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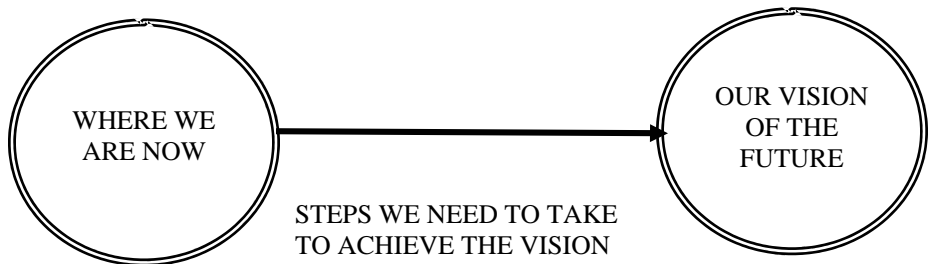
*A Vision of the future*

*The decisions we make today will determine how we live tomorrow*

## PREFACE

A Strategic Plan is one of the most important documents that a community can have. It is important because it sets out the vision of the community's desired future and the steps necessary to achieve the vision.

A Strategic Plan reflects the needs and expectations of residents. Through public consultation activities, residents provide comments based on their living experiences, on their aspirations for the future and on what would make their lives better.



Armed with the community's vision of the future, local officials can identify a sequence of actions that would need to be undertaken to successfully attain the vision. Such actions may lead to changes in City guidance documents such as official community plans, transportation plans and parks and recreation plans.

A Strategic Plan acknowledges those things that a community can do by itself, what things must be done in cooperation with others and what decisions rest with other levels of government. A Strategic Plan provides direction on how local officials, businesses and residents can make informed decisions.

A Strategic Plan sets out the direction for the City and the path on how to get there. As circumstances can change, this direction must be periodically reviewed, refined and, if needed, modified.

The context in which the vision and direction of the Kelowna Strategic Plan were prepared and how residents and community organizations took part in developing the Plan are described in detail in this document.

*1992 Kelowna  
Strategic Plan*

*Kelowna has  
seen many  
changes since  
1992*

*The Strategic  
Plan outlines  
directions for  
Kelowna policies  
and services*

## INTRODUCTION

Kelowna City Council recognized the need to revisit the 1992 Strategic Plan in view of the many changes that have affected the city since it was approved. Since December 2003, the City has been involved in a review process to assess the changing needs of Kelowna residents, the ways in which those needs can best be met, and how to implement strategies to address these needs in the most efficient and effective manner.

Since the original Strategic Plan was adopted in 1992 the city's population has increased by 25,000 people. Over 9,000 homes have been built and approximately 8 million square feet of commercial, industrial and institutional space have been developed. The economy has seen growth in most sectors, with the biggest growth occurring in education services, health and social services and high tech industries.

Kelowna's Strategic Plan is the umbrella document that provides guidance and direction for the City's plans, programs and services. For example, over the last ten years, the Strategic Plan has guided major policy initiatives such as the City's Official Community Plan, the Transportation Plan and the Social Plan. The Plan has also guided major program initiatives such as the Partners in Parks, Community Policing, road maintenance, Cultural District and environment programs.

Upon adoption by City Council, the new Strategic Plan will outline future directions for City of Kelowna policies and services over the next five to ten years, taking into account the most recent trends, issues, priorities and community input. The Strategic Plan will be implemented through an annual priority setting process, including the development of operational work programs and annual budgets.

This Strategic Plan document is organized into the following sections:

- Overview of the 2004 Strategic Plan
- How the Plan was Developed
- Detailed 2004 Strategic Plan

# **OVERVIEW OF THE** **2004 STRATEGIC PLAN**

## 2004 STRATEGIC PLAN

The Strategic Plan is divided into five components:

- 1) **Vision** – a statement of what residents value the most about the city and wish to retain in the future.
- 2) **Goals** – qualitative statements that highlight the key issues raised during the strategic planning process and add depth to the vision statement.
- 3) **Objectives** – measurable steps that lead to achieving the goals.
- 4) **Actions** – specific tasks with timeframes and assigned responsibilities that must be undertaken in order to achieve the objectives.
- 5) **Implementation** – how the Strategic Plan will be adopted and used by City Council and staff.

The Strategic Plan responds to the following community vision, goals and objectives.

### Vision

**Kelowna is a vibrant city where the agricultural and beautiful natural setting, community spirit, economic stability, and stewardship of the environment enhance the quality of life for residents.**

### Goals

In support of the **Vision** for Kelowna, the following **3 Goals** have been developed:

1. To maintain, respect and enhance our natural environment
2. To foster a strong, stable and expanding economy
3. To foster the social and physical well-being of residents and visitors

These goals form the foundation on which the City's vision has been based, and will ensure the positive continued development of the city.

*The Strategic Plan is divided into five major components*

*Vision – what residents value and wish for in the future*

*Goals – support and add depth to the Vision*

## Objectives

Each **Goal** has a number of supporting **Objectives** which must be achieved to meet the **Goals and the Vision**.

The **Objectives for Goal 1** are:

1. Conserve Kelowna's water resources.
2. Preserve and promote the enhancement of air quality within Kelowna's air shed.
3. Manage human impacts on our natural environment, including Okanagan Lake and the surrounding hillsides.

The **Objectives for Goal 2** are:

1. Aid in the growth and progress of Kelowna as a desirable place to do business.
2. Aid in the growth and progress of Kelowna as a desirable place to visit, shop and tour.
3. Increase the diversity of employment opportunities.
4. Commit to continued sound fiscal management.

The **Objectives for Goal 3** are:

1. Promote health and wellness initiatives.
2. Ensure the availability of fiscal and human resources to provide quality City services (recreation, culture, fire, police, planning, works and utilities).
3. Reduce traffic congestion on City streets, Highway 97 and Okanagan Lake Bridge.
4. Realize construction of housing forms and prices that meet the needs of Kelowna residents.
5. Achieve accessible, high quality living and working environments.
6. Provide infrastructure (utilities, transportation, parks, facilities) that keeps pace with population growth and evolving opportunities.
7. Sensitively integrate new development with heritage resources and existing urban, agricultural and rural areas.
8. Provide meaningful opportunities for a broad range of input from residents and agencies on major directions taken by the City.

