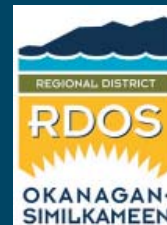


Performance Indicators for the South Okanagan Regional Growth Strategy

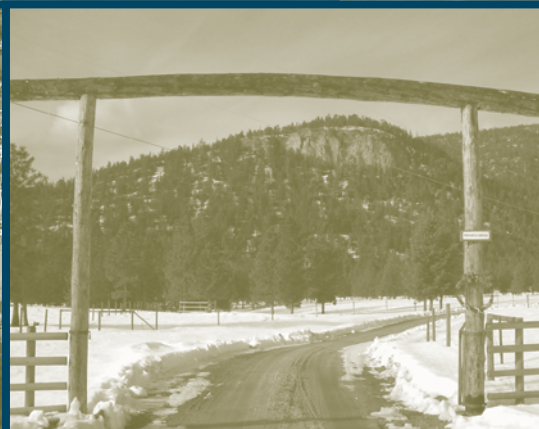


May 2007

Prepared by:



The Sheltair Group



Executive Summary

The South Okanagan's Regional Growth Strategy (RGS) process was initiated in 2004 under the regional growth strategies section of BC's *Local Government Act* and is being led by the Regional District of Okanagan-Similkameen. The South Okanagan's Regional Growth Strategy is in a late draft stage and it is anticipated that the RGS will be finalized by the end of 2007.

Under the legislation, after a regional district adopts a regional growth strategy, it must establish a program to monitor its implementation and progress towards its objectives and actions and prepare annual reports on the implementation and progress.

This report establishes a framework for monitoring the South Okanagan's Regional Growth Strategy, including a proposed set of indicators. The monitoring program is designed to meet the requirements of the provincial legislation, as well as provide feedback to the Board of Directors and the municipal councils on the implementation of the RGS.

Monitoring Framework

A framework structure for monitoring the Regional Growth Strategy was developed. The framework consists of five levels conceptualized as a triangle, with the vision at the apex of the triangle and strategies and actions at the base (see Figure 1). The focus of this report is on the indicators level of the framework.



Figure 1: Regional Growth Strategy Monitoring Framework

An indicator is a measure that reveals a condition, a trend, or an emerging issue. Its purpose is to show the direction the region is moving toward. More specifically, indicators can show if the South Okanagan is moving towards meeting the articulated RGS vision and objectives or away from it. Indicators are tools that help track changes over time and are a yardstick for measuring future change relative to a baseline.

A set of topic areas for organizing the objectives and performance indicators was used. The priority areas are focused on the RGS primary directives, mandatory elements of a regional growth strategy from the *Local Government Act* and the South Okanagan RGS policy areas. The consultant team identified the topic areas and these were reviewed with Regional District staff.

The Topic Areas for organizing the indicators are:

- Context
- Biodiversity and Natural Spaces
- Agriculture
- Human Settlement and Land Use
- Affordable Housing
- Transportation
- Energy Use and Air Quality
- Water Management
- Municipal Solid Waste Management
- Social, Cultural, and Recreation
- Economic Development
- Governance

Indicator Selection

Using the topic areas as an organizing framework, a long list of indicators was developed based on a literature review of existing or proposed regional growth strategy monitoring programs from other regional districts in BC and other pertinent indicator programs.

The approach for selecting indicators included selecting a balanced set of environmental, social, and economic indicators across the different topic areas. Selection criteria were used to assist in choosing the indicators. This long list of indicators was reviewed in a workshop format with RDOS staff, and members of the RGS Environmental Advisory Committee, Economic Advisory Committee and Social Advisory Committee in December 2006. From the workshop, a short list of indicators was identified. The indicators were further refined after review by Regional District staff and the Intergovernmental Advisory Committee in February 2007.

Following the selection process, a set of 30 indicators was selected for monitoring the South Okanagan Regional Growth Strategy.

A Key Facts section is proposed to be included in the indicator reports to supplement the reporting of the indicators. The Key Facts section is intended to be a two-page at-a-glance profile of some of the key statistics for the South Okanagan.

To ensure the highest degree of data quality, it is necessary to have a rigorous process for ensuring data are calculated and presented in an accurate manner. In addition, it also is important to ensure that any updates to the data are done using the same methodology. A separate technical report contains the metadata, or detailed descriptions of the data, for each indicator.

Baseline Year and Reporting

The baseline year for the Regional Growth Strategy is proposed to be 2006 as it coincides with the date of the last Census, which is the closest census year to the completion of the Regional Growth Strategy. Baseline data are used to provide a comparison for assessing the impact of the regional growth strategy as well as providing a reference point for monitoring change.

There are two reporting formats proposed for the RGS Monitoring Program: an RGS Annual Report and a 5-year report (depending on resources, this may need to be prepared on a 10-year cycle but a 5-year report is recommended).

It is anticipated that the Regional Growth Strategy will be completed by the end of 2007. The baseline report is the first 5-year report and would report out on data from 2006 and 2007. Summary data from the baseline report would be included in the first annual report. The baseline report and first RGS annual report are anticipated to be prepared in the first half of 2008.

The indicators are proposed to be included as an appendix in the RGS Annual Report, using tables and charts as appropriate. In terms of length, it is anticipated that this would comprise approximately 10 to 15 pages of the Annual Report (with each indicator comprising a half to a third of a page of text). There are 13 annual indicators that would need to be updated, as well as the Key Facts pages.

The write-up for the annual report would include:

- A short description of the indicator
- A concise statement on the status of the indicator
- A chart with historical trend data for simple data sets or a snapshot in time for more complicated indicators

It is proposed that for the baseline report and the 5-year reports, a longer report be prepared reporting out on more detail for each of the indicators (approximately 70 pages in length with each indicator being written up on two or three pages). The 5-year reports would come out to coincide with the release of census data, approximately 2 years after the census data would be released. The 5-year report would identify things such as:

- Why is this indicator important?
- What is being measured?
- How are we doing?
- How do we compare?
- What is being done?
- What can citizens do?

A template has been included in this report for a sample indicator using the format for both the annual and 5-year reports.

It is recommended that a Highlights version of the baseline and 5-year reports be prepared and written for a broader distribution, including the local elected officials and general public. The longer version of these reports would be of more interest to municipal and regional district staff, partnering provincial and federal agencies, other stakeholders and researchers.

Resource Requirements

The baseline report and the first Annual Report are the first reports that the Regional District will need to prepare. These first reports will be the most resource-intensive to develop as they involve the setting up of data systems, collection and tabulation of current and historical data, and writing the text for each indicator for the first time.

