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Cover photos
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# SOUTH OKANAGAN REGIONAL GROWTH STRATEGY

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Part I: PURPOSE and VISION

PURPOSE of the REGIONAL GROWTH STRATEGY

The South Okanagan Regional Growth Strategy (RGS), launched in 2004, is a long term commitment to manage growth in the south Okanagan of the Regional District Okanagan-Similkameen (RDOS).

The RGS applies to the southern most reaches of the Okanagan Valley (pg.6 South Okanagan Regional Growth Study Area) and includes the municipalities of Oliver, Osoyoos, Penticton and Summerland, and rural electoral areas ‘A’, ‘C’, ‘D’, ‘E’ and ‘F’.

Part 25 of the provincial Local Government Act establishes the authority for the RGS and the purpose of an RGS, which is to, “promote human settlement that is socially, economically and environmentally healthy and that makes efficient use of public facilities and services, land and other resources.” An RGS is, “a general guide as to how regions will grow, change and develop over a 20-year period … and is a regional vision that commits affected municipalities and regional districts to a course of action to meet common social, economic and environmental objectives.”¹

This RGS expresses a vision for the south Okanagan that is rooted in sustainability, often defined as, “development that meets the needs of the present without compromising the ability of future generations to meet their own needs”.² A sustainable community development approach can be expressed as an inter-dependent relationship between economic, physical and social dimensions.

Growth management in the south Okanagan requires an integration of planning efforts in the broader context of social capacity, diversity and equity within an economically vital region, which in turn is ultimately dependent on the carrying capacity of the natural environment.

The collaboration of citizens and local governments was integral to developing the RGS and is a fundamental ingredient to implementing the RGS. In this context, citizens have an important responsibility in the future to monitor and gauge whether the RGS vision is being met, to participate where possible in achieving the strategic actions, and to voice that action is necessary where the RGS goals are not being met.

The key elements of the long term commitment of the south Okanagan RGS, in alphabetical order, are:

1. **Economy**: promote sustainable economic diversification
2. **Environment**: ensure the health of ecosystems
3. **Governance**: foster inclusive and accountable governance
4. **Human Settlement**: strengthen rural and urban community identity
5. **Infrastructure**: maximize the efficient use of infrastructure
6. **Social**: create safe, culturally diverse and healthy communities

² The Brundtland Report, Our Common Future (1987). World Commission on Environment and Development
CONTEXT

The RGS represents four years’ work developed in phases by community individuals and committees, senior government agencies, the Regional Board and RDOS staff.

RGS Phase I

Specific issues and related values, guiding principles and a vision expressed by the community were documented in the first phase, resulting in the “Issues to Vision” report. Six themes, addressed in the second and third phase of the project, emerged during the dialogue – the economy, the environment, governance, human settlement, infrastructure and social needs.

RGS Phase II

The community engaged in examining current trends and future growth scenarios in the second phase of the RGS project (pg.30 Appendix A). The community indicated a preference for a future of applied best management practices for the region. With extensive community consultation and RGS advisory committee input during the second phase of the project, goals, policy and strategic actions were shaped, based on further exploration of the themes.

RGS Phase III

Indicators: The third phase of the project focused on selecting indicators to monitor future performance, in accordance with Section 869 of the Local Government Act, and developing an implementation strategy to reflect policy. The Implementation Plan summarizes key strategic actions and proposed time frames. A signed Implementation Agreement, the commitment of the south Okanagan municipalities, electoral areas and the Province, outlines joint work on growth management for the future of the region.

Toolkit: The RGS Toolkit was developed as a resource for optional specific actions by communities to manage growth, water, agriculture and housing. These subjects were identified by the community and Regional Board as important directives for growth management: a series of discussion papers is provided in the RGS Toolkit, accompanied by specific actions and links for additional information.

RGS Implementation

Context statements: Following adoption, in accordance with Section 866 of the Local Government Act, the municipalities of Oliver, Osoyoos, Penticton, Summerland, and surrounding rural areas Electoral Areas ‘A’, ‘C’, ‘D’, ‘E’ and ‘F’ must adopt regional context statements in their Official Community Plan bylaws. The context statements identify the relationship between OCPs and the RGS and specify how they will be made consistent over time to achieve the long-term vision for the south Okanagan.

Monitoring: An evaluation and monitoring program utilizes performance indicators to measure progress on the south Okanagan commitment to the RGS. Future supplemental agreements between the RDOS, south Okanagan member municipalities, agencies and senior government may be entered into to further address a coordinated approach to growth management.

The Region

A strong thread about the unique qualities of the south Okanagan emerged during the community’s exploration of growth management for the region, along with agreement that these qualities must be protected. The Okanagan-Similkameen is located in the south central interior of British Columbia and covers a geographical area that extends south from Summerland and the Okanagan Park to the United States of America border at Osoyoos, east to Anarchist Mountain and west to the Apex Mountain resort.

The south Okanagan region is best described as a semi-arid mountain-to-valley landscape with intensive production of tree fruits and grapes in the valley bottoms and extensive beef production in the native grasslands between the valleys and the tree-line above. Human settlement has concentrated primarily in the valley bottom.

The south Okanagan is also one of the most unique regions in British Columbia: the warm and dry climate is extremely diverse, encompassing one of the rarest ecosystems in Canada. The region is Canada’s only ‘pocket desert’ and is also home to over 250 species at risk (South Okanagan Naturalist’s Club & Wilderness Committee, 2006). Agriculture plays a key role in the local economy. The Agricultural Land Reserve accounts for approximately 8% of the area and this, combined with an abundance of rich agricultural land, makes the region ideal for farming (Province of BC, 2001). The south Okanagan is best known for its many orchards and is currently the home of more than 40

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3 Proposed South Okanagan Similkameen Nat. Park Reserve Co-published: South Okanagan Naturalists’ Club & Wilderness Committee Vol.25 - No.04, Spring 2006
World Wide Web: wildernesscommittee.org/campaigns/rainforest/interior/okanagan/reports/Vol25No04

4 Province of BC – Ministry of Agriculture and Lands
Regional District of Okanagan-Similkameen – Agriculture in Brief - 1996 and 2001
http://www.agf.gov.bc.ca/resmgmt/sf/agbriefs/ok%5Faim.pdf
wineries (Ministry of Agriculture and Lands, 2001). It is also an ideal tourism locale, combining the beauty of the natural environment with warm weather.