*Objectives for Goal 1 – To maintain, respect and enhance our natural environment.*

*Objectives for Goal 2 – To foster a strong, stable and expanding economy.*

*Objectives for Goal 3 – To foster the social and physical well-being of residents and visitors.*

# **HOW THE PLAN WAS DEVELOPED**

- Developing a Plan for the Next 10 Years
- Key Steps in the Planning Process
- Effectiveness of the 1992 Strategic Plan
- SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis

## DEVELOPING A PLAN FOR THE NEXT 10 YEARS

The process to update the Strategic Plan was overseen by City Council, the City's Senior Management, and a Project Team. The Project Team was comprised of staff from the Policy, Research and Strategic Planning Division of the Planning and Corporate Services Department and consultants with municipal strategic planning experience and process facilitation skills (IER -Planning Research and Management Services). Throughout the process, City staff were asked to support the Project Team in its efforts to implement the strategic planning work program.

*The Strategic Plan is based on extensive public and stakeholder input.*

An extensive stakeholder consultation process was used to prepare the City of Kelowna Strategic Plan (2004). Throughout the development process, residents, community groups, external agencies, City Council and staff were provided opportunities to give their views on elements of the Strategic Plan. These included face-to-face interviews, an internet survey, a mail-back survey, a community telephone survey of 500 residents (representative of the City by age, gender and dwelling location), visioning sessions and an open house.

Stakeholders were kept abreast of project updates through the implementation of a communication plan that included: project information being posted on the City's website, news releases to all media, regular project updates and invitations advertised in the newspapers and updates and invitations being mailed to community organizations.

## KEY STEPS IN THE PROCESS

The following outlines the key steps used in preparing the Strategic Plan.

- Project start date: November 28, 2003
- Review of background materials (e.g. statistical data collected by the City, Province and Government of Canada, Kelowna Official Community Plan, 1992 Strategic Plan, 20 year Servicing and Financing Strategy): December 2003 – January 2004.
- Interviews with City Managers and external agencies such as Interior Health, School District #23, Regional District, Okanagan University College, Ministry of Transportation: December 2003

The purpose of the interviews was to assist in identifying key issues needing to be addressed in developing the Strategic Plan. The information collected from the interviews enhanced the consultants understanding of the City of Kelowna, which helped provide a solid foundation for the completion of the remaining tasks.

Open-ended questions were used during the interviews. Sixteen interviews were conducted with City Managers and five interviews were conducted with staff from external agencies.

An online survey was emailed to City Managers and external agency contacts that were not interviewed.

- Trends, issues and SWAT analysis: January - March 2004

Background research provided a snapshot look at the current conditions in Kelowna with respect to demographic, social, economic, transportation and agricultural aspects. A trends, issues and SWOT (strengths, weaknesses, opportunities and threats) analysis was conducted in order to identify things that should be considered as part of the Strategic Plan update.

*Background research and interviews*

*Trends, Issues and SWAT analysis*

<p><i>Communications strategy</i></p>	<ul style="list-style-type: none"><li>• Communications strategy: project duration</li></ul> <p>Key communication points included announcing:</p> <ul style="list-style-type: none"><li>➤ the start of the project and the invitation to take part in a community survey;</li><li>➤ the results of the community survey and an invitation to take part in the City's visioning sessions;</li><li>➤ the results of the visioning sessions and an invitation to attend an open house;</li><li>➤ an invitation to provide comments on the first draft of the updated Strategic Plan;</li><li>➤ the completion of the Strategic Plan.</li></ul> <p>At each of these points, advertisements were posted in newspapers and on the City website and information was mailed and emailed directly to community organizations and persons that had expressed an interest in the update of the Plan.</p>
<p><i>Community survey</i></p>	<ul style="list-style-type: none"><li>• Community survey (via telephone, Internet and regular mail): April 2004</li></ul> <p>The survey provided residents with an opportunity to express their desired future for Kelowna, their satisfaction with City services and their quality of life and to provide suggestions for improvements.</p> <p>See Appendix I for complete survey results.</p>
<p><i>Visioning sessions</i></p>	<ul style="list-style-type: none"><li>• Three visioning sessions with stakeholders (residents, agencies, and City staff): May 2004</li></ul> <p>The purpose of the visioning sessions was to engage residents, external agencies and City staff in developing the draft vision and goals. A background document was provided to participants in advance of the sessions in order to help guide and stimulate discussion. Participants were asked to comment on the results of the background research and community survey and to provide suggestions on how this information could be used to update the City's vision and goals for the future. Information from the sessions was compiled into a draft vision statement and a series of draft goals and corresponding objectives.</p>

<p><i>Open House</i></p>	<ul style="list-style-type: none"><li>• Open House: June 2004</li></ul> <p>Held at the Okanagan University College - KLO Campus, the open house included a guest speaker, Dr. Eugene McCann, who talked about strategic planning efforts in other North American cities.</p> <p>Residents were invited to comment on the draft vision, goals and objectives and to identify any other items they felt were not supported by the draft materials. Comment forms were made available and the project team was available to receive input. Along with providing comments on the draft information, participants were asked to identify action steps that could be taken to help achieve the vision, goals and objectives.</p> <p>Copies of the display panels and the comment form were posted on the City webpage for individuals who could not attend the open house.</p>
<p><i>City staff workshops</i></p>	<ul style="list-style-type: none"><li>• Workshops with City staff: June 2004</li></ul> <p>City staff members were invited to participate in an action-planning exercise. The intent of the exercise was to identify action items that each respective department in the City could accomplish to support the draft vision, goals, and objectives. Once drafted, the action items were circulated back to staff for feedback on whether additional actions were needed, on whose responsibility implementing the actions would be and on the timeframe for completing them.</p>
<p><i>Draft Strategic Plan review</i></p>	<ul style="list-style-type: none"><li>• The draft Strategic Plan was developed between July and September 2004.</li></ul> <p>A news release was issued and letters were sent to local organizations to solicit comments on the first complete draft of the Strategic Plan. Copies of the draft Strategic Plan were made available on the City's webpage and in hard copy format at City Hall. Information panels were on display at City Hall during the month of October.</p>
<p><i>Final Strategic Plan review</i></p>	<ul style="list-style-type: none"><li>• Preparation of the Final Draft – October 2004.</li></ul> <p>Comments on the first complete draft were examined and used to develop a final draft of the Strategic Plan for Council's approval.</p>

