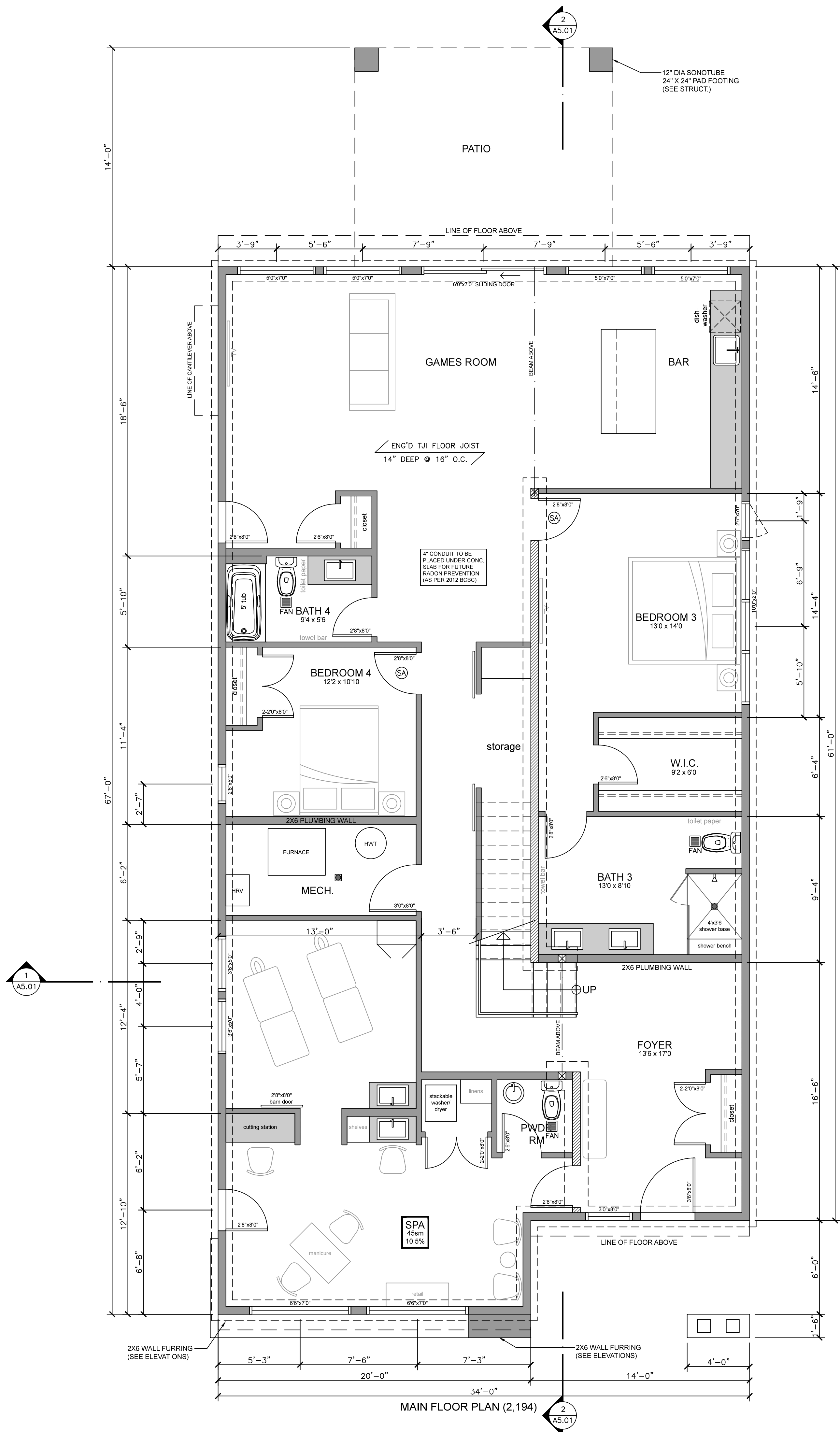
DRAWINGS ARE NOT TO BE SCALED
ALL DIMENSIONS SHALL BE VERIFIED ON JOB

DRAWING TITLE
SITE PLAN

No.	Date	Revision
01	2017-10-03	issued for DP
02	2018-02-23	revisions for DP
Date	2018-02-23	
Job #	17-081	
Scale	As Shown	
Drawn	PH	

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SCHEDULE A
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Z17-0101
Planner Initials LK
City of Kelowna
COMMUNITY PLANNING

PROJECT
SEKHON HOUSE
490 N. DOUGALL RD, KELOWNA, BC
DRAWING NUMBER

A3.01

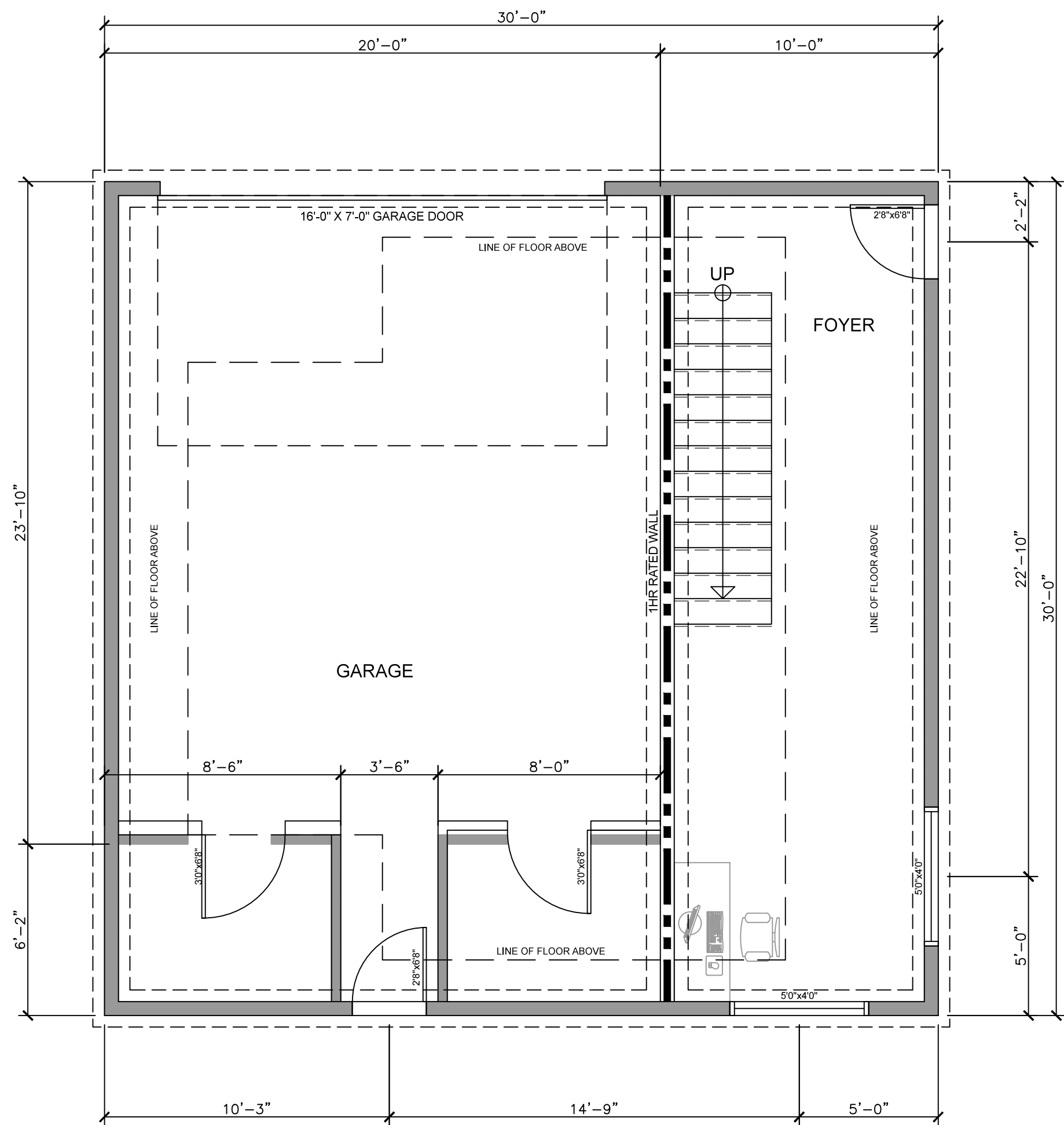
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ALL DIMENSIONS SHALL BE VERIFIED ON JOB

DRAWING TITLE
MAIN & UPPER
FLOOR PLAN

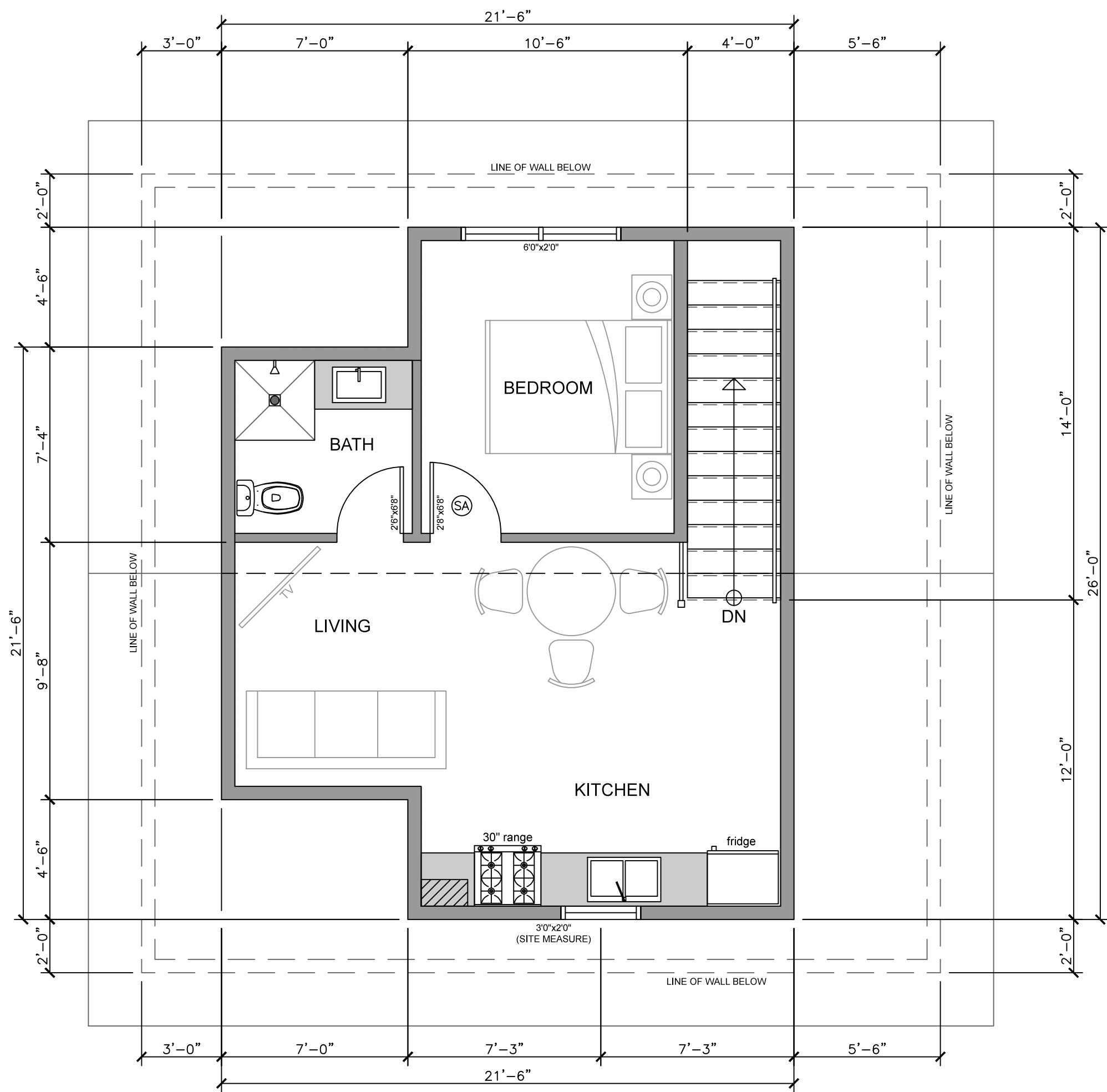
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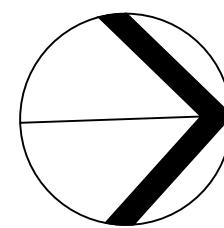


DETACHED GARAGE (607sft)
CARRIAGE HOUSE MAIN FLOOR (292sft)



CARRIAGE HOUSE
UPPER FLOOR PLAN (496sft)

SCHEDULE A
This forms part of application
Z17-0101
Planner Initials LK
City of Kelowna
COMMUNITY PLANNING



PROJECT
SEKHON HOUSE
490 N. DOUGALL RD, KELOWNA, BC
DRAWING NUMBER

A3.02

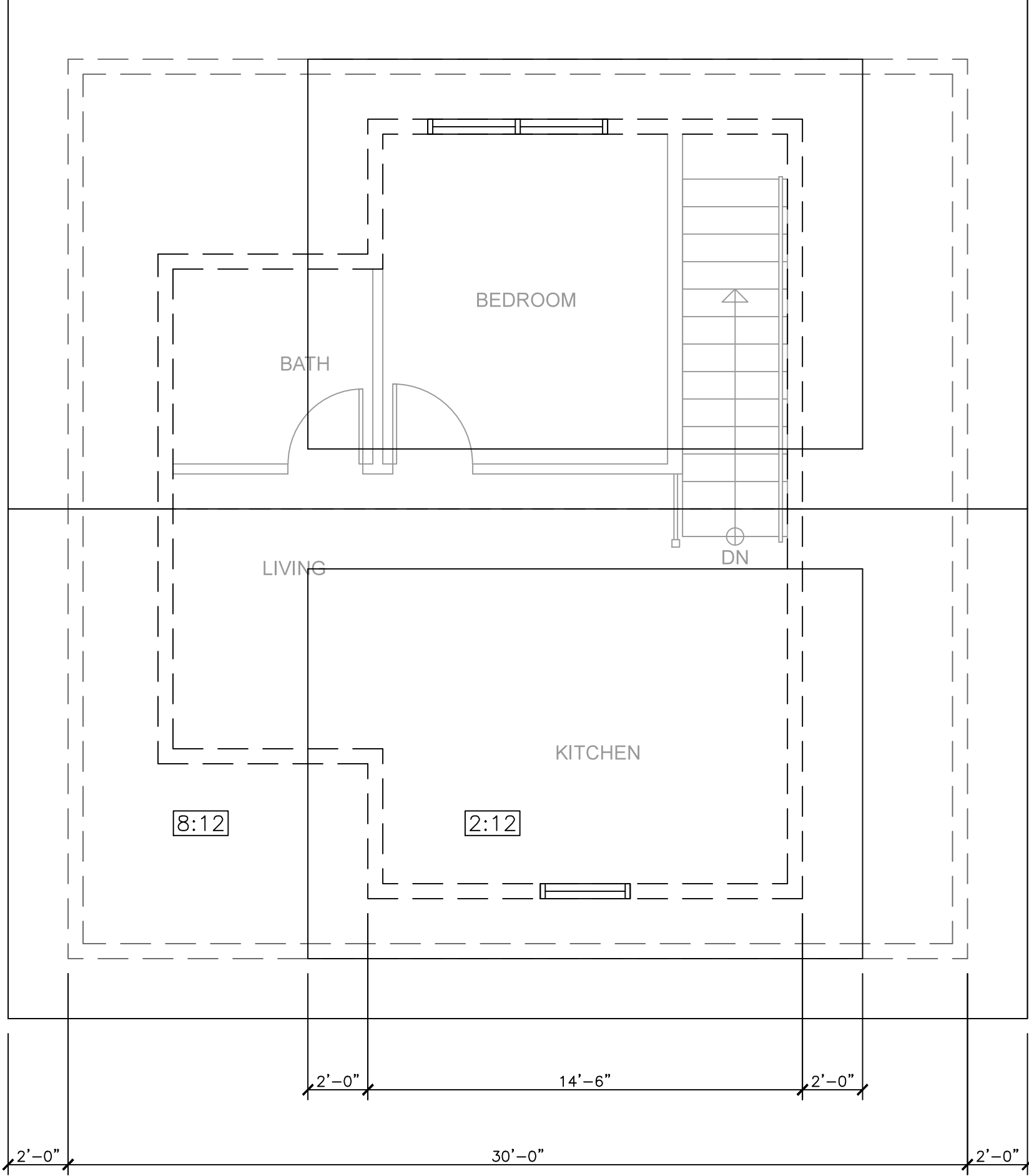
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DRAWING TITLE
DETACHED GARAGE
& CARRIAGE HOUSE

No.	Date	Revision
01	2017-10-03	issued for DP
02	2018-02-23	revisions for DP

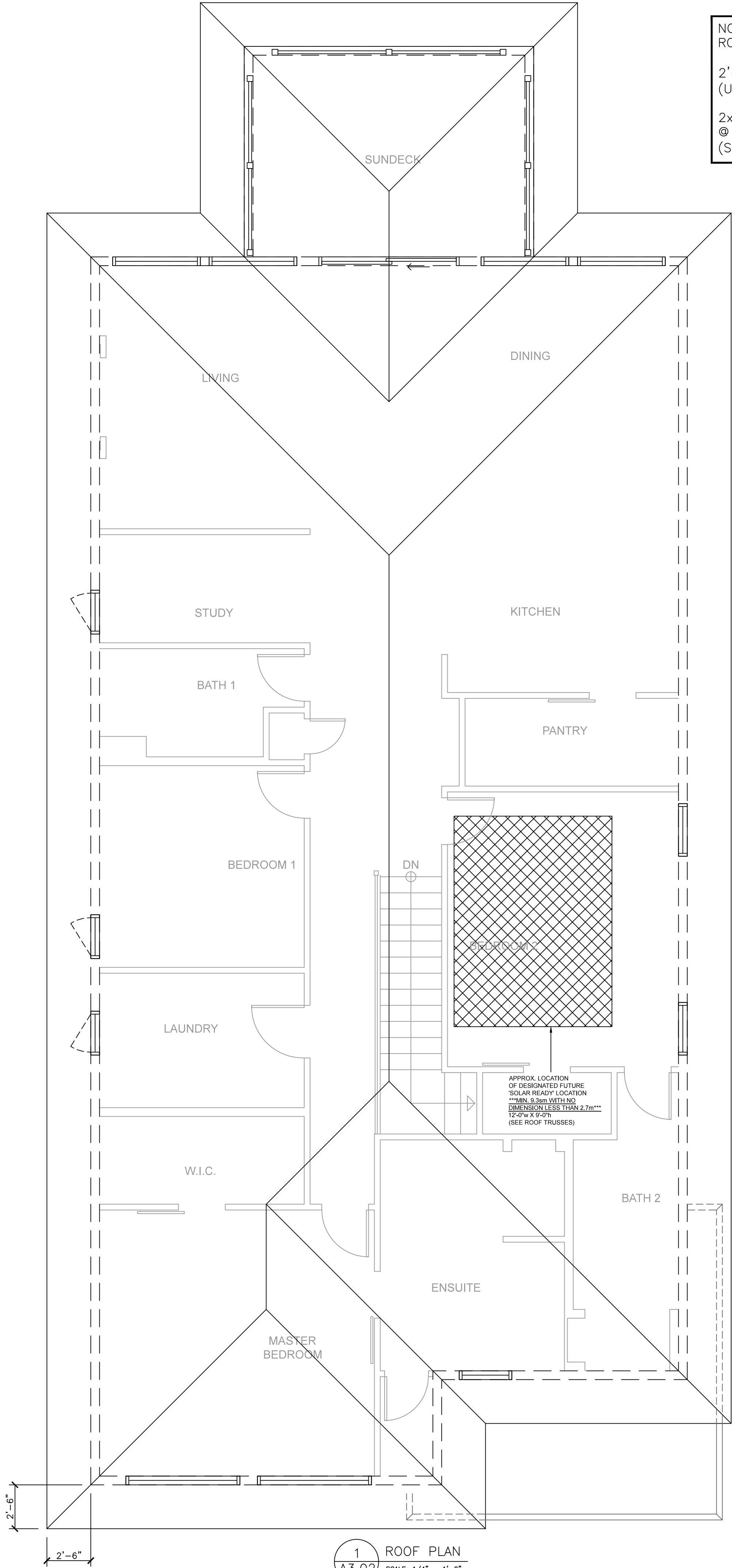
Date	2018-02-23
Job #	17-081
Scale	As Shown
Drawn	PH

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NOTE:
MAIN ROOF SLOPE: 8:12
UPPER ROOF SLOPE: 2:12
2'-0" TYPICAL OVERHANG
(UNLESS NOTED OTHERWISE)
2x6 CONTIN. WOOD NAILER
⊙ PERIMETER OF TRUSS
(SEE DETAIL)

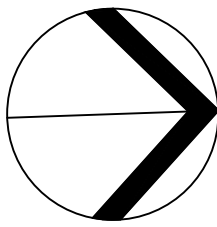
2 CARRIAGE HOUSE ROOF PLAN
A3.02 SCALE: 1/4" = 1'-0"



NOTE:
ROOF SLOPE @ 4:12
2'-6" TYPICAL OVERHANG
(UNLESS NOTED OTHERWISE)
2x6 CONTIN. WOOD NAILER
⊙ PERIMETER OF TRUSS
(SEE DETAIL)

1 ROOF PLAN
A3.02 SCALE: 1/4" = 1'-0"

SCHEDULE A
This forms part of application
Z17-0101
Planner Initials LK
City of Kelowna
COMMUNITY PLANNING



PROJECT
SEKHON HOUSE
490 N. DOUGALL RD, KELOWNA, BC
DRAWING NUMBER

A3.03

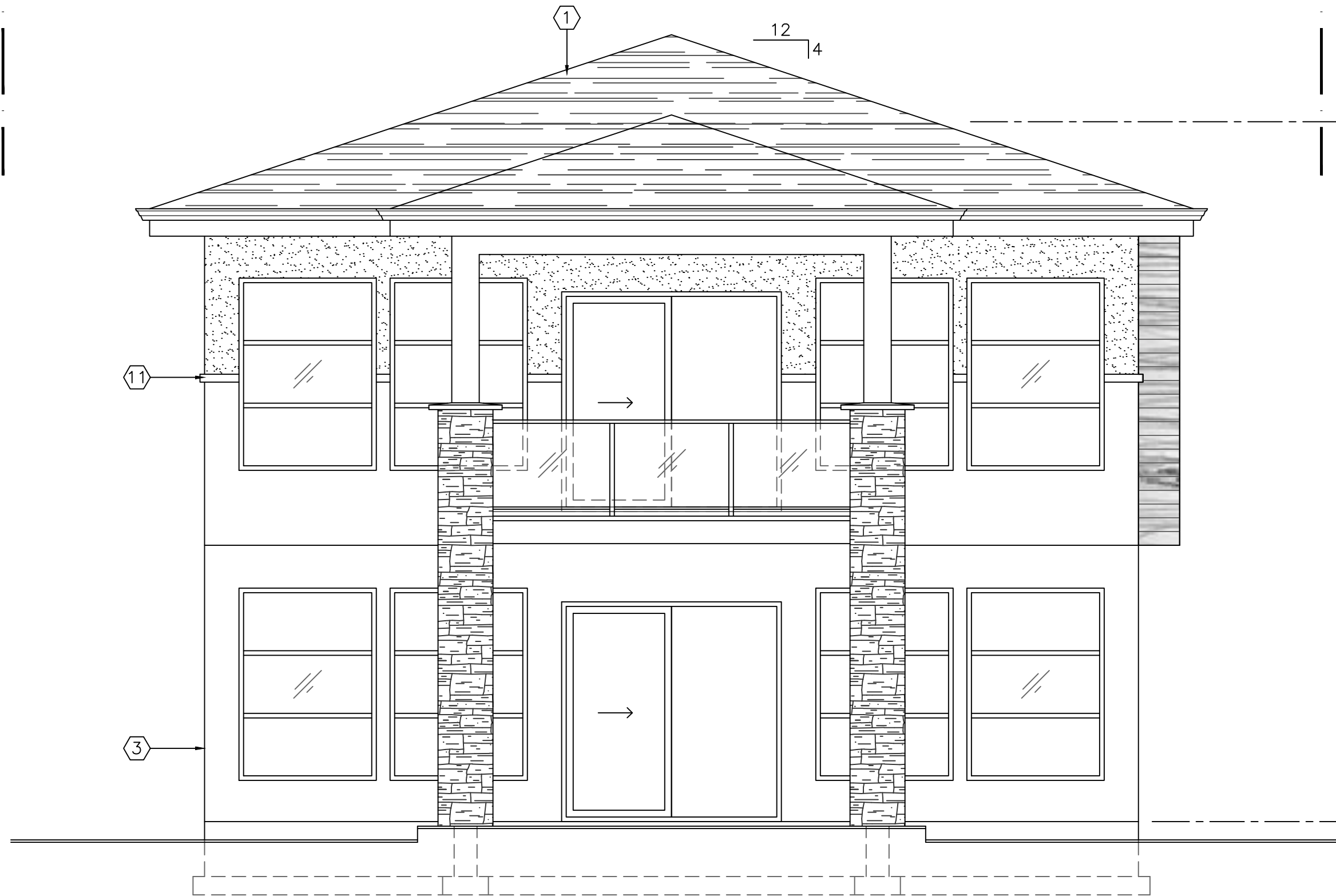
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ALL DIMENSIONS SHALL BE VERIFIED ON JOB
DRAWING TITLE

ROOF PLANS

No.	Date	Revision
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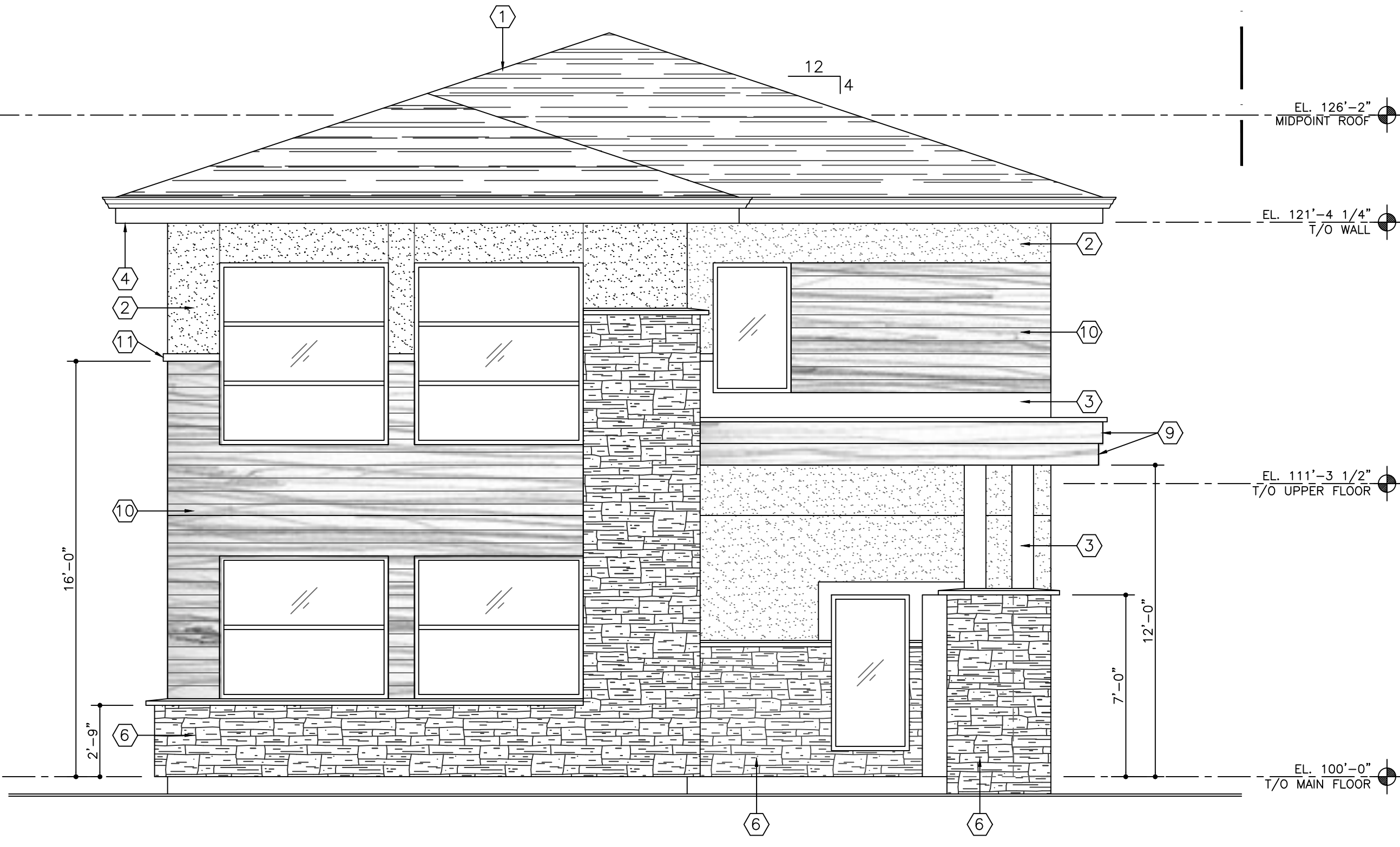
PROPERTY LINE