The 2006 census yields a current population of 79,475 for the RDOS. It is expected that the RDOS will see a moderate population increase of more than 1.5% per year, or 29,000 additional people by 2031, as outlined below. The current settlement trend in the RDOS is an increasing number of residents settling outside of urban areas, with potential attendant economic, social and environmental costs.

<table>
<thead>
<tr>
<th>YEAR</th>
<th>POPULATION</th>
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<tbody>
<tr>
<td>2006</td>
<td>79,475</td>
</tr>
<tr>
<td>2012</td>
<td>90,640</td>
</tr>
<tr>
<td>2017</td>
<td>96,287</td>
</tr>
<tr>
<td>2022</td>
<td>101,188</td>
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<tr>
<td>2027</td>
<td>105,361</td>
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<tr>
<td>2031</td>
<td>108,266</td>
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Historically, population growth has been higher in the south Okanagan than the Similkameen and significantly higher in the urban than rural areas. Statistics for 1966 indicate that 64.2% of the RDOS population resided in municipalities, a proportion which increased to 71.5% in 1993. Statistics for 2006 indicate a total south Okanagan population of 69,682, of which 65% was found in the municipalities and the remainder in rural areas, including Reserve lands. The last census also indicated a greater population increase in the Similkameen than in the south Okanagan.

The average annual increase for the area has been approximately 0.8 to 1% per year. Population growth is estimated to occur most dramatically in the 55 plus age group, with a reduction in the 15 to 24 age group.

Conversely, the population is becoming younger in the region’s Aboriginal communities (Indian and

### VISION and APPROACH

South Okanagan residents value living in a region that celebrates a sense of community that supports a positive quality of life, where people can enjoy sustainable development with environmental integrity while meeting the social and economic needs for present and future generations.

Key elements of this regional vision expressed by south Okanagan residents are:

- the Agricultural Land Reserve is respected;
- rural areas experience limited population growth and maintain a strong agricultural and resource base;
- an integrated biodiversity conservation strategy protects priority sensitive ecosystems;
- the majority of future population is housed in existing urban areas;
- new development is predominantly mixed-use higher density where parking requirements are reduced;
- new employment is encouraged evenly between Oliver, Osoyoos, Penticton and Summerland;
- transportation emphasizes carpooling, public transit and other alternatives to single occupant automobiles and roadway expansion;
- opportunities to reduce and recycle waste are maximized; and
- best land development practices are used and funding is applied to programs that achieve significant water and energy conservation.

The RGS vision, goals and strategic actions were derived during comprehensive public consultation during which citizens and RGS advisory committees identified the communities’ issues, values and priorities. Resources were limited to the extent that little background research was conducted to inform the RGS context.

This approach has led to a responsive RGS that relies on local knowledge and perception about current conditions in the region. While these conditions are not verified with substantive data, two approaches will assist in implementing the RGS to

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5 Ministry of Agriculture and Lands - BC Grape Industry Overview [www.agf.gov.bc.ca/grape/overview.htm](http://www.agf.gov.bc.ca/grape/overview.htm)
6 BC Stats: Census 2006: BC Municipal and Regional District 2006 Census Results [www.bcstats.gov.bc.ca](http://www.bcstats.gov.bc.ca)
10 Indian and Northern Affairs Canada; [http://www.ainc-inac.gc.ca/ch/rcap/sg/sg4_e.html](http://www.ainc-inac.gc.ca/ch/rcap/sg/sg4_e.html)
build a history of data that can be compared over time:

1. Consider growth management decisions with caution, while recognizing that the absence of information should not postpone decisions. This precautionary approach recognizes that when making many decisions, particularly those dealing with the natural environment and social fabric of communities, it is difficult to have perfect knowledge of all conditions and possible outcomes. When the effect of a decision is somewhat uncertain, that decision should be approached with caution with a view to mitigating the potential long-term negative impacts.

2. Establish a regional monitoring program, as required by the Local Government Act, to evaluate progress made on the RGS. The long-term monitoring program will examine the health of a region by tracking a range of economic, environmental and social indicators over time. As RGS indicators are monitored annually, trends and conditions will be revealed and will allow a regional response in adjusted policy and practice. This research will go hand-in-hand with the precautionary approach to provide the foundation on which growth management policies are updated and revised to better reflect the community vision for the region.
Part II: GROWTH MANAGEMENT GOALS and ACTIONS

Guiding the RGS growth management goals are six themes on the region’s economy, environment, governance, human settlement, infrastructure and social health, derived in consultation with the south Okanagan communities and RGS advisory committees and articulated in RGS policy and strategic action.

1. Promote sustainable ECONOMIC DIVERSIFICATION

Public consultation has identified that providing jobs and opportunities for local residents is of critical concern to the region. What makes this so important is the trend of an aging demographic and diminishing opportunity for youth employment in the south Okanagan.

The RGS is designed to promote the development of industry, retain youth and attract and retain young families to the region by balancing economic interests with ecosystems and social health.

The RGS primary directive for the agricultural industry identifies opportunities for implementation agreements in the south Okanagan - this is reflected in the economic policies and is further developed in the RGS Toolkit under Agriculture.

POLICY EC1
Coordinate and partner for regional economic diversification

1. Meet with economic development partners to develop a regional approach to economic diversification and work with the RDOS Board toward a coordinated and collaborative environment for business.
2. Support the development of an inter-regional Economic Development Strategy with a focus on business investment clusters, strategies for business attraction and retention, networking for small business and entrepreneurial support to balance economic interests with ecosystems and social sustainability.
3. Work with Aboriginal leaders to develop partnerships for regional economic diversification.
4. Monitor the effectiveness of RGS economic actions, including annual indicators for key economic measures.

POLICY EC2
Ensure a sustainable local economy which impacts positively on the region’s character

1. Encourage and promote the retention of large rural holdings, open spaces, parks and viewscapes that contribute to the region’s rural ambience.
2. Consult with and involve the local and inter-regional community on business development proposals and opportunities.
3. Support the retention of the Agricultural Land Reserve while recognizing there is land within the ALR that may not be suitable for agriculture.
and land outside the ALR that may be suitable for agriculture.