## ***EFFECTIVENESS OF THE 1992 STRATEGIC PLAN***

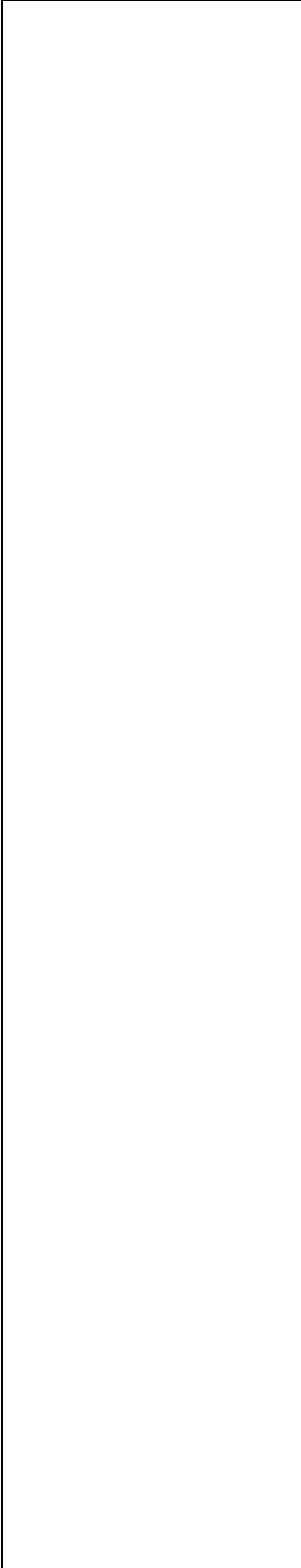
Development of the Strategic Plan involved assessing the effectiveness of the 1992 Strategic Plan to determine which components worked well and which could be improved. The successes and weaknesses of the 1992 Strategic Plan are summarized below.

### **1992 Strategic Plan Successes**

- Overall, City staff and external agency contacts felt the primary goals of the 1992 Plan had been met or were in the process of being met.
- Resident responses collected from the community survey indicated the City was most successful at achieving the following 1992 Strategic Plan goals:
  - Supporting the arts;
  - Supporting heritage preservation;
  - Providing high quality City services;
  - Encouraging economic opportunities; and
  - Supporting multi-cultural diversity.
- The 1992 Strategic Plan was a useful guiding document in the development of major planning documents and community programs and services.
- Overall, City staff and external agency contacts felt that Council had been visionary, realistic and supportive of City officials in implementing actions identified in the 1992 Strategic Plan.

### **1992 Strategic Plan Weaknesses**

- Resident responses collected from the community survey indicated the City was least successful at achieving the following 1992 Strategic Plan goals:
  - Improving public access along Okanagan Lake;
  - Providing convenient transportation options;



- Growing in a way that takes advantage of existing infrastructure;
- Preserving agricultural lands; and
- Supporting a full range of housing types.
- City staff and external agency contacts felt that co-operation between the City and external agencies have not been as successful as all parties would like.
- Progress has been made with respect to providing and promoting the use of alternative modes of transportation, including bicycle lanes, sidewalks and public transit routes. Overall, the development of alternative modes of transportation has not kept pace with growth.
- Market conditions and consumer preferences haven't helped in supporting the City's goal of promoting growth within Urban Centres.
- While the budget for road infrastructure has increased since 1992, it has not kept pace with the growth in the number of cars in the city.
- The 1992 Strategic Plan had a lengthy mission statement and 18 primary goals, some of which were repetitive or too generic.

Overall, the 1992 Strategic Plan can be viewed as a successful planning exercise. A majority of the 24 actions identified in the Plan were achieved in support of related goals and objectives. A summary table of the 24 actions from the 1992 Strategic Plan and the progress for each item is provided in Appendix III.

## SWOT ANALYSIS SUMMARY

A SWOT analysis is an important component in the development of a Strategic Plan. The following analysis identifies various strengths, weaknesses, opportunities and threats Kelowna experiences and faces.

### **Key Strengths**

Enhancing the following strengths could help in achieving the City's vision, goals and objectives.

- Kelowna has a relatively large skilled and educated labour force. More Kelowna residents have some form of post secondary education than residents in other similar sized cities in BC.
- Kelowna has a growing population that outpaced growth in BC and many similar sized cities across Canada. The growth of the labour force has supported the area's economic growth.
- Kelowna is a diversified centre for trade and commerce and is supported by a large service area with over 450,000 people.
- Over the last 10 years, Kelowna has maintained a relatively high ratio of new business incorporations and a relatively low business failure rate. Kelowna boasted the lowest failure rate when compared to similar sized cities in BC.

With only 2.4% of BC's population, Kelowna has generated between 2.5 to 3.3% of all new BC incorporations over the past 10 years. This reinforces Kelowna's position as a major regional centre.

- Kelowna and the Okanagan Valley are important fruit producing areas.
- The climate and natural beauty of the area are major attractions to residents, visitors and businesses.
- A managed debt, healthy reserves and a growing tax base has strengthened the City's financial situation.
- New and well-maintained parks and infrastructure (including roads, water and sewer utilities) strengthens the standard of living for Kelowna residents.
- The airport has experienced strong growth.

*A growing population and economy*

*A regional commercial centre*

*A high ratio of new business incorporations and a low ratio of business failures*

*New and well-maintained parks and infrastructure*

## Key Weaknesses

Addressing the following weaknesses could help in achieving the City's vision, goals and objectives.

*A growing older population*

- Kelowna has a relatively large elderly population and much of the recent population growth has occurred in the 35-54 age cohort. This indicates that Kelowna could be faced with a larger retired population and an aging, smaller workforce. This can lead to more demands on health and helping services, most of which are not under the control of the City.

