

ELECTORAL AREA C (SOUTH SHUSWAP) BOUNDARY ANALYSIS

REPORT

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CHAPTER 1 INTRODUCTION

Over a twelve month period beginning in the summer of 2016, the South Shuswap Governance Committee undertook the *Electoral Area C (South Shuswap) Governance Study*. The purpose of the *Study* was to document and assess the current state of local governance and service delivery in Electoral Area C of the Columbia Shuswap Regional District (CSRD), understand the concerns and interests of Area C residents with respect to governance and service delivery, and identify future governance and service delivery options for the Electoral Area.

The Governance Committee presented its final report to the CSRD Board of Directors in August, 2017. The report ended with the following passage:

Based on its review of the current governance and service delivery frameworks, the South Shuswap Governance Committee recommends to the CSRD Board of Directors that a restructure study for Electoral Area C be undertaken, and that the restructure study examine two options:

- the incorporation of a portion of the electoral area; and
- the division of the current electoral area into two electoral areas.

The CSRD Board of Directors endorsed the Committee's recommendation, and requested funding from the Ministry of Municipal Affairs and Housing for a restructure study. The Minister responded in February, 2018, with funding and the terms of reference for a *Boundary Analysis* to define the potential study area geographies for the alternatives recommended by the Governance Committee.

BOUNDARY ANALYSIS

The Ministry's terms of reference for the *Boundary Analysis* identified four separate restructure scenarios for study:

- incorporation of Sorrento (or portion thereof) as a separate municipality
- incorporation of Blind Bay (or portion thereof) as a separate municipality
- incorporation of Blind Bay and Sorrento (or portion thereof) as a combined, single municipality
- division of Electoral Area C into two electoral areas, each with its own Electoral Area Director

For each of these scenarios, the *Boundary Analysis* is to recommend a study area — that is, a potential boundary. The recommendations are to be based on an assessment of quantitative and qualitative data, driven by a set of boundary criteria. For each scenario, the *Analysis* is to identify, at a high level, the implications that would be explored further under a full restructure study.

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Discrete Incorporation Scenarios

It should be understood that any restructure arising out of the *Boundary Analysis*, and subsequent full-scale restructure study, would focus on only one of the restructure scenarios. Put differently, any incorporation that were to occur as a result of the restructure initiative would create a separate Sorrento municipality, *or* a separate Blind Bay municipality, *or* a separate single municipality that included both Sorrento and Blind Bay. Restructure would not, under the current initiative, result in the incorporation of a separate Sorrento Municipality *and* a separate Blind Bay Municipality.

Independent Analysis

The terms of reference specified that the *Boundary Analysis* was to be completed by an independent consultant retained by the CSRD. The CSRD retained Neilson Strategies Inc. — formerly, Neilson-Welch Consulting Inc. — to undertake the work. Neilson Strategies Inc. led the consortium of consultants that worked with the South Shuswap Governance Committee on the *Electoral Area C (South Shuswap) Governance Study* in 2016-2017.

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This document presents the consultants' work and recommended boundaries for the four different scenarios. The remainder of the document consists of the following chapters:

- Chapter 2: Approach and Criteria Chapter 2 outlines the approach
 followed in undertaking the study. The chapter also introduces and explains
 the factors that were considered in developing potential boundaries, and the
 specific criteria on which the recommended boundary for each of the four
 scenarios was based.
- Chapter 3: Recommended Boundaries Chapter 3 presents and explains the recommended boundary for each scenario. Each boundary is assessed against the evaluation criteria.
- Chapter 4: Restructure Implications This chapter presents a high-level overview of the potential restructure implications for residents and the CSRD associated with the recommended boundaries. Implications related to service finances, governance and property taxes are explored.
- Chapter 5: Summary and Conclusion Chapter 5 ends the report with a summary of the study and the recommended boundaries. Chapter 5 does not provide any recommendations on restructure scenarios to examine further through a full-scale restructure study. In the project's terms of reference, the consultants were instructed to develop recommended boundaries for the restructure scenarios. The consultants were not asked, however, to recommend one scenario, or a sub-set of scenarios, for further examination.

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Attached to the report is a set of five appendices — one appendix for each boundary scenario, and one appendix on the local services provided in Electoral Area C today. Each of the scenario appendices presents a set of maps related to the scenario; each map features the recommended boundary and a set of data related to one or more factors. The use of several maps aids in the presentation of the various data.

This document was submitted in December, 2018, in draft form to the CSRD and Ministry of Municipal Affairs and Housing for review and comment. Feedback received from reviewers has been incorporated into this final version, which will be presented to the CSRD Board of Directors. The Board will determine whether to reaffirm or withdraw its request to the Ministry for a full restructure study. The decision to proceed with a full-scale restructure study on one or more scenario, using the recommended boundaries in this report, will be made by the Minister of Municipal Affairs and Housing.

CSRD Geographic Information System

All of the maps, including the many iterations that preceded the final versions, were produced using the CSRD's geographic information system (GIS). The consultants wish to thank the CSRD's GIS group in the Development Services Department. Staff in the group spent significant time and effort responding to the consultants' many mapping and data requests.

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CHAPTER 2 APPROACH AND CRITERIA

This chapter begins by reviewing the approach that was followed to conduct the *Boundary Analysis*. The chapter then introduces and explains the key factors specific criteria that were used to develop the recommended boundaries.