2 REAR ELEVATION (WEST)
A4.01 SCALE: 1/4" = 1'-0"

PROPERTY LINE

PROPERTY LINE



1 FRONT ELEVATION (EAST)
A4.01 SCALE: 1/4" = 1'-0"

PROPERTY LINE

EXTERIOR FINISHES SCHEDULE	
1	ASPHALT SHINGLES
2	HARDIE PANEL SIDING (PAINTED BLACK)
3	STUCCO FINISH (COLOUR TO BE SELECTED BY OWNER)
4	PREFIN. METAL GUTTER OVER 1X12 PAINTED FASCIA BOARD
5	VINYL WINDOWS
6	STONE VENEER SELECTED BY OWNER
7	SAFETY GLASS RAILING
8	OVERHEAD GARAGE DOORS
9	1X12 WOOD FASCIA (STAIN FINISH)
10	1X6 WOOD SIDING (STAIN FINISH)
11	2" X 4" FOAM TRIM BAND
12	

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SCHEDULE

This forms part of application
Z17-0101

Planner
Initials LK

B

City of
Kelowna
COMMUNITY PLANNING

PROJECT
SEKHON HOUSE
490 N. DOUGALL RD, KELOWNA, BC
DRAWING NUMBER

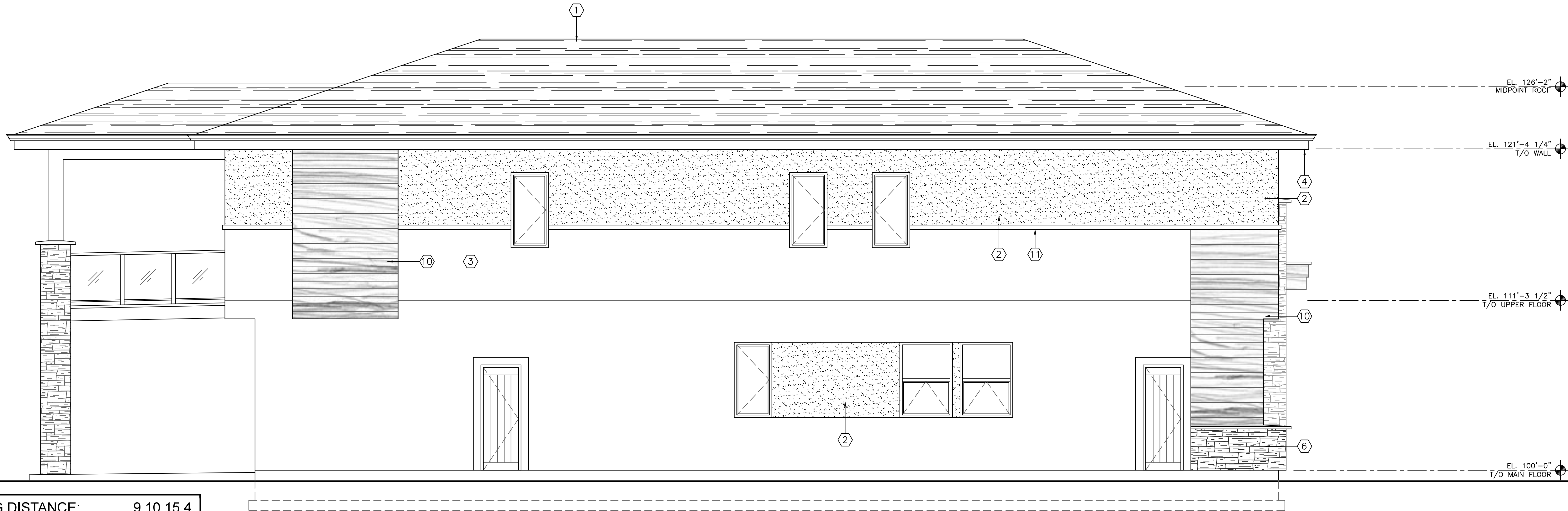
A4.01

DRAWINGS ARE NOT TO BE SCALED
ALL DIMENSIONS SHALL BE VERIFIED ON JOB
DRAWING TITLE

FRONT & REAR
ELEVATIONS

No.	Date	Revision
01	2017-10-03	issued for DP
02	2018-02-23	revisions for DP
Date	2018-02-23	
Job #	17-081	
Scale	As Shown	
Drawn	PH	

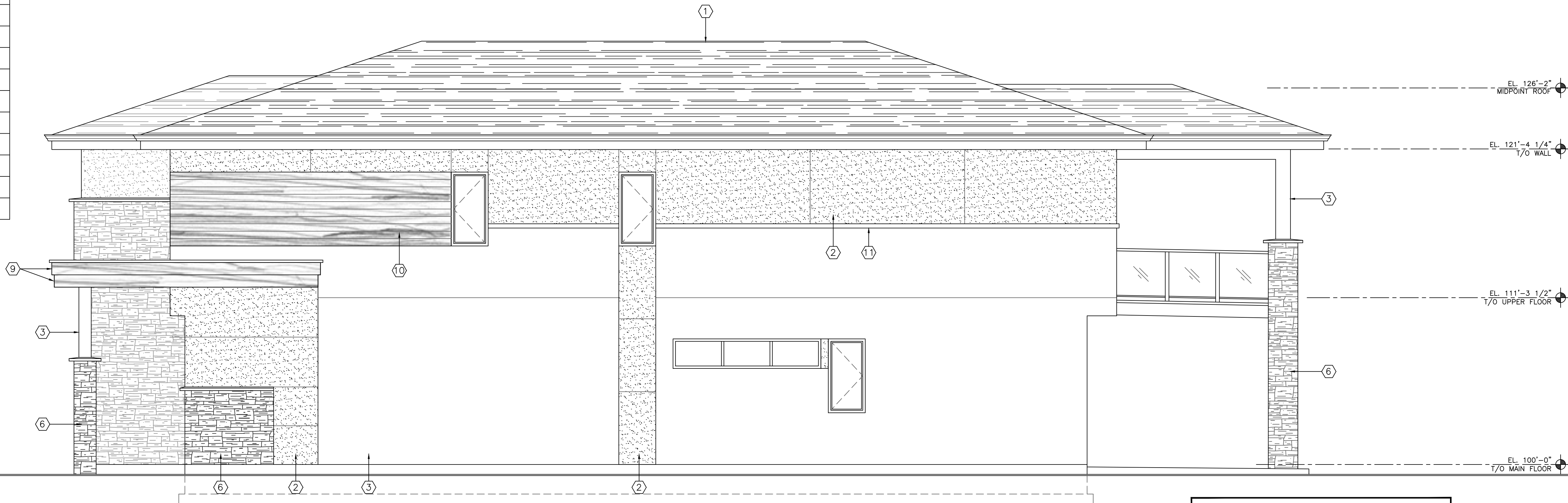
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LIMITING DISTANCE:	9.10.15.4
TOTAL WALL AREA	138.6sm
MAX. ALLOWABLE (8%)	11.1sm
PROPOSED (glazing)	7.9sm
PROPOSED (doors)	3.45sm

1
A4.02
SIDE ELEVATION (SOUTH)
SCALE: 1/4" = 1'-0"

EXTERIOR FINISHES SCHEDULE	
①	ASPHALT SHINGLES
②	HARDIE PANEL SIDING (PAINTED BLACK)
③	STUCCO FINISH (COLOUR TO BE SELECTED BY OWNER)
④	PREFIN. METAL GUTTER OVER 1X12 PAINTED FASCIA BOARD
⑤	VINYL WINDOWS
⑥	STONE VENEER SELECTED BY OWNER
⑦	SAFETY GLASS RAILING
⑧	OVERHEAD GARAGE DOORS
⑨	1X12 WOOD FASCIA (STAIN FINISH)
⑩	1X6 WOOD SIDING (STAIN FINISH)
⑪	2" X 4" FOAM TRIM BAND
⑫	



2
A4.02
SIDE ELEVATION (NORTH)
SCALE: 1/4" = 1'-0"

LIMITING DISTANCE:	9.10.15.4
TOTAL WALL AREA	126.7sm
MAX. ALLOWABLE (8%)	10.1sm
PROPOSED (glazing)	4.9sm

SCHEDULE B

This forms part of application # Z17-0101

Planner Initials LK

City of Kelowna COMMUNITY PLANNING

PROJECT
SEKHON HOUSE
490 N. DOUGALL RD, KELOWNA, BC

DRAWING NUMBER

A4.02

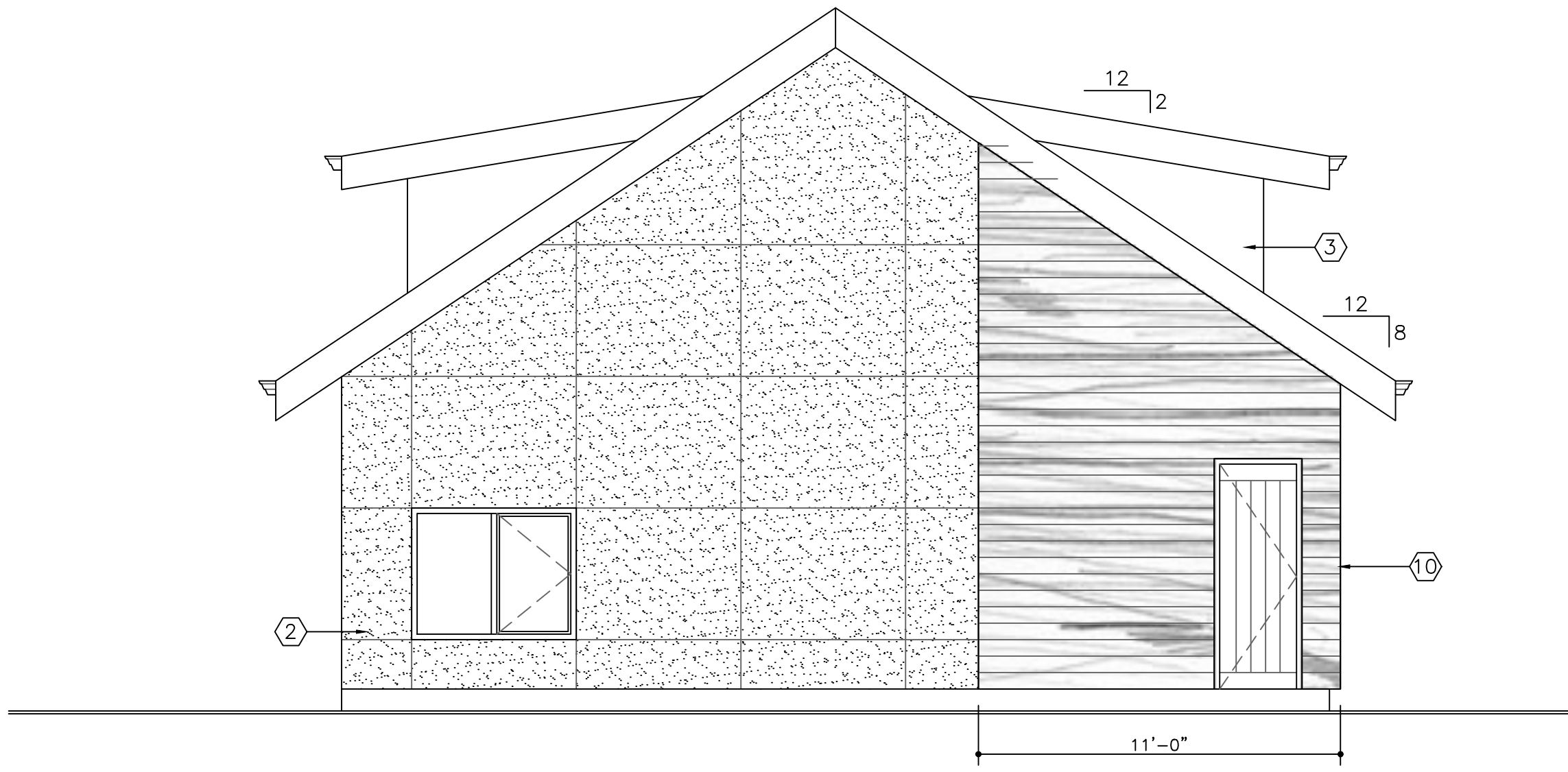
DRAWINGS ARE NOT TO BE SCALED
ALL DIMENSIONS SHALL BE VERIFIED ON JOB

DRAWING TITLE
SIDE (NORTH&SOUTH)
ELEVATIONS

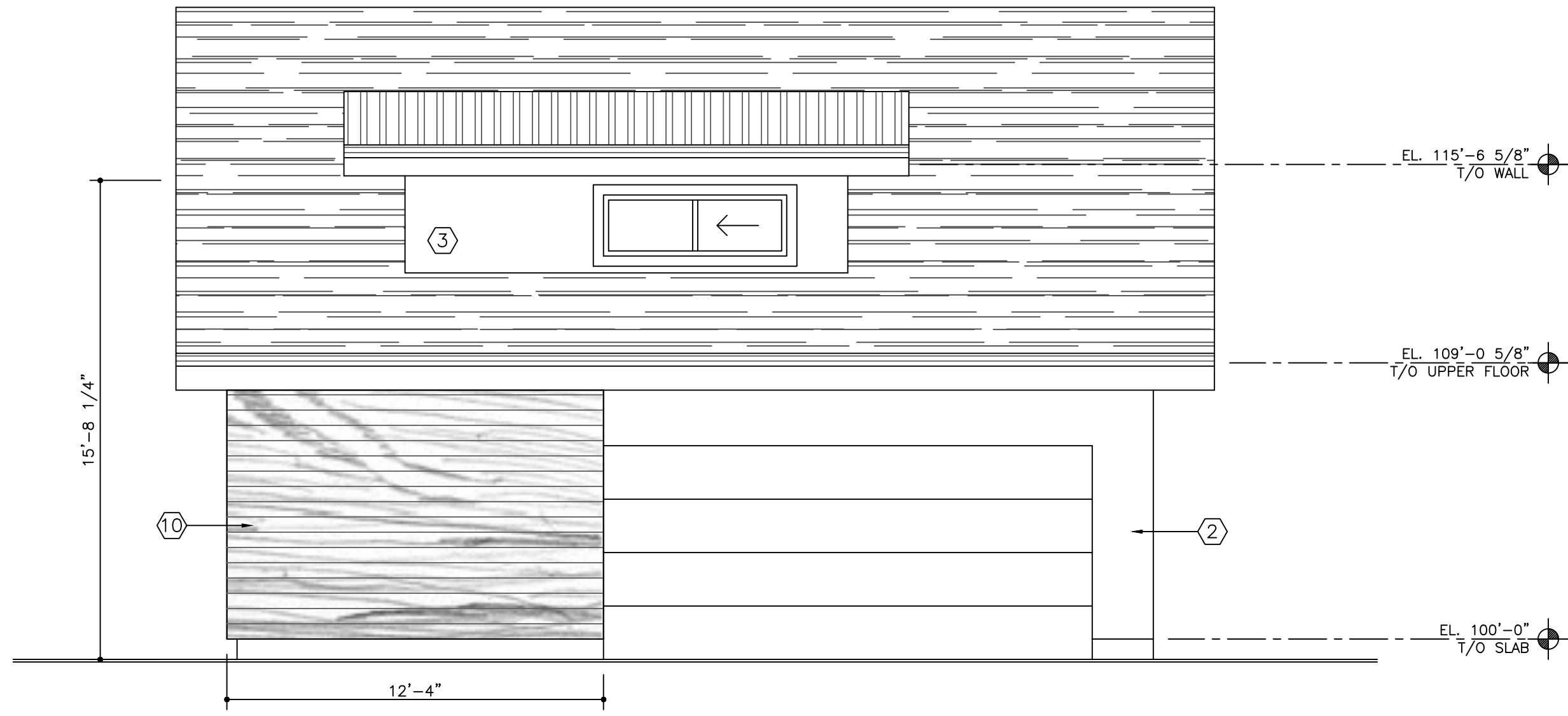
No.	Date	Revision
01	2017-10-03	issued for DP
02	2018-02-23	revisions for DP

Date	2018-02-23
Job #	17-081
Scale	As Shown
Drawn	PH

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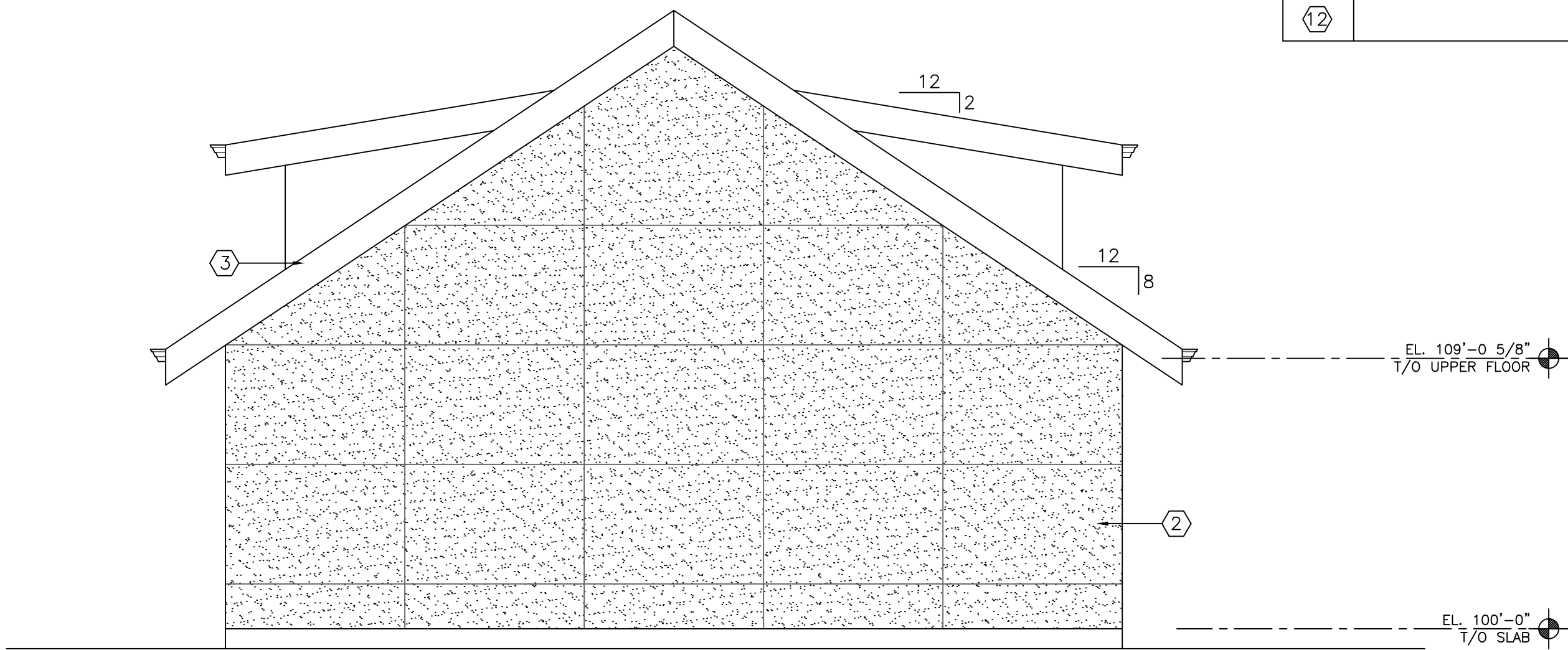


3 SIDE ELEVATION (NORTH)
A4.03 SCALE: 1/4" = 1'-0"

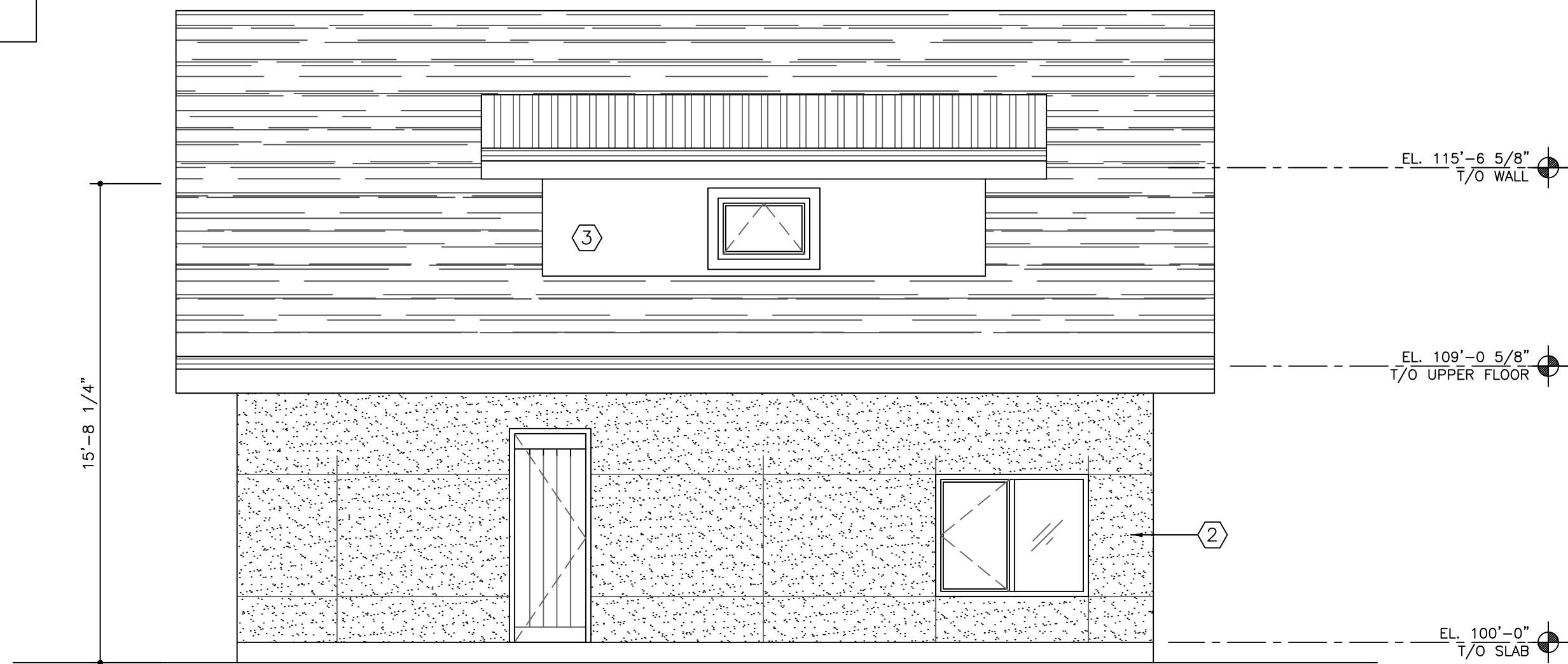


1 LANE ACCESS/REAR ELEV (WEST)
A4.03 SCALE: 1/4" = 1'-0"

EXTERIOR FINISHES SCHEDULE	
1	ASPHALT SHINGLES
2	HARDIE PANEL SIDING (PAINTED BLACK)
3	STUCCO FINISH (COLOUR TO BE SELECTED BY OWNER)
4	PREFIN. METAL GUTTER OVER 1X12 PAINTED FASCIA BOARD
5	VINYL WINDOWS
6	STONE VENEER SELECTED BY OWNER
7	SAFETY GLASS RAILING
8	OVERHEAD GARAGE DOORS
9	1X12 WOOD FASCIA (STAIN FINISH)
10	1X6 WOOD SIDING (STAIN FINISH)
11	2" x 4" FOAM TRIM BAND
12	



4 SIDE ELEVATION (SOUTH)
A4.03 SCALE: 1/4" = 1'-0"



2 'FRONT' ELEV (EAST)
A4.03 SCALE: 1/4" = 1'-0"

SCHEDULE **B**

This forms part of application
Z17-0101

Planner Initials LK

City of Kelowna
COMMUNITY PLANNING

PROJECT
SEKHON HOUSE
490 N. DOUGALL RD, KELOWNA, BC
DRAWING NUMBER

A4.03

DRAWINGS ARE NOT TO BE SCALED
ALL DIMENSIONS SHALL BE VERIFIED ON JOB
DRAWING TITLE

DETACHED GARAGE
& CARRIAGE HOUSE

No.	Date	Revision
01	2017-10-03	issued for DP
02	2018-02-23	revisions for DP

Date 2018-02-23
Job # 17-081
Scale As Shown
Drawn PH

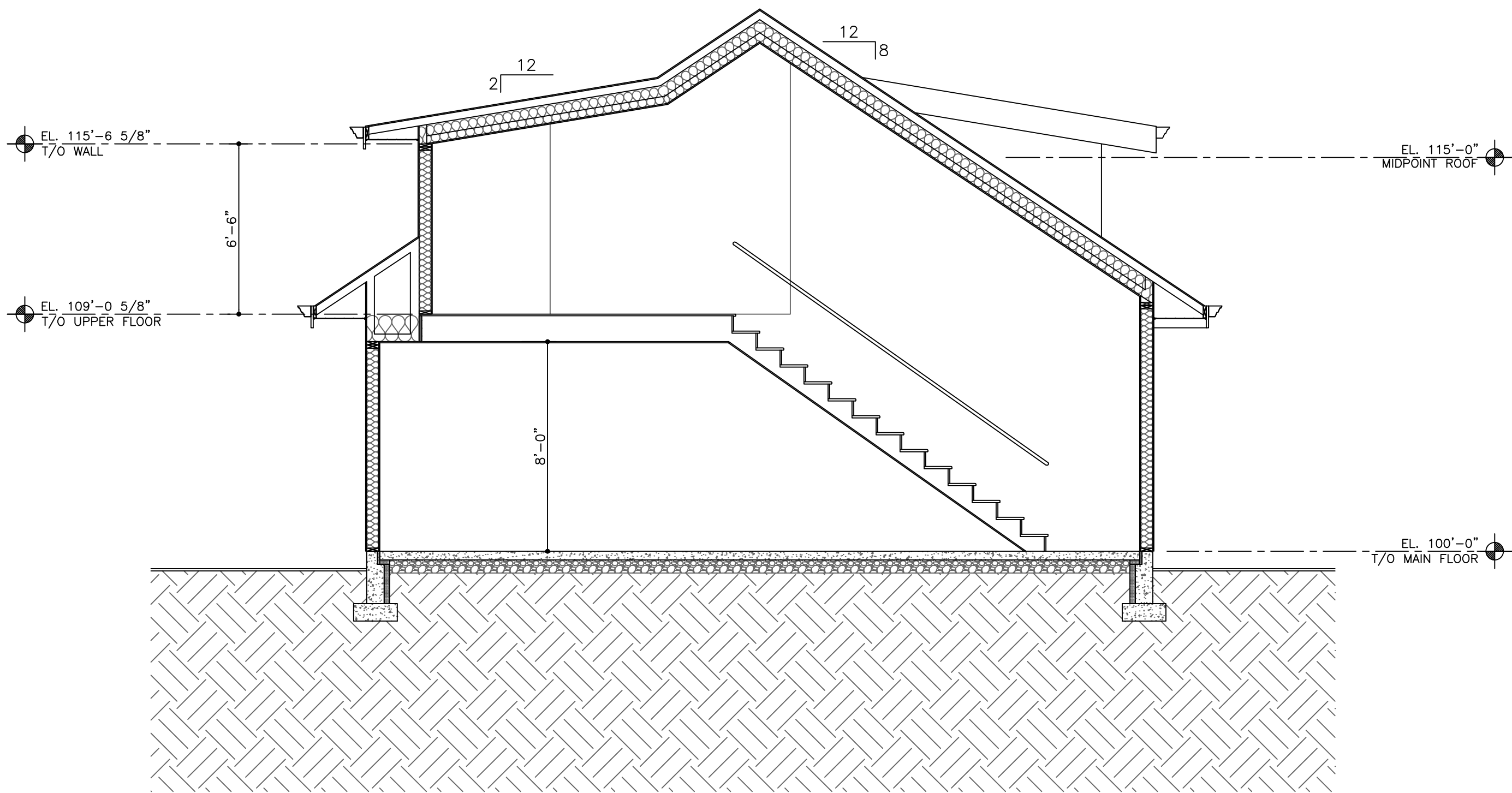
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defined by lines