*Relatively large number of low paying jobs*

- Compared to other cities across B.C., Kelowna has a relatively large number of low-paying jobs, particularly in retail and tourism industries.
- The level of information sharing and coordination of efforts has hampered regional and inter-agency planning initiatives.

*Continued traffic growth*

- Growth has placed pressure on the City's road network and has contributed to Hwy 97 traffic congestion.
- The lack of a complete sidewalk and bike lane system has inhibited their use.

*Pressure on land resources*

- Housing needs have placed development pressures on agricultural and environmentally sensitive lands.
- Retaining City staff with skills that are in high demand in the private sector has been challenging.

## Key Opportunities

Taking advantage of the following opportunities could help in achieving the City's vision, goals and objectives.

*Increased tourism growth*

- Encouraging people to use alternate modes of transportation can help reduce traffic congestion.
- The City currently has a strong mix of attractions (arts, cultural, heritage and agricultural resources) which provide opportunities for tourism growth.

*New niche market potential*

- New development can help support improvements to the sidewalk, bike lane and transit services.
- With a growing retirement population, opportunities exist for new niche markets to support the needs of this population and to harness their energies and expertise.

<p><i>Expanded health and medical sector</i></p> <p><i>New industrial growth potential</i></p>	<ul style="list-style-type: none"><li>• Kelowna is a regional medical centre and is in a position to take advantage of the anticipated growth of health care and health related industries.</li><li>• Society's increased focus on health through nutrition can further stimulate the demand for organic and hormone free food products. This can enhance and stimulate Kelowna's agricultural sector.</li><li>• North America can become a centre of the knowledge industry, which will affect situations such as education, health and technology. These are industries that traditionally have higher paying jobs. The implication for Kelowna may be mostly in agriculture and tourism with some research and development potential if a critical mass can be attracted and retained.</li><li>• Kelowna's airport will enables the City to take advantage of the growth in air travel tourism and in aerospace industries.</li></ul>
<p><i>Housing pressure in a constrained land area</i></p>	<p><b>Key Threats</b></p> <p>Addressing the following threats could help in achieving the City's vision, goals and objectives.</p> <ul style="list-style-type: none"><li>• Kelowna's limited land base and growing population could have a negative impact on the affordability of housing and the City's aesthetic beauty.</li><li>• If Kelowna continues to experience low-density development and increased traffic volumes, air pollution and the cost of providing the needed roads and services could increase substantially.</li></ul>
<p><i>Growing automobile traffic</i></p>	<ul style="list-style-type: none"><li>• If the use of automobiles increases at present rates, traffic congestion in the afternoon peak hours will increase substantially.</li></ul>
<p><i>Changing government funding relationships</i></p>	<ul style="list-style-type: none"><li>• Continued economic growth can aggravate social disparity or create a sense of a widening gulf between higher and lower income earners.</li><li>• The changing funding relationships with the Federal and Provincial governments, and the downloading of services, puts added pressure on municipal finances.</li><li>• If growth in the number of people with income and health related limitations outpaces the community's resources to respond to their needs, the economic and social stability of the city, particularly the downtown area, could be weakened.</li></ul>

# **KELOWNA** **STRATEGIC PLAN** **2004**

- Vision
- Goals
- Objectives
- Actions
- Implementation

## STRATEGIC PLAN

The Strategic Plan describes a vision of what residents hope Kelowna will be like in the future. Three themes emerged from the input received from the community, which helped in developing this vision. Overall, residents aspire to live in a community that:

- aims to co-exist with the **physical environment** and minimize negative impacts to air, land, and water resources, including Okanagan Lake and the surrounding natural and agricultural areas.
- works to develop and maintain a **strong, diversified local economy** that offers residents opportunities for high-paying jobs.
- embraces the **social, cultural and physical well-being** of its residents through the delivery of quality services at a reasonable price, the development and maintenance of quality infrastructure and built forms, and meaningful opportunities to be involved in major decisions made by the City.

The background research showed a strong link between these themes. Kelowna's most defining characteristics are its natural and agricultural setting. These attributes contribute to the stability and strength of the local economy and to the quality of life of local residents.

Kelowna is evolving from small-sized city to a medium sized city. People move to Kelowna to take advantage of the economic opportunities and the quality of life. As the city continues to grow, urban livability issues will be tied more to the community's economic vitality and standard of living than they have been in the past.

From these themes, a vision was developed and a number of goals and objectives were identified in support of achieving the vision. For each objective, a number of action steps were identified. Each action step represents an activity that must be carried out by the City in order to support the vision, goals, and objectives.

The following vision, goals, objectives and action items are the outcome of the Strategic Plan review process.

## VISION

*Kelowna is a vibrant city where the agricultural and beautiful natural setting, community spirit, economic stability and stewardship of the environment enhance the quality of life for residents.*

### GOAL 1 – TO MAINTAIN, RESPECT AND ENHANCE OUR NATURAL ENVIRONMENT

#### *The Rationale for this Goal and its Objectives ...*

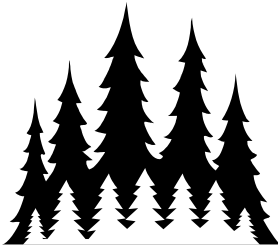
Kelowna residents identified the preservation and maintenance of the natural environment as a high priority throughout the consultation process. Through the community survey, respondents were asked to indicate the most appealing aspects about Kelowna. The four most appealing things about Kelowna were the climate, the natural setting, the outdoor recreation opportunities, and Okanagan Lake.

These sentiments were reinforced when respondents indicated the services of most importance with respect to the spending of City tax dollars were maintaining the quality of Okanagan Lake, conserving water, preserving natural areas and preserving drinking water and air quality.

Similar results were obtained through the SWOT analysis, which identified the natural beauty, climate and environmental aesthetics of Kelowna as key strengths.

The above noted input led to the creation of the following three objectives which support the goal of maintaining, respecting and enhancing Kelowna's natural environment:

1. Conserve Kelowna's water resources.
2. Preserve and promote the enhancement of air quality within Kelowna's air shed.
3. Manage human impacts on our natural environment, including Okanagan Lake and the surrounding hillsides.