4. Support the promotion of business retention and attraction to preserve and promote the region’s unique geographical and biophysical advantage.

5. Support the promotion and further development of high tech and scientific research facilities such as DRAO and its related spin-off industries to capitalize on the unique geographic advantage of the region as well as its established infrastructure and expertise.

**POLICY Ec3**

**Foster business development in centralized areas**

1. Collaborate to attract clean, high-tech, knowledge-based industry.
2. Encourage mapping of centralized and accessible areas appropriate for new and relocating business to avoid conflicts and fragmentation and capitalize on business advantage.
3. Support development of under-utilized industrial land, protect the existing industrial land base from conversion to other uses and seek out new land in the region to provide more diverse business opportunities.
4. Seek opportunities to support primary and secondary value-added industry in all sectors.

**POLICY Ec4**

**Support and promote tourism and tourism-related activity**

1. Support the promotion of tourism in the south Okanagan in conjunction with regional marketing efforts to target the tourism value of agriculture, high-tech and science research facilities and the rural ambience of the region.
2. Encourage tourism facilities to locate appropriately to enhance and capitalize the business advantage and to meet regional needs.

**POLICY Ec5**

**Support agriculture that contributes to the local economy**

1. Endorse, in principle, a South Okanagan Agricultural Area Plan which promotes the right to farm and protects the agriculture industry, including its water allocation.
2. Support the enhancement of a sustainable, local agricultural industry inclusive of value-added industry.
3. Consider policy and regulation with area farmers and communities to preserve the agricultural land base.

**POLICY Ec6**

**Enhance the diversity of the labour force**

1. Encourage new and diverse business opportunities to build upon the labour force and support the provision of a diversity of skilled workers.
2. Support the development of a regional workforce attraction program that targets skills needed and initiates recruitment and training programs in collaboration with Okanagan educational institutions.
3. Support the creation of economic opportunities for private / public partnerships.
4. Consider policy that encourages labour market skill development.
5. Support and encourage research and development initiatives and programs in conjunction with UBCO and Okanagan College related to key economic and business features of the South Okanagan. These would include agriculture, food processing, wine making, biodiversity, water management, tourism, amenity migration and high tech applications including those based on astrophysical research.
2. Ensure the HEALTH of ECOSYSTEMS

Environment Goal
Ensure the health of ecosystems in the south Okanagan to provide water, land, air, and biodiversity

The RGS recognizes that the south Okanagan is a unique ecosystem and one of the top four endangered ecosystems in Canada (South Okanagan Naturalists’ Club & Wilderness Committee, 2006). Sound environmental planning will ensure that ecosystems in the region continue to provide the ecosystem services – clean air, water, habitat and biodiversity – that compose the environment and are the basis for the quality of life in the south Okanagan.

The RGS environment goal is built upon fundamental principles and assumptions which include:

- all components of the natural environment are respected for their intrinsic value, and valued beyond meeting human and ecological needs;
- the environment should be respected for the ecosystem services that support the well-being of the human species, including human health;
- water has been recognized as one of the key environmental concerns to the south Okanagan and is a priority consideration for environment resource management initiatives;
- current economic efforts do not adequately reflect the inherent value of the environment and social value of a diverse and engaged community.

The RGS primary directive for water explores the opportunities within the Province of BC Convening for Action education and conservation program for the south Okanagan - this is reflected in the environment policies and is further developed in the RGS Toolkit under Water.

POLICY EN1
Coordinate management of regional biodiversity conservation

1. Meet with environment partners to develop a regional approach to biodiversity conservation and work with the RDOS Board toward coordinated biodiversity conservation and ecosystems protection.
2. Support the development of an inter-regional Biodiversity Conservation Strategy by collaborating with ecosystems experts, including those with traditional ecological knowledge, and balance ecosystems interests with economic and social sustainability.
3. Work with Aboriginal leaders to develop partnerships for regional ecosystems health.
4. Monitor the effectiveness of RGS ecosystems actions, including annual indicators for key ecosystem measures.

**POLICY EN2**

**Support environmental stewardship strategies**

1. **Develop** policy and regulation to protect the natural environment, including mapping of sensitive ecosystems and designating development permit areas.
2. Collaborate to direct land use and resource-based decisions away from ecologically sensitive areas and encourage land development practices and methods of environmental enhancement that maintain ecosystem health and the ability of natural systems to sustain life.
3. Promote conservation and sustainability of watersheds, wetlands and riparian areas and a green space network to serve as a wildlife corridor.
4. Support the right to farm in balance with best environmental management practices.
5. Support restoring and managing key habitats.

**POLICY EN3**

**Reduce contribution to and increase adaptation to climate change**

1. **Enact** a policy for green buildings for local government buildings.
2. Work with business and agriculture to apply innovative best practices that include renewable energy technologies and energy efficiency.
3. Consider rebate programs for high-efficiency fixtures, appliances and water efficiency.
4. Investigate the opportunity to use tax and other incentives in the region.
5. Consider the region’s vulnerability to climate change in planning responses to proposed and existing activities for their resilience to climate change impacts and minimization of greenhouse gas emissions.
6. Support public awareness and education on climate change to foster best air quality management practices and stewardship.

**POLICY EN4**

**Protect regional air quality**

1. Further support a coordinated inter-regional approach with the Regional Air Quality Management Plan and supplement the plan to identify best management practices.
2. Implement policies and support best management practices, such as reducing or eliminating residential and industrial burning, chemical spraying, and controlling air emissions, or other practices that protect the environment.
3. Support public awareness and education to foster best air quality management practices and stewardship.

**POLICY EN5**

**Promote water sustainability through conservation and related best practices**

1. Apply and promote four guiding principles to manage the water resource capacity and efficiency in the Okanagan basin;
   a. preserve ecosystems functions to maintain water quantity and quality,
   b. encourage best water management practices in agriculture,
   c. reduce residential water use to support population growth in urban areas,
   d. use best practices to manage water use for industrial, commercial and institutional purposes.
2. Support the development of an inter-regional Water Plan, including consideration of long term plans for upper level water storage / source water protection and work collaboratively with the Okanagan Basin Water Board to further expand on the Okanagan Water Supply and Demand study with other agencies and levels of government.
3. Collaborate with the Water Sustainability Committee of the BC Water and Waste Association, the Water Stewardship Council of the Okanagan Basin Water Board, local governments and others on the management of the inter-regional water resource.
4. Support the development of a water-centric outreach and education program as the next phase of the Convening for Action program.
5. Promote, support and participate in local and basin-wide solutions for efficient water management and conservation practices.
6. **Support the continued provision of adequate water resources for the agriculture sector, and ensure that adequate and secure access**
to water for the agriculture sector is a priority over non-essential urban uses.