In terms of time, it is believed that the baseline report and first Annual Report would require 4 to 5 months to complete. It is recommended that the monitoring report process be undertaken in the first half of 2008 (all the census data from the 2006 census will be released by May 2008). As this will involve technical work and requires the setting up of spreadsheet templates and tabulating current and historical data, it is recommended

that the RDOS seek additional funding to cover or cost-share this work, such as from the BC Ministry of Community Services.

Following the preparation of the baseline report, the preparation of annual reports and 5-year reports will be much less resource-intensive, and should be able to be performed within the core mandate of the Regional District.

Following the baseline report in 2008, the 5-year reports would next be prepared in 2013, 2018, and every 5-years subsequently. If there are budget and resource limitations, the 5-year reports could fall to a 10-year reporting cycle following the report prepared in 2013. Ideally the 5-year reports would be prepared to coincide with the review period for the regional growth strategy.

Potential Involvement of RGS Advisory Committees

It is suggested that the RGS Advisory Committees, Intergovernmental Advisory Committee, and the RGS Public Advisory Committee be involved in the process to prepare the baseline report and first annual report. The role of the committees would include reviewing drafts of the report, refining the indicators to be included, and advising on an appropriate communication strategy to get the report out in a suitable format to the elected officials, stakeholders, and the public. In addition, members of the various committees could also be asked to prepare spotlight articles or success stories related to the implementation of the RGS and the indicators.

Summary

By reporting back on the progress in implementing the regional growth strategy and trends in key indicators, the RDOS, its member municipalities and partner agencies will be able to determine how well the RGS is being implemented and to identify steps to refine the implementation of the RGS based on this feedback.

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1 INTRODUCTION

1.1 Background

The South Okanagan's Regional Growth Strategy (RGS) process was initiated in 2004 under the regional growth strategies section of BC's *Local Government Act* and is being led by the Regional District of Okanagan-Similkameen (RDOS). A Regional Growth Strategy is an agreement with a purpose 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." The South Okanagan's Regional Growth Strategy is in a late draft stage and it is anticipated that the RGS will be adopted by the end of 2007.

Under the *Local Government Act*, after a regional district adopts a regional growth strategy, it must establish a program to monitor its implementation and progress towards its objectives and actions and prepare annual reports on that implementation and progress. In addition, at least every five years a regional district with an adopted regional growth strategy must consider reviewing their RGS for possible amendment.

In late 2006 and early 2007, the Regional District retained The Sheltair Group to establish a framework for monitoring the Regional Growth Strategy, including selecting a set of performance indicators. The monitoring framework will enable the Regional District, its member municipalities, and provincial and federal partners to assess whether the RGS and the related implementation actions are achieving their desired intention.

The monitoring program is designed to meet the requirements of the provincial legislation, as well as provide feedback to the Board of Directors and the municipal councils on the implementation of the RGS. The feedback from the monitoring program can then be used to celebrate successes or bring attention to indicators that may be going in the wrong direction to adjust implementation. The monitoring program will also provide useful information to take stock of how the region is performing for use in any subsequent updates or amendments to the RGS.

The approach recommended in this report can be used to monitor the RGS and may be refined over time based on other indicators identified, data gaps, priorities, and financial and staff resources to carry out the monitoring program.

This report incorporates the recommended indicator set and monitoring program as identified by The Sheltair Group in conjunction with staff from the RDOS, the RGS Intergovernmental Advisory Committee, and other RGS advisory committees.

1.2 The Regional Growth Strategy

The Regional Growth Strategy (RGS) is a long-term planning process and project that addresses growth management issues that are regional in nature over a 20-year period for the South Okanagan area.

The South Okanagan RGS identifies and prioritizes common goals that meet a variety of agreed-upon social, economic, and environmental objectives. The RGS addresses at a high-level regional issues such as urban growth, protection of rural areas, air quality, water quality and supply, economic development, housing, transportation, parks and natural areas, and infrastructure planning.

The draft Regional Growth Strategy¹ contains a set of six themes:

1. Coordinating and encouraging economic development
2. Protecting and enhancing the environment
3. Strengthening governance and building relationships
4. Carefully directing human settlement
5. Collaborating on infrastructure and potentially shared services, and
6. Strengthening social structure and supporting community needs.

1.3 Report Structure

This report is structured into three sections following this introduction.

Section 2 describes indicators in general and their strengths and limitations.

Section 3 presents the monitoring program framework for the RDOS RGS monitoring program and selected set of indicators.

Section 4 discusses aspects of implementing the monitoring program and reporting the results.

Appendix A provides a template for a set of proposed Key Facts to accompany the set of performance indicators.

Appendix B contains a sample template and write-up for one indicator for the Regional Growth Strategy annual report.

Appendix C contains a sample template and write-up for one indicator for the Regional Growth Strategy baseline and 5-year reports.

A separate technical report contains the metadata or detailed descriptions of the data for each indicator.

¹ References to the draft Regional Growth Strategy are based on the December 2006 version of the Strategy.

2 MONITORING INDICATORS AND REPORTING GEOGRAPHIES

2.1 Performance Indicators and their Importance in Monitoring

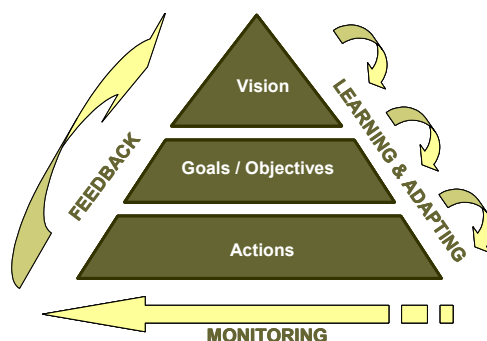
An indicator is a measure that reveals a condition, a trend, or an emerging issue. Its purpose is to reveal the direction the region is moving in. More specifically, indicators can show if the South Okanagan is moving towards meeting the articulated RGS vision and objectives or away from it. Indicators are tools that help track changes over time and are a yardstick for measuring future change relative to a baseline.

Indicators also provide an opportunity to identify and address policy gaps, shortfalls in implementation, or trends that may affect RGS implementation. The communication of indicators and trends help decision makers and residents to see where changes are needed and desired.

In their book, *Reinventing Government*, authors David Osborne and Ted Gaebler (1992) suggested four reasons why indicators are important for progress:

“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.”

Monitoring is a critical activity as it shows changes over time and to identify things that are working (what we should celebrate and protect) and areas where we are not making progress (where we need to direct more resources). Indicators provide feedback on how the region is doing through ongoing monitoring and feedback. Feedback in itself does not facilitate change as it merely indicates past performance. Learning from the feedback is required to allow the region to “correct its course” by modifying and adjusting its actions as it goes forward.