APPROACH

The consultants followed a five-stage approach to complete the *Boundary Analysis*. Each stage is described as follows:

- Stage 1: Data Collection and Review The consultants began by collecting and reviewing data and other information on a wide range of factors that are important, or may be important, to the development of boundaries.
 Factors that were examined include:
 - future community development plans and land use categories, as outlined in the Electoral Area C (South Shuswap) Official Community Plan
 - existing settlement patterns and land use regulations
 - population and population density for Area C and its communities, as collected by Statistics Canada in the 2016 Census
 - local government services (all types) and service areas
 - potential future infrastructure developments
 - local road networks
 - property assessment classes
 - property assessment values
 - Agricultural Land Reserve (ALR) and farm property inventories in Area C
 - community input

Much of the data and information had been collected in 2016 and 2017 as part of the *Electoral Area C (South Shuswap) Governance Study*. Staff at the CSRD provided updated information to the consultants to supplement their review of the *Governance Study* materials. Other information sources — Agricultural Land Commission, Statistics Canada, BC's Ministry of Transportation and Infrastructure — were also contacted.

- Stage 2: Evaluation Criteria Specific evaluation criteria, related to and drawn from the boundary factors, were developed in stage two of the study.
- Stage 3: Recommended Boundaries The criteria and data from the earlier stages were used in stage three to develop potential boundaries for the different scenarios. Several iterations of the boundaries were drafted,

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mapped and reviewed. Refinements were made to every iteration to arrive at the recommended versions.

- Stage 4: High-Level Restructure Implications Potential service finance, governance and property tax implications associated with each of the recommended boundaries were identified in stage four.
- Stage 5: Draft Report The recommended boundaries and supporting materials were brought together to the create the Electoral Area C Boundary Analysis Report.

FACTORS AND CRITERIA

The factors considered in developing potential boundaries were identified under the outline of the consultants' approach to the study. Each of these factors is explained in this section of the chapter. Criteria associated with the factors are identified, as well.

Future Development

In 2014, the CSRD Board of Directors adopted the *Electoral Area C (South Shuswap) Official Community Plan* (OCP) after a lengthy process that involved a considerable amount of public engagement. The plan is a policy document that sets out the community's vision for the future development of the Electoral Area and the settlements within it. Specific sections of the OCP are particularly important to the boundary-setting exercise, including:

- policies that aim to concentrate future development in designated settlement areas
- policies that seek to protect natural features, rural lands, and the agricultural industry
- policies that address future road network and transportation needs
- policies that set out expectations with respect to infrastructure development, in particular water and sewer systems
- twenty-six land use categories that identify specifically where different types of future development may occur, and that speak to allowable residential forms and densities

These sections, taken together, guide the selection of potential boundaries, especially for the incorporation options.

> Evaluation Criteria

The following criteria related to future development inform the development of recommended boundaries:

 Incorporation scenarios that involve Sorrento are structured to include the Village Centre, which is identified in the OCP as the

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primary location for future residential, retail and business development in Area C.

- Incorporation scenarios that involve Blind Bay include the Blind Bay Secondary Settlement Area, which is identified in the OCP as an area for future residential development and some neighbourhood commercial development.
- Incorporation scenarios exclude lands that are identified in the OCP for low-density residential development, which include future landuse classes with densities no greater than 1 unit per 4 ha.
- Incorporation scenarios minimize the amount of protected agricultural land included within the boundaries.
- Incorporation scenarios represent areas that are large enough to allow for future growth, but sufficiently compact to facilitate efficient and cost-effective servicing.
- The Two Electoral Areas Scenario does not split any individual settlement area, including the Sorrento Village Centre, the Blind Bay Secondary Settlement Area, and the secondary settlement areas identified for Eagle Bay, Sunnybrae and White Lake.

Existing Settlements

Growth that has occurred in the South Shuswap, to date, has resulted in the development of unincorporated centres, the two largest of which are Sorrento and Blind Bay. Current land use in these areas is regulated under the *South Shuswap Zoning Bylaw, No. 701*.

Future development patterns, as envisioned by the OCP, represent a more important factor in the development of future boundaries than existing settlements and regulations.¹ Care should be taken when charting boundaries, however, to ensure that existing settlements are kept whole, and that local urban and semi-urban land uses and zones are not excluded from potential incorporation areas.

> Evaluation Criteria

The following criteria related to existing settlements and regulations inform the development of recommended boundaries:

- All scenarios keep whole existing settlement areas.
- Incorporation scenarios include higher-density residential zones, as well as commercial zones.

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 $^{\, 1} \,$ In any event, zoning is generally consistent with OCP land use designations.



Population and Population Density

According to the 2016 Census, 31 of the 160 municipalities in British Columbia have fewer than 1,000 people. It may be feasible, therefore, to incorporate a community around a relatively small population. Where possible, however, it is generally preferred to incorporate areas with larger populations. It is almost always the case that economic viability and resiliency are easier to achieve with larger numbers of people, and the greater level of activity that accompanies them.

Population density is another important consideration in the development of potential boundaries. Concentrations of people are a key factor in differentiating between urban development nodes and rural living. As well, density is critical to the development of efficient infrastructure networks, and the provision of urban-level local services.

In the 2016 Census, Statistics Canada provides population and population density figures for the Blind Bay "population centre", and separately for the Sorrento and Blind Bay "designated places". The number and concentration of people in these places help to define the places as communities, and help to distinguish them from surrounding parts of Area C.

> Evaluation Criteria

The following criteria related to population and population density inform the development of recommended boundaries:

- Incorporation scenarios represent areas with more than 1,000 people.
- Incorporation scenarios represent areas with population densities that set the areas apart from their rural surroundings, and that allow for the development of efficient infrastructure.
- The Two Electoral Areas Scenario avoids significant differences in population between the two new areas.

Local Government Services and Service Areas

The CSRD provides a broad range of local services to the communities in Electoral Area C (see *Appendix V*). Some of the services are provided to all residents and properties throughout the entire jurisdiction; other services are provided to individual communities within, or to parts of, Area C. Local government incorporation would result in the transfer of responsibility for the CSRD's local services from the regional district to the municipal government.