7. Support the protection of access to adequate water for the agriculture sector in any future inter-regional Water Plan.

8. Recognize that all users will have to cut back their water use in times of drought or where stream health is threatened.

9. Promote the implementation of universal metering for water service connections, in alignment with policy recommendations proposed by the Okanagan Basin Water Board.

10. Create partnerships to provide infrastructure and services regionally where applicable.
3. Promote INCLUSIVE and ACCOUNTABLE GOVERNANCE

Governance Goal

Foster inclusive and accountable governance and promote inter- and intra-jurisdictional cooperation for the benefit of south Okanagan residents

Strong communication structures, inclusiveness, accountability and transparent governance begin with leadership. In partnership with all Okanagan-Similkameen partners, the Regional District is continually evolving in its leadership capacity.

The RGS governance goal is built upon some fundamental guiding principles:
- effective governance is integral to the health of the region;
- leadership demonstrated in an open and respectful manner can improve regional and inter-regional cooperation between member municipalities, electoral areas, Aboriginal communities, and the Province;
- enhanced citizen engagement and participation through civic education will contribute to effective governance.

2. Develop agreements with senior levels of government and non-governmental agencies as more responsibility is transferred to local government, in order to build capacity and resources concurrent with the transfer where joint and mutually beneficial decision-making is necessary for sustainable growth management.

3. Develop constructive working agreements which address the interests of both rural and urban residents, to manage growth and plan for the future.

4. Continue to foster dialogue between communities to meet common shared goals, while recognizing and supporting distinct goals.

POLICY G2

Build and enhance communication and relationship with local Aboriginal communities

1. Develop protocol agreements with the Osoyoos Indian Band and Penticton Indian Band for communication, cost sharing, delivery of services, capacity building and/or development plans.

2. Support the development of a cultural Aboriginal awareness program for local communities and governments.

POLICY G1

Enhance regional local government partnerships

1. Foster dialogue between electoral areas and municipalities for cost sharing, delivery of services, capacity building and development.
POLICY G3

Promote participation and education in governance

1. Support the creation and development of cross-educational governance initiatives within the community.
2. Foster enhanced civic consciousness and participation by providing the public with information about local governance and opportunities for involvement on committees and at community consultation meetings and planning sessions.

POLICY G4

Cultivate effective governance characterized by transparency, accountability and accessibility

1. Develop a Communication Plan to continue to enhance the transparency and accessibility of local governance.
2. Monitor and evaluate the effectiveness of RGS goals, policy and strategic actions, including a baseline report for the performance indicators and annual and five year indicators.
4. Carefully DIRECT HUMAN SETTLEMENT

The South Okanagan is composed of diverse settlement areas, from small to large, urban to rural, resort residential to low-density rural residential. These communities are indicated on the Existing Settlement Areas Map (pg. 20).

The RGS recognizes that sustainable land use decisions must be evaluated for their long-term consequences on the built environment, social health, ecosystem function and the economic prosperity of each community.

As a guiding principle, land use decisions should take into account the broader values and needs of south Okanagan residents and the surrounding environment. The ultimate result of RGS goals, policy and strategic action is intended to be economic prosperity, healthy ecosystems and community.

The RGS aims to keep urban settlement compact by encouraging and directing development to concentrate where services are located to protect the integrity of rural areas, including agricultural and ecologically sensitive lands, and maximizing servicing efficiency.

The Growth Management Map (pg. 21) identifies those existing settlement areas where future growth should be directed, in accordance with the policy direction under the Human Settlement goals. On this map, larger south Okanagan communities that have all the necessary services, infrastructure and amenities in place to accommodate future growth are shown as Primary Growth Areas. The substantial majority of future growth in the south Okanagan should be directed to Primary Growth Areas. The Growth Management Map also identifies Rural Growth Areas – established rural settlement areas with some infrastructure and/or amenities in place – where limited further development is anticipated, or where development has been pre-determined.

Primary Growth Areas and Rural Growth Areas are typically characterized by the following:

**Primary Growth Areas:**
- essential services / amenities are in place to accommodate growth
- all necessary infrastructure is in place

**Rural Growth Areas:**
- Established rural settlement areas with a minimum of 200 lots and/or dwelling units
- Community water and/or community sewer services in place
- Existing commercial, industrial or parks development
- Where development has been pre-determined

In those existing communities not shown on the Growth Management Map, it is understood that some infill development that does not significantly increase the number of units or the established density and that respects the character of the communities will occur as these communities evolve over time.

It is further acknowledged that, in those areas not identified for growth, some resource, industrial, public and commercial uses may be considered, as specified in the policies of this section.

The RGS primary directive for growth in the south Okanagan explores the policies of promoting compact urban form and protecting the character of rural areas, including the development of growth management boundaries around both Primary and Rural Growth Areas. This directive is reflected in the Human Settlement policies below.

**Policy H1**

Dialogue between rural and urban communities to direct development to Primary Growth Areas and, to a lesser extent, to Rural Growth Areas.
and to coordinate and collaborate on human settlement.

1. Set growth management boundaries, which may or may not coincide with current municipal boundaries, around Primary Growth Areas, and consider using the Agricultural Land Reserve boundary as the growth management boundary where appropriate, in coordination with the development of Regional Context Statements for Official Community Plans, and according to the Implementation Agreement.

2. Set growth management boundaries around Rural Growth Areas, and consider using the Agricultural Land Reserve boundary as the growth management boundary where appropriate, in electoral area Official Community Plans within a reasonable timeframe and as detailed in the Implementation Agreement.