## GOAL 2 – TO FOSTER A STRONG, STABLE AND EXPANDING ECONOMY

### *The Rationale for this Goal and its Objectives ...*

The value residents place on the economy was reflected throughout the consultation process. Of the respondents in to community survey that weren't born in Kelowna, 36% indicated that their main reason for moving to Kelowna was for a job or a businesses opportunity.

The majority of survey respondents felt that promoting Kelowna as a place to do business and to visit was of also of importance with respect to spending tax dollars.

Similar results were obtained through the SWOT analysis, which identified Kelowna's labour force, business and tourism opportunities, airport, accessibility (by land and air), agricultural land base, infrastructure and financial situation as key strengths.

Results of the SWOT analysis and the survey also indicated a need to promote an increase in the range and diversity of employment opportunities in order to improve residents' ability to obtain higher wages and to increase the Kelowna's economic ability to sustain provincial or national fluctuations.

The above noted input led to the creation of the following four objectives which support the goal of fostering a strong and stable economy.

1. Aid in the growth and progress of Kelowna as a desirable place to do business.
2. Aid in the growth and progress of Kelowna as a desirable place to visit, shop and tour.
3. Increase the diversity of employment opportunities.
4. Commit to continued sound fiscal management.



### **GOAL 3 – TO FOSTER THE SOCIAL AND PHYSICAL WELL BEING OF RESIDENTS AND VISITORS**

#### *The Rationale for this Goal and its Objectives ...*

Throughout the consultation process, Kelowna residents expressed a strong desire to maintain their quality of life. In support of this, over 95% of the survey respondents stated that they felt satisfied (48.8%) or very satisfied (46.5%) with the City of Kelowna as a place to live.

Respondents were asked in the community survey to rate the City's success in achieving previous goals set out by the City. Respondents indicated the City was most successful at supporting the arts, heritage preservation, and providing high quality City services, including recreational, police and fire protection services.

Respondents were also asked to identify what would make life more enjoyable in Kelowna. Nearly one-quarter of the respondents were pleased with present conditions and therefore did not offer suggestions. The majority of the remaining respondents indicated that life would be more enjoyable if Kelowna had less traffic congestion (particularly on Highway 97), if residents didn't have to rely as much on automobiles and if new urban development were improved to better meet their needs and to minimize the impact it has on existing urban and rural areas.

A key threat to come out of the SWOT was that Kelowna's limited land base and growing population could have a negative impact on the affordability of housing. The growing population could also have an impact on the costs associated with the services and infrastructure needed for such growth. These issues were identified as concerns by a majority of the respondents when asked how they felt about the city's projected population growth.

The survey results indicated the majority of respondents felt that seeking public input on City projects and providing information about City initiatives was of importance with respect to the spending of City tax dollars. This was strongly supported throughout the consultation process.

*Objectives for  
Goal 3:*

*Service related  
Objectives*

*Infrastructure  
and Built-form  
related  
Objectives*

*Community Input  
related Objective*

The above noted input led to the creation of the following eight objectives which support the goal of fostering the social and physical well being of residents and visitors:

1. Promote health and wellness initiatives.
2. Ensure the availability of fiscal and human resources to provide quality City services (recreation, culture, fire, police, planning, works and utilities).
3. Reduce traffic congestion on City streets, Highway 97 and Okanagan Lake Bridge.
4. Realize construction of housing forms and prices that meet the needs of Kelowna residents.
5. Achieve accessible high quality living and working environments.
6. Provide infrastructure (utilities, transportation, parks, facilities) that keep pace with population growth and evolving opportunities.
7. Sensitively integrate new development with heritage resources and existing urban, agricultural and rural areas.
8. Provide meaningful opportunities for a broad range of input from residents and agencies on major directions taken by the City.

## **Action Steps**

The following section outlines the specific action steps identified through the consultation process as being necessary in order to achieve the objectives. The following points were considered while developing the action items:

- Each action must be directly linked to achieving an objective which supports the goals and overall vision for the City.
- The action item(s) must be relevant, useful, and achievable.
- Assigning responsibility to one or more City departments to implement the action(s).
- Assigning an appropriate timeframe to accomplish the action(s).

The actions are summarized in tabular format below and are itemized under their corresponding goal and objective. Each table identifies the estimated timeframe for completing the actions as well as the parties who would be responsible for completing the tasks.

A description of the periods used for timeframe (short, medium and long) is provided below, along with the abbreviations used to identify each City department.

### **Timeframe**

- Short Term = action initiated within 24 months;
- Medium Term = action initiated within 24-60 months;
- Long Term = action initiated after 60 months.

### **Responsibility**

The department(s) that will take a lead in the implementation of an action and the department(s) that will contribute. In some cases, actions require the contribution of all departments.

- CMO = City Manager's Office;
- FS = Financial Services;
- HR = Human Resources;
- PLS = Parks and Leisure Services;
- PCS = Planning and Corporate Services;
- WU = Works and Utilities.

## GOAL #1

<b>Goal #1</b> - To maintain, respect and enhance our natural environment.			
<b>Objective #1</b> – Conserve Kelowna’s water resources.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Develop and enhance education and awareness programs related to promoting sustainable water conservation practices.	ST	WU	PLS
Explore options on how the City could implement new and more aggressive water conservation practices with City-owned properties.	ST	PLS / PCS	WU
Explore options on how the City could implement new and more aggressive water conservation development regulations.	ST	PCS	WU / PLS
Work with other water suppliers, including suppliers to agricultural users, to provide similar service levels and to implement water conservation measures.	ST-MT	WU	
Prepare a Water Management Plan which addresses issues related to supply, carrying capacities, security, distribution costs and jurisdictional boundaries.	ST	WU	ALL
Support the development of a Central Okanagan and Okanagan Valley Water Management Plan.	ST-MT	WU	CMO