The first part of the learning process involves developing awareness of performance and trends in the community. A monitoring report is one vehicle for building awareness about current performance. It highlights the successes and focuses attention on the areas that need work. In this light, it serves as a useful tool for decision-makers to address priority areas and to develop initiatives and actions over time.

2.2 The Limitations of Indicators

There are limitations to the use of indicators. A region comprises many subsystems with complex relationships and interdependencies. Indicators can only show one thing within an individual system and therefore are simplified. They do not explain the workings of a system, causality or the reasons for a particular condition or trend. Many of the indicators are too crude to capture any type of site-specific condition or qualitative condition. They also rely on “after-the-fact” information. As such, they are useful for basic information provision, but should be supplemented by observation, studies, survey research, and more detailed assessment and analysis.

Where an indicator is showing a perceived problem, or unintended effect associated with some aspect of the RGS, a more in-depth review or analysis may be warranted to determine why the indicator is responding in a particular direction.

2.3 Key Monitoring Questions

Monitoring a regional growth strategy is intended to answer key questions. These questions include:

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 the 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 livable 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?

The indicators in the monitoring program are intended to answer these and other questions.

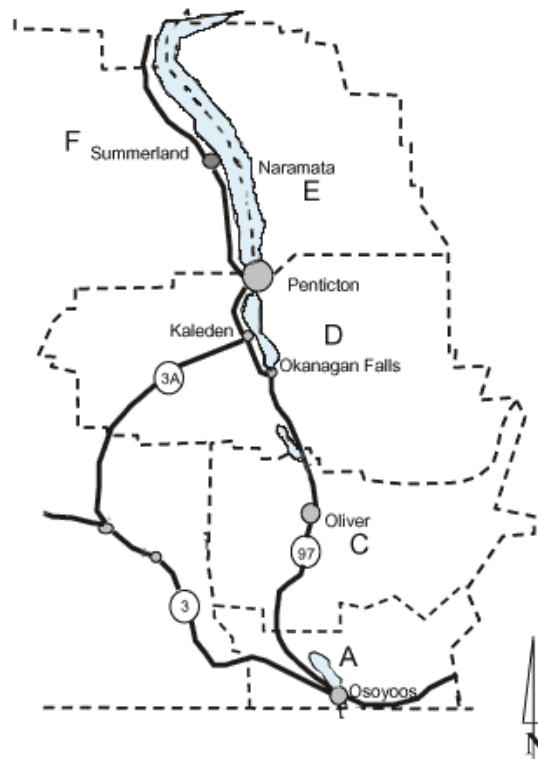
2.4 Reporting Geographies

There are various reporting geographies that are used in the proposed monitoring program. The specific geographic area to use for reporting the indicator results depends on the nature of the indicator and data sources.

Regional District of Okanagan Similkameen – The Regional Growth Strategy only covers the South Okanagan. However, the data for RDOS are included in the Key Facts section for comparison purposes.

South Okanagan - The Regional Growth Strategy covers only a portion of the Regional District of Okanagan-Similkameen. The following areas are included in the definition of the South Okanagan: the municipalities of the City of Penticton, District of Summerland, Town of Oliver, and Town of Osoyoos, and the RDOS electoral areas A, C, D, E, and F (see Figure 2-1). RDOS Electoral Areas B, G, and H are outside the scope of the RGS as is the Town of Princeton.

Figure 2-1: Map of the South Okanagan Regional Growth Strategy Area



Source: RDOS

Member Municipalities and Electoral Areas – Where available, the data for many of the indicators are to also be reported at the level of the individual member municipalities and RDOS Electoral Areas.

Census Consolidated Subdivisions - A Census Consolidated Subdivision (CCS) is a grouping of adjacent census subdivisions. The census dictionary indicates that, in general, the smaller, more urban census subdivisions (towns, villages, etc.) are combined

with the surrounding, larger, more rural census subdivision, in order to create a geographic level between the census subdivision and the census division. Consolidated Census Subdivisions are to be used for reporting data from the Census of Agriculture in the South Okanagan Regional Growth Strategy Monitoring Program.

3 PROPOSED RGS MONITORING FRAMEWORK AND INDICATORS

3.1 Proposed Monitoring Framework Structure

A framework structure for monitoring the Regional Growth Strategy was developed by the consultant. The framework consists of five levels for the Regional District of Okanagan Similkameen Performance Indicators Framework (see Figure 3-1). The framework can be conceptualized as a pyramid with the vision at its top and strategies, actions and monitoring at the base.



Figure 3-1: Regional Growth Strategy Monitoring Framework

The framework links the monitoring indicators to the overarching vision for the Regional Growth Strategy and objectives for each topic. This structure facilitates the communication and assessment of indicators to the overall intent of the Regional Growth Strategy. A brief description of each level in the Regional Growth Strategy Monitoring Framework follows.

Vision - The Regional Growth Strategy Steering Committee, the public and selected regional advisory committees identified the following as the vision for growth management in the South Okanagan:

Vision - 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.

Issues to Vision: South Okanagan Regional Growth Strategy (October 2005)

The vision represents the starting point for the framework.

Priority Areas – A set of topic areas for organizing the objectives and performance indicators was used. The priority areas were identified after reviewing the most recent draft of the Regional Growth Strategy. The priority areas are focused on the RGS primary directives, mandatory elements of a regional growth strategy from the *Local Government Act* (i.e. Housing, Transportation, Regional District Services, Parks and Natural Areas, and Economic Development), and the South Okanagan RGS policies and policy areas. The topic areas are based on those in the Regional Growth Strategy but the names have been generalized and have also been disaggregated into a larger number of categories to facilitate presenting the indicators.

The Topic Areas for organizing the indicators are:

- Context
- Biodiversity and Natural Spaces
- Agriculture
- Human Settlement and Land Use
- Affordable Housing
- Transportation
- Energy Use and Air Quality
- Water Management
- Municipal Solid Waste Management
- Social, Cultural, and Recreation
- Economic Development
- Governance

The topic area called “Context” is included which provides indicators on the population size and growth rate to set the context for the indicator reports. The Context topic area is different than the other indicators because there are no policies related to the population growth rate. The other topic areas all deal with managing that growth.

For the Governance topic area, there are currently no indicators included, as governance is more of a process and structure rather than an end in itself. Governance is left as a topic area in the monitoring program in case the Regional District would like to add indicators in this area in the future.

Objectives – Within each priority area, the consultant team reviewed the set of objectives based on a review of the draft RGS (various versions up to and including the December 2006 draft). The objectives articulate what is desired to be achieved for each topic area. These were used to inform the identification of indicators.