3. Collaborate on fringe planning decisions on major development in the vicinity of rural / municipal boundaries.

4. Consider entering into a memorandum of understanding on the process of determining municipal boundary extensions.

5. Respect and protect the ecosystem and environment by directing growth of an urban density and commercial, industrial and institutional uses within the boundaries of south Okanagan primary growth areas, where there is accessibility to services, amenities and employment opportunities.

6. Respect and protect the unique advantages in location, facilities and functional requirements of the DRAO by continuing to minimize development and maximize rural landscape protection within the electromagnetic interference area surrounding the Observatory.

**POLICY H2**

Promote compact urban form

1. Recognize Primary Growth Areas where the substantial majority of the region’s growth should occur and Rural Growth Areas where further limited development is anticipated, in accordance with the Growth Management Map (pg.21).

2. Support infill of existing, serviced development areas as a first priority.

3. Create walkable, livable mixed-use neighbourhoods and communities.

4. Encourage accessible commercial, institutional and appropriately located light and heavy industrial development within urban areas.

5. Integrate transportation infrastructure within and between communities.

6. Ensure that new development is adequately serviced according to a community infrastructure plan.

7. Communicate and work with Aboriginal leaders on cost sharing, delivery of services, capacity building and/or development plans.

8. Maintain environmental integrity when considering new development.

9. Discourage incremental and additional rural growth, including rezoning of large rural land parcels to smaller parcel sizes, outside of Primary Growth Areas and Rural Growth Areas, except where such growth is infill and does not significantly increase the number of units or the established density and that respects the character of its surroundings.

**POLICY H3**

Protect the character of rural areas

1. Strengthen policies in Official Community Plans to discourage incremental and additional rural growth outside of identified growth areas (see Growth Management Map, pg. 21). Proposed developments that do not closely adhere to OCP guidelines for the protection of rural and resource areas will not be supported.

2. Identify areas where rezoning to larger minimum lot sizes is necessary to protect agricultural and rural users.

3. Discourage new development in areas of moderate to high risk for natural disasters.

4. Communicate and work with Aboriginal leaders on cost sharing, delivery of services, capacity building and/or development plans.

5. Consider the following uses outside of identified growth areas only where the uses are not feasible or appropriate in growth areas and where they will have limited adverse effects on their surroundings: resource, industrial, resort (non-residential), small-scale commercial, public
utility/institutional, parks and recreational development.

**POLICY H4**

Protect the agricultural land base and encourage agricultural enterprise

1. Support the establishment of a South Okanagan Agricultural Advisory Committee to advise the Regional District Board on agricultural matters.
2. Work collaboratively to develop, set priorities and implement a regional approach to agriculture to strengthen farming and encourage agriculture.
3. Discourage further subdivision of farm parcels.
4. Encourage value-added agricultural activities and agri-tourism which improve farm economic viability while maintaining farming as the primary farming activity.
5. Undertake edge planning to plan for and mitigate the impacts of non-farm uses on farming activities when considering development adjacent to the Agricultural Land Reserve boundary.
6. Support urban growth boundaries that are consistent with the Agricultural Land Reserve boundary, and not growth boundaries that encompass land within the ALR.

**POLICY H5**

Recognize the critical link between infrastructure, environment, social conditions and human settlement for effective growth management

1. Continue to consult with the public, community leaders and professionals to assess current community conditions in the context of effective growth management principles.
2. Assess and measure major development proposals against sustainability assessment checklists in order to determine that the proposal is generally consistent with the intent of the RGS.
3. Support a process and content for the extent of adoption of minor amendments to the RGS to allow for flexibility and minor adjustments within the RGS that do not substantially change the vision and direction of the RGS, and where the process and content for the extent of amendments is not yet complete, defer to a default alternative adoption process identified in the Section 857.1 of the Local Government Act.
4. Where proposals substantially change the vision and direction of the RGS, or where the addition of one or more new Primary or Rural Growth Areas is considered, a major amendment to the RGS, subject to the acceptance of all affected local governments, is required.
5. Ensure that proposals for the establishment of new growth areas are evaluated on their individual merits and are assessed by the Sustainability Checklist to ensure consistency with the vision and direction of the RGS.
6. Recognize that major changes to established growth management boundaries may be significant regional issues, and therefore, that processes and procedures for communicating and cooperating around such major changes should be developed in the Implementation Agreement.
7. Monitor the effectiveness of RGS human settlement actions, including annual indicators for key settlement measures.
5. Maximize the EFFICIENT USE of INFRASTRUCTURE

Infrastructure Goal
Coordinate efforts throughout the south Okanagan that maximize efficient and effective delivery of infrastructure and services, reduce environmental impact and recognize the scarcity of resources.

Local governments can work together to increase efficiencies and economies of scale. Infrastructure development extends past conventional jurisdictions and as a result requires communities to collaborate to address the needs of the community as a whole.

The RGS infrastructure goal is built upon some fundamental guiding principles which include:

- respecting the relationship between land use and infrastructure planning – the availability of existing and planned infrastructure upgrades and services is recognized as a major consideration for identifying future growth areas;
- the need to address methods to safeguard both the quality and quantity of a highly variable water supply while meeting the demands made by a complexity of jurisdictional and competing users is a priority for the future;
- by improving the coordinated planning and management efforts on a regional and inter-regional level for infrastructure upgrades and services, there is potential to maximize benefit from economies of scale and increased efficiencies;
- well-planned infrastructure services and standards are important to the overall health, safety and liveability of communities.

**POLICY I1**

Promote ongoing dialogue between rural and urban communities to coordinate and collaborate on infrastructure

**POLICY I2**

Preferentially direct development where public cost-efficient service and infrastructure is possible

1. In already serviced developed areas, guide new development to take full advantage of existing physical infrastructure, including roads, sewer systems, schools, parks and recreation and cultural facilities.
2. Direct development to Primary Growth Areas and, to a lesser extent, to Rural Growth Areas - new development should occur only in a manner that ensures a cost-effective ability to deliver infrastructure and institutional services such as underground utilities, health facilities, transit, emergency services, schools, and recreation and cultural facilities.
3. Encourage public use of utilities and discourage the establishment of private utilities and services.