**City of Kelowna Strategic Plan (2004)**

<b>Goal #1</b> - To maintain, respect and enhance our natural environment.			
<b>Objective #2</b> – Preserve and promote the enhancement of air quality within Kelowna’s air shed.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Develop and enhance education and awareness programs that promote clean-air practices (including alternative modes of transportation, more efficient vehicle trip planning, green building methods and wood burning practices).	ST	WU	PLS
Explore options that would improve clean-air practices and activities (including eliminating or reducing parking subsidies, implementing bus pass and car pooling incentives and improving vehicle emission standards).	ST	WU	
Ensure City bylaws and policies promote clean-air practices (including tree and vegetation planting, growth management and land use, transportation, green buildings, wood burning / industry / vehicle emission regulations, and incentives for alternatives).	ST	PCS	WU / PLS
Work cooperatively with regional and provincial agencies to improve regional clean-air initiatives (including reducing duplication of efforts and coordinating greenhouse gas and energy reduction policies and programs to support regional air quality and national climate change initiatives).	ST	WU	
Update the Central Okanagan Emissions Inventory and the Kelowna Air Quality Management Plan.	ST	WU	ALL
Support and facilitate an update of the Central Okanagan Air Quality Management Plan.	ST	WU	CMO
Support the development of an Okanagan Valley Air Quality Management Plan.	MT	WU	CMO

**City of Kelowna Strategic Plan (2004)**

<b>Goal #1</b> - To maintain, respect and enhance our natural environment.			
<b>Objective #3</b> - Manage human impacts on our natural environment, including Okanagan Lake and the surrounding hillsides.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Develop and enhance education and awareness programs aimed at youth, residents, businesses and the development industry which promote good use of the natural environment, including ways to enhance the enjoyment of and reduce impacts caused by recreational users, such as bikers, hikers, boaters.	ST	WU / PLS	CMO
Develop a Corporate Environmental Plan which addresses pollution prevention planning and compliance of all City activities with applicable environmental laws and regulations, including source control programs for stormwater and wastewater sources entering Okanagan Lake.	MT	WU	ALL
Assess ways to acquire or protect significant natural open space areas, including natural lands abutting Okanagan Lake.	ST-MT	PCS / PLS	WU / FS
Monitor and evaluate the successes and challenges of hillside development related bylaws and policies, including the OCP, Zoning Bylaw and Subdivision, Development and Servicing Bylaw and Hillside Development Guidelines.	ST	PCS / WU	PLS
Assess the feasibility of implementing standards and limits related to impermeable surfaces within new developments as a means to decreasing stormwater runoff volumes and improving Okanagan Lake water quality.	ST	WU	PCS
Identify significant view corridors and revise existing plans and/or policies to protect these amenities.	ST	PCS	PLS / WU
Continue to work with Regional, Provincial and Federal agencies to determine strategies aimed at maintaining and enhancing the water quality of Okanagan Lake, and to ensure water quality at all designated beaches and waterfront parks is suitable for primary contact.	ST - LT	WU	CMO
Continue to work cooperatively with the Westbank First Nations, the District of Lake Country and the Regional District of Central Okanagan in the joint development of plans for the region.	ST - LT	PCS	CMO

## GOAL #2

<b>Goal #2</b> - To foster a strong, stable and expanding economy.			
<b>Objective #1</b> – Aid in the growth and progress of Kelowna as a desirable place to do business.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Review the Official Community Plan to ensure an adequate supply of land and infrastructure is available to meet future commercial and industrial needs.	MT	PCS	WU
Develop and expand partnerships with external agencies that promote business opportunities and investments in Kelowna.	ST – LT	CMO	PCS / PLS
Promote and support the review and update of economic development strategies and marketing the City as a preferred business location.	ST - LT	CMO	PCS

<b>Goal #2</b> – To foster a strong, stable and expanding economy.			
<b>Objective #2</b> – Aid in the growth and progress of Kelowna as a desirable place to visit, shop and tour.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Provide recreational, sport and cultural facilities and outdoor areas that accommodate small and large scale tourism events and festivals.	ST	PLS	PCS / WU
Ensure a balanced approach between tourism needs for outdoor events and festivals and resident needs for park and outdoor space.	ST	PLS	
Work with external agencies and tourism operators to promote cultural, recreational and natural amenities.	ST	PLS	

**City of Kelowna Strategic Plan (2004)**

<b>Goal #2</b> - To foster a strong, stable and expanding economy.			
<b>Objective #3</b> – Increase the diversity of employment opportunities			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Work with UBC Okanagan, Okanagan College and other educational institutions to develop initiatives that promote Kelowna as a knowledge centre and that help increase education levels of Kelowna's residents.	ST - LT	CMO	PCS
Work with growth industries, including health care, agriculture, education, high tech, manufacturing and aerospace industries, in an effort to promote their continued growth in our region.	ST - LT	CMO	PCS
Prepare a 20 year master plan for the Kelowna International Airport to ensure the airport continues to support the needs of local residents and the growth of local businesses.	ST	CMO	PCS
Evaluate the effectiveness of City policies and programs in supporting agricultural industries.	ST - MT	PCS	

<b>Goal #2</b> - To foster a strong, stable and expanding economy.			
<b>Objective #4</b> - Commit to continued sound fiscal management.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Review and update fiscal performance indicators annually, assess and report to the community.	ST – LT	FS	ALL
Continue to conduct annual resident surveys to assess community desires and priorities.	ST - LT	CMO	ALL
Develop corporate communication and public education initiatives that convey the costs associated with community desires.	ST	ALL	
Maintain a competitive property tax structure relative to similar BC municipalities.	ST - LT	FS	ALL
Provide analysis and options regarding the City's financial capacity to achieve the action items outlined in the Strategic Plan.	ST - LT	ALL	

## GOAL #3

<b>Goal #3</b> - To foster the social and physical well-being of residents and visitors.			
<b>Objective #1</b> - Promote health and wellness initiatives.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Develop and enhance education and awareness programs that promote the benefits of health and wellness initiatives, including recreational activities, walking, cycling and community activities.	ST	PLS	WU / PCS
Work with external agencies, including Interior Health and School District No. 23, which promote health and wellness initiatives.	ST	PLS	PCS
Assess physical activity levels of Kelowna residents and promote the Province's goal of increasing activity levels by 20% by 2010.	ST	PLS	PCS
Encourage and support planning that promotes Kelowna as a child-friendly community.	ST - LT	PCS / PLS	
Develop or support programs that promote healthy, positive lifestyles for youth by addressing their needs and engaging their energy.	ST	PLS	PCS
Develop or support programs that address the needs and engage the energies of seniors.	ST	PLS	PCS
Identify and take steps to reduce crime and bylaw infractions related to public safety in all parks, open spaces and streets.	ST - MT	PLS / PCS	CMO
Work proactively with the community and other levels of government to address homelessness, mental health and drug abuse.	ST - LT	PCS	CMO