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For Statistics Canada, a "population centre" is a community with at least 1,000 people and a density of 400 persons or more per km². A "designated place" is a small, distinct community of no more than 10 km², but with fewer people and less density than a population centre.



Wherever practicable, efforts should be taken to include whole local service areas within a proposed municipal boundary. Service planning, governance and finance are easier to manage when the entire service area is contained within one jurisdiction, under the responsibility of one government. Sewer service areas are particularly important to contain within the jurisdiction that intends to accommodate urban development. Sewers are planned and constructed in anticipation of, and as a necessary requirement for, urban-level development. Lands with available sewer service that are excluded from incorporation scenarios will be under pressure to develop. Urban development in municipal fringe areas can result in sprawl, "free-rider" issues, and uncoordinated planning.

> Evaluation Criteria

The following criteria related to local government services and service areas are important in the development of recommended boundaries:

- Incorporation scenarios include the whole of individual local service areas for water, sewer, fire and other local, community-specific services.
- The Two Electoral Areas Scenario places the whole of individual local service areas within one or the other new electoral area.

Potential Future Infrastructure Development

The need to allow space for the development of future local government infrastructure in a community is another factor to consider in the design of boundaries. In the South Shuswap, the need for a public sewage treatment plant, to facilitate the development of a liquid waste utility, stands out as a particularly important consideration.

> Evaluation Criteria

The following criteria related to future infrastructure development inform the development of recommended boundaries:

- Incorporation scenarios accommodate the need for future infrastructure development, in particular the development of a public sewage treatment plant.
- The Two Electoral Areas Scenario accommodates, in each new area, the need for future infrastructure required to service local communities within the new area.

Local Road Networks

In Electoral Area C, similar to all unincorporated areas in BC, responsibility for constructing, upgrading and maintaining all local public roads falls to the provincial Ministry of Transportation and Infrastructure (MOTI). Within municipalities, MOTI is responsible for numbered provincial highways, all of which form part of the

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provincial highway network. All local roads in municipalities, however, are owned by, and under the responsibility of, the municipal governments. As the responsible authorities, municipalities:

- determine the standards (e.g., rural, urban) to which different types of local roads are constructed, upgraded and maintained
- integrate road capital projects with other servicing projects and priorities
- determine the amount of municipal capital and operating funding to allocate to road projects and maintenance
- integrate land-use planning and road planning decisions
- develop and execute financial strategies to pay for road improvements, including improvements required to accommodate growth

Control and responsibility over roads may be one reason that some communities seek to incorporate. The transfer of responsibility from the provincial to the local level, however, often comes at a significant price.

When setting potential incorporation boundaries, it is important to be sensitive to the road-related cost burden that would be transferred to the municipal government as a result of incorporation. Roads that are important to include within a boundary in order to create a strong local road network, and opportunities for further development, should be considered for inclusion. Roads that are not necessary, however, should be studied carefully and, if possible, excluded.

Local roads not a concern in the development of a potential boundary for the Two Electoral Areas Scenario. This scenario would not result in the creation of a municipality, or in the transfer of responsibility over local roads from the province to a local authority.

➤ Evaluation Criteria

The following criteria related to local road networks inform the development of recommended boundaries:

- Incorporation scenarios include only those roads that are required to facilitate proper transportation and land use planning, and that are important to the local community.
- Incorporation scenarios, wherever practicable, include complete local roads, and do not create "orphan" road-ends by excluding portions of no-through roads.

Property Assessment Classes

BC Assessment classifies all real property in the province into nine different classes (see Figure 2.1) for the purpose of assessment. Properties in each class are taxed at a particular rate to generate the revenues to fund local services.

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In unincorporated areas, regional district boards each year determine the Class 1 (residential) tax rate for each service provided. Rates for the other eight property classes are determined using variables that are set by the province, pursuant to the Regional District Tax Regulation (see Figure 2.1). These variables result in tax rates that are higher than the residential rate in five classes.

In municipalities, the tax rates for all classes — not only residential — are set each year by the municipal council. 2018 provincial data show that councils in almost every municipality

Figure 2.1 Property Assessment Classes

| Classes | Description | RD Tax Variable* |
|---------|-----------------------|---------------------|
| Class 1 | Residential | 1.0 |
| Class 2 | Utilities | 3.5 |
| Class 3 | Supportive Housing | 1.0 |
| Class 4 | Major Industry | 3.4 |
| Class 5 | Light Industry | 3.4 |
| Class 6 | Business and Other | 2.45 |
| Class 7 | Managed Forest Land | 3.0 |
| Class 8 | Recreation Non-Profit | 1.0 |
| Class 9 | Farm | 1.0 |

^{*} Section 1, Regional District Tax Regulation

set tax rates for several of the non-residential property classes above the Class 1 level. Indeed, for properties assessed as Utilities (Class 2), Industrial (Classes 4 and 5), and Business (Class 6), rates are higher (often considerably higher) than Class 1 rates in all but two of the 160 municipalities in the province.³

When selecting potential boundaries for incorporation scenarios, attention should be paid to the range and size of property classes present. If possible, it is useful for jurisdictions to have a good level of diversity in property types. Such diversity enables jurisdictions to spread their local tax burdens across more than just residential properties. In areas with Class 2, 4, 5 and 6 properties, the significance of diversity is heightened.

A range of assessment classes is important in electoral areas as well as municipalities. The need is greater in municipalities, however, given their broader range of funding responsibilities (e.g., roads).