**POLICY I3**

Recognize the critical link between water resource management, human settlement and effective growth management
POLICY I4

Minimize waste production through education, regulations that promote reduction and recycling programs in the region

1. Promote and encourage targets for solid and liquid waste reduction.
2. Research and develop best practices, benchmarks, and policies for effective waste management.
3. Support public awareness of waste management and promote waste reduction programs.
4. Continue to implement and monitor the Regional Solid Waste Management Plan.
5. Promote expansion and creation of sewered areas within urban areas or Rural Growth Areas.
6. Update and implement the Regional Liquid Waste Management Plan which will examine environmental concerns and address the links between liquid waste management, nutrient management, and water use.
7. Design growth in a manner that handles waste in an environmentally sound manner to minimize the negative impact on the environment.

POLICY I5

Apply innovative and best management practices to increase efficiencies and reduce environmental impacts of infrastructure

1. Integrate storm water management with provincially-mandated watercourse protection strategies.
2. Support projects to improve resource management, including but not limited to water conservation and reuse, ground water management, solid waste management and recycling.
3. Consider hillside development guidelines and alternate development standards, in conjunction with the Province, to reduce environmental impacts of development.
4. Minimize the risks associated with development in the vicinity of natural hazards by identifying and avoiding environmental hazards.
5. Monitor the effectiveness of RGS infrastructure actions, including annual indicators for key infrastructure measures.
6. Identifies sites of potential electrical generation to include hydro-electric generation and wind generation.

POLICY I6

Increase transportation options, improve transportation efficiency and reduce automobile dependency

1. Support the creation of an inter-regional Transportation Plan from the regional transportation study, to include comprehensive transportation demand management, innovative transportation options and funding strategies.
2. Support the creation of walkable neighbourhoods and pedestrian / cycle / transit networks that offer both alternative transportation and recreational opportunities, and work with the Province to further develop the pedestrian / cycle network in conjunction with highway improvements.
3. Expand formal agreements with transportation providers for public transportation options beyond current service boundaries.
4. Encourage the identification of land in community cores appropriate for transit hubs.
5. Consider Light Rapid Transit (LRT) as an option to improve community linkages and mitigate the effects of transportation on air quality and climate change.
**POLICY I7**

Protect and improve Highway 97 as a key transportation corridor

1. Work together to set priorities to update Ministry of Transportation road network and transportation plans and identify and implement improvements and expansion where necessary.
2. Ensure the impacts of a high-volume transportation corridor passing through urban centres and rural areas are considered and adequate mitigation measures applied to maintain transportation efficiency and protect community integrity.
3. Work with the Province to identify highway sections that should be carefully planned for limited highway access to ensure public safety and transportation efficiency outside of urban centres.
6. Create safe, culturally diverse and HEALTHY COMMUNITIES

Community involvement, partnerships and networking, local government commitment and the creation of sound public policy are considered important elements for creating a healthy community (BC Ministry of Health, 2005). Some other key factors include diversity of age and culture, accessible (safe, affordable, barrier-free) housing, recreational opportunities, and a range of transportation options.

With the region’s population shifting to an older demographic, key planning considerations include housing, transportation and health services. RGS policies are directed at attracting a young and diverse population to maintain a broad demographic profile, which will contribute to the social fabric and vitality of south Okanagan communities.

The RGS primary directive for housing explores accessible housing strategies for the south Okanagan – this is reflected in the social policies and is further developed in the RGS Toolkit under Housing.

POLICY S1
Support the coordinated management of community health

1. Support the development of an inter-regional Social Health Strategy for coordinated social health action, including applying health impact assessments, prioritizing short and long term health initiatives with regional agencies and balancing social interests with economic and environmental sustainability.

2. Monitor the effectiveness of RGS social actions, including annual indicators for key social health measures.

POLICY S2
Work in partnership to create healthy and safe communities

1. Support the coordination of regional parks and recreation services and trail networks to improve accessibility of recreational opportunities.

2. Support the local health authority to expand regional health promotion programs and a proactive recruitment program to increase medical services in the south Okanagan.

3. Maintain safe and vibrant urban centres by supporting downtown revitalization and neighbourhood planning efforts which foster a sense of public ownership.

4. Support emergency planning and networking of response services both regionally and inter-regionally.

5. Support the local police authority in its awareness programs for crime reduction and watch programs.

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13BC Healthy Communities, BC Ministry of Health. 2005
www.bchealthycommunities.ca
**POLICY S3**

Continue to work towards developing vibrant communities and neighbourhoods

1. Encourage the development and preservation of ‘village centres’ and ‘distinct neighbourhoods’ through the supporting neighbourhood associations and plans.
2. Support communities to work together to identify and obtain desired services.
3. Consider innovative agreements with School Districts to recognize and support school facilities as a valuable neighbourhood resource.
4. Support the celebration of community and local festivities and improve accessibility to public places, recognizing changing demographics and diversity in communities.

**POLICY S4**

Encourage greater demographic diversity to enhance the social health of the community

1. Support the creation of economic opportunities that are consistent with other values to encourage young families to migrate to, or remain, in the south Okanagan.
2. Promote healthy and diverse communities that encourage the use of public open spaces for all age and socio-economic levels by requiring a diversity of land uses and housing mixes in communities.
3. Support the development of a regional social network, dissemination of cross-cultural information and programs and services for rural and urban residents.

**POLICY S5**

Improve accessible housing options in the region

1. Support or facilitate community objectives for accessible housing integrated within mixed-use neighbourhoods.
2. Develop responsive policy for non-market driven accessible housing, such as emergency and transition housing.
3. Encourage market driven housing by considering policy for new development to meet community objectives for accessible housing.
4. Support the creation of a Regional Housing Society and the establishment of a housing trust fund in partnership with government agencies and programs.
5. Consider supporting accessible housing in communities where services are available that can sustain housing options.

**POLICY S6**

Support the education and lifelong learning, diversity of culture, heritage and a strong arts community

1. Support the location and collaboration of education institutions in urban areas.
2. Encourage the creation of affordable education opportunities and foster education and business collaboration between agencies and institutions.
3. Work with providers of local heritage and cultural education programs to preserve and respect different cultural values.
4. Work cooperatively with agencies to create an arts and cultural vision for the region.
5. Encourage development that meets the needs for accessible arts and cultural facilities.
6. Identify and protect important cultural places and structures through policies and other mechanisms.
7. Reducing ENERGY EMISSIONS

Our economy is dependent upon non-renewable fossil fuels. This reliance poses serious challenges to our long term sustainability. Fossil fuels are becoming more limited in supply and their prices are becoming more volatile, leaving the economy vulnerable to price shocks. Burning of fossil fuels releases air pollutants which can have adverse health impacts. Finally, fossil fuel combustion releases greenhouse gases (GHGs) into the atmosphere that contribute to global climate change.