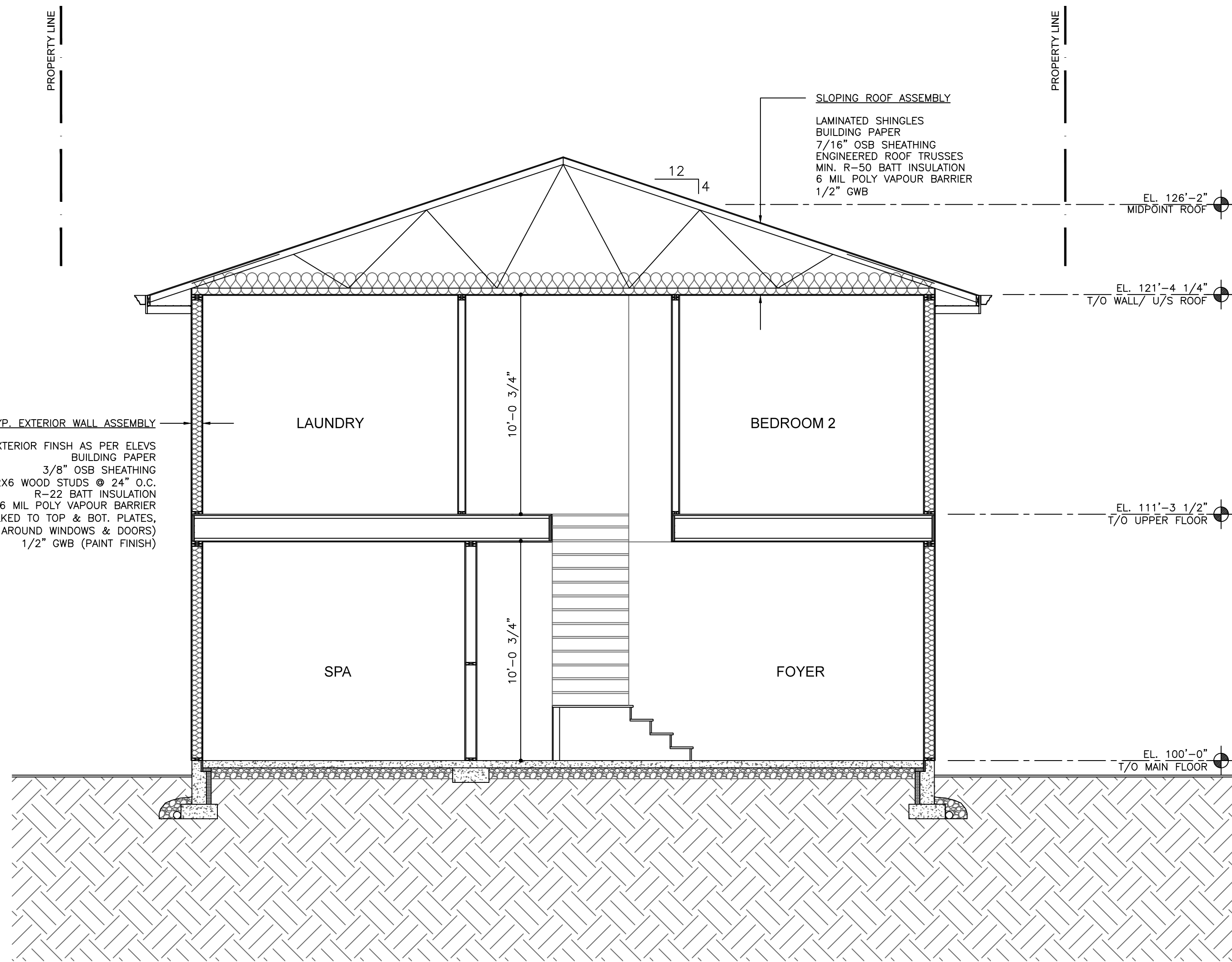
PARM HUNDAL CONCEPTS

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parm@hundalhomes.com

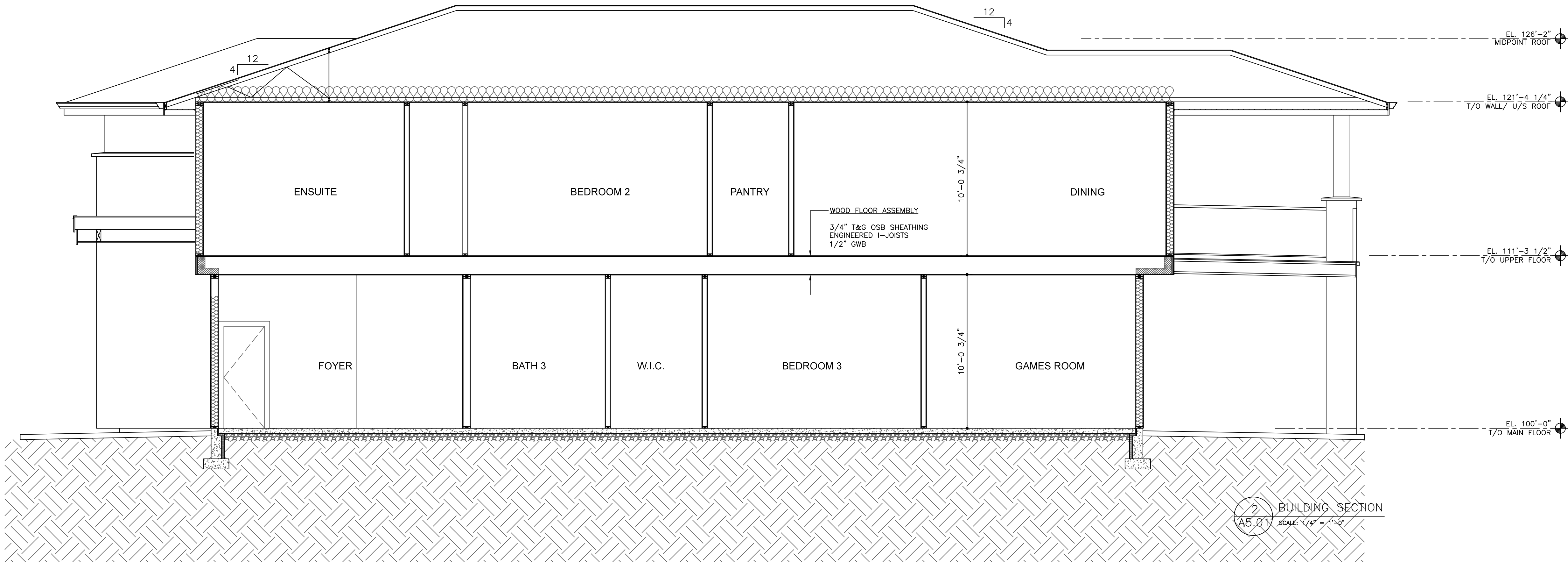
(250)899 0504



3
A5.01
BUILDING SECTION
(DETACHED GARAGE/CARRIAGE HOUSE)
SCALE: 1/4" = 1'-0"



1
A5.01
BUILDING SECTION
SCALE: 1/4" = 1'-0"



2
A5.01
BUILDING SECTION
SCALE: 1/4" = 1'-0"

defined by lines

PARM HUNDAL CONCEPTS

WWW.HUNDALHOMES.COM
parm@hundalhomes.com

(250) 899 0504

PROJECT
HARI RESIDENCE
875 MAYFAIR RD, KELOWNA, BC
DRAWING NUMBER

A5.01

DRAWINGS ARE NOT TO BE SCALED
ALL DIMENSIONS SHALL BE VERIFIED ON JOB

DRAWING TITLE

BUILDING SECTIONS

No.	Date	Revision
01	2016-09-11	preliminary approval
02	2016-09-25	issued for coord/BP
Date	2016-09-27	
Job #	16-065	
Scale	As Shown	
Drawn	PH	

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CITY OF KELOWNA

BYLAW NO. 11614

Z17-0101 490 Dougall Road North

A bylaw to amend the "City of Kelowna Zoning Bylaw No. 8000".

The Municipal Council of the City of Kelowna, in open meeting assembled, enacts as follows:

1. THAT City of Kelowna Zoning Bylaw No. 8000 be amended by changing the zoning classification of Lot 17 Section 26 Township 26 ODYD Plan 3476, located at Dougall Road North, Kelowna, BC from the RU1 – Large Lot Housing zone to the RU1c – Large Lot Housing with Carriage House zone.
2. This bylaw shall come into full force and effect and is binding on all persons as and from the date of adoption.

Read a first time by the Municipal Council this

Considered at a Public Hearing on the

Read a second and third time by the Municipal Council this 1

Approved under the Transportation Act this

(Approving Officer-Ministry of Transportation)

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk

REPORT TO COUNCIL



Date: May 7, 2018

RIM No. 1250-30

To: City Manager

From: Community Planning Department (AF)

Application: Z18-0014

Owner: James Brigham Wilson
Robin Leslie Wilson

Address: 814 Hubbard Road

Applicant: Damien Burggraeve

Subject: Rezoning Application

Existing OCP Designation: S2RES – Single/Two Unit Residential

Existing Zone: RU1 – Large Lot Housing

Proposed Zone: RU2 – Medium Lot Housing

1.0 Recommendation

THAT Rezoning Application No. Z18-0014 to amend the City of Kelowna Zoning Bylaw No. 8000 by changing the zoning classification of Lot 2, District Lot 580A, SDYD, Plan 17390, located at 814 Hubbard Road, Kelowna, BC from the RU1 – Large Lot Housing zone to the RU2 – Medium Lot Housing zone be considered by Council;

AND THAT the Rezoning Bylaw be forwarded to a Public Hearing for further consideration;

AND THAT final adoption of the Rezoning Bylaw be considered subsequent to the outstanding conditions of approval as set out in Attachment "A" attached to the Report from the Community Planning Department dated May 7, 2018;

2.0 Purpose

A development application to rezone the subject property from RU1 – Large Lot Housing to RU2 – Medium Lot Housing to facilitate a proposed two lot subdivision.

3.0 Community Planning

Community Planning supports the proposed rezoning from RU1 – Large Lot Housing to RU2 – Medium Lot Housing as it is in line with the Official Community Plan (OCP) Future Land Use Designation of S2RES – Single/Two Unit Residential for the subject property and is located within the Permanent Growth Boundary. The property is fully serviced and is in close proximity to transit, parks, and schools. It is

therefore consistent with the Compact Urban Growth and Sensitive Infill Housing OCP Land Use Policies. These policies state that growth should occur in areas that are already serviced and have access to transit, and that growth should be designed to be sensitive to the existing character of the neighbourhood.

As a condition of rezoning, the applicant will be required to upgrade the adjacent frontage by installing curb and gutter, storm drainage and pavement widening or by providing cash in lieu for the frontage improvements.

4.0 Proposal

4.1 Background

The subject property currently has an existing one and a half storey single family dwelling with two accessory buildings located at the rear of the property.

4.2 Project Description

The proposed rezoning from RU1 to RU2 would facilitate the development of a two lot subdivision of the subject property. The proposed rezoning meets all of the zoning regulations and does not require any variances.

In order to facilitate the proposed subdivision, the existing single family dwelling and accessory buildings will be demolished and subsequently removed.

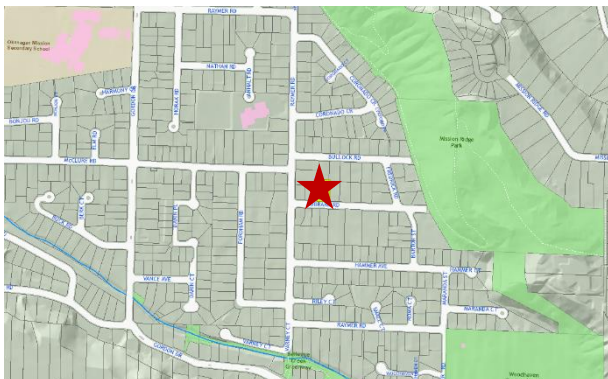
4.3 Site Context

The subject property is located in North Okanagan Mission near the intersection of Raymer Road and McClure Road and just west of Mission Ridge Park. It is in close proximity to transit routes located along Gordon Drive and is within walking distance to Mission Ridge Park. The surrounding neighborhood is comprised largely of RU1 – Large Lot Housing zoned properties. Currently, there are two other RU2 – Medium Lot Housing zoned properties within the neighborhood. Other surrounding zones include several RU6 – Two Dwelling Housing and RU1c – Large Lot Housing with Carriage House zoned properties.

Adjacent land uses are as follows:

Orientation	Zoning	Land Use
North	RU1 – Large Lot Housing	Residential
East	RU1 – Large Lot Housing	Residential
South	RU1 – Large Lot Housing	Residential
West	RU1 – Large Lot Housing	Residential

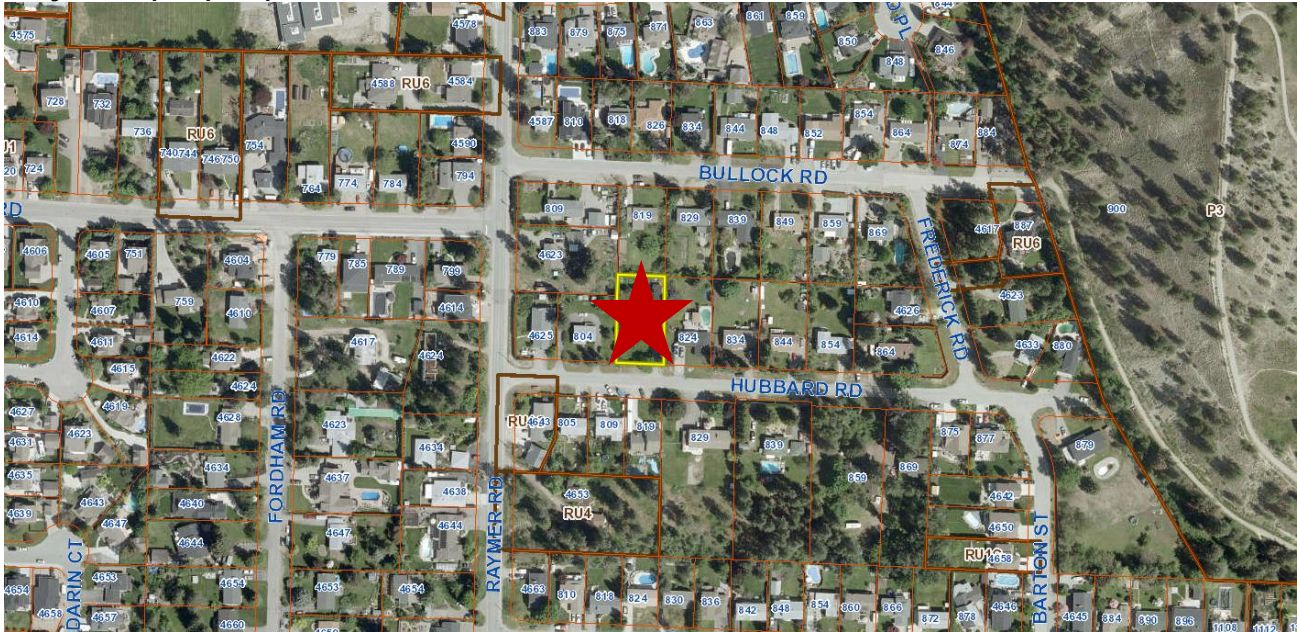
Site Context Map



Future Land Use Map



Subject Property Map: 814 Hubbard Road



5.0 Current Development Policies

5.1 Kelowna Official Community Plan (OCP)

Development Process

Compact Urban Form.¹ Develop a compact urban form that maximizes the use of existing infrastructure and contributes to energy efficient settlement patterns. This will be done by increasing densities (approximately 75 - 100 people and/or jobs located within a 400 metre walking distance of transit stops is required to support the level of transit service) through development, conversion, and re-development within Urban Centres (see Map 5.3) in particular and existing areas as per the provisions of the Generalized Future Land Use Map 4.1.

Sensitive Infill.² Encourage new development or redevelopment in existing residential areas to be sensitive to or reflect the character of the neighbourhood with respect to building design, height and siting.

6.0 Technical Comments

6.1 Building & Permitting Department

- No comment

6.2 Development Engineering Department (see attached Dev. Eng. memo dated February 26, 2018)

- Road frontage improvements are triggered by this rezoning application. The requirements include curb and gutter, storm drainage system and pavement widening. Also required is a landscaped boulevard, street lighting and the re-location or adjustment of utility appurtenances if required to accommodate the upgrading construction. The cost of this construction is at the applicant's expense.
- The proposed redevelopment includes the subject parcel being subdivided into two lots. A subdivision application will require service upgrades that include the installation of additional

¹ City of Kelowna Official Community Plan, Policy 5.3.2 (Development Process Chapter).

² City of Kelowna Official Community Plan, Policy 5.22.6 (Development Process Chapter).

services. The work will require road cuts and boulevard and pavement restoration. Development Engineering is prepared to defer the requirements of the rezoning to the subdivision stage.

7.0 Application Chronology

Date of Application Received: January 18, 2018

Date Public Consultation Completed: March 28, 2018

Report prepared by: Andrew Ferguson, Planner

Reviewed by: Terry Barton, Urban Planning Manager

Approved for Inclusion: Ryan Smith, Community Planning Department Manager

Attachments:

Attachment A: Development Engineering Technical Comments

Attachment B: Site Plan

CITY OF KELOWNA

MEMORANDUM

Date: February 26, 2018 _ *REVISED*

File No.: Z18-0014

To: Community Planning (EW)

From: Development Engineering Manager (JK)

Subject: 814 Hubbard Rd. RU1 – RU2

ATTACHMENT A	
<small>This forms part of application</small>	
<small># Z18-0014</small>	
<small>Planner Initials</small> <div style="border: 1px solid black; padding: 2px; display: inline-block;">AF</div>	 City of Kelowna <small>COMMUNITY PLANNING</small>

The Development Engineering Department has the following comments and requirements associated with this rezoning application. The road and utility upgrading requirements outlined in this report will be a requirement of this development. The Development Engineering Technologist for this project is Aaron Sangster.

1. General

Road frontage improvements are triggered by this rezoning application. The requirements include curb and gutter, storm drainage system and pavement widening. Also required is a landscaped boulevard, street lighting and the re-location or adjustment of utility appurtenances if required to accommodate the upgrading construction. The cost of this construction is at the applicant's expense.

The proposed redevelopment includes the subject parcel being subdivided into two lots. A subdivision application will require service upgrades that include the installation of additional services. The work will require road cuts and boulevard and pavement restoration. Development Engineering is prepared to defer the requirements of the rezoning to the subdivision stage.



James Kay, P. Eng.
Development Engineering Manager

AS

**PROPOSED SUBDIVISION OF LOT 2
DL 580A SDYD PLAN 17390**

CIVIC ADDRESS: 814 HUBBARD ROAD, KELOWNA, BC

Proposed zoning is RU2.

Lot dimensions and areas subject to minor
change at time of actual survey.

Scale 1:500

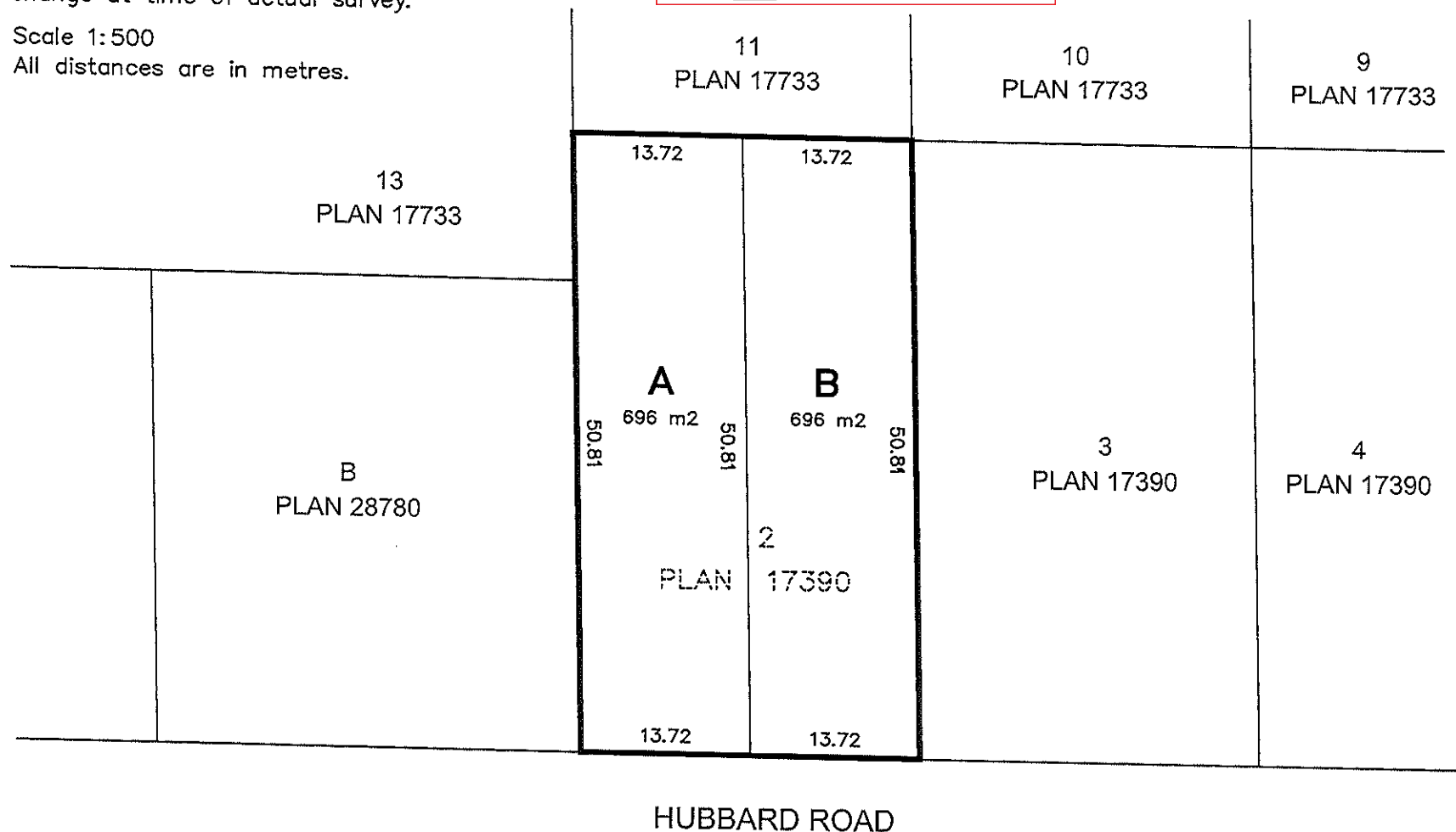
All distances are in metres.

ATTACHMENT B

This forms part of application

Z18-0014

Planner
Initials **AF**



DA Goddard Surveys
File: 418007
January 18, 2018.

CITY OF KELOWNA

BYLAW NO. 11615

Z18-0014– 815 Hubbard Road

A bylaw to amend the "City of Kelowna Zoning Bylaw No. 8000".

The Municipal Council of the City of Kelowna, in open meeting assembled, enacts as follows:

1. THAT City of Kelowna Zoning Bylaw No. 8000 be amended by changing the zoning classification of Lot 2 District Lot 580A SDYD Plan 17390, located at Hubbard Road, Kelowna, BC from the RU1 – Large Lot Housing zone to the RU2 – Medium Lot Housing zone.
2. This bylaw shall come into full force and effect and is binding on all persons as and from the date of adoption.

Read a first time by the Municipal Council this

Considered at a Public Hearing on the

Read a second and third time by the Municipal Council this

Adopted by the Municipal Council this

Mayor

City Clerk

CITY OF KELOWNA
BYLAW NO. 11580
Z18-0009 4185 McClain Road

A bylaw to amend the "City of Kelowna Zoning Bylaw No. 8000".

The Municipal Council of the City of Kelowna, in open meeting assembled, enacts as follows:

1. THAT City of Kelowna Zoning Bylaw No. 8000 be amended by changing the zoning classification of Lot A Sections 2 and 3 Township 26 ODYD Plan 7436 located on McClain Road, Kelowna, BC from the RR1 – Rural Residential zone to the RR1c – Rural Residential with Carriage House zone.
2. This bylaw shall come into full force and effect and is binding on all persons as and from the date of adoption.

Read a first time by the Municipal Council this 26th day of March, 2018.

Considered at a Public Hearing on the 17th day of April, 2018.

Read a second and third time by the Municipal Council this 17th day of April, 2018.

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk

CITY OF KELOWNA
BYLAW NO. 11581
Z17-0081 255 Ziprick Road

A bylaw to amend the "City of Kelowna Zoning Bylaw No. 8000".

The Municipal Council of the City of Kelowna, in open meeting assembled, enacts as follows:

1. THAT City of Kelowna Zoning Bylaw No. 8000 be amended by changing the zoning classification of Lot 3 Section 22 Township 26 ODYD Plan 26018, located at Ziprick Road, Kelowna, BC from the RU1 – Large Lot Housing zone to the RU6 – Two Dwelling Housing zone.
2. This bylaw shall come into full force and effect and is binding on all persons as and from the date of adoption.

Read a first time by the Municipal Council this 26th day of March, 2018.

Considered at a Public Hearing on the 17th day of April, 2018.

Read a second and third time by the Municipal Council this 17th day of April, 2018.

Approved under the Transportation Act this 27th day of April, 2018.

Audrie Henry
(Approving Officer-Ministry of Transportation)

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk

Report to Council



Date: May 7, 2018
File: 0610-51
To: City Manager
From: Doug Nicholas, Sport & Event Services Manager
Subject: Kelowna 55+ BC Games – Board of Directors

Recommendation:

THAT Council receives for information, the report from the Sport & Event Services Manager dated May 7, 2018, with respect to assembling a Board of Directors for the Kelowna 2019 55+ BC Games;

AND THAT Council appoint David Graham, Hugh Gloster, Keith Grayston, Lesley Spiegel, Valaura Vedan, Ron Forbes, Willy Kovacic, Lesley Driscoll, Don Backmeyer, Tom Dyas, Dan Rogers and Mark Fromberg as members of the Kelowna 2019 55+ BC Games Board of Directors.

Purpose:

To obtain Council approval of the appointment of the Board of Directors responsible for organizing and hosting the Kelowna 2019 55+ BC Games on behalf of the City of Kelowna.

Background:

The 55+ BC Games, formerly known as the BC Seniors Games, is an annual multi-sport event in BC that brings together approximately 3,800 participants annually to celebrate community and athletic achievement. Kelowna was selected to host the 2019 55+ BC Games, scheduled for September 10 to 14, 2019, and preparations are now underway.

A nominations committee, chaired by Mayor Basran, was established to recommend and recruit a list of candidates to serve on the Board of Directors that will form a new Society, under the Societies Act of BC, responsible for organizing and hosting the Games. Based on the work of the nominations committee, the following people were nominated, and have agreed to serve in one or more of the thirteen (13) portfolios identified for the Kelowna 55+ BC Games' Board of Directors (Biographies attached):

- President – David Graham

- Vice President/Administration – Hugh Gloster
- Administration – Keith Grayston
- Ceremonies – Lesley Spiegel
- Promotions – Valaura Vedan
- Registration & Results – Ron Forbes
- Friends of the Games – Willy Kovacic
- Sport – Lesley Driscoll
- Security/Transportation – Don Backmeyer
- Protocol – Tom Dyas/Dan Rogers
- Medical – Mark Fromberg

Recruitment continues for two director portfolios (Communications and Special Events) and these additional directors will be added by the Board of Directors for the new Society as soon as possible. Additionally, Games preparations will begin immediately for Board members with the “Games & Guidelines Session” and “Directorate Specific Meetings” scheduled to take place in May. City staff will liaise with and support the Board of Directors, and provide progress updates to Council throughout the planning process.