It should be noted that property assessment classes are a factor in boundary setting not only from the perspective of property taxation, but also because of the local economy. Properties are categorized by BC Assessment based on their existing use. Thus, a Class 5 property describes a site with an industrial use, and a Class 6 property is a site with a business. These land uses are important to the local

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³ Ministry of Municipal Affairs and Housing, Schedule 702 – 2018 Tax Rates



economy as wealth and employment generators. Jurisdictions with properties in these classes may have more robust local economies than other centres.

Evaluation Criteria

The following criteria related to property assessment classes inform the development of recommended boundaries:

- Incorporation scenarios include properties that together cover a range of property assessment classes.
- The Two Electoral Areas Scenario leaves each area with some diversity in assessment classes.

Property Assessment Value

Each property in every class is assessed annually by BC Assessment to determine the property's value. In each local jurisdiction, the values for all properties in a given class are added together to determine the total assessed value for that class. The totals for all classes combine to equal the jurisdiction's total assessment base.

Two issues related to assessment base are important to consider in the boundary-setting exercise:

- Total Value of Assessment Base A jurisdiction's total assessment base is
 one measure of financial strength and resiliency. In general, municipalities
 with a larger assessment base are better positioned to fund services and
 withstand economic shocks.
- Percentage of Non-Residential Assessment Jurisdictions that contain almost all Class 1 assessment are forced to rely on residents to carry the bulk of the local tax burden. Conversely, places with a sizable percentage of Class 2, 4, 5, and/or 6 assessment are able to spread a portion of costs beyond residences.

It is worth noting that communities in BC that formed around industry, or that evolved as service centres, tend to be characterized by relatively large and diverse assessment bases. Conversely, communities that formed around agriculture, or that have become known as vacation destinations and/or retirement centres, typically have more modest assessment bases, both in terms of size and diversity. Agriculture, vacation opportunities and retirement living are features of some communities in the South Shuswap, including Sorrento and Blind Bay.

➤ Evaluation Criteria

The following criteria related to property assessment value inform the development of recommended boundaries:

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⁴ The assessment methodology varies by class.



- Incorporation scenarios create an assessment base that is significant in value.
- Incorporation scenarios create an assessment base that is significant in diversity.
- The Two Electoral Areas Scenario ensures that each area has a sufficiently-sized and -diverse assessment base.

Agricultural Land Reserve and Farm Properties

The ALR was established to protect agricultural land in the province from non-agricultural development. "Agriculture", which is broadly defined to include farming and ranching activities that produce crops and/or livestock, is the primary allowable use on all lands in the ALR. A variety of "farm uses" are also permitted, such as wineries and cideries, processing facilities for farm products, timber production, seasonal agri-tourism activities, and others.⁵

The constraints on the use and development of properties in ALR are the same in municipalities and electoral areas. These constraints, however, may be particularly problematic for communities that are candidates for incorporation, such as Sorrento and Blind Bay. Some in these communities will look to incorporation, in part, as a way to promote additional commercial and/or industrial activity. Both places, however, have ALR lands within their communities and are tightly surrounded by ALR lands. All of the ALR lands within and outside of the communities are off-limits to non-agricultural uses. Efforts may be made to exempt lands from the ALR; however, such efforts are not guaranteed to succeed.

"Farm" is a property assessment class (Class 9) that is assigned by BC Assessment to ALR parcels that are actively used for farming practices, and that meet minimum income-generating and other requirements, as set out in the *Assessment Act*. All property that qualifies for Class 9 farm status with BC Assessment is also protected as part of the ALR. Not all ALR land, however, is classified as farm for the purpose of property taxation.

The property tax exemptions available to ALR parcels in incorporated and unincorporated areas differ depending on whether or not the properties are classified by BC Assessment as farm. ALR properties (lands and improvements) that do <u>not</u> have Class 9 status are taxed as residential properties in electoral areas and municipalities. ALR properties that <u>do</u> have Class 9 status, however, receive more generous tax exemptions in unincorporated areas. Specifically, the provincial rural tax that is charged in unincorporated areas exempts 100% of the value of farm residences, and 100% the value of related farm structures from taxation. The

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⁵ Section 2(1), Agricultural Land Reserve Use, Subdivision and Procedure Regulation



exemptions available under municipal taxation are much different — 0% of the residence's value, and \$50,000 of the assessed value of related structures.^{6,7}

➤ Evaluation Criteria

The following criteria related to ALR lands informs the development of recommended boundaries:

- Incorporation scenarios minimize the amount of ALR land included within municipal boundaries.
- Incorporation scenarios exclude Class 9 farm properties from municipal boundaries.

Community Input

The Electoral Area C (South Shuswap) Governance Study featured an extensive public engagement process to understand the community's views and perceptions on governance and local government services. The views that emerged strongly informed the Governance Committee's recommendation on restructure, and the three incorporation boundary scenarios that are the focus of this study. The community's views did not, however, speak to specific factors to consider in the development of incorporation boundaries.

Community input is more relevant, however, in the development of a boundary for the Two Electoral Areas Scenario. During the engagement process, the Committee learned that there is a clear divide between communities in Area C that desire urban services and development, and communities that prefer to remain unincorporated with modest service levels and modest development. The Committee also heard a desire to divide the total Area C population between two areas, and to limit the geographic size of each area. These two points speak to the need to make it easy for the director from each separate area to travel throughout, and to represent, his or her constituents.

➤ Evaluation Criteria

The following criterion related to community input inform the development of recommended boundaries:

 The Two Electoral Areas Scenario divides Area C based on community preference for urban services and development.

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The exemptions applied by the school tax and regional district tax are the same for Class 9 lands and improvements in municipalities and electoral areas.

Municipal councils may choose to set municipal property tax rates to, in effect, harmonize the tax treatment of farm lands in municipalities with farm lands outside of municipal boundaries. Some municipalities in the province do set Class 9 farm rates to achieve this result. Such an approach, however, could not be assumed in any restructure exercise.