**City of Kelowna Strategic Plan (2004)**

<b>Goal #3</b> - To foster the social and physical well-being of residents and visitors.			
<b>Objective #2</b> - Ensure the availability of fiscal and human resources to provide quality services (recreation, culture, fire, police, planning, works and utilities).			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Assess the results of the community policing and crime prevention programs developed as an outcome of the 1992 Strategic Plan.	MT	CMO / PCS	
Monitor the provision of police services to ensure maximum effectiveness and responsiveness to community needs.	ST	CMO	
Continue to develop performance targets for all City departments and ensure appropriate staff levels and resources to meet performance targets.	ST – LT	ALL	
Continue to conduct customer satisfaction surveys.	ST – LT	CMO	
Update internal and external customer service policies and establish implementation guidelines.	ST	HR / CMO	ALL
Review and update corporate programs that encourage and reward customer service.	ST	HR / CMO	
Work closely with external agencies, including School District No. 23, in the development of joint use facilities as well as the expansion of current joint use facilities.	ST	PLS	PCS
Identify and evaluate alternate forms of service delivery that meet or enhance the current quality of service at lower costs, such as applying or paying for City services online.	ST	CMO / PCS	ALL
Develop a Parks and Leisure Services Master Plan that identifies ways to provide recreational programs and services that are responsive to the needs of residents and maximize the potential of recreational centres.	ST	PLS	
Evaluate the recreational opportunities and constraints of Okanagan Lake and the surrounding hillsides.	ST	PLS	
Develop an Arts and Culture Strategy that identifies ways to provide cultural services that are responsive to the needs of residents and visitors.	ST	PLS	

**City of Kelowna Strategic Plan (2004)**

<b>Goal #3</b> - To foster the social and physical well-being of residents and visitors.			
<b>Objective #3</b> – Reduce traffic congestion on city streets, Highway 97 and Okanagan Lake bridge.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Work with the Province to identify and implement measures to maximize capacity of Okanagan Lake Bridge, Highway 97 and Highway 33 including appropriate expansions of capacity, coordination of traffic signals, access management, road safety strategies and implementation of intelligent traffic systems.	ST-MT	WU	
Work with the Province, Central Okanagan Regional District, Westbank First Nations and other partners on the identification and implementation of a central Okanagan bypass highway and second crossing.	ST-MT	WU	
Work with regional partners on transportation modelling, growth management strategies and joint long range transportation planning.	ST-LT	WU	
Ensure data systems have accurate current information to allow for traffic and transportation planning and sound decisions on day to day development issues.	ST-LT	WU	
Review and update transportation components of Zoning and Subdivision Bylaw to improve traffic flow and road safety, and to promote transit oriented development.	ST	WU	
Maximize city road network capacities through mechanisms such as ongoing traffic system analysis, implementation of modern technologies, and best practices for traffic control and road maintenance.	ST-LT	WU	
Decrease use of single occupancy vehicles through public education and outreach programs, accelerating implementation of the Sidewalk Master Plan and on-and-off road bike plans, and implementation of bylaws and policies that promote alternative modes of transportation.	ST-LT	WU	PLS
Actively promote and work with City, Provincial, Regional and other partners for the expansion of transit services and transit oriented developments.	ST	WU	

**City of Kelowna Strategic Plan (2004)**

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<b>Goal #3</b> - To foster the social and physical well-being of residents and visitors.			
<b>Objective #4</b> – Realize construction of housing forms and prices that meet the needs of Kelowna residents.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Work in partnership with housing organizations and finance institutions to monitor the range of housing options required in the City.	ST	PCS	
Identify ways to establish partnerships with builders, developers and other levels of government in an effort to use targeted City owned land, existing resources and legislative tools to influence the supply and diversity of housing and to increase the supply of affordable housing.	ST	PCS	
Review development related bylaws and policies to determine if greater incentives for building affordable housing can be provided.	ST	PCS	

**City of Kelowna Strategic Plan (2004)**

<b>Goal #3</b> - To foster the social and physical well-being of residents and visitors.			
<b>Objective #5</b> – Achieve accessible, high quality living and working environments.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Develop an internal review process for City initiated projects to promote City leadership in aesthetic, design, accessibility and environmental considerations.	ST	PLS / WU / PCS	
Assess the effectiveness of development permit guidelines and policies in achieving safe, accessible, high quality living and working environments.	ST - MT	PCS	WU / PLS
Review targets for density increases in various sectors of the city and establish how such increases can be sensitively integrated.	ST	PCS	
Work with other regional interests to improve the valley's visual appearance.	ST - LT	ALL	
Monitor and participate in initiatives to manage and preserve the Okanagan Valley's quality of life.	ST	PCS	WU / CMO
Develop policies and incentives to revitalize public and private properties within Urban Centres.	ST	PCS	WU / PLS
Implement and evaluate the effectiveness of city wide and Urban Centre standards for lighting, signage, pedestrian crosswalks and crossing opportunities to ensure the safety of pedestrians and accessibility for all residents.	MT	WU	PCS
Complete an inventory of Kelowna's public 'natural capital' (parks, creeks, city trees, landscaped boulevards, lakes, green spaces, scenic views and outdoor recreation areas), assess their benefits, and track changes over time.	ST	PLS	PCS / WU
Prepare a coordinated management system and long-term strategies for acquisition, maintenance, and enhancement of natural capital within the public realm.	MT	PLS	PCS / WU