Internal Circulation:

Jim Gabriel, Divisional Director, Active Living & Culture
Amanda Lamberti, Communications Advisor

Financial/Budgetary Considerations:

On May 25, 2015, Council committed to the Games a cash contribution of \$60,000 and in-kind support of services and facilities with a deemed value of \$55,000

Considerations not applicable to this report:

Legal/Statutory Authority:
Legal/Statutory Procedural Requirements:
Existing Policy:
Personnel Implications:
External Agency/Public Comments:
Communications Comments:
Alternate Recommendation:

Submitted by:

Doug Nicholas, Sport & Event Services Manager

Approved for inclusion:

Jim Gabriel, Divisional Director, Active Living & Culture

Attachments:

Kelowna 55+ BC Games – Board Biographies

cc: Jim Gabriel, Divisional Director, Active Living & Culture

Kelowna 55+ BC Games

Board of Directors

Biographies

Dan Rogers is the current Executive Director with the Kelowna Chamber of Commerce. He joined the organization as its operational leader in 2017 after spending a number of years running the Vernon Chamber of Commerce. A lifelong volunteer, Dan spent thirty years in Prince George prior to coming to the Okanagan. While in Prince George he was the Bid Chair for that city's successful effort to land the 2015 Canada Winter Games. Previous to that he Chaired the host committee for the 2007 RBC Royal Bank Cup National Junior Hockey Championship, Chaired the Prince George Trails Task Force, was Sport Chair (Soccer) at the Prince George 55+ BC Games, and he also served on the board for the Prince George Track and Field Club and the Northern Capital Sports Society.

David Graham served as Kelowna's Director of Recreation Parks and Culture and as Director of Strategic Initiatives until retiring in 2012. In those roles, he gained a thorough understanding of sport administration, local/ provincial sport organizations, management of sport facilities and multi-sport events. Through his time as CEO of YMCA's in both Kelowna and Prince George, and many years serving on boards of directors with both Pacific Sport Okanagan and the Canadian Sport Institute-Pacific, David became passionate about developing best practices in governance in the not-for-profit, sport and charitable sectors. Degrees in physical education, psychology and a masters in organizational leadership provide an academic under-pinning. David lives by the Sport for Life philosophy and has engaged in many recreational and competitive sports for more than 50 years. He welcomes the opportunity to contribute to Kelowna's success as a leading centre for sport and active living in Canada through the 55+ BC Games.

Don Backmeyer served in numerous positions in the Recreation Department throughout his illustrious 27 year career with the City of Kelowna. He has extensive experience in outdoor and special events and chaired the City's Outdoor Events Committee for over ten years. Additionally, Don organized the Terry Fox Run for 10 years and was a member of the organizing committees of both the 1991 BC Games for the Physically Disabled and the 2011 International Children's Winter Games.

Hugh Gloster completed his term as Superintendent of Schools/CEO for the Central Okanagan School District (No. 23) on December 31, 2015. During his thirty-six (36) year career with the District, Hugh held a variety of leadership positions including Vice-Principal and Principal at the elementary, middle and secondary school levels. Since being Superintendent, Hugh has worked as an educational consultant in B.C. and as an Inspector of Offshore Schools for the Ministry of Education. His previous 'games experience' included volunteering for the BC Summer Games, the Memorial Cup, the World Junior Hockey Championships and being on the bid committee for the 2015 Canada Winter Games. Hugh has also been a coach and referee of high school rugby for many years.

Keith Grayston has over 35 years of experience in the financial industry. He worked as a professional accountant with the City of Kelowna for 25 years, retiring in 2015 as the Director of Finance. Outside of the finance world, Keith has had a lifetime interest in almost all sports and is currently involved with golf, cycling, skiing and curling. The 55+ BC Games provides an exciting opportunity for Keith to combine his prior professional skill set with his sporting interests.

Lesley Driscoll has been involved in the sport of Ringette for more than 7 years. From Team Manager to Assistant Coach to President of the Kelowna Ringette Association, she has held a variety of local and provincial volunteer positions during that time. Lesley has been involved in the planning and execution of numerous ringette events including the annual Sweetheart Tournament, Kelowna Ringette Summer Camps and the BC Ringette Provincial Championships. Prior to her involvement in Ringette, Lesley was a Convocation Member of the UBC Okanagan Senate and Fundraising Coordinator for Okanagan Montessori. Outside of her passion for ringette and her firm belief in Sport for Life, Lesley has a background in both Financial Planning and Government Relations.

Lesley Spiegel, the founder of Synergy Events, is a multiple award winning event producer with over 30 years of experience in the industry, producing both large and small scale events for such notable clients as the Province of British Columbia, the City of Kelowna, Kelowna General Hospital Foundation and Tourism Kelowna. Lesley has had the pleasure of crafting the opening and closing ceremonies for the BC Summer Games in 2008 and the International Children's Winter Games in 2011. Having been recognized by her peers with numerous awards, Lesley is delighted to be collaborating with this outstanding team of professionals. Committed to excellence, Lesley will take this concept from inception to completion with a bold, trusted and experienced approach.

Dr. Mark Fromberg has a lifelong interest in competitive sport that has directed him through first a kinesiology degree and then a 30-year medical career. He recently retired, but has retained a passionate interest in preventive health, living well to 100, and potentially rebranding Kelowna as Canada's healthiest community. He has been a long-time director of Canada's largest open water swim event (Kelowna's Across the Lake Swim) and has overseen its 5-fold growth in the last 10 years, winning recognition as one of the World's Top 20 open water swim events, while it drown-proofs an entire generation of Central Okanagan kids with free swimming lessons. In the last 15 years, he has provided medical support and direction for multiple triathlons, including Ironman Canada, the Ironman Kona World Championships, and the Apple Triathlon.

Ron Forbes worked for the City of Kelowna for 35 years starting in the Recreation Department. As the Supervisor of Administration, Ron was instrumental in the installation, operating and maintenance of the computerized registration, membership and facility booking system. In addition to the Recreation Department, Ron also worked in the Civic Properties Department, Cultural Services Department before winding up his career with the City as Property Manager with the Real Estate Department. After a brief retirement, Ron was coaxed back into the workplace as a Property Manager with Westcorp and as a Players Assistant at the Okanagan Golf Course. He hopes to bring his many years of experience to ensure that the registration and results components of the BC 55+ Games in Kelowna run smoothly.

Tom Dyas has owned and operated TD Benefits for more than 30 years. He moved from Toronto to BC in 1986, and lived in the lower mainland before settling in the interior in 1996. Over the years, as his children have grown, Tom has been actively involved with Kelowna Minor Hockey and local soccer clubs, as well as serving on countless steering committees aimed at community development. Tom served as President of the Kelowna Chamber of Commerce and was awarded the President's Award for Director of the Year. He enjoys being actively involved in the community and will serve as the Chairman of Kelowna's bid committee for the 2020 Memorial Cup in addition to his role with the Kelowna 55+ BC Games.

Valaura Vedan moved to Kelowna in September 2011, from Drayton Valley, AB. She worked for a time in media and marketing, including Content Manager for WelcometoKelowna.com (Kelowna Now), Content Strategist for Csek Creative and Community Animator for Kelowna Culture Days, before launching her own marketing business, "By Jove Co". Valaura is passionate about being involved in, and helping to build, community, and was recognized as one of the Okanagan's most exciting young entrepreneurs in BDO's "Top 40 Under 40" program. She has volunteered for the past six years as the photographer for Flower Power and more recently, as a member of the host committee for Breakout West.

Willy Kovacic recently retired after 25 years in the property management business as the co-founder and president of Okanagan Strata Management. During that time, Willy served on several boards and committees in both public and industry based organizations including Festivals Kelowna, the Strata Property Agents of BC, and the Manufactured Home Owners of BC. Willy continues to be active in the sport of basketball and has participated in the last two World Masters Games in Torino, Italy and Auckland, New Zealand.

Report to Council



Date: May 7, 2018
File: 0710-30
To: City Manager
From: Mariko Siggers, Community & Neighbourhood Services Manager
Subject: 2018 Community Social Development Grants

Recommendation:

THAT Council receives, for information, the report from the Community & Neighbourhood Services Manager dated May 7, 2018, regarding the distribution of the Community Social Development Grants;

Purpose:

To provide Council with background information about the Community Social Development Grants, the grant review process and the decision of the Grant Review Committee regarding the distribution of the 2018 program funds.

Background:

The City social grant program currently consists of Community Social Development Grants and Emergency Grants (Policy 218). The purpose of these grants is to support the social sustainability objectives outlined in Chapter 10 of the Official Community Plan, the City Social Framework and Social Policy (Policy 360).

The annual budget for the Community Social Development Grant is \$187,000, which includes the funds transferred from the RDCO Grant-In-Aid fund. The Central Okanagan Foundation (COF) has been contracted by the City since 2005 to administer an arms-length, independent evaluation process for the social grants. This relationship is governed by an annual Memorandum of Understanding.

COF is responsible for establishing a Grant Review Committee and providing oversight to this committee. The Grant Review Committee evaluates submitted grant applications based on parameters established through Council Policy 218 and the Community Social Development Grant Guidelines. Award amounts are determined based on the applicants' ability to demonstrate how the objectives of the grant program will be met and to clearly identify how the funds will be used. Applications that do not demonstrate this are given partial or no funding.

The Community Social Development Grants include three streams of funding:

Grant	Purpose	Funding Levels
Operational Grants	Assist with expenditures incurred funding the operation and/or delivery of existing programs	A maximum of 25% of the organization's operating budget
Project Grants	Assist with special events or to operate short term programs or projects	A maximum of 50% of the costs of the project
Emergency Grants	Assist an organization through a financial crisis	A maximum of \$5000 once in a three-year period

Annually, the Operational and Project Grants have an intake and administrative timeline while the Emergency Grants are distributed as the need arises and are funded through the Social Development Grant Reserve (R117).

Below is the 2018 timeline for the Community Social Development Project and Operating Grants:

- January 17, 2018 - community information session
- February 23, 2018 – deadline for grant submissions
- April 4, 2018 - Grant Review Committee adjudicate grant applications

In 2018, 18 grant applications were received. The total amount requested was \$375,222. Following the adjudication process, 11 applicants were approved for funding and the total annual budget of \$187,000 was allocated.

A list of the grant recipients and a brief description of the project or organization is included in Attachment A and has been summarized below:

	Organization	Amount Awarded	Type of Grant	Funding Level
1	Brain Trust	\$8,000	Project	Full
2	Elevation Outdoors	\$15,000	Operational	Full
3	Hands in Service	\$25,000	Operational	Full
4	Hope for the Nations	\$17,000	Operational	Partial
5	Karis Support Society	\$15,000	Operational	Full
6	Kelowna Pride Society	\$14,500	Operational	Partial
7	Living Positive Resource Centre	\$20,000	Operational	Full
8	NOW Canada	\$31,000	Operational	Full
9	Okanagan Immigrant Collective	\$13,500	Project	Full
10	Seniors Outreach Resource Centre	\$8,000	Operational	Full
11	Start Fresh Project Society	\$20,000	Project	Partial
	Total	\$187,000		

Total Grant Applications Received: 18
Total Grant Applications Funded: 11
Total Funds Distributed: \$187,000

Total Funds Requested: \$375,222
2018 Grant Funding Available: \$187,000

The guidelines have been modified over the past few years in order to be more responsive to the greatest community needs. In 2017, Council approved the addition of “Resiliency Themes” to be applied if the program is over-subscribed. The applications which better align with the themes are given a higher funding priority than those which do not.

Resiliency Themes:

1. Create a culture of inclusivity and increase opportunities for social connections and support, particularly for residents who are isolated or vulnerable.
2. Support initiatives that focus on capacity building to prevent homelessness and provide housing support.

In 2018, these themes were used to guide the decision making as the requests for funds were higher than the allocated amount. In particular, applications which were difficult for the committee to reach consensus on were tabled. The resiliency themes were applied to these applications and influenced the final funding decision.

Applicants have all been notified of the decisions. Unsuccessful applicants received feedback as to how the decision was reached and how they can improve their application for next time. Successful applicants must sign a Letter of Agreement outlining the terms and conditions of the grant and show proof of adequate liability insurance before any funds will be released. A final report is required within 90 days of the end of the grant term and will include the following information:

- how the agreed upon measureable performance targets were met.
- project statistics and supplementary data as they relate to project goals, objectives and outcomes.
- a financial statement certified correct by the directors of the agency or an independent auditor, showing all revenue and expenses related to the project and detailing how the grant funds were dispersed.

Next Steps

As important work continues on developing strategies for collaborative community wide social services, the Community Social Development Grant guidelines will continue to become more strategic in advancing Council’s priorities. In addition, improvements to the application form, guidelines and scoring matrix will be developed with the Central Okanagan Foundation to further refine and clarify administrative process.

Internal Circulation: Divisional Director, Active Living & Culture; Divisional Director; Communications Advisor; Social Development Manager

Existing Policy:

Council Policy 218 Community Social Development Grants
Council Policy 360 Social Policy

Financial/Budgetary Considerations:

Allocated in the Community & Neighbourhood Services Branch the annual budget is \$187,000 for Community Social Development Grants and \$15,000 for contracted services for grant administration.

External Agency/Public Comments

This report has been prepared in consultation with the Central Okanagan Foundation in their role as the contractor providing arms-length administration and review of this grant program.

Considerations not applicable to this report:

Legal/Statutory Authority
Legal/Statutory Procedural Requirements
Personnel Implications
Communications Comments
Alternate Recommendation

Submitted by:

M. Siggers, Community & Neighbourhood Services Manager

Approved for inclusion: J. Gabriel, Divisional Director, Active Living & Culture

Attachments:

Attachment A: Report from the Central Okanagan Foundation

Attachment B: Council Policy 218 Community Social Development Grants

Cc: Divisional Director, Corporate Strategic Services
Divisional Director, Financial Services

April 16.2018

Mayor Basran & Council
1435 Water Street
Kelowna, BC
V1Y 1J4

Dear Mayor Basran & Council:

This report contains the approved recipients for the 2018 City of Kelowna, Community Social Development Grant program to be presented to City of Kelowna Council on May 7.2018.

A total of eighteen grant applications were received for the Community Social Development grant program. There was \$187,000.00 available to fund and the total amount requested was \$375,222.00. Eleven applicants received final approval for a total of \$187,000.00 to be dispersed.

The City of Kelowna / Central Okanagan Foundation review committee approved the following grants from their meeting on April 4.2018.

Respectfully submitted,



Cheryl Miller
Director, Grants & Community Initiatives
Central Okanagan Foundation

2018 Community Social Development Grants

1. Brain Trust

Brain Injury Counselling Pilot Program - Project/Full

Approved: \$ 8,000

To enhance the rehabilitation support provided to youth and adults with brain injury and persistent concussions symptoms. To provide clients with immediate and timely access to trained counsellors who understand mental health as it relates to brain injury, as well as strategies to ensure the information is processed and retained.

2. Elevation Outdoors

Operational/Full

Approved: \$15,000

Elevation Outdoors offers specially designed outdoor sports programs, personal mentorship and life skills coaching to vulnerable youth 12 to 18 years who face barriers to participation.

3. Hands in Service

Operational/Full

Approved: \$25,000

General operating funds for at risk adults 19 to 65 years and their families experiencing social, financial, health, mobility limitations for basic housekeeping services and access to food and resource information.

4. Hope for the Nations

Operational/Partial- Food for Thought Program

Approved: \$17,000

Provides breakfast to 19 schools in Kelowna.

5. Karis Support Society

Operational/Full – Parenting Recovery Program

Approved: \$15,000

This is a facilitated, recovery-focused parenting program offering resources, information and skill development opportunities for women in recovery who are pregnant, parenting and/or in the process of having children returned to their care.

6. Kelowna Pride Society

Operational/Partial

Approved: \$ 14,500

Kelowna Pride Society is committed to serving Kelowna's LGBT2Q+ community. We create events and offer programs to connect our community and advocate for equity, inclusion and acceptance within the Okanagan Valley and beyond.

7. Living Positive Resource Centre

Operational/Full

Approved: \$20,000

To work with clients, and community partners to improve the health and wellness for people living with, or at risk of, Human Immunodeficiency Virus, Hepatitis C, or other Sexually Transmitted Blood Borne Infections.

8. NOW Canada

Operational/Full – Essentials Program

Approved: \$31,000

Essentials is a continuum of care program offered to women and youth. The program offers women and female youth the opportunity to address their challenges of homelessness, addiction, abuse and mental health concerns by providing housing placement

9. Okanagan Immigrant Collective

Project/Full

Approved: \$13,500

To develop a Multicultural Hub Homework Club that will focus on meeting the academic and social needs of immigrant elementary school children by empowering parents to support their children in their schooling.

10. Seniors Outreach Resource Centre

Operational/ Full

Approved: \$8,000

Supports the non-medical needs of seniors. Helps seniors navigate systems, including benefits, health and housing. Information and referral.

11. Start Fresh Project Society

Project/Partial – Culinary Arts and Farm Education Program

Approved: \$20,000

A program focusing on teaching participants (demographic is high functioning but vulnerable community members who experience barriers to employment resulting from chronic or permanent mental health struggles or related life circumstances) the fundamentals of growing and preparing food. Offers valuable life and employment skills, certificates including FoodSafe, Farm Safety and Fire Suppression.



City of Kelowna
1435 Water Street
Kelowna, BC V1Y 1J4
250 469-8500
kelowna.ca

Council Policy

Community Social Development Grants

UPDATED: January 23, 2017

Contact Department: Active Living & Culture

Guiding Principle

The City is committed to supporting community organizations who make a direct impact on the social well-being and resiliency of the community.

Purpose

The purpose of the Community Social Development Grants is to make available funding to registered non-profit organizations and community organizations offering services or programs with the goal of generating, promoting or accelerating socially beneficial services or programs in the city of Kelowna.

Application

To be eligible for this program applicants must be

- a. a Registered Charity Organization that is registered with Canada Revenue Agency, a not for profit organization that is incorporated under the Societies Act; or
- b. a Community Organization that has established a set of working rules and regulations, a banking account in the group's name and has been operating for at least two years.

The following are ineligible for funding:

- a. programs primarily providing for recreation or leisure time pursuits;
- b. retroactive financial support for projects and programs that occurred prior to the decision to award the grant;
- c. agencies or programs that receive ongoing City of Kelowna funding within the City's Annual Budget;
- d. activities of religious organizations that serve primarily their membership and/or for direct religious purposes;
- e. permanent or continual funding for an organization
- f. programs which offer direct financial assistance to individuals or families;
- g. programs which duplicate services that fall within the mandate of a senior government agency;
- h. major building or other major capital projects (limited capital costs are eligible);
- i. assistance for an industrial, commercial or business undertaking.

Policy Statements

1. The following grant categories are established through this policy:

1. Operational Grants

Purpose: To assist eligible organizations with expenditures incurred funding the operation and/or delivery of existing programs;

Eligible Uses: Office supplies, administrative and facility costs, minor capital costs (e.g. office equipment), advertising, training, technical/material assistance, and similar items necessary to deliver existing programs. This category is not intended to provide the basis for permanent operational funding.

Funding Levels: A maximum of 25% of the organization's operating budget.

2. Project Grants

Purpose: To assist eligible organizations to stage special events or to operate short-term programs or projects (less than 12 months in duration). Projects must have clear time frames, not require additional permanent staff, and be projects which would not normally have been undertaken without this additional resource.

Eligible Uses: To cover costs of hosting and promoting special events (facility rental, guest speakers, food, advertising, promotional items, etc.); administrative and delivery costs for short-term programs/projects (supplies and materials, facility rental, etc.); minor capital costs (e.g. office equipment) and non-permanent staffing.

Funding Levels: A maximum of 50% of the costs of the special project.

3. Emergency Grants

Purpose: To provide emergency funding for the purpose of assisting an organization through a financial crisis. It is anticipated that the funding will be short-term funding only, pending more secure or ongoing funding.

Eligible Uses: To cover costs incurred in the operation and the delivery of their programs such as administrative costs, program delivery, facility costs and technical/material assistance.

Funding Levels: A maximum of \$5000 once in every three-year period. Funding will depend on the availability of funds within the Social Development Grant Reserve (R117).

2. The following criteria will be used to evaluate all applications for Community Social Development Grants:
 - a. alignment with the City's Social Framework including Social Policy No. 360 and Chapter 10 of the Official Community Plan and/or policies tagged as socially sustainable in the Official Community Plan with a person symbol; innovative or unique approach to addressing social well-being;
 - b. promotion and demonstration of volunteerism;
 - c. evidence of community support;
 - d. an approach that is responsive to social needs, strengthens and stabilizes family and community life, and improve peoples' abilities to identify and act on their own social needs;
 - e. clear information on their operations and planning, demonstrating transparency;
 - f. clearly identified needs based on local research and effective planning as the basis for the services provided;
 - g. demonstrated collaboration with other service providers in the community; identify how other organizations will be engaged;
 - h. clearly defined performance targets and timelines;
 - i. demonstrated need for funding;
 - j. a clear plan for future funding from other sources
 - k. quality of management, including the satisfactory administration of any previous City of Kelowna grant
3. The City of Kelowna will contract a funding agency by agreement to administer the grants program.
 - a. The funding agency will establish a Grants Committee consisting of two (2) appointed members representing the City of Kelowna and additional members as determined by the funding agency.
 - b. The Grants Committee will follow the established policy and service agreement to evaluate each application and provide a list of grant recipients through an annual report to Council.
4. All organizations approved for funding under the Community Social Development Grants program will be required to sign and adhere to the City of Kelowna's Letter of Agreement for Funding and have liability insurance in place, as outlined on the City's Certificate of Insurance.
 - a. Funding will commence once the Letter of Agreement and Certificate of Insurance has been received, is deemed satisfactory to the Funding Agency and signed by the Funding Agency or a qualified designate of the Funding Agency.
5. A three month time period will be given for applicants to claim their grants following written confirmation of the grant to the applicant. Any grant that is not claimed within the three month period will remain in the Community Social Development Grant fund.
6. Any unused portion of the Community Social Development Grant appropriation will be carried over to the following year and operated similar to a reserve fund with interest accrued and the necessary administration of the fund managed by the City.
7. Grant proposals that offer services or programs that cross municipal boundaries will be considered; however, grant funds may only be used for those portions of the program that are delivered within the boundaries of the City of Kelowna for the benefit of Kelowna residents.
8. Emergency Grants shall be administered as described above with the following exceptions:
 - a. Emergency grant applications may be submitted throughout the year, on the basis of need.
 - b. The Grants Committee shall review an application for emergency funding at a special meeting no later than 2 weeks following receipt of the application by the City. An interview with the applicant may be conducted.
 - c. Recommendations of the Grants Committee for any additional funding will be forwarded to City Council for consideration at the earliest available Council meeting. Funding is at the discretion of City Council. Notification of a decision by City Council will be provided to the applicant within two days of the Council meeting date when the decision is made.

- d. Emergency funding is only available to an organization once every three-year period.
- e. The organization must claim the Emergency grant within one month following written notification of the grant approval. Any unclaimed funds will be returned to the Social Development Grant Reserve.

Amendments

RESOLUTION: R061/17/01/23

REPLACING: R946/12/10/12, R375/10/04/26; R858/05/09/12; R440/02/11/25; R07/00/01/10; R887/1998/11/09; R962/1996/11/25; S1053/1992/09/14

Report to Council



Date: May 7, 2018
File: 1120-01-001
To: City Manager
From: Derek Edstrom, Director, Strategic Investments
Subject: Okanagan Rail Trail - Endorsement

Recommendation:

THAT Council receives for information the report from the Director Strategic Investments, dated May 7, 2018, with respect to the proposed governance model for the regional rail trail, including the establishment and operation of an interjurisdictional committee for the use, operation and further development of the Okanagan Rail Trail;

AND THAT Council endorse the City of Kelowna's participation in the Okanagan Rail Trail Committee in accordance with the Terms of Reference for the same, effective June 30, 2018;

AND THAT Council endorse the cessation of the Interjurisdictional Development Team, effective June 30, 2018;

AND FURTHER THAT Council appoint the Divisional Director, Community Planning and Strategic Investments, and the Director Strategic Investments as the alternate, to the committee to represent the City of Kelowna's interests, liaise internally with staff and report back to Council for updates, consultation and approvals as required.

Purpose:

To enter into an agreement with other Okanagan Rail Trail owners and stakeholders for governance of the use, operation and future development of the corridor.

Background:

In response to CN Rails' discontinuance of its rail line between Kelowna and Coldstream in 2014, the City of Kelowna, together with the jurisdictions of District of Coldstream, Regional District of North Okanagan, Regional District of Central Okanagan and District of Lake Country, united as an interjurisdictional acquisition team (IAT) to work collaboratively together to secure ownership of the rail

corridor. Upon successful acquisition of the corridor in 2015, the mandate of the IAT was fulfilled and the team disbanded.

Following this, and in order to lead the coordinated design and development of the rail trail, the jurisdictions of Regional District of North Okanagan (RDNO), District of Lake Country (DLC) and City of Kelowna (CoK) joined together as an interjurisdictional development team (IDT). In early 2016 Okanagan Indian Band (OKIB) joined the team. Fundraising for development of the first phase of the rail trail, led by Okanagan Rail Trail Initiative (ORTI), has been very successful and the fundraising target of \$7.68 million is expected to be reached before the end of 2018. Construction of the rail trail began in 2017 in parallel with the fundraising and to date is approximately 50% complete overall. Substantial completion of most sections of the trail (i.e. in RDNO, DLC, CoK) will happen in 2018, with some site specific drainage, erosion, environmental and agricultural work to be followed up on in 2019. ALC approval for use of certain sections has not yet been received .

The timing for development of the 2.3km of rail trail proposed through OKIB IR No 7 is unknown at this time. Before construction or use of this section can begin, the corridor land must go through an Addition to Reserve (ATR) process.

At a rail trail strategy session of elected leaders held in November, 2018, participants identified a number of issues that they felt should be coordinated moving forward, including:

- Oversight, monitoring, and management;
- Planning for long term development of the ORT;
- Design and construction of future improvements and infrastructure;
- Regulation of uses and activities on the ORT;
- Maintenance and operations;
- Wayfinding and interpretive facilities;
- External communications and public relations;
- Programming and special events;
- Marketing and branding; and
- Fundraising.

As the initial phase of rail trail development is reaching an end and the function of the corridor is preparing to change, from one of development to one of operation, the mandated role of the IDT is coming to a close.

In preparation for this, and in response to input received at the November strategy session of elected leaders, a report on how the partner jurisdictions can jointly coordinate their future management and development of the corridor was commissioned.

This report (attached), the *"Interjurisdictional Arrangement for the Future Development and Management of the Okanagan Rail Trail Corridor"* (Tonn, 2018), can be best summarized by paraphrasing its vision statement:

- Develop and manage a world class rail trail that links the communities of the valley.

- Provide a range of recreational, transportation, tourism, and event opportunities in the communities through which it passes.
- Optimize the enjoyment of the rail trail experience for all.
- Manage uses to minimize conflicts between users.
- Integrate community and other regional level trails with the rail trail.
- Provide for the enjoyment, convenience, and safety of users by developing and managing and well-designed facilities along the route.
- Coordinate development, management, maintenance, and governance of the rail trail between owner jurisdictions
- Protect the long term opportunity to develop a multi-modal transportation corridor linking the communities along the corridor.
- Ensure owner jurisdictions retain decision-making authority for all matters within their legislated mandate, bylaws and adopted official policies.

As with the jointly participated-in committees that led the acquisition and development phases of this initiative, the report recommends that the long term development and management of the corridor be coordinated by a new committee of owner and stakeholder jurisdictions, namely:

- Regional District of North Okanagan (Owner)
- District of Lake Country (Owner)
- Okanagan Indian Band (Owner)
- City of Kelowna (Owner)
- District of Coldstream (Stakeholder)
- City of Vernon (Stakeholder)

This new committee would be called the Okanagan Rail Trail (ORT) Committee. A terms of reference has been prepared (see Appendix 1 in the attached report) in order to define the objectives, values, deliverables, processes and procedures under which the ORT will function. At high level these include:

- Principles
- Vision
- Coordination required to achieve shared vision
- Appointment of the ORT committee
- Responsibilities of the committee
- Responsibilities of the elected Councils and Regional Board
- Consultation with the elected Councils and Regional Board
- Term of the committee
- Committee membership
- Representation of committee members
- Committee chairperson
- Procedures
- Funding and financial management

Parallel to this report and its recommendation to this Councils, the same governance report and terms of reference will be presented to the other elected Councils of all the participating jurisdictions for their endorsement.