 The Two Electoral Areas Scenario divides Area C on the basis of population and geography in a way that allows two new electoral area directors to effectively represent and travel throughout their respective jurisdictions.

SUMMARY TABLE

Figure 2.2 summarizes the factors and associated evaluation criteria that were considered in developing potential boundaries.

Figure 2.2 Factors and Criteria

| Factors | Evaluation Criteria |
|----------------------|---|
| Future Development | Incorporation scenarios that involve Sorrento are structured to include the Village Centre, which is identified in the OCP as the primary location for future residential, retail and business development in Area C. |
| | Incorporation scenarios that involve Blind Bay include the Blind Bay Secondary Settlement Area, which is identified in the OCP as an area for future residential development and some neighbourhood commercial development. |
| | Incorporation scenarios exclude lands that are identified in the OCP for low-density residential development, which include future land-use classes with densities no greater than 1 unit per 4 ha. |
| | Incorporation scenarios minimize the amount of protected agricultural land included within the boundaries. |
| | Incorporation scenarios represent areas that are large enough to allow for future growth, but sufficiently compact to facilitate efficient and cost-effective servicing. |
| | The Two Electoral Areas Scenario does not result in the splitting of any individual settlement area, including the Sorrento Village Centre, the Blind Bay Secondary Settlement Area, and the secondary settlement areas identified for Eagle Bay, Sunnybrae and White Lake. |
| Existing Settlements | All scenarios keep whole existing settlement areas. |
| and Regulations | Incorporation scenarios include higher-density residential zones, as well as commercial zones. |

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| Factors Evaluation Criteria | | | | | | |
|---|---|--|--|--|--|--|
| Population and Population Density | Incorporation scenarios represent areas with more than 1,000 people. | | | | | |
| | Incorporation scenarios represent areas with population densities that set the areas apart from their rural surroundings, and that allow for the development of efficient infrastructure. | | | | | |
| | The Two Electoral Areas Scenario avoids significant differences in population between the two new areas. | | | | | |
| Local Government Services and Service Areas | Incorporation scenarios include the whole of individual local service area for water, sewer, fire and other local, community-specific services. | | | | | |
| | The Two Electoral Areas Scenario places the whole of individual local service areas within one or the other new electoral area. | | | | | |
| Potential Future Infrastructure Development | Incorporation scenarios accommodate the need for future infrastructure development, in particular the development of a public sewage treatment plant. | | | | | |
| | The scenario that divides Electoral Area C into two electoral areas accommodates, in each new area, the need for future infrastructure required to service local communities within the new area. | | | | | |
| Local Road Networks | Incorporation scenarios include only those roads that are required to facilitate proper transportation and land use planning, and that are important to the local community. | | | | | |
| | Incorporation scenarios, wherever practicable, include complete local roads, and do not create "orphan" road- ends by excluding portions of no-through roads. | | | | | |
| Property Assessment Classes | Incorporation scenarios include properties that together cover a range of property assessment classes. | | | | | |
| | The Two Electoral Areas Scenario areas leaves each area with some diversity in assessment classes. | | | | | |
| Property Assessment Values | Incorporation scenarios create an assessment base that is significant in value. | | | | | |

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| Factors | Evaluation Criteria |
|------------------------------|---|
| | Incorporation scenarios create an assessment base that is significant in diversity. |
| | The scenario that divides Electoral Area C into two electoral areas ensures that each area has a sufficiently- sized and -diverse assessment base. |
| Agricultural Land Reserve | Incorporation scenarios minimize the amount of ALR land included within municipal boundaries. |
| | Incorporation scenarios exclude Class 9 farm properties from municipal boundaries. |
| Community Input | The Two Electoral Areas Scenario divides Area C based on community preference for urban services and development. |
| | The Two Electoral Areas Scenario divides Area C on the basis of population and geography in a way that allows two new electoral area directors to effectively represent and travel throughout their respective jurisdictions. |

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CHAPTER 3 RECOMMENDED BOUNDARIES

Based on the factors identified in the previous chapter, the consultants developed several potential boundaries for the four boundary scenarios. Successive iterations for each scenario were refined to better align with the evaluation criteria. Final versions emerged to become the recommended boundaries.

This chapter of the report introduces and describes the recommended boundaries, and assesses them using the evaluation criteria. Individual sets of maps on each of the recommended boundaries are contained in four appendices — one set and one appendix for each boundary scenario.

SORRENTO MUNICIPALITY SCENARIO

The recommended boundary for the Sorrento Municipality Scenario is presented in *Appendix I*. Six separate maps, all showing the same recommended boundary, are included:

- Map 1: Base Map— This opening map is the most basic of the series, showing lot lines, roads and rail corridors.
- Map 2: Assessment Classes All nine property assessment classes are shown on the base map.
- Map 3: OCP Designations Future land uses, as identified in the OCP, are highlighted on this map. To enhance readability, the 26 separate OCP categories have been consolidated into a total of 13. Six commercial designations are represented together, as are eight rural residential designations.
- Map 4: Agricultural Land Reserve Map 4 shows all ALR lands within and surrounding the recommended boundary.
- *Map 5: Local Service Areas* This map features the local fire department response areas, as well as local water and sewer service area.
- Map 6: Census Areas Map 6 identifies the Sorrento Designated Place boundary that is used by Statistics Canada for the purpose of counting and reporting population.

The insert at the bottom of every map presents the total size (km²) of the proposed incorporated area, the total length of local roads, and the total estimated population. The insert also shows the total assessment base (land and improvements) for the proposed jurisdiction, broken out to highlight the Class 1

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(residential) base, Class 4 (major industry) and Class 5 (light industry) assessment base (combined), Class 6 (business) base, Class 8 (recreation/non-profit) base, and the base for all other assessment classes combined.