Indicators – The indicators are the final tier of the RGS monitoring framework that further articulates an aspect of an objective. The following illustrates an example of the framework structure for one indicator for the second, third and fourth levels of the hierarchy:

Topic Area: Agriculture

Objective: Protect agricultural land base in the South Okanagan and encourage agricultural development

Indicator: AG1 – Amount of land excluded from ALR (a) annually and (b) cumulatively (ha)

Strategies and Actions – The strategies and actions are not covered in this document. See the Regional Growth Strategy for the specific strategies and actions.

3.2 Process to Select RGS Monitoring Program Indicators

Using the topic areas as an organizing framework, a long list of indicators was developed. A variety of relevant indicator data sets were reviewed including existing or proposed regional growth strategy monitoring programs from other regional districts in BC (i.e. CRD, GVRD, RDCO, RDN, SLRD), the Smart Growth on the Ground process in Oliver, the South Okanagan QUEST model, and indicators from other parts of Canada and in Oregon.

This long list of indicators was reviewed in a workshop format with RDOS staff, and members of the RGS Environmental Advisory Committee, Economic Advisory Committee and Social Advisory Committee in December 2006. From the workshop, a short list of indicators was identified. The indicators were further refined after review by Regional District staff and the Intergovernmental Advisory Committee in February 2007.

The approach for selecting indicators included selecting a balanced set of environmental, social, and economic indicators across the different topic areas. Selection criteria were used to assist in choosing the indicators. The following is the selection criteria that was used to evaluate each indicator and for considering the addition of new indicators.

Is the indicator:

- Within the influence of the Regional District or the member municipalities?
- Meaningful?
- Measurable and data are available?
- Easily and affordably measured?
- Easily understood by a broad range of readers and audiences?
- Comparable to indicators used by other regional districts (or municipalities)?
- Focused on ends rather than means?

Another criterion was to have an indicator set that had a manageable set of indicators and that would be practical to update. Following the select process, a set of 30 indicators was selected for the RDOS RGS monitoring program. This number is slightly higher than originally intended but there was a desire to include several indicators under each of the topics, which resulted in the 30 indicators. The indicators consist of 13 indicators to be updated annually and 17 indicators to be updated every 5 years. The indicators are likely to be refined slightly as part of the first monitoring program report so there may be slightly fewer or more indicators in this list.

The indicators are organized by each of the topic areas. In addition, an indicator code is assigned to each indicator consisting of a code for the topic area and a number. For example indicator AG-1 is the code for the indicator on the amount of land excluded from the Agricultural Land Reserve as part of the Agriculture topic area. The coding system facilitates referring to particular indicators and is also used for data management.

Table 3-1 contains the selected set of indicators for the RDOS Regional Growth Strategy Monitoring Program.

Table 3-1: Finalized Set of RDOS Regional Growth Strategy Monitoring Indicators

Topic Area	Indicator	Units of Measure	Update Frequency
Context	CTX-1: Total Population and annual population growth rate (i) within RGS study area, (ii) by municipality and iii) by rural area	Total population and annual growth rate (%)	Annual
Biodiversity & Natural Spaces	BNS-1: Annual and cumulative area of parkland and protected areas	Ha and % of total land area	Annual
	BNS-2: Percentage of sensitive ecosystems protected or stewarded by general habitat type	% of Sensitive Ecosystem Inventory polygons by general habitat categories (wetland / riparian, grassland / shrub-steppe, dry coniferous forests, rugged terrain)	5-year
	BNS-3: Percentage of riparian areas protected	% of riparian corridors protected (within 30m)	5-year
Agriculture	AG-1: Amount of land excluded from Agricultural Land Reserve (a) annually and (b) cumulatively since 1974	ha	Annual
	AG-2: Agricultural Intensity using Gross Farm Receipts Per Ha of Land Farmed	\$/ha	5-year
Human Settlement & Land Use	HS-1: a) Share of 5-year dwelling unit growth and b) cumulative % of dwelling units since 2006 located i) inside and ii) outside Urban Growth Area boundaries	%	5-year
	HS-2: Dwelling unit density in urban areas vs. rural areas	Units/ha	5-year
	HS-3: Proximity to services	% of dwelling units located within proximity of key services: <ul style="list-style-type: none"> • Parks (400 m) • Shopping (400m) • Community or Recreation Centres (2 km) 	5-year
Affordable Housing	AH-1: Housing starts by structural type	Total units and % of units by structural type	Annual
	AH-2: Mix of total dwelling units by structural type	Total units and % of units by structural type	5-year
	AH-3: % of owner households spending 30% or more of gross income on housing	% of owner households	5-year
	AH-4: % of renter households spending 30% or more of gross income on housing	% of renter households	5-year
Transportation	T-1: % of labour force living and working in the same municipality	% of labour force with usual place of work	5-year
	T-2: Median commuter trip distance (km)	km	5-year
	T-3: (i) Region-wide and (ii) municipal Modal Share for Journey-to-Work Trips	% of journey-to-work trips	5-year

Topic Area	Indicator	Units of Measure	Update Frequency
	T-4: Length of cycling infrastructure by facility type (multi-user path, bike lane, signed bike route)	km	5-year
Energy Use and Air Quality	EE-1: a) Total and per capita energy consumption for residential buildings	GJ/capita/year	5-year
	EE-2: Percentage of days ambient air quality exceeds provincial objectives and Canada Wide Standards for PM2.5 or ground-level ozone	Days/year	Annual
Water Management	W-1: Municipal Water Consumption	Litres/capita/day	Annual
	W-2: Percentage of water distribution system samples with a positive bacterial detection (total coliforms or fecal coliforms)	% of test results showing a detection of total or fecal coliforms in potable distribution water	Annual
	W-3: Percentage of water distribution system sample test results exceeding selected Drinking Water Quality Guidelines	% of sample test results exceeding the Canadian Drinking Water Quality Guidelines (turbidity, total dissolved solids, total suspended solids, copper and lead (if available))	Annual
Municipal Solid Waste	MSW-1: Municipal solid waste disposed per capita	kg / capita /year	Annual
Social, Cultural, and Recreational	SCR-1: Length of trails	km	Annual
	SCR-2: Crime rates	Crime incidents reported/ 1,000 people	Annual
	SCR-3: Percentage of total budget committed by municipalities to arts, culture, diversity, heritage, and recreation	\$ and %/year	Annual
Economic Development	ED-1: Percentage breakdown of labour force by age cohort	% of labour force	5-year
	ED-2: Percentage household income distribution	% of households	5-year
	ED-3: Percentage breakdown of total income by source	% by source of income (employment, pension, investment, self-employed, tax exempt, other)	Annual
	ED-4: Total employment by sector	Employment by sector	5-year

3.3 Key Facts

A Key Facts section is proposed to be included with the reporting out of the indicators. The Key Facts are intended to be a two-page summary of key variables that are primarily profile in nature. It is intended to provide an at-a-glance profile of some of the key statistics in the region and for the RGS study area. The Key Facts are simpler in nature than an indicator. There are approximately 25 statistics that are included in the proposed Key Facts. The Key Facts section is designed to be updateable in one to two days and is primarily based on existing published sources and does not require any data manipulation or processing. It is not intended to be a comprehensive profile – just a snapshot and handy reference that would go at the end of the Monitoring Program report.