Internal Circulation:

Infrastructure Delivery, Senior Project Manager

Considerations not applicable to this report:

Legal/Statutory Authority:

Legal/Statutory Procedural Requirements:

Existing Policy:

Financial/Budgetary Considerations:

Personnel Implications:

External Agency/Public Comments:

Communications Comments:

Alternate Recommendation:

Submitted by: Derek Edstrom, Director, Strategic Investments

Approved for inclusion: Doug Gilchrist, Divisional Director, Community Planning & Real Estate

cc: A. Gibbs, Infrastructure Delivery, Senior Project Manager

April 20th, 2018

INTERJURISDICTIONAL ARRANGEMENT FOR THE FUTURE DEVELOPMENT AND MANAGEMENT OF THE OKANAGAN RAIL CORRIDOR



Gerhard Tonn & Associates Inc.

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Appendix 1 - Terms of Reference for Okanagan Rail Trail Committee

1. Introduction

On June 1, 2015, the Regional District of North Okanagan (RDNO), the District of Lake Country, and the City of Kelowna (the “owner jurisdictions”) purchased 47 km of discontinued CN rail corridor within their respective boundaries. The Okanagan Indian Band (OKIB) is in the process of acquiring the 2.5 km section of the rail corridor that passes through Duck Lake I.R. No. 7, and is engaged in the Addition to Reserve (ATR) process to include the corridor within the reserve. Since acquiring the corridor, the owner jurisdictions have begun constructing the Okanagan Rail Trail (ORT) with funding raised through grants as well as the successful fundraising activities of the Okanagan Rail Trail Initiative (ORTI), a local nonprofit organization. The first phase of development is scheduled for completion in the fall of 2018, although portions of the completed sections will be opened to the public earlier in the year.

The successful acquisition of the rail corridor and construction of the first phase of the ORT came about due to two factors. First, the owner jurisdictions established a shared vision to create an asset that will have long term benefits for both local residents and visitors to the region. Second, the owner jurisdictions understood that the shared vision could only be achieved by working together and coordinating those matters that were vital to realizing the vision. To this end, they designed and established interjurisdictional arrangements that were unique and effective in enabling the jurisdictions to work together.

To date, the collaborative efforts of the owner jurisdictions have resulted in a number of important achievements:

- Acquisition of the corridor is generally complete, with funds generated by the RDNO, District of Lake Country and the City of Kelowna with assistance of the Province of B.C. The section of corridor through OKIB’s Duck Lake I.R. No. 7 will be secured by title transfer.
- Statutory right of way agreements have jointly been registered on acquired lands along the corridor, guaranteeing the right of public access and restricting trail use by motorized vehicles.
- Various legal agreements, such as crossing agreements and rights of first refusal have, and continue to be, negotiated with utility companies and adjacent land owners on acquired sections of the corridor.
- A successful partnership has been established with the Okanagan Rail Trail Initiative (ORTI). This has enabled funding of the first phase of development. Funds for future development of in-scope work not yet undertaken (e.g., section through OKIB’s Duck Lake I.R. No.7, erosion control, Kelowna trail north of the airport) will be held in trust until it is time to undertake the work.
- Plans and engineering design drawings for the initial phase of development have been completed for the entire rail trail corridor. Engaging a single design team has ensured consistency in design work along the entire ORT.
- Construction of the first phase of development is ongoing, with a number of ORT sections already completed and anticipated for use in 2018.

The opening of the ORT to public use in 2018, and ongoing development of the trail related facilities, signals a new phase of opportunity and challenge for the owner jurisdictions. This phase will include (1) the active use of the ORT by the public and by various user groups, (2) the development of additional public facilities and services such as wayfinding facilities, interpretive opportunities, parking facilities, and rest areas, (3) completion of the acquisition of the corridor, (4) the development of commercial services and supporting trail networks serving the users of the trail, and (5) operation and maintenance of the rail trail. The owners of the ORT believe that their ability to take advantage of new opportunities and to address anticipated challenges will require ongoing collaboration and coordination. This will require the owners to again design and implement an effective interjurisdictional arrangement, as the current arrangement expires when the initial phase of development is complete in 2018.

This report makes recommendations for the design of a future interjurisdictional arrangement that will enable the owner jurisdictions to continue working together and with external partners to achieve the shared vision for the ORT. The recommendations are based on information gathered at a workshop held in November 2017 with elected officials from the owner jurisdictions as well as from the City of Vernon and the District of Coldstream (stakeholder jurisdictions). At the workshop, elected officials reviewed the shared vision for the ORT, assisted in identifying the matters that may require coordination in the future, and provided suggestions for designing the next interjurisdictional arrangement.

In making recommendations for a new interjurisdictional arrangement, the following factors were considered:

- A re-affirmation and elaboration of the shared vision for the ORT.
- The guiding principles that have been adopted by the owner jurisdictions in developing the various interjurisdictional arrangements to date.
- Identification of the opportunities and challenges that may arise in the next phase of ORT development and use, and the issues that may require coordination in the future.

The report is structured as follows:

- Section 2 describes the shared vision for the ORT.
- Section 3 discusses the key attributes of the various interjurisdictional arrangements to date.
- Section 4 identifies the potential opportunities and challenges that may occur in the next phase of ORT development and use.
- Section 5 identifies the matters that may require coordination among the owner and stakeholder jurisdictions in the next phase of ORT development and use.
- Section 6 identifies the key features to be incorporated into the new interjurisdictional arrangement and presents draft terms of reference for the interjurisdictional staff committee.
- Section 7 provides concluding remarks.

2. Vision Statement

It was the vision for the acquisition, development, and use of the ORT that initially brought the various jurisdictions together to create a legacy project. Commitment to the shared vision has led the owner jurisdictions to develop an innovative approach to working together to coordinate the matters that are

vital to realizing the vision. A shared vision will continue to be the key reason that the owners continue to work together in the future to maximize the full potential of the ORT. It will also serve to identify the matters for which future coordination and joint action will be required. Given the importance of the vision, the level of commitment to the existing vision by the owner and stakeholder jurisdictions was assessed to determine whether the vision needed to be refreshed and expanded to achieve the full potential of the ORT.

2.1 Current Vision

No concise vision statement for the ORT, integrating all of the important elements, has been prepared to this point. Rather, the adopted vision consists of a number of important elements that are found in documents such as the terms of reference for both the Interjurisdictional Acquisition Team (IAT) and the Interjurisdictional Development Team (IDT). These elements are as follows:

- the development of the ORT as a recreational trail that excludes motorized vehicles;
- ensuring the right of public access along the entire ORT;
- providing a basic level of trail development (width and surfacing) to provide for desired use and safety;
- ensuring basic and consistent wayfinding along the ORT; and
- protecting the right of way for long term development of a continuous multi-modal transportation corridor.

While these elements are reasonably basic, they have provided the direction for significant achievements to date such as the acquisition of the corridor and the funding and construction of the initial phase of development.

2.2 Views of Elected Officials

Elected officials were requested to provide their views on the ORT vision at the workshop held in November 2017. Elected officials support the existing vision for the ORT, but believe that the vision should be expanded and refined to reflect the creation of a world-class rail trail that provides benefits firstly, to local citizens that are largely funding its acquisition and development, and secondly to visitors. The following are some of the elements that elected officials believe should be reflected in the vision statement:

- Ensuring that the location, design, and quality of public facilities—parking areas, rest areas (including washrooms), wayfinding and interpretive components (e.g., kiosks), benches, and road crossings—and the trail itself are coordinated. This does not necessarily imply that the same standard of development would be found in every jurisdiction, given that the character of the trail and the level of available funding may differ among jurisdictions.
- Wayfinding is vital to the success of the ORT in that it, more than any other element, reinforces the perception of a planned, continuous trail connecting the various communities along it.
- While recreational use of the ORT is common to all jurisdictions, it is recognized that the range of uses and activities may vary along differing sections of the rail trail. In some jurisdictions,

commuting on the trail may be more important than recreational uses. The uses of the ORT may also vary from season to season. For example, the use of the ORT during the winter months for Nordic skiing and snowshoeing may be stronger along certain sections of the rail trail than in others.

- Use of the ORT for events by various groups and organizations is supported, although such activities need to be coordinated to ensure that the trail remains open to the general public. Granting exclusive use to specific groups and organizations is not supported.
- Linking and marketing the ORT with other rail trails in the region (both north and south of the ORT) to create opportunities for increased recreation and tourism is very desirable.
- The role and involvement of the private sector in developing facilities and services that support the use of the ORT must be encouraged, as these will complement the public investments to create a world-class trail. Such facilities could include accommodation, eating and drinking establishments, bicycle rentals and repair services, and shuttle services.
- A minimum level of maintenance must be provided along the entire ORT if it is to support the projected uses and anticipated volume of activity. This is a matter that should be coordinated along the entire ORT.
- Linking local transportation services such as transit to the ORT should be promoted to enhance the role of the corridor in both commuting and recreational use.
- While the ORT will undoubtedly attract many visitors, it is also important to ensure that local citizens benefit from the investments that have been made on their behalf and, in large part, with development funds donated by the public.

2.3 Proposed Vision Statement

The following is a proposed vision statement which incorporates both the initial vision for the ORT as well as the suggestions made at the elected officials' workshop.

"It is the vision of Okanagan Rail Trail owners to develop and manage a world class rail trail that links the communities of the Okanagan Valley. While the type and intensity of use along the rail trail may vary from community to community, the ORT will provide a range of recreational, transportation, tourism, and event opportunities along the length of the trail and in the communities through which it passes. Rail trail uses will be managed to minimize conflicts between users and optimize the enjoyment of the rail trail experience for all. Community level trails and other regional trails will be integrated with the ORT. The enjoyment, convenience, and safety of local residents and visitors alike will be assured by the development and management of well-designed facilities along the rail trail, including private or other community developments along the route. While aspects of development, management, maintenance, and governance of the rail trail will be coordinated among the owner jurisdictions, the owner jurisdictions will retain decision-making authority for all matters within their legislated mandate, bylaws and adopted official policies. Finally, and in order to reflect the joint intent of the original purchase of the corridor, the ORT will provide a long term opportunity to develop a multi-modal transportation corridor linking the communities along the corridor."

3. ORT Interjurisdictional Arrangements

The achievements to date have resulted from the implementation of the initial vision established by the owner jurisdictions for the acquisition and development of the ORT and by their decision to work collaboratively to realize that vision. In this section, the past and current interjurisdictional arrangements that the owner jurisdictions established to pursue acquisition and development of the ORT are described and characterized.

3.1 Current and past interjurisdictional arrangements

The jurisdictions initially engaged in the acquisition of the CN rail corridor recognized from the start that they would only be successful in their negotiations with CN if they collaborated and established a united front. They also agreed that the full potential of the rail trail could only be achieved if they coordinated certain activities that were vital to the achievement of the shared vision. It was also recognized that the involvement of the OKIB was vital to achieving the shared vision for the rail trail, and the OKIB was invited to participate in the effort to acquire and develop the corridor.

In order to pursue acquisition of the CN right of way, the local governments agreed to develop an interjurisdictional arrangement through which to coordinate their activities. Rather than developing a comprehensive formal agreement, the local governments opted for a more practical, short-term approach. They agreed to prepare and abide by a simple terms of reference that would establish the basis for the partners to work together in negotiating acquisition of the right of way. The terms of reference provided for the establishment of a committee which became known as the Interjurisdictional Acquisition Team (IAT), consisting of senior staff from the three owner jurisdictions, the City of Vernon, and the District of Coldstream. The OKIB was also invited to participate as a member of the team in view of its important role in establishing a continuous rail trail. The terms of reference established:

- the objectives to be achieved;
- the membership of the committee;
- the committee's duties and responsibilities;
- the term for the committee; and
- the manner in which the team would function.

The IAT was responsible for establishing a coordinated approach to negotiations with CN, but was not given any decision-making authority. Final decisions were made by the elected councils and the RDNO board. In addition to the successful negotiation for acquiring the rail corridor, the IAT was also successful in negotiating statutory ROW-public access agreements between the owner jurisdictions. This agreement secured public access along the entire rail trail and also restricted the use of the rail trail by motorized vehicles.

Once the CN right of way was successfully acquired by the owner jurisdictions, the term of the IAT expired. The owner jurisdictions agreed that it was important to continue to coordinate ORT activities, including developing the rail trail to a minimum standard to enable its use as a recreational trail. They also agreed to develop a partnership with ORTI to raise the necessary funding for the initial phase of development. A consultant was engaged to assist with developing an appropriate interjurisdictional arrangement for undertaking the initial phase of development. The consultant identified and evaluated a broad range of models, ranging from limited interjurisdictional coordination to the establishment of a

stand-alone corporation or a nonprofit agency. The options were evaluated on the basis of a number of key considerations. The most important of these considerations were that the local governments would continue to own the sections of the rail trail within their boundaries, and that all final decisions would continue to be made by the elected councils and regional board.

Based on the consultant's report, the councils and regional board endorsed an interjurisdictional model that was based on the IAT model but was specifically designed to address matters related to the development of the first phase of the rail trail. As in the case of the IAT, the councils and regional board did not enter into a long-term, comprehensive agreement, but agreed to a clearly defined terms of reference for the establishment of a staff committee which became known as the Interjurisdictional Development Team (IDT).

To date, the owner jurisdictions have favoured informal interjurisdictional agreements that help achieve the shared vision of the ORT but do not change the fundamental governance structure and processes of the OKIB or the local governments. The arrangements have been characterized by the following:

- The interjurisdictional arrangements have focused on specific matters to be coordinated, and have not been designed to undertake a comprehensive mandate. In view of the focused nature of the mandate, the current and past arrangements have been "customized" for each phase of the work (IAT for acquisition and IDT for initial phase of development).
- The past and current arrangements have been time-limited in that the arrangement is only valid for the time period required to complete the task for which it was created. This incremental approach to establishing interjurisdictional arrangements has enabled the owner jurisdictions to monitor the effectiveness of the arrangement during each phase of the process, and allowed them to make appropriate adjustments to ensure effectiveness in subsequent phases.
- All interjurisdictional arrangements to date have been informal and voluntary, allowing each jurisdiction the opportunity to leave the arrangement without legal implications.
- All elected councils and the regional board were required to agree to joint plans, policies, regulations, or other initiatives in order for them to be ratified.
- All recommendations prepared by the staff committees have been made by consensus.
- The arrangements to date have not changed the basic governance structure or processes of the local governments or the OKIB. While an interjurisdictional staff committee advises and makes joint recommendations to the elected bodies, the elected councils and the regional board reserve the right to make all final decisions. The full authority and jurisdiction of local governments and the OKIB are respected in all interjurisdictional arrangements.

Fundamental to the current (IDT) and past (IAT) arrangement is the requirement that the ownership structure of the rail corridor is unaltered, and that each jurisdiction continues to own the section of the rail trail within its boundaries.

3.2 Characteristics of current and past interjurisdictional arrangements to be retained

Discussions with elected officials indicate that while there are some changes that must be undertaken to improve the current interjurisdictional arrangement, the basic structure and processes embodied in past

arrangements are still valid and should be used as a basis for future arrangements. Aspects of the current (IDT) and past arrangements that should be retained are as follows:

- **Customized.** The interjurisdictional arrangement must be customized, and specify the types of matters that will be coordinated and those which will be left to the individual jurisdictions to address.
- **Time-limited.** The interjurisdictional arrangement will only be valid for a specified time period—generally, the time required to address the matters to be coordinated.
- **Informal and voluntary.** The agreements to establish the interjurisdictional arrangement will be informal and voluntary, enabling jurisdictions to withdraw without penalty.
- **Endorsement of all jurisdictions required.** All elected councils (including the OKIB) and the regional board must agree to joint plans, policies, regulations, or other initiatives in order for them to be implemented along the entire ORT.
- **Staff committee advisory only.** A staff committee, consisting of senior staff from the owner and stakeholder jurisdictions, will be responsible for reporting to and for making recommendations to the elected councils and the board concerning joint initiatives and matters to be coordinated to realize the shared vision.
- **Shared funding.** The activities of the staff committee, including any joint initiatives such as planning and policy development, will be funded by the owner jurisdictions with costs allocated on the basis of an agreed-upon formula.
- **Maintain existing governance structures.** The interjurisdictional arrangement must not change the basic governance structure and processes of the OKIB or the local governments. All final decisions will be made by the elected councils and the regional board.
- **No change to ownership structure.** There shall be no change in the ownership structure for the ORT.

3.3 Aspects of the current arrangement requiring improvement

Elected officials are generally supportive of the approach used to design the current interjurisdictional arrangement. However, they identified the need to improve the level and quality of communication between the interjurisdictional staff committee and the elected councils and regional board. The specific elements targeted for improvement include:

- **Increased involvement of elected officials in future joint planning and policy initiatives for the ORT.** It is the view of elected officials from some jurisdictions that the current IDT arrangement does not provide the elected councils and board with sufficient information in advance of the decisions they are required to make on various initiatives. This places the elected councils and the board at a disadvantage in making sound decisions that reflect the interests of both their constituents and the vision for the ORT. The elected officials from these jurisdictions believe that earlier involvement in the process of preparing joint plans, policies, plans, regulations, and similar initiatives by elected officials is desirable. When joint initiatives such as plans and policies are proposed, it is suggested that the terms of reference for such initiatives set out the nature and scope of consultation to be carried out with the elected officials of the owner jurisdictions

prior to final decision-making. Consistent with the terms of reference, elected officials would then have the opportunity to be consulted prior to formal consideration of joint recommendations from the interjurisdictional committee. In certain cases, it may also be desirable to consult with the elected officials of the stakeholder jurisdictions where the plans or policies impact their interests and jurisdictions.

- **Increased communication.** Increased communication between the staff committee and the elected councils and board is required to ensure that elected officials are in a position to respond to inquiries or issues raised by their constituents. Required communication should include regular meetings between representatives of the staff committee with their elected bodies as well as opportunities to meet on specific matters as requested by the elected councils and board.
- **Representation of the City of Vernon and the District of Coldstream on the Interjurisdictional Committee.** Opportunity should be provided for the City of Vernon and the District of Coldstream to have representatives on the interjurisdictional staff committee in order to participate in discussions on matters that impact their communities. Participation of senior staff from these municipalities on the interjurisdictional staff team would also enhance communication between the interjurisdictional staff team and the two councils, ensuring that (1) the councils have the information required to respond to public enquiries, and (2) council policies are taken into account in the joint plans, policies, and other initiatives that impact the two municipalities. Recommendations on matters falling within the mandate and responsibilities of the owner jurisdictions would only be made by the representatives of the owner jurisdictions while recommendations on matters falling within the mandate and responsibilities of both owner and stakeholder jurisdictions would involve the entire staff committee.

4. Anticipated Opportunities and Challenges Related to Future ORT Use and Development

Construction of the ORT is anticipated to be complete by the fall of 2018, with some sections scheduled for completion in early 2018. Some seasonal work that cannot be completed in 2018, such as erosion control, may be undertaken in 2019. Development throughout 2018 and use of the trail by the public will have significant implications for the owner and stakeholder jurisdictions. The owner and stakeholder jurisdictions will need to:

- Complete the acquisition and secure public access for sections of the rail trail not yet finalized (e.g., OKIB section) in order to create a continuous corridor.
- Respond to the opportunities and issues arising from the use of the rail trail by the general public and for organized events and activities.
- Develop public facilities such as parking, rest areas, wayfinding and interpretive facilities.
- Engage and work with agencies involved in tourism marketing and fundraising.
- Respond to anticipated public and interest group demands for a greater voice in planning, design, use, and overall decision-making related to the ORT.

It is projected that a significant amount of coordination among the owner and stakeholder jurisdictions will be required in order to adequately address these matters.

4.1 Trail use issues

The use of the ORT by the general public and various groups will serve to identify issues that will require the attention of the owner jurisdictions. These issues are summarized below.

- **Permitted/prohibited uses.** The permitted uses and activities on the rail trail, and the activities which will be prohibited, have not yet been fully addressed by the owner jurisdictions. While the statutory right of way agreement between the owner jurisdictions prohibits motorized vehicles on the rail trail, other uses that will need to be addressed include trail use by equestrians, dogs (on and/or off leash), electric bicycles and perhaps even electric scooters. Conflict between trail users is reasonably common on trails, and it is likely that various interest groups will advocate for specific uses while wishing to restrict others.
- **Organized events.** Groups and organizations will view the rail trail as an attractive venue for organized events and functions. This could result in potential conflicts with the general public's use of the rail trail or between the groups and organizations themselves.
- **Development and enforcement of regulations.** In light of the various anticipated uses of the trail, it will be necessary to implement and enforce existing or new bylaw regulations. These regulations could cover a broad range of issues including the uses and activities permitted on the rail trail, ensuring public safety and dealing with nuisances.
- **Maintenance.** Trail use will result in the need for maintenance, and the need to establish minimum standards for maintenance.

4.2 Facility development

Increasing public rail trail use will result in the need to develop basic facilities to ensure the safety and convenience of trail users. These facilities include parking, wayfinding infrastructure, interpretive facilities, rest areas (including washrooms) refuse receptacles, and benches. The location, design, and other aspects of facility development will need to be coordinated although it is recognized that some facilities may not be located on the lands containing the ORT. Development of these facilities will not necessarily need to meet common standards although, in order to enable the ORT to have a consistent "look", some common design elements will need to be implemented. The matter of wayfinding and developing interpretive facilities are clearly important matters in linking the trail from one jurisdiction to another to create a cohesive facility.

4.3 Corridor acquisition

There are various sections of the rail trail yet to be acquired in order to establish a continuous, uninterrupted trail. The longest of these sections is located through the OKIB's Duck Lake I.R. No. 7. The OKIB has been in negotiations with both the federal government and CN Rail, and indications are that the right of way will be transferred to the OKIB. In addition to acquiring the CN right of way, the OKIB intends to add the right of way to Duck Lake I.R. No.7. This will require an application to the federal government to expand Duck Lake I.R. No. 7 through the Addition to Reserve process. Approval of the OKIB community may also be required to enable the ORT to pass through the reserve. The other owner jurisdictions are highly supportive of OKIB's acquisition of the right of way, the Addition to Reserve of

the corridor and its ultimate use as a rail trail that will allow public access along the 2.5 km section through Duck Lake I.R. No.7.

4.4 Involvement of external agencies

The development and use of the ORT will result in the need to engage with external agencies in areas such as marketing and fundraising.

4.4.1 Marketing the ORT

The development of a functional rail trail will result in the increased involvement of local and regional tourism marketing agencies in the marketing of the rail trail and in advocating for increased development of the rail trail to meet the expectations of visitors (including international visitors) to the region. In their November 2017 elected officials' workshop, participants acknowledged that facility and product marketing was not part of their core public services.

The Thompson Okanagan Tourist Association has prepared the Thompson Okanagan Regional Rail Trails Tourism Strategy that, while focusing on the Kettle Valley Rail Trail, also identifies the ORT as a key facility within the regional rail trail network. The strategy indicates that:

"A common theme for all successful rail trails, however, is an organizational symmetry that brings together the many different actors responsible for physical, product and market aspects of trail development in a coordinated fashion."

To achieve this symmetry, the strategy recommends the implementation of a regional governance arrangement consisting of a trail advisory committee that would eventually transition to a Rail Trails Trust. In view of the rising importance of rail trails as key tourism assets in the region, there will be increased demands to link the marketing, physical and product development aspect of rail trail development in the region. The owner jurisdictions will need to determine how to work with marketing agencies and to what extent they are prepared to address tourism versus local demands for the use and development of the rail trail. While the owner jurisdictions may choose not to be actively involved in the actual marketing of the ORT, they will need to work with marketing agencies to develop marketing strategies that are consistent with the vision for the ORT.

4.4.2 Fundraising for the continued development of the ORT

Demands for continued development of the ORT will also require ongoing fundraising to supplement funds from government sources. The owner jurisdictions have had an excellent working relationship with ORTI, which has been, and continues to be, highly effective in raising funds for rail trail development. Developing relationships with funding partners, including private donors, will be necessary to generate the funds required to meet future development needs. The owner jurisdictions will need to develop strategies and policies to determine what fundraising will be done collectively and which will be undertaken on the basis of individual jurisdictions.

4.5 Responding to special interest groups and the general public

The development of a major recreational and tourism asset such as the ORT will result in increased interest on the part of user groups (e.g., cycling organizations) and the general public to become involved in decisions concerning the future development and use of the ORT. The views of these interest

groups and organizations may conflict with one another as well as with the views of community groups and the general public.

4.6 Responding to private sector initiatives and investment opportunities

The continued development and use of the ORT has already drawn the attention of the private sector for investment in opportunities that will be essential to generating the long term economic benefits of the ORT. These include accommodation, eating and drinking establishments, transportation services such as shuttles, and other services such as bicycle repair and rental establishments. While the approval of development proposals on lands adjacent to the corridor remains the sole responsibility of the owner and stakeholder jurisdictions, there may be an interest in developing design and other guidelines for developments oriented to the ORT. There may also be opportunities for concessions to be awarded for services that are oriented to the users of the ORT. Again, while these will continue to be awarded by individual jurisdictions, the owner jurisdictions may be interested in coordinating the award of concession and other contracts.

4.7 Proposed use of the ORT right of way by owner jurisdictions

It is possible and even probable that the owner jurisdictions may wish to use the ORT right of way for uses other than those already agreed to. For example, the City of Kelowna is planning to use a portion of the ORT lands within its boundaries for the construction of a sewer main. Such additional uses of the right of way may impact the shared vision and objectives for the ORT, and require full consultation with the other owner jurisdictions.

5. Matters Requiring Coordination in the Future

The owner jurisdictions believe that realizing the vision and shared objectives for the ORT will require continued coordination of activities, particularly when the trail is opened to public use. While coordination of certain activities will be required, elected officials also believe that certain matters do not require coordination and should be addressed by individual councils and the board to respond to local community needs. Additional or unanticipated matters may also arise and require coordination in the future. In these situations, the owner jurisdictions believe that monitoring is required to determine the need for coordination before final decisions are made. In all matters, including those matters for which coordination is desired, the final decisions will continue to be made by the elected councils and board.

Marketing and fundraising are aspects of ORT development that may also require a coordinated response; however, these activities are not central to the mandate of the owner jurisdictions, and it is evident that the owner jurisdictions do not wish to undertake such activities that are more effectively undertaken by other agencies working in partnership with them.

There is also a need to determine what aspects of a particular matter need to be coordinated. In some cases, coordination needs to occur at a high level—such as an overall plan or policy—while in other situations, coordination of more detailed, “on-the-ground” matters needs to be undertaken.

Discussions with the elected officials indicate that coordination may take differing forms depending on the specific matter and the degree of coordination required. These potential forms include the following:

- **Joint initiatives.** In this approach, the owner jurisdictions agree to collaborate on specific initiatives to establish the basis for coordinated action. Joint initiatives could include plans, policies, projects, or similar activities and would generally be carried out for the entire corridor under the direction of the interjurisdictional staff committee. Joint initiatives would draw on pooled financial resources and would require each council and board to agree to fund such initiatives. Joint initiatives would be undertaken in cases where there is a need for a high level of coordination and integration such as wayfinding and the development of interpretive facilities. An example of a joint initiative is the planning work that was carried out for the initial phase of development for the ORT now being completed. Once a joint initiative has been carried out and recommendations adopted by all of the councils and board, it provides the basis for individual jurisdictions to implement the joint plan, policy or other initiative within their own boundaries.
- **Coordinated action not requiring joint initiatives.** Not all matters requiring coordination will require a joint initiative to be carried out. In certain cases, the matter to be coordinated will be relatively straightforward or the level of required coordination may be relatively low. In this case, individual owner jurisdictions could jointly agree to a specific policy or course of action and implement it within their boundaries. An example is an agreement on regulating certain uses on the ORT. Once a policy or regulation has been jointly agreed to, it would be implemented by individual elected councils and the board by enacting or amending their own bylaws.
- **Agreement to monitor activities to determine the need for coordinated action.** Matters that may require joint or coordinated action are not always known in advance, but may become apparent in the course of the use and further development of the ORT. In situations where the actions of a jurisdiction may impact other jurisdictions, an individual council or the board would communicate its intentions and then determine, based on the response of other jurisdictions, whether further joint or coordinated actions are desirable.