General Description

In developing the recommended boundary for the Sorrento Municipality Scenario, efforts were taken to:

- create a compact jurisdiction, while also providing for some future growth potential
- minimize the number of "property peninsulas" that may result from rightangle turns in the boundary route
- capture all existing Sorrento settlement areas, as well as all potential urban development areas as identified in the OCP
- minimize the amount of ALR land within the boundary, and exclude as much Class 9 farm land as possible
- exclude rural resource lands
- contain all local water service areas, as well as all of the Sorrento portion of the South Shuswap Liquid Waste Management Plan (LWMP) area, and Sorrento portion of the Sorrento-Blind Bay Fire Department response area
- include lands in a variety of property assessment classes
- capture an assessment base that is as sizable and diverse as practicable

Evaluation

Figure 3.1, beginning on the following page, assesses the recommended Sorrento boundary against the evaluation criteria. The left-hand column in the figure lists the criteria. The centre column grades the recommended boundary against each criterion using a three-point scale:

fully meets criterion

○ — partly meets criterion

★ — does not meet criterion

The right-hand column in the figure provides comments to help explain the grades awarded under each set of criteria.

It is important to emphasize that the recommended boundaries cannot be expected to fully meet all criteria. Trade-offs between individual criteria are to be anticipated. For example, the desire to minimize ALR properties in the incorporated area needs to be balanced against the desire to include all service areas with the boundary. This trade-off and others are explained further in the comments column of the figure.

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Figure 3.1 Sorrento Municipality Scenario Evaluation of Recommended Boundary

| Evaluation Criteria | Grade | Comments | | |
|--|-------|---|--|--|
| Future Development | | | | |
| Includes Sorrento Village Centre, which is identified in the OCP as the primary location for future residential, retail and business development in Area C. | • | The recommended boundary contains some agricultural land. The boundary also includes some rural residential lands that are designated in the OCP as Large Holdings, and that anticipate future low-density development of 1 unit per 10 ha. | | |
| Excludes lands that are identified as areas for low-density residential development, which include future land-use classes with densities no greater than 1 unit per 4 ha. | 0 | Some of these types of lands were included only so that other adjacent commercial or residential lands could also be included. In other cases, the lands are within the Sorrento portion of the fire department boundary, and/or the Sorrento water service area. Lands were also | | |
| Minimizes the amount of protected agricultural land within the boundaries. | 0 | included to minimize the creation of "property peninsulas", to reflect transportation networks, and to prevent the creation of "orphan" roadends (i.e., portions of no-through roads left outside of the boundary). | | |
| Represents area that is large enough to allow for future growth, but sufficiently compact to facilitate efficient and cost- effective servicing. | • | ends (i.e., portions of no-through roads left outside of the boundary). | | |
| Existing Settlements and Regulations | | | | |
| Existing settlement areas are kept whole, and within the recommended boundary. | • | All significant existing development areas within the Sorrento community, including higher-density residential zones and commercial | | |
| Incorporation scenarios include higher- density residential zones, as well as commercial zones. | • | zones, are contained within the recommended boundary. | | |
| Population and Population Density | | | | |
| Population within recommended boundary exceeds 1,000. | • | Statistics Canada reports a population of 1,285, and a density of 108.3 persons/km ² , for the Sorrento Designated Place. The Designated Place | | |

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| Eva | luation Criteria | Grade | Comments |
|-----|--|-------|--|
| _ | Population density sets the area apart from its rural surroundings, and allows for the development of efficient infrastructure. | • | boundary, shown on Map 5 in <i>Appendix I</i> , is very similar to the recommended boundary for this scenario. This density figure is comparable to that of several municipalities, including the City of Salmon Arm. |
| Lo | cal Government Services and Service Areas | | |
| | Includes the whole of individual local service areas for water, sewer, fire department and other local services that are provided to the Sorrento community. | 0 | Care has been taken to include the entire Sorrento Water local service areas, and the entire Sorrento portion of the South Shuswap LWMP service area. Much of this latter area extends into Blind Bay and Reedman Point. The Sorrento potion of the Sorrento-Blind Bay Fire Department area is contained within the boundary. To the southwest of the Sorrento community lie some large parcels designated as rural resource. These lands lie outside of the fire department area; for that reason, they have been excluded from the recommended boundary for the scenario. The Sorrento Street Lighting service area (not shown on maps) is entirely contained within the recommended boundary. |
| Po | tential Future Infrastructure Development | | |
| _ | Accommodates the need for important future infrastructure development, in particular the development of a public sewage treatment plant. | • | There has been no discussion regarding specific future infrastructure needs in the Sorrento area. Sufficient land area, however, is included to accommodate needs that may arise. |
| Lo | cal Road Networks | | |
| _ | Includes only those roads that are required to facilitate proper transportation and land use planning, and that are important to the local community. | • | |