Appendix A contains a sample template for the Key Facts.

4 IMPLEMENTING THE MONITORING PROGRAM AND REPORTING

The following information provides some more detail for implementing the RGS monitoring program.

4.1 Ensuring Data Quality

To ensure the highest degree of data quality, it is necessary to have a rigorous process for ensuring data are calculated and presented in an accurate manner. In addition, it also is important to ensure that any updates to the data are done using the same methodology. To assist in the process, meta-data was developed for all of the indicators. Meta-data is descriptive information about the data and includes:

- definitions
- description of data source(s)
- data limitations
- geographic scale of data collection and reporting
- earliest date when comparable data is available
- contact information for obtaining the data,

Metadata for each of the indicators is included in a separate technical report for each of the indicators.

4.2 Baseline Data

An important first step in establishing the RGS Monitoring Program is the collection, tabulation, and archiving of baseline data for each indicator. Baseline data is basic information gathered before a program, policy, or development begins. The baseline data is used later to provide a comparison for assessing the impact of the Regional Growth Strategy as well as providing a reference point for monitoring change.

The baseline year for the RDOS RGS was identified to be 2006 for most of the proposed indicators as it coincides with the 2006 Census, which is the closest census year to the completion of the Regional Growth Strategy. Also in 2006, mapping was completed for the Sensitive Ecosystem Inventory, which is also a key data source for the RGS monitoring program. Although the RGS will likely not be completed until the end of 2007, it is believed that 2006 is a better year for establishing the baseline, rather than the year the RGS is adopted due to the availability of data.

The collection of baseline data is proposed to include:

- determining the values for the baseline year for all indicators
- archiving GIS files and various databases (e.g. BC Assessment Authority) for the baseline year
- archiving orthophoto files for the baseline year (or closest year to the baseline year), and
- taking photographs of areas of interest and the region for the baseline year

The baseline data will be used in future years to assess change from the 2006 reference point.

4.3 Benchmark Comparisons

A benchmark compares an indicator from one region (or community) to similar regions (or communities) or to other reference points, such as provincial and national comparisons. This context is powerful because it makes the indicator meaningful and understandable by showing how the Regional District is performing relative to its peer group.

For the monitoring program, it is important to select appropriate benchmarks for comparisons. Some of the criteria for selecting benchmarks include:

- comparable data is available for the benchmark jurisdiction
- the community or region is of a similar population size to the South Okanagan
- for benchmark regions, the benchmark is an area with a similar settlement pattern with a similar economic structure to the South Okanagan
- the benchmark locations focus first on those in BC, the Pacific Northwest, the rest of Canada, and where applicable could include international comparisons

The selection of benchmarks will vary for each indicator. However, there are certain regions that in general provide useful benchmarks, including:

- Central Okanagan Regional District (or Kelowna Census Agglomeration)
- North Okanagan Regional District (or Vernon Census Agglomeration)
- Thompson Nicola Regional District (or Kamloops Census Agglomeration)
- Comox-Strathcona Regional District
- Capital Regional District (or Victoria Census Metropolitan Area)
- Greater Vancouver Regional District
- BC average
- Canadian average

4.4 Reporting

The growth strategy legislation requires that an annual report be prepared within the first year after adoption of a regional growth strategy and every year thereafter. The audience includes: staff and local elected officials from the member municipalities, partner agencies, stakeholders, and general public.

The first RGS annual report is anticipated to be prepared in early 2008 and would report out on data for 2006 (the baseline year) and 2007 (for all the annual indicators). It is proposed that the annual reports be released in March or April of each year. This would coincide with the release of data for the annual reports for year-end and allow time for compilation of the data and generation of charts for the report. It will also allow the elected officials to consider the findings, and allow time for the distribution of the Annual Report to residents and stakeholders prior to the summer months.

There are two reporting formats proposed for the RGS Monitoring Program: an Indicator Appendix for the RGS Annual Report, and more detailed 5-year reports (depending on

resources, this may need to be prepared on a 10-year cycle but a 5-year report is recommended). For each of these reporting formats, it is proposed that the information be included in a report format as well as a version on the RDOS web site. The web site offers the opportunity to provide more detailed information and interpretation of indicator trends as well as web links to data sources, such as programs and initiatives related to the indicators (or the proposed toolbox). A note can be included in the written reports referring readers to the more detailed information on the web site.

The annual indicators are proposed to be included as an Indicator Appendix in the Annual Report, using tables and charts as appropriate. In terms of length, it is anticipated that this would comprise approximately 10 to 15 pages of the Annual Report (with each indicator comprising a half to a third page of text). There are 13 annual indicators that would need to be updated, as well as the Key Facts pages. Selected indicators can also be included in the body of the RGS Annual Report to highlight specific indicators as desired. The report version of the Annual Report is anticipated to be a user-friendly, non-technical, and concise document.

The write-up for the Annual Report Indicator Appendix would include:

- A short description of the indicator
- A concise statement on the status of the indicator
- A chart with historical trend data for simple data sets or a snapshot in time for more complicated indicators

It is proposed that for the baseline report and the 5-year reports that a longer document (approximately 70 pages) profiles each of the indicators in greater detail. The 5-year reports would come out to coincide with the release of census data, approximately 2 years after the census data would be released. The 5-year report would identify things such as:

- Why is this indicator important?
- What is being measured?
- How are we performing? (including a graph) (includes comparisons to the desired direction according to the RGS objectives)
- How do we compare? (including a graph of selected benchmarks)
- What is being done?
- What can citizens do?

Each indicator would be written-up on two to three pages. The indicators comprise the body of the report and would also include benchmark comparisons. It is recommended that a Highlights version of this be written up as a shorter 12 to 14 page document. Each page of the document could feature a summary for each of the 12 topic areas and there could be some introduction and concluding text on the first and last page of the document. The Highlights version of the report is primarily intended for the public and local elected officials. The longer version of the report would be of more interest to municipal and regional district staff, partnering provincial and federal agencies, other stakeholders and researchers.

By reporting back on the progress in implementing the regional growth strategy and trends in key indicators, the RDOS, its member municipalities and partner agencies will be able to determine how well the RGS is being implemented and to identify steps to refine the implementation of the RGS based on this feedback.