A strong factor behind the Regional Growth Strategy’s inclusion of energy use and GHG emissions policies is recent provincial legislation requirements. Beginning in 2007, the Province has moved forward with a number of actions designed to encourage energy efficiency and reduce emissions of GHGs. These measures include the Climate Action Plan (2008), the Carbon Tax Act (2008) and Greenhouse Gas Reduction Targets Act (2007). Through the Greenhouse Gas Reduction Targets Act, BC has committed to a 33 percent reduction in GHG emissions from 2007 levels by 2020 and 50 percent by 2030.

The Local Government (Green Communities) Statutes Amendment Act (Bill 27, 2008) requires that a Regional Growth Strategy includes GHG reduction targets and actions.

In 2010, the Regional District in partnership with its member municipalities, hired Stantec Consulting to develop regional Community Climate Action Plans (CCAP) for the region, member municipalities and rural areas. The CCAPs provide strategic direction on how to reduce community energy use and greenhouse gas emissions.

Each community has its own CCAP that includes both regional strategies and local actions. Each community and RDOS electoral area also has its own targets set to reach the overall goal of a 35 percent reduction per person by 2030 across the region.
Part III: MONITORING and EVALUATION

Developing Performance Indicators

The Local Government Act requires a regional district to measure its progress on an RGS. Performance indicators selected for the South Okanagan RGS will allow the RDOS to monitor its implementation and progress towards the vision articulated by the community.

The selected indicators are based on the RGS themes. A long list of indicators, derived from a literature review of existing or proposed regional growth strategy monitoring programs from regional districts in British Columbia and other indicator programs, was refined by RGS advisory committees, adjusted following public review, and endorsed by the RGS Steering Committee.

The indicators are intended to answer these and other questions:

1. How fast or slow is the population increasing in the region?
2. Where is the population growth and new development going?
3. How much of the new growth is located in urban areas vs. rural areas?
4. How efficiently is land being used for accommodating growth?
5. Is the agricultural resource base being adequately protected?
6. How intensely are agricultural areas used?
7. How well are sensitive habitats being protected?
8. How efficiently are we consuming resources, such as potable water and energy?
9. How effective is the region in reducing waste going to the landfills?
10. Is drinking water and ambient air quality in the region within levels set by provincial or federal guidelines?
11. How diverse is the housing stock in the community?
12. Is housing affordability an issue in the region?
13. How are we doing in supporting alternative transportation modes and reducing automobile dependence?
14. Where do people work in relation to where they live?
15. How liveable is the region?
16. Do we have enough younger people in the labour force to support a healthy level of economic growth and an aging population?
17. How is the economy changing amongst employment in different sectors of the economy?

A progress report on the RGS is to be prepared annually, and at least every five years the RDOS is to consider reviewing the RGS for possible amendments.

By monitoring the indicators, the RDOS and its south Okanagan member municipalities will be able to identify what is working and where improvements can be made, and take steps to refine its actions to implement the RGS. When considering a review the RDOS must provide opportunity for meaningful input from the local community and provincial and federal agencies.

Consultation

The development of performance indicators was derived through consultation with the general public, RGS advisory committees and the Inter-governmental Advisory Committee. A total of 80 performance indicators were examined and it was determined that 33 indicators would be used as the primary measure to monitor the effectiveness of the RGS:

• 14 indicators will be tracked for annual updating,
• 19 indicators will be reported on every 5 years.

In order to track the progress of the RGS a baseline report will be required to establish benchmarks to monitor changes over time. These benchmarks will determine the starting point for all indicators of the strategy. The reporting process to the public will include:

• Annual RGS Reports
  • reports yearly on indicators
  • focuses on 14 annual indicators

• 5-year Report
  • reports on all 33 indicators
  • is comprehensive in nature

What gets measured tends to get done. If you don’t measure results, you can’t tell success from failure. If you can’t recognize success, you can’t reward it. If you can’t recognize failure, you can’t learn from it.

David Osborne and Ted Graebl, 1992 Reinventing Government
## Performance Indicators