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| Evaluation Criteria | Grade | Comments | |
|--|-------|--|--|
| Includes complete local roads, and does not create "orphan" road-ends by excluding portions of no-through roads. | • | | |
| Property Assessment Classes | | | |
| Includes properties that together cover a range of property assessment classes. | 0 | The Sorrento community, similar to the whole of Electoral Area C, has limited lands classified as Class 2, 4, 5 and 6. An effort has been made, however, to maximize the range of classes within the boundary. | |
| Property Assessment Values | • | | |
| Creates an assessment base that is significant in value. | 0 | At \$386 million, the assessment base of the proposed incorporation area is not great; however, it is greater than the base in 57 of the 160 municipalities in BC today. | |
| Creates an assessment base that is significant in diversity. | 0 | The assessment base, at 94.6% residential, would make the jurisdiction highly dependent on residential property tax revenues. Eighteen municipalities in the province today have total assessment bases with a greater percentage of residential value (the median municipal assessment base measure is 85.1% residential). The 94.6% residential figure, however, is lower than the existing 97.6% figure for Electoral Area C. | |
| Agricultural Land Reserve | | | |
| Minimizes the amount of ALR land included within boundary. Excludes Class 9 farm properties from | 0 | Some ALR land has been included. One small Class 9 property is within the boundary. | |
| municipal boundaries. | | | |
| Community Input | | | |
| No criteria specific to the incorporation scenarios. | n/a | n/a | |

| lacksquare | Fully | Meets | Criterion |
|------------|-------|-------|-----------|
| | | | |



BLIND BAY MUNICIPALITY SCENARIO

The recommended boundary for the Blind Bay Municipality Scenario is presented in *Appendix II*. Six separate maps, all showing the same border, are included. These maps have the same titles, and show the same data layers, as the maps presented earlier for the Sorrento Municipality Scenario. The maps are:

- Map 1: Base Map
- Map 2: Assessment Classes
- Map 3: OCP Designations
- Map 4: Agricultural Land Reserve
- Map 5: Service Areas
- Map 6: Census Areas

As with the previous scenario, the insert on every Blind May Municipality Scenario map presents the total size (km²) of the proposed incorporated area, the total length of local roads, and the total estimated population. The insert also shows the total assessment base (land and improvements) for the proposed jurisdiction, broken out to highlight the Class 1 (residential) base, Class 4 (major industry) and Class 5 (light industry) assessment base (combined), Class 6 (business) base, Class 8 (recreation/non-profit) base, and the base for all other assessment classes combined.

General Description

In developing the recommended boundary for the Blind Bay Scenario, many of the same objectives that guided the Sorrento exercise applied. Specifically, efforts were taken to:

- create a compact jurisdiction, while also providing for some future growth potential
- minimize the number of "property peninsulas" that result from right-angle turns in the boundary route
- capture all existing Blind Bay settlement areas, as well as all potential urban development areas as identified in the OCP
- minimize the amount of ALR land within the boundary, and exclude as much Class 9 farm land as possible
- exclude rural resource lands
- contain all local water service areas, as well as all of the Blind Bay portion of the South Shuswap LWMP and the Sorrento-Blind Bay Fire Department area
- include lands in a variety of property assessment classes
- capture an assessment base that is as sizable and diverse as practicable

Evaluation

Figure 3.2 assesses the recommended boundary against the evaluation criteria. Trade-offs between and among criteria are explained in the comments column of the figure.

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Figure 3.2 Blind Bay Municipality Scenario Evaluation of Recommended Boundary

| Evaluation Criteria | Grade | Comments | | |
|---|-------|---|--|--|
| Future Development | | | | |
| Includes Blind Bay Settlement Area, which in the Area C OCP is a location for future residential and neighbourhood commercial development. | • | The recommended boundary contains some agricultural land. The boundary also encompasses one large parcel, just south of Reedman Point, that is designated in the OCP as Rural Holding (shown on Map 3 in <i>Appendix II</i> as Rural Residential). Future development on this parcel | | |
| Excludes lands that are identified in the OCP for low-density residential development, which include future land- use classes with densities no greater than 1 unit per 4 ha. | 0 | is identified as low-density development, at 1 unit per 60 ha. The agricultural lands are included in order to capture commercial properties in Balmoral, to align with the Fire Department area boundary, and to avoid road dead-ends. The large rural residential parcel is included because it lies between the centre of Blind Bay and | | |
| Minimizes the amount of protected agricultural land within the boundaries. | • | Reedman Point to the north. | | |
| Represents area that is large enough to allow for future growth, but sufficiently compact to facilitate efficient and cost- effective servicing. | • | | | |
| Existing Settlements and Regulations | • | | | |
| Existing settlement areas are kept whole, and within the boundary. | • | The Blind Bay Secondary Settlement and all other developed areas within the Blind Bay community, including higher-density residential | | |
| Includes higher-density residential zones, as well as commercial zones. | • | zones and commercial zones, are contained within the recommended boundary. | | |
| Population and Population Density | | | | |
| Population within boundary exceeds 1,000. | • | Statistics Canada reports a population of 1,315, and a density of 78.4 persons/km², for the Blind Bay Designated Place. Statistics Canada also | | |

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| Evaluation Criteria | Grade | Comments |
|--|-------|--|
| Population density sets the area apart from its rural surroundings, and allows for the development of efficient infrastructure. | • | reports a population of 1,976, and a relatively significant density of 585.8 persons/km², for the Blind Bay Population Centre. The boundaries for both population areas are shown on Map 5 in <i>Appendix II</i> . The larger Designated Place boundary surrounds the Population Centre boundary, and is very similar to the recommended boundary for the Blind Bay Municipality Scenario. |
| Local Government Services and Service Areas | | |
| Includes the whole of individual local service areas for water, South Shuswap LWMP, Sorrento-Blind Bay Fire Department, and other local services that are provided to the community. | 0 | There are three local water service areas in the Blind Bay area: Cedar Heights Water, Lakeview Place Water, and MacArthur/Reedman Water. All three are included, in whole, within the recommended boundary. The entire Blind Bay portion of the South Shuswap LWMP area, which includes Reedman Point, is also included. The Blind Bay portion of the Sorrento-Blind Bay Fire Department area is contained within the boundary. The Blind Bay Street Lighting service area (not shown on maps) is also contained within the boundary. |
| Potential Future Infrastructure Development | | |
| Accommodates the need for important future infrastructure development, in particular the development of a public sewage treatment plant. | • | There has been considerable discussion regarding a new sewage treatment plant in the Blind Bay area. Sufficient land area has been included in the southern part of the proposed boundary area to accommodate such a use. The site in Balmoral that had been identified for the project, and that is currently before the ALC, is within the recommended boundary. |
| Local Road Networks | | |
| Includes only those roads that are required to facilitate proper transportation and land use planning, and that are important to the local community. | • | The recommended boundary is particular strong when assessed against local road criteria. |