4.5 Potential Sector Profiles, Did You Know? and Success Story Text Boxes

Sector Profiles

It is suggested that the RDOS consider working with its IAC members or members on the RGS Advisory Committees to prepare profiles of the highest priority topic areas. Profiles are more detailed publications that contain a variety of historical and current information about a single topic area from a variety of sources. The profile is intended to provide more in-depth data and information than could possibly be included in a single indicator.

Potential topics for the sector profiles include:

- Agriculture (e.g. publishing out data from the Census of Agriculture) (note: the BC Ministry of Agriculture and Lands publishes a 2-page Agriculture in Brief, including data from the Census of Agriculture and BC Agricultural Land Commission – a link would just be needed on the RDOS website to this publication)
- Water
- Transportation
- Biodiversity and Natural Spaces

Did You Know? Textboxes

Within the main body of the Annual Report, it is suggested that some interesting facts related to the indicators be included. For the indicators on Biodiversity and Natural Spaces, this could include some facts about wildlife populations and rare or endangered species. These “Did you know?” facts help make the indicators and annual report more tangible to the reader.

Success Stories

Success stories highlight positive steps that have been undertaken in the region that have helped improve the performance of an indicator. For example, a new protected area could be highlighted which contributes to indicator BNS-1 (Annual and cumulative area of parkland and protected areas). The success stories are intended to help communicate out some of the more substantial aspects of progress that has been achieved.

The success stories are also a good way to solicit stories from the IAC members and the RGS advisory committees to potentially contribute content to the annual reports. Ideally, these would be linked to particular indicators.

4.6 Resource Requirements

The implementation of the Monitoring Program will require sufficient resources to be allocated by the RDOS.

The Regional District will need to assign an individual to be responsible for coordinating the data collection, tabulation, and preparation of the annual reports and 5-year reports. Possible options for this person include a person within the RDOS Development Services Department, such as the person assigned responsibility for coordinating the implementation and monitoring of the regional growth strategy. An alternative person could be someone within the GIS group as they have the technical skills for conducting

much of the work and calculating the GIS-based indicators and coordinate the writing with a planner.

The baseline report is the first report that the District will need to prepare and it will be the most resource-intensive as it is the first report and will require the setting up of data systems, collection and tabulation of data, and writing the text for the first time.

For the baseline report, the following resources would be required:

- Internal project manager time allocation
- Time allocation for in-house GIS person to calculate GIS-based indicators (this may be approximately 2 weeks worth of work spread out over two to three months)
 - The work includes calculating indicators (i.e. BNS-1, BNS-2, BNS-3, HS-1, HS-2, HS-3, SCR-1)
 - The work also could include preparing maps for some of the indicators (e.g. BNS-1, BNS-2, AG-1, T-4, SCR-1)
- Possible consultant budget for collecting data, tabulating indicators, and report writing for all 30 indicators (approximately \$1,000/indicator can be used as a guideline – total budget would depend on how many indicators would be done in-house, especially the GIS-indicators which are more time-consuming) or alternatively hiring a junior or intermediate person with a sufficient skill set to conduct this (would require approximately 4 to 5 months of time)
- Meeting expenses with RGS advisory committees on the indicator project and report
- Potential data purchases (the RDOS may already have the basic data from the census covered under other budgets) (assumed to be less than \$1,000 every 5 years)

The only data cost is believed to be purchasing the custom electronic profiles of the municipalities and electoral areas within the RDOS (Profile of Census Divisions and Subdivisions) if the Regional District does not already do this.

In terms of length of time, it is believed that preparing the baseline report and the Indicator Appendix for the first RGS Annual Report would require 4 to 5 months to complete. It is recommended that the process start in late January or February 2008 and be completed by June of 2008 (all the census data from the 2006 census will be released by May 2008).

For the baseline report, it is recommended that the RDOS approach the Ministry of Community Services for assistance with funding the baseline report (approximately \$30,000 to \$40,000 to conduct the project as a guideline for budgeting). It is not anticipated that any consultant time would be required after the baseline and first annual reports are prepared (other than possibly assistance for a 5-year or 10-year report).

Following the preparation of the baseline report, the preparation of annual reports and 5-year reports will be much less resource-intensive, and should be able to be performed within the core resources of the Regional District.

For annual reports, the following resources would be required:

- Internal project manager time allocation
- Time allocation for a junior staff person to update the 13 annual indicators and the key facts (estimated at 1 to 2 weeks)
- Planner or technician to write annual report appendix for the indicators (estimated at 1 to 2 days)

- Time allocation for planner or technician for updating the two-page Key Facts (1 to 2 days)

For preparing the Indicator Appendix for the annual reports, it is believed that this work could easily be done in-house. A planner with technical skills or a technician (or student) could be assigned the responsibility of updating the indicators.

For preparing the subsequent 5-year reports (or a 10-year report if there are budget and resource issues), it is possible that this could primarily be done in-house. One or two staff persons could be assigned the project for a three or four-month period with possible consultant assistance as required.

4.7 Roles and Responsibilities

The roles and responsibilities of the internal project manager includes:

1. Including the monitoring program in the City's annual workplan and securing the necessary budget and staff resources to undertake the monitoring program
2. Exploring potential funding for preparing the baseline report
3. Liaising and organizing meetings with the RGS Intergovernmental Advisory Committee, the RGS Economic Advisory Committee, RGS Environmental Advisory Committee, the RGS Social Advisory Committee, and the RGS Public Advisory Committee
4. Coordinating with the GIS Coordinator, potential consultant, and staff to tabulate and update the indicators
5. Integrating the indicator information into the RGS Annual Report
6. Reviewing drafts of the indicator appendix for the RGS Annual Report and the 5-year reports
7. Reporting the results to the RGS Steering Committee
8. Developing a communications strategy for release of the reports and posting the report on the RDOS web site.