5.1 Overview of issues requiring coordination

The matters tentatively identified by participants at the November 2017 elected officials workshop for coordinated or joint action in the future include:

- Oversight, monitoring, and management;
- Planning for long term development of the ORT;
- Design and construction;
- Regulation of uses and activities on the ORT;
- Maintenance and operations;
- Wayfinding and interpretive facilities;
- External communications and public relations;

- Programming and special events;
- Marketing and branding; and
- Fundraising.

Each of these matters is discussed in more detail below.

5.1.1 Oversight, monitoring, and management

Oversight, monitoring, and management are necessary to ensure that the overall vision established for the ORT is being realized, and that policies, procedures, and regulations jointly agreed upon by the owner jurisdictions are adhered to. This requires monitoring of uses and activities within the ORT corridor. It also involves monitoring the initiatives of other agencies and organizations to identify potential issues that may affect the ability of the owner jurisdictions to realize the vision for the ORT. Any issues requiring coordinated action by the owners would be identified, and solutions recommended by the interjurisdictional committee to the elected councils and board.

Views expressed at elected officials' workshop

There is general support for oversight and monitoring of activities, uses, and development related to the ORT, although there were questions on the level of management that would be carried out jointly. Elected officials believe that this will be more important during the initial development phases of the ORT, and less important when development is completed. Matters that would require oversight, monitoring, and management include future development such as parking facilities, rest areas, wayfinding and other public facilities, the regulation of uses (and the enforcement of regulations), and the maintenance of the ORT. The importance of good communication between the staff committee and the elected councils and board was stressed in order to identify what is working or not working, and to draw the attention of the councils and board to issues requiring action. The importance of providing consistent messages to the users and general public on coordinated activities was also identified.

Elected officials expressed support for the preparation of an annual ORT report that would identify the progress being made in ORT development, as well as address other matters such as major events.

5.1.2 Planning for long-term development of the ORT

The development of longer term plans and strategies are needed to guide the ultimate development of the ORT. Potential plans may include (1) upgrading the trail surface along certain sections, (2) the development and phasing of facilities such as parking, wayfinding infrastructure, interpretive facilities, rest areas (including washrooms), and refuse receptacles and (3) guidance for the development of future commercial or community-owned facilities adjoining the ORT. Future planning for the development of the ORT must also reflect marketing considerations to ensure the development of a world class attraction.

Views expressed at elected officials' workshop

Elected officials see planning as important activity that must be carried out in a coordinated manner to realize the vision and shared objectives. Elected officials view these activities as ongoing processes that must respond to new opportunities and constraints, and must deal not only with future

development but also the use of the ORT. Annual reviews and refocusing of plans must be undertaken so they remain relevant. Given the importance of longer term plans, elected officials believe that their preparation must involve extensive consultation with user groups, community groups, and the public. Elected officials must be consulted throughout the process, as individual councils and the board will ultimately be asked to approve the plans and strategies and ensure integration with their own official community plans. Integrating plans and strategies with marketing strategies prepared by marketing agencies is also important to elected officials.

As the scope of development will have major impacts on the ability of local government to fund future improvements, expectations may have to be managed. Elected officials emphasized the need to manage expectations consistent with the capacity of the owner jurisdictions to fund future development.

5.1.3 Design and construction

In order to realize the vision for the ORT, development beyond that being undertaken in the initial phase will be required. Future development on lands containing the ORT could include parking, wayfinding facilities, interpretive facilities, rest areas (including washroom facilities), road crossings, and refuse facilities. Coordinating the design and construction of these facilities will lead to design consistency along the ORT, in line with the ORT vision. This does not necessarily imply that the same standards would be implemented within all jurisdictions or that design work would be carried out jointly.

Views expressed at elected officials' workshop

Elected officials support continued coordination of design and construction, as occurred with the initial phase of construction, in order to ensure a consistent “look” or design theme for all facilities and amenities within the ORT. This does not imply that the same standard of development need apply across all jurisdictions, as individual jurisdictions wish to exercise some flexibility to reflect community preferences and financial considerations. The preparation of engineering drawings, the awarding of construction contracts, and the administration of contracts would be the responsibility of individual jurisdictions.

It is evident that elected councils and board wish to be consulted on matters of design and construction given the importance for the vision as well as the funding implications.

5.1.4 Regulating use and activities on the ORT

Owner jurisdictions have already agreed to some limitations on the uses permitted within the ORT corridor such as restricting motorized vehicles and protecting the corridor for possible future use as a multi-modal transportation corridor. A number of other issues may also be of concern due to potential conflict with already-permitted trail uses. These could include use of rail trail by equestrians and electric bicycles/scooters as well as dog control, noise, littering, and dumping of refuse. The owner jurisdictions will, in all probability, be required to enact and enforce regulations to address these or other issues. Whether the enactment and enforcement of certain regulations should be coordinated among the owner jurisdictions is currently unclear. While a coordinated response would result in more consistent regulations and enforcement for the ORT, it may also impact the ability of individual jurisdictions to respond to the needs of their own communities.

Views expressed at elected officials' workshop

Elected officials believe that some regulations will need to be enacted and enforced in a coordinated manner to ensure that the vision for the ORT is realized. They also believe that ORT uses and activities should be monitored to identify other issues that may require a coordinated response. Enacting and enforcing regulations, including those jointly agreed to, would remain the responsibility of individual local governments. In situations where consistent regulations along the entire ORT are required, jurisdictions may need to consult with one another to enact similar bylaws.

The importance of effective communication between the staff committee and the elected councils and board in monitoring the need for a coordinated response to issues was stressed. Potential issues identified by the elected officials include dog control, use of the ORT by equestrians, and the potential use of electric bicycles.

5.1.5 Maintenance and operations

Maintenance and operations activities include maintaining the trail surface, addressing hazardous conditions within or adjacent to the corridor, and maintaining and operating public facilities, such as parking, rest areas (including toilets), refuse facilities, interpretive kiosks, and wayfinding facilities. Maintenance and operations activities are needed to ensure the safe and convenient use of the ORT although it is unclear to what degree coordination of such activities is required to achieve the shared objectives. The establishment of minimum maintenance standards along the entire rail trail should be considered. Opportunities to take advantage of economies of scale and scope by engaging contractors to undertake certain maintenance responsibilities along some or all of the ORT may also need to be examined.

Views expressed at elected officials' workshop

Elected officials expressed the view that maintenance and operations for the ORT should generally be carried out by the individual owner jurisdictions for their sections of the trail due to cost and budget implications. Elected officials supported exploring the possibility of establishing a minimum level of maintenance for the entire ORT that all jurisdictions would agree to. Elected officials may also be open to contracting out certain maintenance and operations responsibilities for some or all of the ORT in order to take advantage of economies of scale and thereby reduce costs.

5.1.6 Wayfinding and interpretive facilities

Wayfinding and the development of interpretive facilities are viewed as important components of the ORT. These components will assist users in orienting themselves along the ORT and enhance the users' understanding of (1) the geographical, biophysical, social, and historical features of the ORT, (2) the communities that are connected by the trail and (3) the region as a whole. The questions to be addressed are:

- Is there a need to coordinate signage and other wayfinding and interpretive facilities on the ORT so that there is consistency in terms of content, design, standards/quality, location, and staging?
- To what degree should wayfinding and interpretive facilities also reflect the unique characteristic and opportunities within the individual communities which are connected by the ORT?

- Should the regulation of third party signs be coordinated along the ORT?

Views expressed at elected officials' workshop

Elected officials believe that wayfinding and the development of interpretive facilities within the ORT must be coordinated in order to realize the vision and shared objectives for the ORT. There must be consistency in design and standards, although provision must also be made to reflect the uniqueness of the local communities and the opportunities for visitors. Elected officials support an interpretive program that is focused on the natural environment as well as the geography, history, and culture of the area. Specifically, elected officials identified the opportunity to acknowledge and interpret the culture and heritage of the Syilx people, including the potential for signage within the ORT corridor to be provided in both the English and Syilx languages. The OKIB also wishes to ensure that all signage through Duck Lake I.R. No.7 as well as signage applicable to Syilx culture and history within the Syilx territory is in the Syilx language as well as in English. Given the importance of wayfinding and the development of interpretive facilities, elected officials wish to ensure that the elected councils and the board have some involvement in the planning and design of such facilities as well as the interpretive program.

5.1.7 External communications and public relations

External communications and public relations include:

- Responding to enquiries relating to the ORT from the public, user groups, other jurisdictions and agencies, and the media.
- Proactively distributing information concerning the ORT corridor (e.g., announcements, issues).
- Proactively consulting with the public, user groups, and other jurisdictions and agencies in the preparation of joint plans, policies, regulations and other initiatives.

The type of communication that should be coordinated to ensure consistent messages concerning the ORT, and the type of communication that should be left to individual jurisdictions, must be determined.

Views expressed at elected officials' workshop

Elected officials believe that this issue may need further discussion in view of potential issues such as the development of parking and possible regulations relating to the use of the ORT. The view is that certain types of communication should be coordinated to provide consistent messages to the public, external agencies and the media. However, there is also a need to ensure that certain types of communication are coordinated at the local level, particularly those dealing with local issues, programming and events.

5.1.8 Programming and special events

The ORT provides an attractive opportunity for groups and organizations to use the trail for special events and activities (e.g., organized running and cycling events, fundraising activities). Some of these events may involve the entire ORT while others may only involve portions of the trail. The question is whether such activities should be coordinated and whether corridor-wide policies and procedures should be adopted for events that impact multiple jurisdictions along the ORT.

Views expressed at elected officials' workshop

Elected officials believe that programming and special events occurring on the ORT should be coordinated, particularly those that impact the entire trail or those that could impact the opportunity for general use of the trail. Officials suggested that a system should be established to enable all owner jurisdictions to be informed on events and other organized activities on the trail. For the convenience of those wishing to use the trail for an event, a permitting process should be established within each owner jurisdiction to enable an application to be made and evaluated. ORT-wide policies and procedures should be developed to determine if the approval of other jurisdictions is required, and to identify the conditions to be met for events and similar activities.

5.1.9 Marketing and branding

The development of the ORT is already attracting considerable interest from agencies involved in tourism marketing (e.g., Thompson Okanagan Tourism Association, local tourism associations). The ORT also provides an opportunity for the owner jurisdictions and other local governments to become directly involved in marketing at both the trail-wide and local level. The question is whether marketing activities related to the ORT in general should be coordinated, and whether an overall "brand" should be established. A further question relates to how the owner jurisdictions wish to represent themselves to community-based tourism marketing agencies as well as region-wide agencies such as the Thompson Okanagan Tourism Association. Do they wish to coordinate their involvement with regional tourism marketing agencies and other government agencies, or do they wish to do this as individual jurisdictions?

Views expressed at elected officials' workshop

Elected officials believe that ORT marketing should be left to local and regional organizations with a mandate for marketing tourism opportunities, and should not be undertaken by the owner jurisdictions themselves. However, the owner jurisdictions should be involved in the development of marketing strategies and other initiatives. Elected officials are interested in establishing a "brand" for the ORT that includes a name and logo that would be used on signage, marketing material, computer applications, and in other means of communication. Elected officials are interested in undertaking an initiative involving all jurisdictions to develop the ORT logo and brand.

5.1.10 Fundraising

To date, fundraising for the development of the ORT has been coordinated by the owner jurisdictions in recognition of the higher degree of success in raising funds, especially grants. The ORTI has been a key organization involved in fundraising and has generated considerable funding for the first phase of development. In light of future planned development and expenditures, fundraising will remain an important activity in the successful development of the ORT. In moving forward, decisions need to be made in how fundraising will be undertaken, as well as the role of the owner jurisdictions and their partners in this process. The question is whether future fundraising should continue to be coordinated. Also, in the past, the owner jurisdictions have allocated the funds in such a way that all jurisdictions have benefitted and no individual jurisdictions has been "left behind" in the allocation of funds. A further question is whether to coordinate the allocation of funds generated from fundraising including grants.

Views expressed at elected officials' workshop

Elected officials believe that a certain amount of flexibility should be exercised in how fundraising is carried out in the future. There is support for the preparation of a more detailed fundraising policy and strategy that would provide guidance to owner jurisdictions and potential fundraising partners. This policy would address matters such as:

- Situations or funding sources such as grants where coordinated fundraising is required to ensure success.
- Projects and funding sources that need not be coordinated.
- Identification of acceptable sources of funding and the opportunity to expand fundraising opportunities, including corporate sponsorship.
- The recognition of donors, particularly large donors.

5.2 Recommendations

As discussed in the previous section, various matters related to the future use, development and marketing of the ORT will require coordination between the owner jurisdictions. Coordination of these matters will require activities that are undertaken jointly as well as activities that are carried out by the individual jurisdictions. Activities carried out jointly will generally involve:

- The preparation of joint plans and policies for the ORT;
- The coordination of the plans, policies, and similar initiatives prepared by the individual jurisdictions;
- Monitoring to ensure that uses and development of the ORT are consistent with the shared vision and objective for the ORT; and
- Communications with the public, media, and external groups and organizations on activities that are being carried out jointly.

Final decisions on all matters being carried out jointly, including the adoption of terms of reference and funding, would rest with the elected councils and board.

Implementation activities will generally be undertaken by the individual jurisdictions. Figure 1 provides an overview of the recommended activities to be undertaken jointly versus those to be undertaken by the individual jurisdictions. Figure 1 also identifies how external organizations may be involved in activities that are viewed as being outside of the mandate of the owner jurisdictions.

In undertaking joint activities or initiatives, provision may need to be made for joint funding of planning or similar activities in order to provide the basis for the implementation activities of the individual jurisdictions.

Figure 1: Summary of Recommendations for Coordination of Future Activities Related to the Use and Development of the ORT

Matters to be Coordinated	Activities to be Carried Out by Individual Jurisdictions	Activities to be Carried Out Jointly	Activities to be Carried Out by External Agencies
Monitoring and management	Monitor use and development of the ORT within jurisdiction's boundaries on basis of jurisdiction's own policies and regulations.	Monitor use and development of ORT on basis of jointly agreed to plans, policies, and similar initiatives. Identify need for coordinated response and make joint recommendation to elected councils and board.	
Planning for ORT support facilities	Implement plans once approved by the owner jurisdictions based on funding availability.	Coordinate planning for ORT support facilities such as parking, rest areas, washrooms, viewpoints, docks, benches and similar facilities. (This could involve preparation of joint plans.) Prepare joint recommendation to elected councils and board on plans.	Marketing organizations engaged and consulted during the planning process.
Planning for development of wayfinding facilities	Implement plans once approved by owner jurisdictions based on funding availability.	Prepare plan, program and design for wayfinding facilities. Incorporate use of Syilx language for signage through Duck Lake I.R. No.7 and all signage applicable to Syilx cultural and historical features along the ORT. Prepare joint recommendation to elected councils and board on plans, program and design.	
Planning for development of interpretive facilities	Implement plans once approved by owner jurisdictions based on funding availability. Develop interpretive programs including content and interpretive messaging for facilities within the boundaries of the individual jurisdictions.	Prepare overall plans, program and general design standards for interpretive facilities. Incorporate use of Syilx language in all interpretive programs relating to Syilx cultural and historical features. Prepare joint recommendation to elected councils and board on plans, program and design.	

Matters to be Coordinated	Activities to be Carried Out by Individual Jurisdictions	Activities to be Carried Out Jointly	Activities to be Carried Out by External Agencies
Construction	Undertake detail design, tender and award of future support facilities, wayfinding and interpretive projects. Provide contract management and construction services.	Coordinate detail design to address technical issues of mutual concern.	
Regulating use	Prepare necessary bylaws to implement regulations agreed to by owner jurisdictions.	Monitor need for coordinated responses to issues related to rail trail use (e.g., policies or regulations). Prepare joint recommendation to elected councils and board to address issues related to the use of the ORT.	
Maintenance and operations	Undertake maintenance activities of ORT consistent with adopted minimum standards.	Prepare minimum maintenance standards for ORT. Prepare joint recommendation to elected councils and board on minimum maintenance standards.	
External communication and public relations	Provide communications for all public, media, and other enquiries related to activities and initiatives being taken by individual jurisdictions.	Provide a single point for communications for all public, media, and other enquiries related to joint activities being undertaken by jurisdictions (includes project updates, schedule of events, regulations). Provide opportunities for public consultation on all major joint initiatives based on agreed upon terms of reference.	
Programming and special events	Approve events and organized activities for the use of section of ORT within the jurisdiction's boundaries consistent with joint policy.	Prepare policy for use of the ORT by organizations for special events and organized activities (e.g., prohibiting exclusive use) and prepare joint recommendations to elected councils and board.	

Matters to be Coordinated	Activities to be Carried Out by Individual Jurisdictions	Activities to be Carried Out Jointly	Activities to be Carried Out by External Agencies
		<p>Provide coordination of applications and approvals for special events and organized activities intending to use the <i>entire</i> ORT.</p> <p>Maintain an events calendar for approved special events and organized activities.</p>	
Marketing and branding	Develop and support local marketing strategies in consultation with local marketing agencies.	<p>Develop recommendations to elected councils and board on logo and brand for ORT.</p> <p>Provide input to local and regional marketing agencies on marketing strategy for the ORT. Prepare recommendation to elected councils and board on marketing strategy.</p>	Develop and implement marketing strategies including preparation of marketing materials, videos, media advertising, etc.
Fundraising	Undertake fundraising and prepare grant applications for projects located within the jurisdictions' boundaries.	<p>Provide overall coordination of fundraising activity in consultation with external organizations.</p> <p>Coordinate and prepare government grant applications for ORT-wide planning and development projects.</p>	Undertake fundraising activities or ORT-wide planning and development projects consistent with strategies and policies.

6. Proposed Terms of Reference for the Post-IDT Interjurisdictional Arrangement

6.1 Considerations

The ability to deal with the opportunities and challenges arising in the next phase of ORT development will require coordinated action by the owner jurisdictions on a number of fronts. This will necessitate the design and implementation of an effective interjurisdictional arrangement.

6.1.1 Required changes from previous interjurisdictional arrangements

The range and types of matters to be addressed in the future differ in some respects from previous arrangements, as follows:

- Rather than focusing on a single function such as “acquisition” or “development”, the future arrangement will be required to concurrently address a broader range of interrelated issues. It will also need to address the issues over a longer period of time. These were discussed at length in the previous section.
- In view of the increased involvement of external agencies, interest groups, community groups, and the private sector, the ability to consult and communicate with such agencies and groups must be enhanced.
- Increased involvement of community groups and the general public will also require an increased level of involvement by the elected councils and board, as many of the demands for information and involvement will be directed to elected officials rather than staff. This will require a greater emphasis on consultation and communication between the elected councils and board and the interjurisdictional staff committee. As noted earlier in the report, the need for increased communication between the interjurisdictional staff committee and the councils and board has been identified by the elected officials of some jurisdictions as an issue with the current IDT arrangement.

6.1.2 No change in fundamental governance structure and processes

While the use and future development of the ORT will require interjurisdictional arrangements to differ from past arrangements, there is little support for changes to fundamental governance structures and processes. Key characteristics of the governance structure and processes to remain unchanged include the following.

- The current ownership structure will remain in place in that individual jurisdictions will continue to own the section of the ORT within their boundaries. As ownership will not change, there are basic responsibilities and functions that must, by necessity, be carried out by the owners. This in turn requires them to maintain ultimate authority over decisions concerning the asset they own and the activities occurring on it.
- No change in the broad governance structure and decision-making process is proposed. Elected councils and the board will continue to make final decisions on recommendations and advice provided by the interjurisdictional staff committee and on all matters related to the expenditure of public funds and their legislative responsibilities. In view of the anticipated uses and further

development of the ORT, this will require the councils and board to be well-supported by the interjurisdictional staff committee in terms of receiving adequate and timely information and recommendations.

- The owner jurisdictions do not intend to undertake activities that are not central to their mandate. For example, while they will participate in developing marketing and fundraising strategies, they will not duplicate the activities of local or regional tourism marketing agencies nor will they duplicate the efforts of trusted fundraising partners.
- All future interjurisdictional arrangements must reflect decisions and agreements already made including the statutory ROW-public access agreements.
- The responsibilities and activities of the staff committee apply only to lands containing the ORT and not to adjacent lands. Only when requested by a jurisdiction, would the staff committee provide advice or recommendations on the uses or developments occurring on adjacent lands.

6.1.3 Role and responsibilities of the interjurisdictional staff committee

In past arrangements, the interjurisdictional staff committee has been central to the process of advising the elected councils and board on the coordination of activities as well as managing joint initiatives authorized by the elected councils and board. Other than the need to enhance communication between the committee and the elected councils and board, this approach has generally been effective. It is proposed to retain the interjurisdictional staff committee as a key component of the post-IDT interjurisdictional arrangement, with the caveat that communications between the staff committee and the elected councils and board need to be clarified and improved.

6.1.4 Increased communication between interjurisdictional committee and councils and board

In the post-IDT arrangement, provision will be made to ensure that elected councils and board of the owner jurisdictions are adequately informed and supported in making decisions on joint recommendations from the interjurisdictional staff committee, and that they are provided with regular updates on the staff committee's activities and initiatives.

To implement this, the following measures are proposed:

- In the case of joint initiatives such as planning or policy development, the terms of reference for such initiatives will establish the nature and scope of consultation to be carried out with elected officials of the owner jurisdictions. This would provide opportunity for elected officials to have input to the plan or policy initiative prior to its formal consideration. As the elected councils and board of the owner jurisdictions would be required to approve any terms of reference and funding for joint initiatives, they would have direct input into the nature and scope of required consultation. In cases where the interests of stakeholder jurisdictions are impacted by joint initiatives, provision would also be made in the terms of reference to consult with the elected officials of stakeholder jurisdictions.
- The staff person appointed from each jurisdiction will be required to:

- determine, in consultation with their elected council or board, the frequency of meetings required to adequately inform their respective council or board on the activities of the staff committee; and
 - attend the meetings and present updates to their respective council or board on the basis of the agreed upon schedule.
- In addition to providing regular updates, the staff person appointed from each jurisdiction will be required to respond to requests from their individual elected councils and board to meet on specific matters and issues. In certain circumstances, additional members of the jurisdictional staff committee may also be required to attend such meetings to provide required information.

6.2 Terms of Reference for Interjurisdictional Committee

Given the considerations discussed in Section 6.1, it is proposed that the owner jurisdictions take an approach similar to past approaches in establishing a basic terms of reference for the interjurisdictional staff committee. This requires no changes to the fundamental governance structure and processes, but provides an administrative arrangement to facilitate the future coordination of activities related to the ORT. By improving communication and opportunities for increased consultation for the councils and board, decision-making will be based on more timely and enhanced information.

The terms of reference for the IDT addressed the following topics:

- Purpose
- Interpretation
- Principles
- Vision
- Matters requiring joint or coordinated action
- Appointment of staff committee
- Responsibilities of staff committee
- Responsibilities of owner and stakeholder jurisdictions
- Required consultation and communications with councils and regional board
- Term of staff committee
- Staff committee membership
- Representation of members
- Appointment of committee chairperson
- Procedures
- Funding and financial management

A format similar to the outline described above is recommended for the future terms of reference. The proposed terms of reference for the post-IDT interjurisdictional committee is provided in Appendix 1.

6.3 Transition from IDT to new Staff Committee

It is probable that the mandate of the current IDT will not be completed until sometime in 2018 due to the time required to complete construction of the initial phase of development. While construction of the initial phase of development will be ongoing in 2018 for certain sections of the ORT, other sections of the ORT will be open to the public. This will result in the need to concurrently address matters within the mandate of the new staff committee and the matters falling within the mandate of the IDT. It is

recommended that the new interjurisdictional staff committee be established as soon as sections of the ORT are officially opened to the public and to transition the remaining responsibilities of the IDT to the new committee at that time. This avoids the situation where two staff committees are responsible for coordinating related activities.

6.4 Name of the Interjurisdictional Staff Committee

The proposed name of the interjurisdictional staff committee is the Okanagan Rail Trail Committee.

7.0 Conclusion

The owner jurisdictions have made significant progress in the acquisition and development of the ORT. Realizing the shared vision and full potential of the ORT will require additional effort. Much of this effort will require coordination and resources, and must be supported by a well-conceived interjurisdictional arrangement that is effective in enabling the owner and stakeholder jurisdictions to work together. Rather than undertaking significant changes to the governance structure for future decision-making related to the ORT, the owner jurisdictions have opted to continue with a practical and informal administrative arrangement that leaves decision-making where it should be—with the elected councils and board. By taking an incremental approach to designing and implementing such arrangements, the owner jurisdictions have been in a position to efficiently adjust and customize the arrangements while leaving their basic governance structure in place. This approach is again proposed for the post-IDT arrangement, which will need to address somewhat different opportunities and challenges from those experienced in the past.

A review of international best practices established for rail trails indicates that the recommended arrangement is consistent with these practices. Consistent with international best practices the proposed arrangement provides for:

- A trail-level governance arrangement that has a clear vision, strategy, leadership, and direction.
- The involvement of individuals with relevant skills and experience.
- Clarity around roles and responsibilities within the interjurisdictional arrangement, including the separation of governance and management/administrative functions.
- Potential for adequate financial resources to be provided to maintain and provide for the further development of the trail.
- Direct involvement of the local government and First Nations in the governance and management of the trails.
- Clarity around the roles and responsibilities of external partners, and the ability to collaborate in planning, development, and marketing of the trail.
- Commitment to long-term, stable funding.
- Existence of dedicated organizations and teams at the regional level to help with marketing and promotion.

Appendix 1
Terms of Reference
Okanagan Rail Trail Committee

1. Purpose

The purpose of these terms of reference is to establish a basis for the owner and stakeholder jurisdictions to work collaboratively in the further development, maintenance, and use of the Okanagan Rail Trail corridor.

2. Interpretation

In these terms of reference:

“Elected councils and board” means the elected councils and regional board of the owner and stakeholder jurisdictions.

“Joint initiative” means an initiative managed by the ORT committee and jointly agreed to and funded by the owner jurisdictions for the purpose of carrying out a plan, project or similar activity to enable the preparation of joint recommendations, but does not involve activities related to the funding and/or the construction of facilities.

“OKIB” means the Okanagan Indian Band.

“ORT” means the Okanagan Rail Trail.

“Okanagan Rail Trail Committee or ORT Committee” means the interjurisdictional staff committee appointed by the elected councils and board under these terms of reference.

“Owner jurisdictions” means the Okanagan Indian Band, the District of Lake Country, the City of Kelowna and the Regional District of North Okanagan.

“Stakeholder jurisdictions” means the City of Vernon and the District of Coldstream.

3. Principles

The jurisdictions will strive to adhere to the following principles in the coordination of activities related to the development, maintenance and use of the ORT:

- To achieve the shared vision for the ORT.
- To work toward the establishment and continuation of mutual trust among the owner and stakeholder jurisdictions.
- To work collaboratively to support the interjurisdictional arrangements agreed to by the jurisdictions.
- To seek consensus on matters requiring joint decisions.
- To acknowledge that the elected leaders of the owner jurisdictions have the decision-making authority for all matters within their legislated mandate.

- To ensure excellent communication among the jurisdictions and between the elected bodies and the ORT committee.
- To treat in confidence those matters designated as such by the ORT committee, elected councils or board consistent with applicable legislation.
- To commit to membership within the interjurisdictional arrangement to the end of its term.

4. Vision

The owner jurisdictions agree to work together in realizing the shared vision for the ORT as follows:

“It is the vision of Okanagan Rail Trail owners to develop and manage a world class rail trail that links the communities of the Okanagan Valley. While the type and intensity of use along the rail trail may vary from community to community, the ORT will provide a range of recreational, transportation, tourism, and event opportunities along the length of the trail and in the communities through which it passes. Rail trail uses will be managed to minimize conflicts between users and optimize the enjoyment of the rail trail experience for all. Community level trails and other regional trails will be integrated with the ORT. The enjoyment, convenience, and safety of local residents and visitors alike will be assured by the development and management of well-designed facilities along the rail trail, including private or other community developments along the route. While aspects of development, management, maintenance, and governance of the rail trail will be coordinated among the owner jurisdictions, the owner jurisdictions will retain decision-making authority for all matters within their legislated mandate, bylaws and adopted official policies. Finally, and in order to reflect the joint intent of the original purchase of the corridor, the ORT will provide a long term opportunity to develop a multi-modal transportation corridor linking the communities along the corridor.”