**City of Kelowna Strategic Plan (2004)**

<b>Goal #3</b> - To foster the social and physical well-being of residents and visitors.			
<b>Objective #6</b> – Provide infrastructure (utilities, transportation, parks, facilities) that keeps pace with population growth and evolving opportunities.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Evaluate park and open space acquisition standards to ensure their provision keeps up with population growth.	ST-LT	PLS	PCS
Develop park and open space areas to ensure they meet the needs of a growing population and of changing demographics.	ST-LT	PLS	PCS
Increase the amount of no and low cost recreational opportunities in parks to keep them accessible to residents of all socio-economic levels.	ST-MT	PLS	PCS
Develop a hillside recreational plan focusing on the development of trails and public stewardship of the natural hillside environment.	ST	PLS	
Support the improvement and development of regional and City trails in an effort to provide a comprehensive network of trails and view points.	ST - LT	PLS	
Continue to develop linear pathways which connect neighbourhoods throughout the City, including public access to and along the shoreline of Okanagan Lake.	ST - LT	PCS / PLS	WU
Ensure drinking water meets or exceeds Canadian drinking water guidelines.	ST	WU	
Work with other water suppliers to provide similar service levels.	ST	WU	
Develop long-term infrastructure plans for water, wastewater, drainage, electrical and transportation that identifies and protects for needs beyond the 20 year time horizon of the Official Community Plan.	MT	WU	PCS

**City of Kelowna Strategic Plan (2004)**

<b>Goal #3</b> - To foster the social and physical well-being of residents and visitors.			
<b>Objective #7</b> – Sensitively integrate new development with heritage resources and existing urban, agricultural and rural areas.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Review policies, including urban centre and housing policies, to ensure growth is effectively directed in a way that takes advantage of existing infrastructure and services.	ST - LT	PCS	WU / PLS
Implement policies that will help curtail the spread of retail uses on Hwy 97 and reduce the supply of underutilized commercial floor space in the downtown and Rutland areas.	ST	PCS	
Develop and implement ways to provide a simulated analysis that demonstrates the potential physical and visual impacts of development proposals.	ST	PCS	
Evaluate the effectiveness of City policies and bylaws in preserving agricultural lands.	MT	PCS	WU
Develop programs to reduce fire hazard conditions in and around residential, park and open space areas.	ST	PLS	WU
Examine local heritage conservation programs, bylaws and policies, identify their successes and weaknesses, set priorities and chart a course for the future.	ST	PCS	PLS
Establish a checklist against which individual development projects can be measured with respect to the City's growth management policies.	ST	PCS	ALL

**City of Kelowna Strategic Plan (2004)**

<b>Goal #3</b> - To foster the social and physical well-being of residents and visitors.			
<b>Objective #8</b> – Provide meaningful opportunities for a broader range of input from residents and agencies on major directions taken by the City.			
Action(s)	Timeframe	Responsibility	
		Lead	Contributor
Review and update guidelines relating to public involvement on Council appointed committees.	ST	PCS / CMO	
Review and update guidelines relating to soliciting and receiving public input on decisions made by Council.	ST	PCS / CMO	
Develop an awareness and education program that describes the municipal decision-making process and the opportunities for community involvement.	ST	PCS	
Develop a Consultation Plan which recommends ways to support and foster input from a diversity of voices and perspectives with the aim of facilitating implementation of sound decisions.	ST	CMO	ALL
Develop a Consultation Plan which recommends standardized ways for all City departments to effectively share information with the public, including use of the media, internet, newsletters and public meetings.	ST	CMO	ALL

## IMPLEMENTATION PROCESS

In order to ensure that the Strategic Plan is used as a guiding document in the City's decision-making procedures, a clear implementation process must be put in place. The following process is proposed:

1. Endorsement of the Strategic Plan by City Council.
2. The departments responsible for implementing an action item will develop operational work plans, including performance measures and benchmarks and multi-year budgets to support implementation of the items.
3. Senior Management meeting agendas are to have a standing item that deals directly with the Strategic Plan on a quarterly basis. Once the performance measures have been identified, the agendas are to deal with implementation of the Plan on a bi-annual basis. This mechanism will ensure that the direction set out in the Strategic Plan is regularly addressed at the highest level of municipal decision-making.
4. Relevant staff reports and budget submissions to Council should conform with the Strategic Plan. Recommendations that do not conform must be explicitly described so that a fully informed decision can be taken.
5. In order for the implementation of the Strategic Plan to proceed efficiently and effectively, it will be essential for the City Manager to oversee and monitor the implementation of the Strategic Plan. The City Manager will be charged with monitoring all of the action steps to assess progress and with recommending changes to actions and timeframes as may be required.

The performance measures and benchmarks should be used in the annual review to measure progress in achieving the objectives and goals.

An annual progress report will be presented to City Council at regular public meeting. The annual progress report will be available on the City website and in hard copy at City Hall.

*Develop performance measures and multi-year budgets*

*Annually report progress on implementation*

**Appendix I**

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**Community Survey Methodology and Complete Results**

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**Appendix II**

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**Progress of 1992 Strategic Plan Actions**

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**Appendix III**

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**Strategic Plan Review Team**

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## **APPENDIX III: STRATEGIC PLAN REVIEW TEAM**

### **2002 – 2005 KELOWNA CITY COUNCIL**

Walter Gray, Mayor  
Andre Blanleil, Councillor  
Colin Day, Councillor  
Ron Cannan, Councillor  
Barrie Clark, Councillor  
Brian Given, Councillor  
Robert Hobson, Councillor  
Al Horning, Councillor  
Sharon Shepherd, Councillor

### **SENIOR MANAGEMENT TEAM**

Ron Born, City Manager  
Ron Mattiussi, Director of Planning and Corporate Services  
John Vos, Director of Works and Utilities  
David Graham, Director of Parks and Leisure Services  
Paul Macklem, Director of Financial Services  
Rick Baker, Director of Human Resources

### **PROJECT MANAGEMENT TEAM**

Signe Bagh, Manager of Policy, Research and Strategic Planning  
Greg Routley, Policy, Research and Strategic Planning  
Gary Stephen, Policy, Research and Strategic Planning  
Trevor Parkes, Policy, Research and Strategic Planning

### **STRATEGIC PLAN CONSULTANTS**

IER – Planning, Research and Management Services of Victoria, British Columbia, assisted the City of Kelowna with data gathering, analysis and development of the 2004 Strategic Plan. Key IER staff involved were:

Dr. Peter Homenuck, RPP  
Mr. Jim Micak  
Mr. Joseph Pittari

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