The roles and responsibilities of the team responsible for the calculating and reporting out on the baseline and 5-year indicators (whether in-house or external) includes:

1. Obtaining data for all of the indicators
2. Tabulating the current and historical data in spreadsheets
3. Preparing graphs for each of the indicators
4. Collecting and tabulating benchmark data and preparing graphs
5. Documenting the methodology for the more complex indicators in the metadata sheets (such as the GIS-based indicators)
6. Writing up the indicator descriptions for the first annual report
7. Writing up the indicator descriptions for the baseline and 5-year reports
8. Preparing and updating the 2-page Key Facts sheet
9. Working through data issues and gaps, and possibly refining some of the indicators based on data availability

For the Indicator Appendix for the Annual Reports (after the first report), it is believed this is a much simpler task. The responsibilities include:

1. Obtaining data from the previous year for all 13 of the annual indicators (CTX-1, BNS-1, AG-1, AH-1, T-4, W-1, W-2, W-3, MS1W-1, SCR-1, SCR-2, SCR-3, ED-3)
2. Tabulating the previous year's data into the spreadsheets

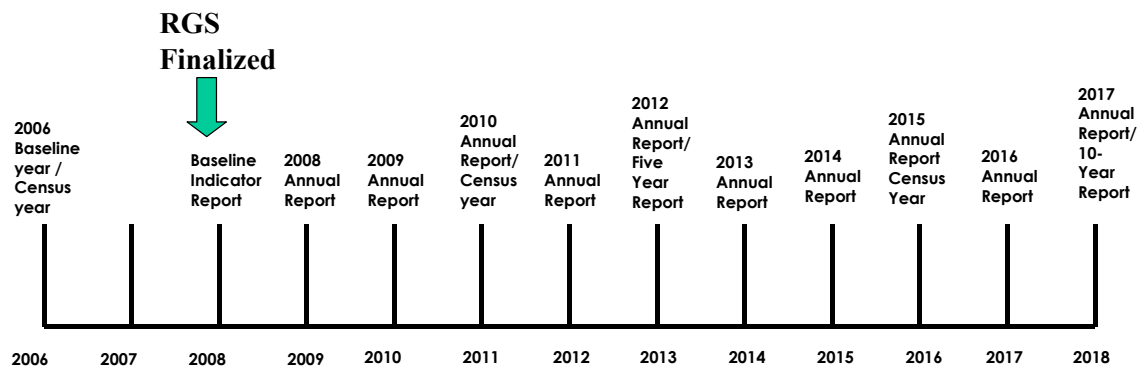
3. Preparing graphs for each of the 13 annual indicators
4. Writing up the short indicator description and status for the Annual Report Indicator Appendix for the annual indicators.

4.8 Implementation Timeline

The following chart provides a suggested timeline for implementing the RGS monitoring program (see Figure 4-1). The first activity is to prepare the RGS baseline report in the first half of 2008. The RGS itself is anticipated to be finalized in late 2007 with adoption in 2008 following the referral process.

The 5-year reports would be prepared in 2013, 2018, and every 5-years subsequently. If there are budget and resource limitations, the 5-year reports could fall to a 10-year cycle following the report prepared in 2013. Ideally the 5-year reports would be prepared to coincide with the review period for the regional growth strategy.

Figure 4-1: Proposed Timeline for Implementation of RGS Monitoring Program



4.9 Potential Involvement of Committees

It is suggested that the RGS Advisory Committees, Intergovernmental Advisory Committee, and the RGS Public Advisory Committee be involved in the process to prepare the first report. Their role would include reviewing drafts of the report, refining the indicators to be included, and advising on an appropriate communication strategy to get the report out in a suitable format to the elected officials, stakeholders, and the public. Members of the various committees could also be asked to prepare spotlight articles or success stories related to the RGS.

The RGS Steering Committee would also be involved in overseeing the first baseline report.

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APPENDIX A: PROPOSED STATISTICS TO BE INCLUDED IN “KEY FACTS”

Category	Statistic	Data Source	Geographic Areas
Land Area (including lakes)	South Okanagan RGS Study Area	GIS	South Okanagan RGS Study Area
	Agricultural Land Reserve	GIS, BC ALC	South Okanagan RGS Study Area
	Municipal Parks	GIS, member municipalities	South Okanagan RGS Study Area
	Regional Parks	GIS, RDOS	South Okanagan RGS Study Area
	Provincial and Federal Parks	GIS, BC MOE and Parks Canada	South Okanagan RGS Study Area
Population & Demographics	Total population estimate (BC Stats)	BC Stats	South Okanagan RGS Study Area and Individual Municipalities
	% of population aged 65 years and older	Census of Canada	South Okanagan RGS Study Area, Individual Municipalities, BC
	Median age	Census of Canada	South Okanagan RGS Study Area, Individual Municipalities, BC
	Average household size (persons/household)	Census of Canada	South Okanagan RGS Study Area, Individual Municipalities, BC
Occupied Private Dwellings	Occupied private dwellings by structural type (single-detached house, semi-detached house, row house, apartment/detached duplex, apartment 5 or fewer stories, apartment 5 or greater stories, other single-attached house, movable dwelling) and total (done as number of units and as a % of total units)	Census of Canada	South Okanagan RGS Study Area, Individual Municipalities, BC (as a %)
Labour Force and Employment	Population 15+ in labour force	Census of Canada	South Okanagan RGS Study Area
	Labour force participation rate	Census of Canada	South Okanagan RGS Study Area, BC
	Unemployment rate	Census of Canada	South Okanagan RGS Study Area, Individual Member Municipalities, BC
	Average household income	Census of Canada (tax filer year is one year prior to the census)	South Okanagan RGS Study Area, Individual Municipalities, BC
Agriculture	Number of farms	Census of Agriculture	Okanagan Similkameen Consolidated Census Subdivision A (Osoyoos), C (Oliver), D (Okanagan Falls), E (Naramata), and F (Summerland)
	Total area of farms (ha)	Census of Agriculture	See above
	Total number of operators	Census of Agriculture	See above
	Average age of operators	Census of Agriculture	See above
Tourism	Seasonal hotel occupancy rates	Tourism BC (based	Penticton

Category	Statistic	Data Source	Geographic Areas
	(quarterly and annual)	on data supplied by Pannell Kerr Forster)	
	Convention Centre Event Participant Days (annual)	Tourism BC (based on data supplied by Conventions BC)	Penticton Trade and Convention Centre (and possibly the South Okanagan Event Centre once opens)
	Convention Centre Event Non-resident Delegate Days (annual)	Tourism BC (based on data supplied by Conventions BC)	Penticton Trade and Convention Centre (and possibly the South Okanagan Event Centre once opens)
Transportation	Transit Ridership	BC Transit	Penticton, Okanagan Similkameen
	Per Capita Transit Ridership	BC Transit	Penticton, Okanagan Similkameen
	Registered and Insured Passenger Vehicles Per Capita	ICBC Motor Vehicle Branch	South Okanagan
Development Activity	Value of Residential Building Permits	Municipalities, RDOS, BC Stats	South Okanagan RGS Study Area, Individual Municipalities
	Value of non-residential building permits	Municipalities, RDOS, BC Stats	South Okanagan RGS Study Area, Individual Municipalities

APPENDIX B: Template and Sample Indicator Write-up for the Annual Report Indicator Appendix