5. Coordination Required to Achieve Shared Vision

The owner jurisdictions agree that certain matters related to the future use and development of the ORT will need to be coordinated in order to realize the shared vision. These are as follows:

- Monitoring and responding to uses, activities, and developments that may be inconsistent with the shared vision, objectives, and agreements for the ORT.
- Planning for the future development of facilities to support the use of the ORT (e.g., parking, washrooms).
- Planning for the development of wayfinding systems and facilities.
- Planning for the development of interpretive programs and facilities.
- Designing and constructing facilities within the ORT.
- Developing policies and coordinating events and similar activities proposed for the entire ORT.
- Establishing maintenance standards and practices.
- Liaising and providing input to external marketing agencies in their preparation and implementation of ORT marketing strategies.
- Fundraising activities and preparation of grant applications.
- Responding to developments proposed within the rail trail corridor by individual owner jurisdictions (e.g. underground utilities)
- Responding to third party interests in the rail trail corridor such as accesses, crossings, leases, rights of way/easements, signage and similar applications.

- Communication and messaging to the public and external groups and organizations on the matters described in this section.

The scope of matters to be coordinated is subject to change from time to time with the approval of the owner jurisdictions.

6. Appointment of ORT Committee

The owner jurisdictions agree to:

- Establish a staff committee to be called the ORT committee, comprised of representatives from the owner and stakeholder jurisdictions, to make recommendations to the elected councils and the board for the coordination of activities required to achieve the shared vision and objectives for the ORT.
- Financially support the activities of the ORT committee on the basis set out in these terms of reference.

7. Responsibilities of the ORT Committee

The responsibilities of the ORT committee are as described in this section. The responsibilities of the ORT committee are limited to the lands containing the ORT.

- a) Monitor the use and development of the ORT to ensure compliance with the shared vision, adopted joint plans, policies, regulations and standards and to make recommendations to the elected councils and board on issues of joint concern or interest.
- b) To coordinate and make joint recommendations to the elected councils and board on the following matters:
 - Plans for the development of ORT support facilities such as parking facilities, rest areas (including washrooms), benches, viewpoints and other facilities deemed necessary to provide for the safety, convenience, and enjoyment of trail users.
 - Design and construction of future facilities within the ORT.
 - A wayfinding plan to be prepared as a joint initiative to provide the basis for the development of wayfinding facilities.
 - A plan, to be prepared as a joint initiative, to identify the location, general design and standards for the development of interpretive facilities provided that individual jurisdictions retain the right to develop the program and content of interpretive messaging for facilities within their own boundaries.
 - Maintenance standards for the ORT.
 - Management of events impacting the entire ORT.
 - Measures to address uses and activities that are inconsistent with the shared vision, objectives, principles, plans, and policies for the ORT.
 - Proposals by owner jurisdictions for development within the rail trail corridor (e.g., underground utilities).
 - Policies and regulations to ensure a coordinated and consistent approach in response to applications from citizens, developers, and other private interests for accesses, crossings, leases, rights of way/easements, dock tenures, signs and similar applications.

- Strategies and plans for communicating with the general public, external groups, organizations, and the media on all matters being coordinated by the staff committee.

In addition to undertaking joint initiatives for the preparation of plans for wayfinding and interpretive facilities, the ORT committee may carry out joint initiatives for other matters to be coordinated. Joint initiatives are subject to the approval of terms of reference and funding of such initiatives by the elected councils and board of the owner jurisdictions.

The ORT committee will make recommendations only to those councils and board that have the jurisdiction and responsibility to make decisions on the matter to be coordinated.

- c) To undertake any remaining responsibilities within the mandate of the IDT upon the dissolution of the IDT.
- d) To liaise with external marketing agencies and to contribute to the preparation and implementation of marketing strategies for the ORT.
- e) In collaboration with external agencies and partners, to coordinate fundraising for joint initiatives including the preparation of grant applications.
- f) To provide a single point of contact for the provision of information to the general public, external groups and organizations, the media, and potential funding partners for all matters that are being coordinated by the ORT committee.
- g) To respond to requests from the owner and stakeholder jurisdictions for input on land use and other development proposals impacting the rail trail corridor.
- h) To investigate and make recommendations on the joint provision of services within the ORT corridor such as maintenance.
- i) To support individual owner jurisdictions in the acquisition of the remaining sections of the ORT from CN Rail, other than the provision of funding.
- j) To support the OKIB in its efforts to have a portion of the ORT through Duck Lake I.R. No. 7 designated as "Reserve" and to support the designation, use, and development of this section of the corridor as a publicly-accessible rail trail.
- k) To identify opportunities for economic development and private sector investment within each jurisdiction along the ORT including those in Duck Lake I.R. No. 7.
- l) To consult and communicate with the elected councils and board of the owner and stakeholder jurisdictions consistent with the provisions of Section 9 of these terms of reference.
- m) To engage consultants or contract staff to assist the ORT committee in undertaking its responsibilities.
- n) To administer and manage the funds approved for the activities of the ORT committee consistent with approved budgets and financial management practices.
- o) To prepare recommendations to the elected councils and board of the owner jurisdictions for confirming the funding formula and input data for each fiscal year.

8. Responsibilities of Elected Councils and Board

It is acknowledged that the elected councils and board of both the owner and stakeholder jurisdictions have ultimate authority over their policies, plans, bylaws, and budgets. With this understanding, the responsibilities of the elected councils and board are as follows:

- a) To consider and make decisions on joint recommendations made by the ORT committee on those matters described in Section 5 of these terms of reference.

- b) To take the necessary steps and provide the necessary resources to implement jointly agreed to plans, strategies, policies, and other joint initiatives falling within their jurisdiction and responsibilities as approved by the elected councils and board. Specifically, to:
- Prepare more detailed plans, as required, consistent with the jointly adopted plans for the ORT in order to integrate the ORT with transportation plans, official community plans, parks and recreation plans, capital plans, and other local government plans and policies.
 - In the case of owner jurisdictions, to undertake capital projects within the ORT corridor located within their jurisdictions consistent with jointly agreed-upon plans and standards for the ORT and the ability to fund such capital projects.
 - Enact bylaws for their jurisdictions consistent with jointly agreed-upon policies.
 - In the case of the owner jurisdictions, to maintain the ORT within their jurisdictions consistent with jointly agreed-upon standards.
 - Make decisions on individual applications for OCP amendment, re-zoning, development permits, temporary use permits, building permits, access permits, crossings, leases, rights of way/easements and similar applications taking into account agreed-upon joint plans and policies for the ORT.
 - In the case of owner jurisdictions, to administer and adjudicate encroachment claims, leases, rights of way/easements, and other tenures and claims consistent with agreed-upon joint policies.
 - In the case of owner jurisdictions, to enter into agreements with other partner organizations and funding agencies for fundraising and other initiatives that provide for the achievement of joint plans and policies.
- c) To appoint staff to the ORT committee and provide the necessary financial support for the participation of their representatives on the ORT committee.
- d) In the case of the owner jurisdictions, to support the functioning and operation of the ORT committee.
- e) To participate in consultation activities as described in Section 9 of these terms of reference.
- f) To collaborate with the other participating jurisdictions and in accordance with these terms of reference to achieve the purpose and the broader shared vision and objectives for the ORT.

9. Required Consultation and Communications with Councils and Regional Board

The ORT committee shall ensure that the elected councils and the board are:

- informed and supported in their decisions on joint recommendations from the ORT committee; and
- provided with regular communication on the activities of the ORT committee.

Specifically:

- a) In the case of joint initiatives, terms of reference for such initiatives shall establish the nature and scope of consultation to be carried out with elected officials of the owner jurisdictions. Consultation with elected officials consistent with the terms of reference shall be carried out prior to formal consideration of joint recommendations by the elected councils and board. In cases where the interests of stakeholder jurisdictions are impacted by joint initiatives, provision

shall also be made in the terms of reference to consult with the elected officials of stakeholder jurisdictions.

- b) The staff person appointed from each jurisdiction shall:
 - determine, in consultation with their elected council or board, the frequency of meetings required to adequately inform their respective council or board on the activities of the ORT committee; and
 - attend the meetings and present updates to their respective council or board on the basis of the agreed upon schedule.
- (c) In addition to providing regular updates, the staff person appointed from each jurisdiction shall respond to requests from their individual elected councils and board to meet on specific matters and issues. In certain circumstances, additional members of the ORT committee, including the chairperson, may also be required to attend such meetings to provide information.

10. Term of ORT Committee

The term of the ORT committee shall be two years from the date of ratification of these terms of reference. The owner jurisdictions may decide to extend the term of the ORT committee if deemed necessary to achieve the shared vision and objectives for the corridor.

11. ORT Committee Membership

11.1 Representation

The membership of the ORT committee shall consist of a representative from each of the owner and stakeholder jurisdictions. Each representative shall meet the qualifications set out in Section 12.1 of these terms of reference.

11.2 Membership Requires Endorsement of Terms of Reference

Membership in the ORT committee by any owner or stakeholder jurisdiction requires the endorsement of these terms of reference and the commitments herein.

11.3 Membership is Voluntary

Membership in the ORT committee is voluntary and any member may suspend or terminate its membership at any time, provided that the other members of the ORT committee are notified in writing sixty days in advance of the date of the suspension or withdrawal.

12. Representation of Members

12.1 Appointment of Representatives

Each member of the ORT committee shall be represented by its chief administrative officer. Designates may be appointed to or withdrawn from the ORT committee by written notice from the chief administrative officer. The representative must:

- a) Have the authority to fully represent the First Nation, municipality or regional district, and must be able to make decisions and commitments on behalf of the First Nation, municipality or regional district on matters other than those requiring approval by the elected councils or board; and
- b) Possess the qualifications and knowledge required to address the matters described in Section 7 of these terms of reference.

Attendance at meetings of the ORT committee shall be limited to one representative from each jurisdiction.

12.2 Term of Representatives

To ensure continuity in representation, representatives appointed to the ORT committee shall, to the extent possible, serve to the end of the term as described in Section 10 of these terms of reference.

12.3 Duties and Responsibilities of Representatives

The duties and responsibilities of the representatives are as follows:

- a) To represent the interests, objectives, and policies of their respective First Nation, municipality or regional district in the discussions, initiatives, and recommendations of the staff committee.
- b) To report on the activities of the ORT committee to their respective elected councils and board.
- c) To present the reports prepared and recommended by the ORT committee to their respective elected council or board to enable elected councils and board to make decisions on joint plans, policies, proposals, and other initiatives.
- d) To secure expertise and human resources from their First Nation, municipality or regional district to assist in meeting the needs of the ORT committee in carrying out its responsibilities.

13. Appointment of Committee Chairperson

The ORT committee shall appoint a chairperson at its first meeting to assist in carrying out its duties and responsibilities.

13.1 Duties and Responsibilities of Chairperson

The chairperson shall be required to carry out the following duties:

- a) To prepare, or provide for the preparation of, written reports, joint recommendations, agreements, and similar documents to the elected councils and the board.
- b) To be the point person for the administration of consulting contracts.
- c) To be the point person for all external communications with the public, community groups, government agencies, and the media for all matters being undertaken jointly or being coordinated for the entire ORT.
- d) To meet with and present reports and other information to the elected councils and board as well as staff of member jurisdictions as required.
- e) To prepare and circulate meeting agendas and information.
- f) To prepare meeting notes and maintain records of meeting notes and other documents.

- g) To assign one or more of the duties described in this section to other ORT committee members upon consent of the ORT committee.

13.2 Term of Chairperson

The term of the chairperson shall coincide with the term of the ORT committee as set out in Section 10 of these terms of reference.

14. Procedures

The ORT committee shall establish procedures as required, although it is the intent to keep the procedures as flexible and as informal as possible. The following are the basic procedures to be followed.

14.1 Decision Making

Decisions by the ORT committee shall be made as follows:

- a) Decisions on matters falling within the mandate, jurisdiction and responsibilities of the owner jurisdictions shall only be made by the representatives of the owner jurisdictions.
- b) Decisions on matters falling within the mandate, jurisdiction and responsibilities of both owner and stakeholder jurisdictions shall be made by the entire ORT committee.
- c) The ORT committee shall strive to make decisions that advance the shared vision and objectives for the ORT and that reflect the opportunities and limitations of each participating jurisdiction.
- d) Decisions by the ORT committee will be made by consensus among the representatives entitled to be involved in the decisions as described in subsections (a) and (b) of this section.

14.2 Meetings

The ORT committee shall, at a minimum, hold regular quarterly meetings. Additional or fewer meetings, if required, will be at the call of the chairperson.

14.3 Meeting Notes

The ORT committee shall ensure that meeting notes are taken at each meeting and that a record of such notes is maintained.

15. Funding and Financial Management

Costs associated with the functioning and operation of the ORT committee will be funded as follows:

- a) Costs associated with the participation of each jurisdiction's representative on the ORT committee shall be borne by each jurisdiction directly.
- b) The costs to be borne jointly by the owner jurisdictions include:
 - Costs for carrying out joint initiatives;
 - Costs associated with the activities of the committee chairperson;
 - Costs associated with administrative or technical staff seconded from a specific jurisdiction by the ORT committee; and

- Costs for external support services required by the ORT committee to carry out its duties and responsibilities for matters described in Section 7.
- c) The ORT committee shall provide to each owner jurisdiction by August 1st of the year preceding the year in which the costs will be incurred, an estimate of the jurisdiction's share of the annual costs that are to be borne jointly.
- d) Costs that are to be borne jointly by the owner jurisdictions shall be shared on the basis of the formula set out in Appendix 1 to these terms of reference.
- e) No expenditure of funds for costs that are borne jointly shall be made until the budget for the ORT committee's operation has been approved by each of the elected councils or board of the owner jurisdictions.
- f) The ORT committee shall appoint or second a financial manager who will be a staff member of one of the owner jurisdictions to manage the finances of the ORT committee consistent with policies and practices of the owner jurisdiction.
- g) The financial manager shall report to the committee chairperson.

These terms of reference are adopted by the participating jurisdictions by the signature of the Municipal Mayors, Regional District Chair, and Chief of the OKIB as follows:

_____ Chair, Regional District of North Okanagan	_____ Date
_____ Chief, Okanagan Indian Band	_____ Date
_____ Mayor, District of Lake Country	_____ Date
_____ Mayor, City of Kelowna	_____ Date
_____ Mayor, City of Vernon	_____ Date
_____ Mayor, District of Coldstream	_____ Date

Appendix 1

Formula for Sharing Costs Associated with the Functioning of the Staff Committee

Costs associated with the operation and functioning of the staff committee that are to be borne jointly by the owner jurisdictions will be shared on the basis of the formula described as follows:

$$C = L \times T$$

Where:

C = the costs to be paid by each of the participating owner jurisdictions.

L = the percentage of the overall length of the ORT corridor within the boundaries of each owner jurisdiction.

T = the total shared costs.



Okanagan Rail Trail Governance

May 2018



Elected Leaders Meeting

- ▶ Owners
 - ▶ RDNO
 - ▶ District of Lake Country
 - ▶ OKIB
 - ▶ City of Kelowna
- ▶ Stakeholder Jurisdictions
 - ▶ City of Vernon
 - ▶ District of Coldstream
- ▶ Facilitated meeting November 2017
 - ▶ Set framework for moving forward

Elected Leaders Meeting

- ▶ Key points of discussion
 - ▶ Shared vision
 - ▶ Coordination issues
 - ▶ Independent or together
 - ▶ Communication
 - ▶ Suggestions for next Interjurisdictional committee

IDT Working Vision

▶ Vision

- ▶ Recreational trail that excludes motorized vehicles
- ▶ Ensure the right of public access along the entire ORT
- ▶ Provide a basic level of trail development
- ▶ Ensure basic and consistent wayfinding
- ▶ Protect the right of way for long term development of a continuous multi-modal transportation corridor

▶ Allowed for acquisition and initial development

Elected Leaders Feedback

- ▶ Wayfinding vital
- ▶ World class trail
- ▶ Public facilities coordinated
- ▶ Recognition of different users in different areas
- ▶ Linking ORT to other trails in region
- ▶ Linking private sector investment
- ▶ Coordinated maintenance standard to support projected use
- ▶ Link to transit
- ▶ Attract visitors, but focus on local citizens

Elected Leaders Meeting

- ▶ Proposed Vision (statement)
 - ▶ *Develop and manage a world class rail trail*
 - ▶ *Links communities*
 - ▶ *Provide range of recreational, transportation, tourism, and event opportunities*
 - ▶ *Community level trails and other regional trails will be integrated*
 - ▶ *Well-designed facilities along the rail trail*
 - ▶ *including private*
 - ▶ *Coordinated approach*
 - ▶ *Owner jurisdictions will retain decision-making authority*
 - ▶ *Long term opportunity: multi-modal transportation corridor*

Elected Leaders Meeting

- ▶ Coordination vs independent
 - ▶ Oversight, monitoring, and management
 - ▶ Planning for long term development of the ORT
 - ▶ Design and construction
 - ▶ Regulation of uses and activities on the ORT
 - ▶ Maintenance and operations
 - ▶ Wayfinding and interpretive facilities
 - ▶ External communications and public relations
 - ▶ Programming and special events
 - ▶ Marketing and branding
 - ▶ Fundraising

Elected Leaders Meeting

- ▶ Agreement to work in an Interjurisdictional manner
- ▶ IDT Terms of Reference successful
 - ▶ Base for ongoing committee

New Committee

- ▶ New Terms of Reference
 - ▶ No change
 - ▶ Fundamental governance structure
 - ▶ Process
 - ▶ Focus on interjurisdictional coordination
 - ▶ Decision making rests with independent Council
- ▶ Transition to operation
 - ▶ Engages
 - ▶ User groups
 - ▶ Marketing organization
 - ▶ Private sector
 - ▶ Events
- ▶ Appointed staff member required to provide communication to respective Council

New Committee

► Resolutions

- Receive report and approve interjurisdictional terms of reference
- Cessation of IDT Committee
 - June 30, 2018
- Appointment of staff



Questions?

For more information, visit kelowna.ca.

CITY OF KELOWNA

BYLAW NO. 11546

Amendment No. 1 to Good Neighbor Bylaw No. 11500

The Municipal Council of the City of Kelowna, in open meeting assembled, enacts that the City of Kelowna Good Neighbour Bylaw No. 11500 be amended as follows:

1. THAT **Section 2. Definitions** be amended by adding a new definition for **Vehicle** in its appropriate location that reads:

“**Vehicle** means a device in, upon, or by which a person or thing is or may be transported or drawn upon a highway, except a device designed to be moved by human power or used exclusively upon stationary rails or tracks”
2. AND THAT **Section 4. Property Nuisances, 4.3 (b)** be deleted that reads:

“(b) keep a **derelict motor vehicle**, vehicle, boat or trailer except as part of a lawful business operating under a license from the City;”

And replace with:

“(b) keep a **derelict vehicle** of any sort, including but not limited to a **motor vehicle, vehicle**, boat or trailer except as part of a lawful business operating under a license from the City;”
3. AND THAT **Section 5. Graffiti, 5.1** be amended by adding the words “in or” after the words “sign or any other structure or surface,”
4. AND THAT **Section 6. Street and Public Space Nuisances**, be deleted that reads:

“6.1 No person shall place **graffiti**, or cause **graffiti** to be placed on any wall, building, fence, sign or other structure or surface in a **street** or **public space**.

6.2 No person shall on a **street** or in a **public space**:

(a) urinate or defecate;

(b) sleep in a **motor vehicle**; or

(c) participate in a violent confrontation or struggle.

6.3 No person shall on a **street** or in a **public space**:

(a) scatter, dump, or dispose of any garbage, glass, crockery, litter or other material, whether liquid or solid, and whether likely to injure any person, animal, vehicle or not;

(b) place or throw any circular, pamphlet, handbill or other paper material, whether or not the paper material had been previously placed upon any **motor vehicle** or other vehicle, without the consent of the **owner** or driver thereof;

(c) cut, remove or damage any tree, shrub or flower plant, bush or hedge;

(d) deface, injure or damage any **street**, ditch or fence or anything erected or maintained for purpose of lighting a **street**;

(e) dispose or place or leave any cement, mortar, lime, or any other substance having a damaging or destructive effect upon the concrete, asphalt, bushes, shrubs, or trees, or grass situate thereon;

- (f) stamp, paint, post, affix or otherwise place any placard, bill, poster, notice advertisement without first having obtained the permission of the City; or
- (g) remove to, or accumulate in from lands adjacent to a **street** or **public space**, grass cuttings, leaves or **rubbish**."

And replace with:

"6.1 No person shall on a **street** or in a **public space**:

- (a) urinate or defecate;
- (b) sleep in a **motor vehicle**; or
- (c) participate in a violent confrontation or struggle.

6.2 No person shall on a **street** or in a **public space**:

- (a) scatter, dump, or dispose of any garbage, glass, crockery, litter or other material, whether liquid or solid, and whether likely to injure any person, animal or cause damage to a vehicle or not;
- (b) place or throw any circular, pamphlet, handbill or other paper material, whether or not the paper material had been previously placed upon any motor vehicle or other vehicle, without the consent of the motor vehicle owner or occupant thereof;
- (c) cut, remove or damage any tree, shrub or flower plant, bush or hedge;
- (d) deface or damage any **street**, ditch or fence or anything erected or maintained for purpose of lighting a **street**;
- (e) dispose or place or leave any cement, mortar, lime, or any other substance having a damaging or destructive effect upon the concrete, asphalt, bushes, shrubs, or trees, or grass situate thereon;
- (f) stamp, paint, post, affix or otherwise place any placard, bill, poster, notice advertisement without first having obtained the permission of the City; or
- (g) remove to, or accumulate in from lands adjacent to a **street** or **public space**, grass cuttings, leaves or rubbish."

5. AND THAT **Section 8. Construction Noise**, 8.1 be amended by deleting "0700 hours or after 2100 hours" and replacing it with "7:00 am or after 9:00 pm".

6. AND THAT **Section 9. Deemed Objectionable Noises**, 9.5 be amended by:

- a) Deleting "sections 7.1 to 8.1 and 9.1 to 9.4 of this bylaw" and replacing it with "sections 7.1 to 8.1 and 9.1 to 9.4, 10.1 to 10.4 and 11.1 to 11.4 of this bylaw";
- b) adding in sub-section (b)(ii) the word "alarm" after the words "a **motor vehicle** horn,"; and
- c) deleting in sub-section (c) "0700 hours or after 2100 hours" and replacing it with "before 7:00 am or after 9:00 pm"

7. AND THAT **Section 10. Compliance Orders**, 10.2 be amended by deleting section 10.2 that reads:

"10.2 Where a condition exists that is a contravention of any of the provisions in sections 4 and 5 of this bylaw, the **bylaw supervisor** may issue an **order to comply** requiring the person to remedy the nuisance or non-compliance within fourteen (14) days of deemed service or ten (10) days in the case of a contravention of section 5.3 of this bylaw, or on a date the **bylaw supervisor** considers reasonable in the circumstances if in the opinion of the **bylaw supervisor** a further period of time is required due to:"

And replace it with:

"10.2 Where a condition exists that is a contravention of any of the provisions in sections 4 and 5 of this bylaw, a **Bylaw Enforcement Officer** may issue an **order to comply** requiring the person to remedy the nuisance

or non-compliance within fourteen (14) days of deemed service or ten (10) days in the case of a contravention of section 5.3 of this bylaw, or on a date a **Bylaw Enforcement Officer** considers reasonable in the circumstances if in the opinion of the **Bylaw Supervisor** a further period of time is required due to:"

8. This bylaw may be cited for all purposes as "Bylaw No.11546 being Amendment No. 1 to Good Neighbor Bylaw No. 11500."
9. This bylaw shall come into full force and effect and is binding on all persons as and from the date of adoption.

Read a first, second and third time by the Municipal Council this 26th day of March, 2018.

Amended at third reading by the Municipal Council this 30th day of April, 2018.

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk

CITY OF KELOWNA

BYLAW NO. 11566

Amendment No. 20 to Bylaw Notice Enforcement Bylaw No. 10475

The Municipal Council of the City of Kelowna, in open meeting assembled, enacts that the City of Kelowna Bylaw Notice Enforcement Bylaw No. 10475 be amended as follows:

1. THAT Schedule "A", **Good Neighbour Bylaw No. 11503**, be deleted in its entirety that reads:

Bylaw No.	Section	Description	A1 Penalty – First Offence	A2 Early Payment Penalty – First Offence	A3 Late Payment Penalty – First Offence	A4 Penalty – second and subsequent offences	A5 Early Payment - second and subsequent offences Payment Penalty	A6 Late Payment Penalty – second and subsequent offences	A7 Compliance Agreement Available (*Maximum 50% Reduction in Penalty Amount Where Compliance Agreement is Shown as "Yes")
Good Neighbour Bylaw No. 11503									
11503	4.2	Owner of real property remain unsightly	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	Yes
11503	4.3a	Permit accumulation of rubbish on premises	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11503	4.3a	Permit compost that is not closed and sealed	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11503	4.3b	Permit derelict motor vehicle, vehicle, boat or trailer on real property	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	Yes

11503	4.3c	Permit accumulation of noxious, offensive or unwholesome materials, substance or objects	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	Yes
11503	4.3d	Permit accumulation of building materials	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	Yes
11503	4.2	Permit contamination of the atmosphere	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	Yes
11503	5.1	Place graffiti on wall, building, fence or other structure	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	No
11503	5.2	Permit graffiti on utility kiosk, customer service box or dumpster	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	No
11503	5.3	Permit graffiti on real property adjacent to street or public space	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	Yes
11503	5.4	Permit graffiti on a motor vehicle	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11503	6.1	Cause or place graffiti on street or public space	\$500.00	\$450.00	\$500	\$500.00	\$450.00	\$500.00	No
11503	6.2a	urinate or defecate on street or public space	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	6.2b	sleep in a motor vehicle on or public space	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	6.2c	Participate in violent confrontation or struggle	\$250.00	\$225.00	\$275.00	\$250.00	\$225.00	\$275.00	No
11503	6.3a	Dispose materials that may injure any person, animal or vehicle	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	No
11503	6.3b	Place paper or other material on motor vehicle	\$250.00	\$225.00	\$275.00	\$500.00	\$450.00	\$500.00	No

11503	6.3c	Cut, remove or damage tree, shrub, flower plant, bush or hedge	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	6.3d	Damage street lighting	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	No
11503	6.3e	Contaminate & harm bushes, shrubs, trees or grass situate	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	No
11503	6.3f	Placing paper materials without the permission of the City	\$250.00	\$225.00	\$275.00	\$500.00	\$450.00	\$500.00	Yes
11503	6.3g	Place or accumulate grass cuttings, leaves or rubbish	\$250.00	\$225.00	\$275.00	\$500.00	\$450.00	\$500.00	No
11503	7.1	Permit noise to disturb the neighbourhood	\$250.00	\$225.00	\$275.00	\$500.00	\$450.00	\$500.00	Yes
11503	7.2	Permit noise from real property to disturb any person	\$250.00	\$225.00	\$275.00	\$500.00	\$450.00	\$500.00	Yes
11503	7.3	Operate sound amplification equipment or instrument to disturb any person	\$250.00	\$225.00	\$275.00	\$500.00	\$450.00	\$500.00	Yes
11503	7.4	Harbour any animal or bird which disturbs the neighbourhood	\$250.00	\$225.00	\$275.00	\$500.00	\$450.00	\$500.00	Yes
11503	8.1	construction noise before 0700 hours or after 2100 hours	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	Yes
11503	9.1	Launch a motor boat without an adequate exhaust system	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	9.2	Operate motor boat with stacks or dry headers	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No

11503	9.3	Operate a motor boat powered by an engine with exhausting devices	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	9.4	Operate a motor boat to cause noise	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	9.5(a)(i)	Noise or sounds exceeding 15 mins – two or more people – raised voices	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	9.5(a)(ii)	Noise or sounds exceeding 15 mins – barking or howling of harbored dog	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	9.5(a)(iii)	Noise or sounds exceeding 15 mins – yelling or screaming	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	9.6(b)(i)	Exhaust system noise	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	9.6(b)(ii)	Horn or alarm noise	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	9.6(b)(iii)	Tire squeal noise	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	No
11503	9.6(c)	Lawn mower or power tool noise before 0700 or after 2100	\$100.00	\$90.00	\$110.00	\$250.00	\$225.00	\$250.00	Yes
11503	14.1	Obstruct a Bylaw Enforcement Officer	\$500	\$450	\$500.00	\$500.00	\$450.00	\$500.00	No

2. AND THAT Schedule "A" be amended by adding a new section for **Good Neighbour Bylaw No. 11500** as attached to and forming part of this bylaw as Attachment A.
3. This bylaw may be cited for all purposes as "Bylaw No. 11566 being Amendment No. 20 to Bylaw No. Bylaw Notice Enforcement Bylaw No. 10475."