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<tr>
<th>TOPIC</th>
<th>INDICATOR</th>
<th>REVIEW FREQUENCY</th>
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<tr>
<td><strong>Population Growth</strong></td>
<td>CTX-1: Total population and annual population growth rate (i) within RGS study area (ii) by municipality and (iii) by rural area</td>
<td>Annual</td>
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<td><strong>Biodiversity and Natural Spaces</strong></td>
<td>BNS-1: Annual and cumulative area of parkland and protected areas</td>
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<td>BNS-2: Percentage of sensitive ecosystems protected or stewarded by general habitat type</td>
<td>5-year</td>
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<td>BNS-3: Percentage of riparian areas protected</td>
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<td></td>
<td>BNS-4: % of urban or agricultural development in land identified as sensitive habitat as identified in Official Community Plans</td>
<td>5-year</td>
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<tr>
<td><strong>Agriculture</strong></td>
<td>AG-1: Amount of land excluded from Agricultural Land Reserve (a) annually and (b) cumulatively since 1974</td>
<td>Annual</td>
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<td></td>
<td>AG-2: Agricultural Intensity using Gross Farm Receipts per hectare of land farmed</td>
<td>5-year</td>
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<td><strong>Human Settlement &amp; Land Use</strong></td>
<td>HS-1: a) Share of 5-year dwelling unit growth and b) cumulative % of dwelling units since 2006 located (i) inside and (ii) outside priority growth area boundaries</td>
<td>5-year</td>
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<td>HS-2: Dwelling unit density in urban areas vs. rural areas</td>
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<td>HS-3: Proximity to services</td>
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<td><strong>Affordable Housing</strong></td>
<td>AH-1: Housing starts by structural type</td>
<td>Annual</td>
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<td></td>
<td>AH-2: Mix of total dwelling units by structural type</td>
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<td>AH-3: % of owner households spending 30% or more of gross income on housing</td>
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<td></td>
<td>AH-4: % of renter households spending 30% or more of gross income on housing</td>
<td>5-year</td>
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<td><strong>Transportation</strong></td>
<td>T-1: % of labour force living and working in the same municipality</td>
<td>5-year</td>
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<td>T-2: Median commuter trip distance (km)</td>
<td>5-year</td>
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<td>T-3: (i) Region-wide and (ii) municipal modal share for journey-to-work trips</td>
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<td>T-4: Length of cycling infrastructure by facility type (multi-user path, bike lane, bike route)</td>
<td>Annual</td>
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<tr>
<td><strong>Energy Use and Air Quality</strong></td>
<td>EE-1: a) total and per capita energy consumption for residential buildings</td>
<td>5-year</td>
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<td>EE-2: Percentage of days ambient air quality exceeds provincial objectives and Canada wide standards for PM2.5 or ground-level ozone</td>
<td>Annual</td>
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<tr>
<td><strong>Water Management</strong></td>
<td>W-1: Water consumption per day: a) per capita residential b) total agricultural, and c) total other sectors</td>
<td>Annual</td>
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<td>W-2: Percentage of water distribution system samples with a positive bacterial detection (total coliform or fecal coliform)</td>
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<td>W-3: Percentage of water distribution system sample test results exceeding selected drinking water quality guidelines</td>
<td>Annual</td>
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<td><strong>Economic Development</strong></td>
<td>ED-1: Percentage breakdown of labour force by age cohort</td>
<td>5-year</td>
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<td>ED-2: Percentage household income distribution</td>
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<td>ED-3: Percentage breakdown of total income by source</td>
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<td>ED-4: Total employment by sector</td>
<td>5-year</td>
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<td>ED-5: Trends in tourism i) visits ii) money spent by trend</td>
<td>5-year</td>
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<td><strong>Municipal Solid Waste</strong></td>
<td>MSW-1: Municipal solid waste disposed per capita</td>
<td>Annual</td>
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<td>MSW-2: Municipal liquid waste - wastewater generation rates per year</td>
<td>5-year</td>
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<tr>
<td><strong>Social, Cultural, Recreational</strong></td>
<td>SCR-1: Length of trails</td>
<td>Annual</td>
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<td></td>
<td>SCR-2: Crime rates</td>
<td>Annual</td>
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<td></td>
<td>SCR-3: Percentage of total budget committed by municipalities to arts, cultural, diversity, heritage, recreation and new facilities</td>
<td>Annual</td>
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APPENDIX A

South Okanagan Growth Scenarios

The SouthOkanaganQUEST (SOQ) inquiry confirmed community participants’ desire for the region to move toward best practices to protect the unique nature of the south Okanagan. The results emphasized that planning for the future must consider economic diversity and sustainability, social well-being and the health of the environment, including environmentally sensitive areas, water and air quality. The preferred SOQ scenarios selected by the public and advisory groups contribute to the RGS policy framework.

The SouthOkanaganQUEST (SOQ) program, developed by Envision Tools, was utilized as a communication tool for the RGS to define a preferred future growth scenario. SOQ was designed in partnership with the Regional District to assist in the RGS public dialogue.

The facilitated SOQ dialogue solicited public discussion around making informed decisions on growth management. It was used during public engagement sessions to explore key issues and choices, illustrated consequences for their selections on the environment, economic health and social well-being of the region. SOQ gave the RGS a means of forecasting the next 40 years for the region.

The development of the program began with local input into key data used in the program. The data was derived from current statistics on water use, transportation, energy consumption, land use, the environment, air quality, economic health and projected population growth in the region.

Areas of exploration included key questions such as where people would live, where jobs would be located, how to maximize and conserve local resources to accommodate projected growth, and obtained valuable feedback on preserving and managing future growth in the region.

The base assumption made in the development of a preferred growth scenario was the expectation of moderate growth in the region for the next 40 years. This assumption was based on 33% increase in population over that time period, as suggested by David Baxter, a leading Canadian economist of the Vancouver-based Urban Futures Institute.

Scenario Results

Population location
Where should new residents be encouraged to live?

South Okanagan residents preferred to protect the Agricultural Land Reserve and encouraged future development to take place in town cores and designated residential growth areas. Further, residents agreed that some development could occur in other areas, including some Crown lands while discouraging development within the ALR.

Job Location
Where will new jobs be encouraged to locate?

South Okanagan residents preferred to promote multi-nodal development to encourage job growth more evenly distributed amongst Oliver, Osoyoos, Penticton and Summerland in existing and planned commercial, industrial and institutional growth areas and on some ALR, Crown and Aboriginal lands.

Transportation Options
To what extent will the region invest in alternative transportation modes?

South Okanagan residents preferred to emphasize alternatives and favour carpooling, public transportation and other alternatives, with some road improvement and expansions.
Solid Waste Management
*To what extent will waste reduction and recycling programs be implemented?*

South Okanagan residents preferred the achievement of best practices and significantly increased funding for programs that require the use of best practices to reduce and recycle waste from homes and businesses.

Water Conservation
*To what extent will water conservation programs be implemented?*

South Okanagan residents preferred the achievement of best practices and significantly increased funding towards programs that require the use of best practices to increase water conservation.

Energy Conservation
*To what extent will energy conservation and emphasis on cleaner fuels be implemented?*

South Okanagan residents preferred the achievement of best practices and significantly increased funding towards programs that require the use of best practices to improve energy conservation and use of cleaner fuels.

Air pollution
*To what extent will air quality improvement programs be implemented?*

South Okanagan residents preferred to support initiatives that use best practices to reduce air emissions.

Development Density
*To which density will new housing and businesses be developed?*

The communities of Penticton and Summerland preferred a higher density than Osoyoos and Oliver, a density characterized by new development favouring apartments and townhouses mixed with shops, office towers and reduced parking, while allowing some single-family homes.

In summary, the preferred growth scenarios suggest that local government together with the provincial and federal governments must do more to protect and manage growth in the south Okanagan. This means that more funding must be made available to improve upon the current situation and plan for the future. As individuals living in the valley best practices are not always a responsibility of governments and in some cases the responsibility of south Okanagan residents.