TOPIC AREA: TRANSPORTATION

T-1: Labour Force Living and Working in the Same Municipality or Electoral Area

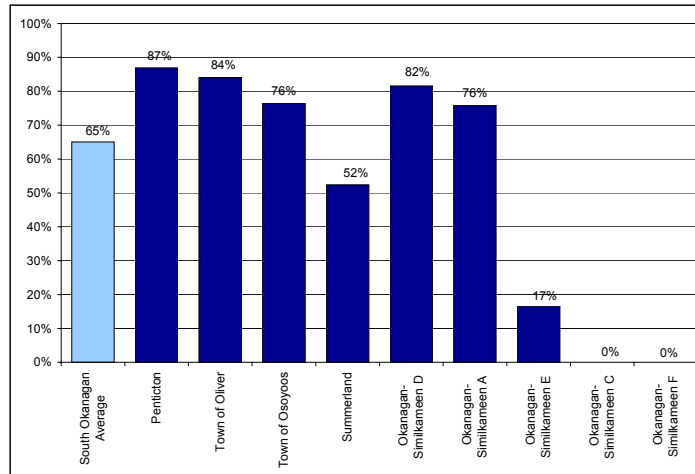
Indicator Description

This indicator estimates the percentage of the employed labour force that lives and works within the same subarea. The relationship between where people live and work is a central theme in building complete communities. The degree to which people live in proximity to their place of employment directly influences the length of trips, transportation mode choice, and transportation demand patterns.

Status

The share of the labour force in the South Okanagan that lived and worked in the same municipality or electoral area was 65% in 2001. The urban areas had the highest proportion of residents working and living in the same area. Penticton, Oliver, and Osoyoos had 87%, 84% and 76% of their labour force living and working in the same municipality.

Percentage of Labour Force Living and Working in the Same Municipality or Electoral Area, 2001



Source: Census of Canada

APPENDIX C: Template and Sample Indicator Write-up for the Baseline and 5-year Reports

TOPIC AREA: TRANSPORTATION

T-1: Labour Force Living and Working in the Same Municipality or Electoral Area

What is Being Measured?

This indicator estimates the percentage of the employed labour force with a usual place of work that live and work within the same municipality or electoral area.

Why is this Indicator Important?

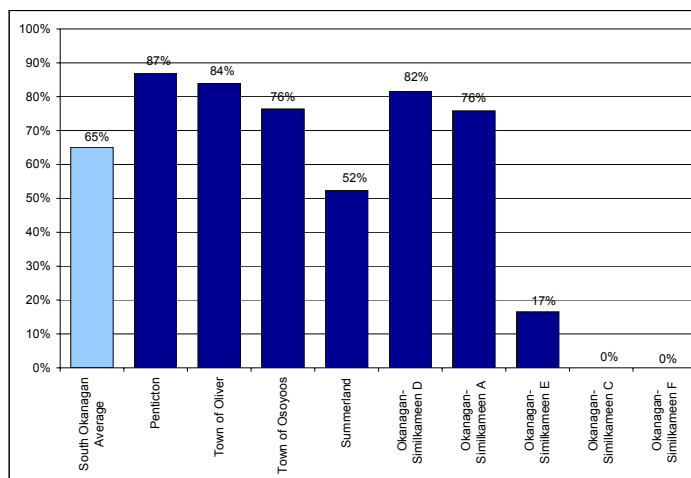
The relationship between where people live and work is a central theme in building complete communities. The degree to which people live in proximity to their place of employment directly influences the length of trips, transportation mode choice, and transportation demand patterns. People who live in close proximity to their work will spend less time in their vehicles. They will also more likely opt to use active forms of transportation, like walking and cycling.

How Are We Doing?

The share of the labour force in the South Okanagan that lived and worked in the same municipality or Electoral Area was 65% in 2001. The urban areas had the highest proportion of residents working and living in the same area while those in the more rural areas had longer commuting distances. Penticton, Oliver, and Osoyoos had 87%, 84% and 76% of their labour force living and working in the same municipality. The electoral areas had a wide divergence of the labour force living and working within the same municipality. Approximately 76% and 82% of the labour force in Okanagan-Similkameen D (directly south of Penticton) and A (surrounding the Town of Osoyoos) respectively lived and worked within the same electoral area. However, this falls to 17% for the Okanagan-Similkameen E (northeast of Penticton), and was 0% for Okanagan-Similkameen C (surrounding the Town of Oliver) and F (surrounding the District Municipality of Summerland).

The high performance on this indicator supports both shorter trips for commuting and greater use of walking, cycling and transit, especially in the urban areas in the region. However, a few Regional District Electoral Areas have only a small percentage of the residents in these subareas work in close proximity to their employment.

Labour Force Living and Working in the Same Municipality or Electoral Area, 2001

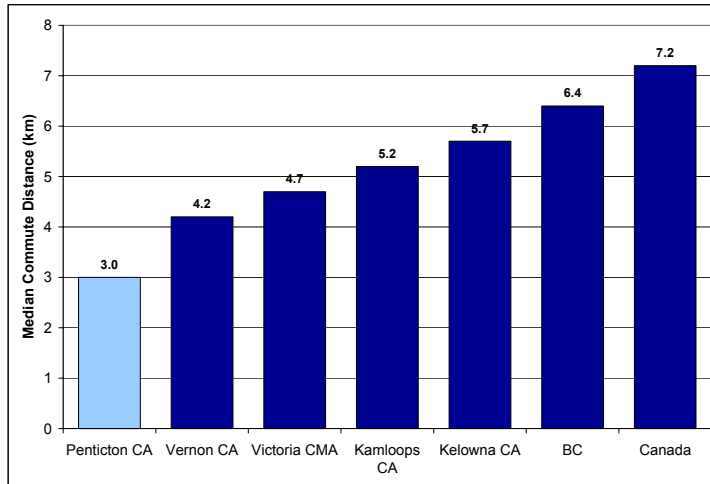


Source: Census of Canada, 20% Census Data

How Do We Compare?

As benchmark communities vary in geographic size, it is more meaningful to compare the median commuter trip distance (see indicator T-2). The Penticton Census Agglomeration has one of the shortest median commuter trip distances at 3.0 km in 2001 compared to its peer group. The Vernon Census Agglomeration and Kelowna Census Agglomeration had median commute distances of 4.2 km and 5.7 km respectively. BC and Canada had median commute distances of 6.4 km and 7.2 km respectively.

Median Commute Distance, Penticton Census Agglomeration and Selected Benchmarks, 2001.



Source: Census of Canada, Statistics Canada

What is Being Done?

The Regional Growth Strategy seeks to promote multi-nodal development, which encourages job growth to be evenly distributed between Oliver, Osoyoos, Penticton, and Summerland.

What Can Citizens Do?

- Work from home a few days per month if your employer allows that flexibility
- Live closer to your location of work to minimize your commuting time and enable a greater range of transportation choice