4. This bylaw shall come into full force and effect and is binding on all persons as and from the date of adoption.

Read a first, second and third time by the Municipal Council this 26th day of March, 2018.

Amended at third reading by the Municipal Council this 30th day of April, 2018.

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk

Schedule A

Bylaw No.	Section	Description	A1 Penalty – First Offence	A2 Early Payment Penalty – First Offence	A3 Penalty – second and subsequent offences	A4 Early Payment - second and subsequent offences Payment Penalty	A5 Late Payment Penalty	A6 Late Payment Penalty – second and subsequent offences	A6 Compliance Agreement Available (*Maximum 50% Reduction in Penalty Amount Where Compliance Agreement is Shown as “Yes”)
Good Neighbour Bylaw No. 11500									
11500	4.2	Owner or occupier allow real property to remain unsightly	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$450.00	Yes
11500	4.3 a	Owner or occupier permit accumulation of water, filth or rubbish on real property	\$100.00	\$90.00	\$100.00	\$90.00	\$110.00	\$110.00	Yes
11500	4.3 b	Owner or occupier permit derelict motor vehicle, vehicle, boat or trailer on real property	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$110.00	Yes
11500	4.3 c	Owner or occupier permit accumulation of noxious, offensive or unwholesome materials, substance or objects on real property	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$500.00	Yes

11500	4.3 d	Owner or occupier permit building materials to accumulate on real property for more than 15 days without permit or being stored in closed building or structure	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$500.00	Yes
11500	4.4	Owner or occupier of real property permit contamination of the atmosphere	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$500.00	Yes
11500	5.1	Cause or place graffiti on wall, building, fence or any other structure	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$500.00	No
11500	5.2	Owner permit graffiti on utility kiosk, customer service box or dumpster	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$500.00	No
11500	5.3	Owner or occupier shall keep real property adjacent to street or public space free of graffiti	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$500.00	Yes
11500	5.4	Owner permit graffiti on a motor vehicle	\$100	\$90	\$100.00	\$90.00	\$110.00	\$500.00	Yes
11500	6.1.a	Urinate or defecate on street or public space	\$100	\$90	\$100.00	\$90.00	\$110.00	\$110.00	No
11500	6.1 b	Sleep in a motor vehicle on a street or public space	\$100	\$90	\$100.00	\$90.00	\$110.00	\$110.00	No

11500	6.1 c	Participate in violent controntation or struggle on a street or public space	\$100.00	\$90.00	\$100.00	\$90.00	\$110.00	\$110.00	No
11500	6.2 a	Dispose materials that may injure any person or animal or cause damage to a vehicle	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$500.00	No
11500	6.2 b	Place paper or other material on motor vehicle	\$250.00	\$225.00	\$500.00	\$450.00	\$500.00	\$500.00	No
11500	6.2 c	Cut, remove or damage any tree, shrub or flower plant, bush or hedge on a street or public space	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$500.00	No
11500	6.2 d	Deface or damage any street lighting	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$500.00	No
11500	6.2 e	Dispose concrete, asphalt or other substance that cause damage to bushes, shrubs, trees or grass situate thereon	\$500.00	\$450.00	\$500.00	\$450.00	\$500.00	\$500.00	No
11500	6.2 f	Stamp, paint, post, affix or place paper materials without the permission of the City	\$250.00	\$225.00	\$500.00	\$450.00	\$500.00	\$500.00	Yes
11500	6.2 g	Place grass cuttings, leaves or rubbish on a street or in a public space	\$250.00	\$225.00	\$500.00	\$450.00	\$500.00	\$500.00	No

11500	7.1	Owner or occupier of real property allow or permit noise to disturb any person	\$250.00	\$225.00	\$275.00	\$500.00	\$450.00	\$500.00	Yes
11500	7.2	Permit or cause noise from an instrument, electronic equipment or device to disturb any person	\$250.00	\$225.00	\$275.00	\$500.00	\$450.00	\$500.00	Yes
11500	7.3	Own, keep or harbor any animal or bird whose sound disturbs any person	\$250.00	\$225.00	\$275.00	\$500.00	\$450.00	\$500.00	Yes

11500	8.1	Cause or permit construction noise before 7:00 am or after 9:00 pm	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	Yes
11500	9.1	Launch a motor boat without adequate exhaust system	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11500	9.2	Operate motor boat with stacks or dry headers	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11500	9.3	Operate a motor boat powered by an engine with exhausting devices	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11500	9.4	Operate a motor boat so as to cause noise and disturb any person	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11500	9.5 a (i)	Noise or sounds exceeding 15 mins - two or more people – raised voices	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11500	9.5 a (ii)	Noise or sounds exceeding 15 mins - barking or howling of a harboured dog	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11500	9.5 a (iii)	Noise or sounds exceeding 15 mins – yelling or screaming	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes

11500	9.5 b (i)	Noise or sounds from motor vehicle exhaust system that disturbs any person	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11500	9.5 b (ii)	Horn, alarm or warning device from motor vehicle that disturbs any person	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11500	9.5 b (iii)	Operate motor vehicle in a manner to cause tires to squeal	\$100.00	\$90.00	\$110.00	\$100.00	\$90.00	\$110.00	Yes
11500	9.5 c	Lawn mower or power garden tool noise before 7:00 am or after 9:00 pm	\$100.00	\$90.00	\$110.00	\$250.00	\$225.00	\$275.00	Yes
11500	14.1	Interfere with, hinder or obstruct a bylaw officer	\$500.00	\$450.00	\$500.00	\$500.00	\$450.00	\$500.00	Yes

CITY OF KELOWNA

BYLAW NO. 11557

Road Closure and Removal of Highway Dedication Bylaw **(Portion of Curlew Road)**

A bylaw pursuant to Section 40 of the Community Charter to authorize the City to permanently close and remove the highway dedication of a portion of highway on Curlew Road

NOW THEREFORE, the Municipal Council of the City of Kelowna, in open meeting assembled, hereby enacts as follows:

1. That portion of highway attached as Schedule "A" comprising 89.3m² shown in bold black as Closed Road on the Reference Plan EPP80408 prepared by Mark A. Cahill, B.C.L.S., is hereby stopped up and closed to traffic and the highway dedication removed.
2. The Mayor and City Clerk of the City of Kelowna are hereby authorized to execute such conveyances, titles, survey plans, forms and other documents on behalf of the said City as may be necessary for the purposes aforesaid.

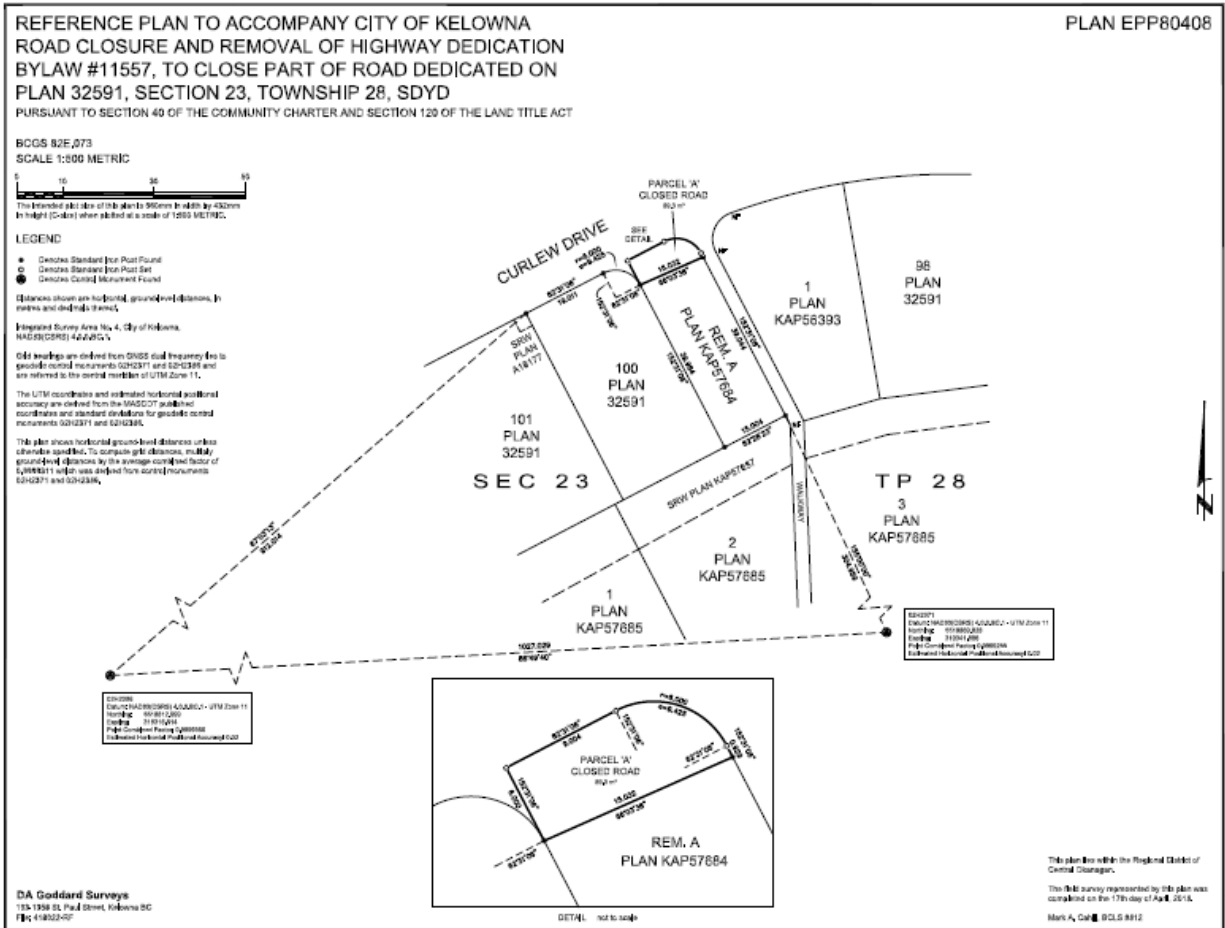
Read a first, second and third time by the Municipal Council this 23rd day of April, 2018.

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk

Schedule "A"



CITY OF KELOWNA

BYLAW NO. 11583

Five Year Financial Plan 2018-2022

The Municipal Council of the City of Kelowna, in open meeting assembled, enacts as follows:

1. Schedule "A" attached hereto and forming part of this bylaw is hereby declared to be the Five Year Financial Plan of the City of Kelowna for the period January 1, 2018 to and including December 31, 2022.
2. Schedule "B" attached hereto and forming part of this bylaw is hereby declared to be the Statement of Objectives and Policies in accordance with Section 165 (3.1) of the *Community Charter*.
3. This bylaw may be cited for all purposes as the "Five Year Financial Plan Bylaw, 2018-2022, No. 11583".

Read a first, second and third time by the Municipal Council this 30th day of April, 2018.

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk

Schedule A

Financial Plan 2018-2022

	2018	2019	2020	2021	2022	2023-2030
Revenue						
Property Value Tax	133,481,167	139,430,437	145,122,266	150,408,366	157,382,755	1,461,906,406
Library Requisition	6,208,386	6,332,554	6,459,205	6,588,389	6,720,157	58,832,475
Parcel Taxes	3,182,576	3,240,499	3,264,934	3,267,975	3,289,512	27,087,039
Fees and Charges	120,340,045	121,423,849	124,052,661	126,394,056	128,980,515	1,133,108,927
Borrowing Proceeds	4,949,710	-	-	4,000,000	38,000,000	47,000,000
Other Sources	120,141,281	53,638,039	51,174,731	50,325,889	49,664,592	473,329,592
	388,303,165	324,065,378	330,073,797	340,984,675	384,037,531	3,201,264,439
Transfer between Funds						
Reserve Funds	1,636,769	1,187,642	1,187,644	1,187,644	1,187,644	7,783,328
DCC Funds	21,026,529	21,156,387	35,099,364	28,359,611	10,007,504	134,230,749
Surplus/Reserve Accounts	107,612,509	60,585,009	64,873,876	59,207,023	81,179,101	364,048,101
	130,275,807	82,929,038	101,160,884	88,754,278	92,374,249	506,062,178
Total Revenues	518,578,972	406,994,416	431,234,681	429,738,953	476,411,780	3,707,326,617
Expenditures						
Municipal Debt						
Debt Interest	9,751,943	5,967,121	4,775,593	4,518,089	5,593,509	45,124,844
Debt Principal	15,701,603	11,854,479	8,752,346	6,995,881	8,324,481	57,547,333
Capital Expenditures	199,532,820	91,168,105	110,037,653	100,637,265	140,242,793	718,303,710
Other Municipal Purposes						-
General Government	32,234,881	32,742,458	33,666,861	34,477,239	35,336,979	316,874,041
Planning, Development & Building Services	30,055,912	22,228,128	21,572,763	22,177,065	22,841,006	206,781,561
Community Services	85,529,601	87,394,503	91,120,838	93,916,881	96,761,805	887,920,257
Protective Services	57,220,810	60,132,712	62,932,499	65,027,364	67,192,476	622,851,700
Utilities	21,075,639	20,769,420	21,136,728	21,615,414	22,109,942	196,351,254
Airport	14,960,261	15,426,153	15,907,225	16,385,650	16,880,195	154,533,470
	466,063,470	347,683,079	369,902,506	365,750,848	415,283,186	3,206,288,170
Transfers between Funds						
Reserve Funds	19,482,943	19,812,358	19,845,931	19,869,137	19,380,963	155,107,575
DCC Funds	-	-	-	-	-	-
Surplus/Reserve Accounts	33,032,559	39,498,979	41,486,244	44,118,968	41,747,631	345,930,872
	52,515,502	59,311,337	61,332,175	63,988,105	61,128,594	501,038,447
Total Expenditures	518,578,972	406,994,416	431,234,681	429,738,953	476,411,780	3,707,326,617

Schedule "B"
Statement of Objectives and Policies

In accordance with Section 165(3.1) of the *Community Charter*, municipalities are required to include in the Five Year Financial Plan, objectives and policies regarding each of the following:

- (a) For each of the funding sources described in Section 165(7) of the *Community Charter*, the proportion of total revenue that is proposed to come from that funding source;
- (b) The distribution of property value taxes among the property classes that may be subject to taxes; and
- (c) The use of permissive tax exemptions.

Funding Sources

Table 1 shows the proportion of total revenue proposed to be raised from each funding source in 2018. Property taxes and fees and charges are two of the largest sources of revenue. Both have advantages in that they are stable, relatively simple to administer and are generally understood by citizens. The City of Kelowna also utilizes funds from reserves and surplus as another main source of financial support. Reserve funds are closely managed to ensure and protect the current and future financial viability of the municipality. Other sources of revenue may be variable and fluctuate from year to year depending on the economic influences and capital programs undertaken by the City.

Objectives

- Investigate other potential funding sources and securing opportunities for additional revenues.
- Begin to decrease the municipality's reliance on property taxes and explore opportunities to increase the percent of total revenue received from user fees and charges and senior government grants.
- Maintain a fees and charges structure whereby increases are applied on a regular basis in line with inflation, while ensuring that service levels remain competitive and affordable.

Policies

- Pursue non-property tax revenues whenever possible through applying for government grants and charging user fees at appropriate levels.
- Perform regular reviews of revenue generating areas for appropriate application of rate increases.
 - Planning and Development Fees.
 - Recreation & Cultural Services – application of BC Consumer Price Index.
 - Utility Revenues – ensure Utilities operate as self-supporting enterprise funds.
- Increase provincial and federal grant revenue through maximum utilization of the City's Grant Manager position.

Table 1: Sources of Revenue

Revenue Source	Revenue \$ (000's)	% of Revenue
Property Value Tax	133,481	26%
Library Requisition	6,208	1%
Parcel Taxes	3,183	1%
Fees & Charges	120,340	23%
Borrowing Proceeds	4,950	1%
Other Sources	120,141	23%
Reserve Funds/Accounts	130,276	25%
Total	518,579	100%

Distribution of Property Tax Rates

Table 2 outlines the council approved municipal tax distribution policy for 2017 and the relative proportion of tax revenues. Projected revenues from the combined residential, recreational and Non-Profit classes, provides the largest proportion of property tax revenue. This cumulative class represents the largest tax assessment base and hence utilizes the majority of City services.

Objectives

- Provide an effective tax change that is the same for all property classes.
- Ensure that business and light industry property tax ratios remain below the average of BC municipalities with populations greater than 75,000.
- Allow for a maximum ratio cap of 3:1 for the Light Industrial/Business class.

Policies

- Council will annually review and modify tax class ratios to provide an effective tax change that is the same for all classes.
- The impacts on other property classes from administering a ratio cap on the Light Industrial/Business classes will be reported to Council during the annual Tax Distribution Policy review.
- Regularly review and compare the City's relative position in terms of distribution of taxes to other similarly sized municipalities in British Columbia.

Table 2: Tax Class Ratios and Projected Revenues

Property Class	Description	2018 Tax Class Ratios	Tax Revenue (000's)	2017 Tax Class Ratios
01/08/03	Res/Rec/NP/SH	1.0000:1	93,167	1.0000:1
02	Utilities	5.5475:1	658	5.3182:1
04	Major Industrial	6.6176:1	441	5.8019:1
05/06	Light Ind/Bus/Other	2.3777:1	38,668	2.2967:1
09	Farm Land	0.1524:1	10	0.1357:1
91	Farm Improvements	0.4987:1	537	0.4810:1
	Total Revenues		133,481	

Property Tax Exemptions

The City has an existing permissive tax exemption policy which guides the administration and approval of permissive tax exemptions. Some of the eligibility criteria for permissive tax exemptions that are outlined in the policy include the following:

- The applicant must qualify for an exemption under the provisions of the Community Charter.
- The organization receiving an exemption must be a registered non-profit society or registered charity, as the support of the municipality will not be used for commercial and private gain.
- The tax exemption must demonstrate benefit to the community and residents of the City by enhancing the quality of life (spiritually, educationally, socially and culturally), while delivering services economically to the citizens within the community.

The value of tax exemptions provided by Council for 2018 (based on 2017 assessment totals and tax rates) is \$2,463,969. The following breaks down the total into various exemption categories and the exemption value for the category:

Places of Worship - \$ 287,834

Private schools - \$ 181,969

Hospitals - \$ 17,151

Special Needs Housing - \$ 61,925

Social Services - \$251,379

Public Park, Athletic or Recreational - \$ 442,931

Cultural - \$ 364,954

Partnering, Heritage or Other Special Exemptions Authority - \$ 350,770

Revitalization - \$ 505,056

In order to encourage the restoration and preservation of commercial, industrial and institutional building, properties that meet the criteria outlined in the Heritage Building Tax Incentive Program policy can receive a tax exemption.

The establishment of the Revitalization Tax Exemption policy allows qualifying properties within the Downtown Urban Centre and Rutland Urban Centre areas to receive a tax exemption.

Objectives

- Continue to provide permissive tax exemptions to support qualifying organizations that improve the well-being of the community.
- The municipality will continue to provide heritage and revitalization tax exemptions for qualifying properties.

Policies

- Permissive tax exemptions will be considered to encourage activities that: (a) are consistent with the quality of life objectives of the municipality; (b) provide direct access and benefit to the public; and (c) would otherwise be provided by the municipality.

- To meet the city's commitment to the ongoing restoration, preservation and maintenance of buildings and structures on its Heritage Register, eligible properties will be considered for a tax exemption.
- To support the city's revitalization program of the Downtown Urban Centre and Rutland Urban Centre, qualifying properties will be considered for a tax exemption.

CITY OF KELOWNA

BYLAW NO. 11584

Tax Structure Bylaw, 2018

WHEREAS the Letters Patent of the City of Kelowna provide that the municipality may be divided into two (2) or more taxation areas by bylaw adopted prior to the adoption of the Annual Budget Bylaw;

NOW THEREFORE, the Municipal Council of the City of Kelowna, in open meeting assembled, enacts as follows:

1. **Taxation Area 1**

All lands and improvement thereon classified for assessment purposes as "Farm".

2. **Taxation Area 2**

All lands and improvements thereon not included in Taxation Area 1.

3. This bylaw shall be applicable for the 2018 taxation year.

4. This bylaw may be cited for all purposes as "Tax Structure Bylaw, 2018 No. 11584".

Read a first, second and third time by the Municipal Council this 30th day of April, 2018.

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk

CITY OF KELOWNA

BYLAW NO. 11585

Annual Tax Rates Bylaw, 2018

WHEREAS the Letters Patent dated the Twenty-fifth day of April, 1973 for the City of Kelowna provides for differing levels of taxation taking into consideration the extent of level of services being provided to different areas within the municipality.

The Council of the City of Kelowna, in open meeting assembled, enacts as follows:

1. The following rates are hereby imposed and levied for the taxation year 2018:
 - (a) For all lawful General purposes of the municipality on the assessed value of land and improvements taxable for general municipal purposes, rates appearing in column "A" of Schedule 1 of this Bylaw;
 - (b) For Debt purposes on the assessed value of land and improvements taxable for general municipal purposes, rates appearing in column "B" of Schedule 1 of this Bylaw;
 - (c) For purposes of the Okanagan Regional Library on the assessed value of land and improvements taxable for Regional Library purposes, rates appearing in column "C" of Schedule 1 of this Bylaw;
 - (d) For Hospital purposes on the assessed value of land and improvements taxable for Regional Hospital District purposes, rates appearing in column "D" of Schedule 1 of this Bylaw;
 - (e) For purposes of the Regional District of Central Okanagan on the assessed value of land and improvements taxable for Regional District purposes, rates appearing in column "E" of Schedule 1 of this Bylaw;
 - (f) For purposes of the Regional District of Central Okanagan on the assessed value of land only for the Regional District of Central Okanagan Sterile Insect Release Program, rates appearing in column "F" of Schedule 1 of this Bylaw; and
 - (g) For Local Service Area purposes on the assessed value of land and improvements taxable for general municipal purposes, rates appearing in columns "A" and "B" of Schedule 2 of this Bylaw.
2. This bylaw may be cited as "Annual Tax Rates Bylaw, 2018 No. 11585".

Read a first, second and third time by the Municipal Council this 30th day of April, 2018.

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk

SCHEDULE 1

CITY OF KELOWNA

**GENERAL MUNICIPAL, DEBT, HOSPITAL AND REGIONAL DISTRICT
TAX RATES - 2018**

		TAX RATES (DOLLAR OF TAX PER \$1,000 TAXABLE VALUE)					TAXABLE LAND ONLY
		A GENERAL MUNICIPAL	B DEBT	C LIBRARY	D REGIONAL HOSPITAL DISTRICT	E REGIONAL DISTRICT	F REGIONAL DISTRICT SIR
PROPERTY CLASS							
01	Residential	2.9961	0.1051	0.1437	0.2638	0.2452	0.0329
02	Utilities	16.6206	0.5830	0.7974	0.9232	0.8581	0.1151
03	Supportive Housing	2.9961	0.1051	0.1437	0.2638	0.2452	0.0329
04	Major Industrial	19.8267	0.6955	0.9512	0.8968	0.8336	0.1118
05	Light Industrial	7.1236	0.2499	0.3417	0.8968	0.8336	0.1118
06	Business/Other	7.1236	0.2499	0.3417	0.6462	0.6007	0.0805
08	Recreation/Non-Profit	2.9961	0.1051	0.1437	0.2638	0.2452	0.0329
09	Farm:						
	a) Land	0.4619	0.0160	0.0221	0.2638	0.2452	0.0329
	b) Improvements	1.4941	0.0524	0.0717	0.000	0.0000	0.0000

SCHEDULE 2

CITY OF KELOWNA

2018 LOCAL SERVICE AREA TAX RATES

PROPERTY CLASS	A	B
	DOWNTOWN BUSINESS IMPROVEMENT AREA	UPTOWN RUTLAND BUSINESS IMPROVEMENT AREA
1. RESIDENTIAL	0	0
2. UTILITY	0	0
4. INDUSTRIAL – MAJOR	0	0
5. INDUSTRIAL – LIGHT	1.2640	1.0824
6. BUSINESS	1.2640	1.0824
7. TREE FARM	0	0
8. SEASONAL	0	0
9. FARM		
a) LAND	0	0
b) IMPROVEMENT	0	0

CITY OF KELOWNA

BYLAW NO. 11586

Development Cost Charge Reserve Fund Expenditure Bylaw, 2018

WHEREAS, there is an unappropriated balance in the Development Cost Charge Reserve Fund established under Bylaw No. 11397, which has most recently been replaced by Bylaw No. 11586, of Forty Two Million, Seven Hundred and Sixty Seven Thousand, Four Hundred and Four dollars (\$ 42,767,404.00) as at January 1, 2018.

AND WHEREAS, it is deemed desirable to expend a portion of the monies set aside under said Bylaw No. 11397, which has most recently been replaced by Bylaw No. 11586, for the purpose of utility, road and land improvement and additions;

NOW THEREFORE, the Municipal Council of the City of Kelowna, in open meeting assembled, enacts as follows:

1. The sum of Forty Two Million, Seven Hundred and Sixty Seven Thousand, Four Hundred and Four dollars (\$42,767,404.00) is hereby appropriated from the Development Cost Charge Reserve Fund to be expended in 2018 for the following purposes:

Land for Park Purposes	\$ 10,300,408.00
Road Construction	\$ 21,038,276.00
Water Mains, Pump Stations & Reservoir Construction	\$ 4,093,597.00
Wastewater Trunks, Plant & Debt Repayment	\$ 7,335,121.00
	<u>\$ 42,767,404.00</u>

2. The expenditure to be carried out by the monies hereby appropriated shall be more particularly specified and authorized by resolution of Council.
3. Should any of the above remain unexpended after the expenditures hereby authorized have been made, the unexpended balance shall be returned to the credit of the Development Cost Charge Reserve Fund.
4. This bylaw may be cited as the "Development Cost Charge Reserve Fund Expenditure Bylaw, 2018, No. 11586".

Read a first, second and third time by the Municipal Council this 30th day of April, 2018.

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk

CITY OF KELOWNA

BYLAW NO. 11587

Sale of City-Owned Land Reserve Fund Expenditure Bylaw, 2018

WHEREAS, there is an unappropriated balance in the Sale of City-Owned Land Reserve Fund of Twelve Million, Two Hundred Seventy-Two Thousand, Three Hundred Fifty-Eight Dollars (\$12,272,358) as at January 1st, 2018.

AND WHEREAS, it is deemed desirable to expend a portion of the monies set aside under said Sale of City-Owned Land Reserve Fund for the purpose of land purchases and enhancements set out below;

NOW THEREFORE, the Municipal Council of the City of Kelowna, in open meeting assembled, enacts as follows:

1. The sum of Twelve Million, Two Hundred Seventy-Two Thousand, Three Hundred Fifty-Eight Dollars (\$12,272,358) as at January 1, 2018 is hereby appropriated from the Sale of City-Owned Land Reserve Fund to be expended in 2018 for the following purposes:

General Land	\$ 9,364,490.00
Parks Land	\$ 742,031.00
Housing Opportunity	\$ 2,165,837.00
	<u>\$ 12,272,358.00</u>

2. The expenditure to be carried out by the monies hereby appropriated shall be more particularly specified and authorized by resolution of Council.
3. Should any of the above remain unexpended after the expenditures hereby authorized have been made, the unexpended balance shall be returned to the credit of the City-Owned Land Reserve Fund.
4. This bylaw may be cited as the "Sale of City-Owned Land Reserve Fund Expenditure Bylaw, 2018, No. 11587.

Read a first, second and third time by the Municipal Council this 30th day of April, 2018.

Adopted by the Municipal Council of the City of Kelowna this

Mayor

City Clerk