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| Evaluation Criteria | Grade | Comments | |
|---|-------|--|--|
| Includes complete local roads, and does not create "orphan" road-ends by excluding portions of no-through roads. | • | | |
| Property Assessment Classes | | | |
| Includes properties that together cover a range of property assessment classes. | 0 | As much diversity as possible in property types has been included within the recommended boundary. | |
| Property Assessment Values | | | |
| Creates an assessment base that is significant in value. | • | At \$889 million, the assessment base of the proposed incorporation area is considerable. It is greater than the base in 83 of the 160 | |
| Creates an assessment base that is significant in diversity. | | municipalities in BC today, and slightly higher than the median municipal assessment base value in the province of \$850 million. | |
| | × | At over 98% residential, however, the assessment base would make the jurisdiction highly dependent on residential property tax revenues. Only four municipalities in the province today have total assessment bases with a greater percentage of residential value, and a lower level of diversity. | |
| Agricultural Land Reserve | | | |
| Minimizes the amount of ALR land included within the boundary. Excludes Class 9 farm properties from municipal boundaries. | 0 | Some ALR land has been included to avoid creating "property peninsulas", to align the recommended boundary with the local service area boundaries, to capture outlying commercial properties, and to accommodate potential future infrastructure. One Class 9 property within the boundary would be impossible to exclude. | |
| Community Input | | | |
| No criteria specific to the incorporation scenarios. | n/a | n/a | |



SORRENTO-BLIND BAY MUNICIPALITY SCENARIO

The recommended boundary for the Sorrento-Blind Bay Municipality Scenario is presented in *Appendix III*. Six separate maps, all showing the same border, are included. These maps have the same titles, and show the same data layers, as the maps presented earlier for the other incorporation scenarios. The maps are:

Map 1: Base Map

• Map 2: Assessment Classes

Map 3: OCP Designations

Map 4: Agricultural Land Reserve

Map 4: Service Areas

Map 5: Census Areas

As with the previous scenario, the insert on every map presents the total size (km²) of the proposed incorporated area, the total length of local roads, and the total estimated population. The insert also shows the total assessment base (land and improvements) for the proposed jurisdiction, broken out to highlight the Class 1 (residential) base, Class 4 (major industry) and Class 5 (light industry) assessment base (combined), Class 6 (business) base, Class 8 (recreation/non-profit) base, and the base for all other assessment classes combined.

General Description

In developing the recommended boundary, many of the same objectives that guided the boundary exercise for the earlier scenarios applied. Specifically, efforts were taken to:

- create as compact a jurisdiction as possible, while also providing for some future growth potential
- minimize the number of "property peninsulas" that result from right-angle turns in the boundary route
- capture the existing Sorrento Village Centre, the Blind Bay Secondary Settlement Area, all current development areas, and all potential urban development areas as identified in the OCP
- minimize the amount of ALR land within the boundary, and exclude as much Class 9 farm land as possible.
- exclude rural resource lands
- contain all local water service areas, as well as the entire Shuswap Lake LWMP local sewer area, and all Blind Bay and Sorrento parts of the Sorrento-Blind Bay Fire Department area
- include lands in a variety of property assessment classes
- capture an assessment base that is as sizable and diverse as practicable

Evaluation

Figure 3.3 assesses the recommended boundary against the evaluation criteria.

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Figure 3.3 Sorrento – Blind Bay Municipality Scenario Evaluation of Recommended Boundary

| Evaluation Criteria | Grade | Comments | |
|---|-------|--|--|
| Future Development | | | |
| Includes Sorrento Village Centre and Blind Bay Secondary Settlement Area, both of which are identified for future residential and commercial development. | • | The recommended boundary contains some agricultural land. The boundary also includes some rural residential lands that anticipate future low-density development of greater than 1 unit per 4 ha. | |
| Excludes lands that are identified in the OCP for low-density residential development. | 0 | Some of these lands were included only so that other adjacent commercial or residential lands could be included. In other cases, the lands are within the Sorrento-Blind Bay Fire Department boundary, and/or the local water service areas. In all cases, lands were included | |
| Minimizes the amount of protected agricultural land within the boundaries. | • | to minimize the creation of "property peninsulas", to reflect transportation networks, and to prevent the creation of "orphan" road-ends. | |
| Represents area that is large enough to allow for future growth, but sufficiently compact to facilitate efficient and cost- effective servicing. | • | Todu-enus. | |
| Existing Settlements and Regulations | | | |
| Existing settlement areas are kept whole, and within the boundary. | • | All settlement areas and developed areas are within the boundary, including higher-density residential zones and commercial zones. | |
| Includes higher-density residential zones, as well as commercial zones. | • | | |
| Population and Population Density | | | |
| Population within the boundary exceeds 1,000. | • | Based on Census 2016 data, the estimated population for the potential incorporation area is approximately 4,700. The density for the entire | |
| Population density sets the area apart from its rural surroundings, and allows for | • | area is difficult to calculate; however, based on the figures reported earlier for the other incorporation scenarios, the population density for | |

○ — Partly Meets Criterion

★ — Does Not Meet Criterion

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● — Fully Meets Criterion



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● — Fully Meets Criterion

| Evaluation Criteria | Grade | Comments | |
|--|-------|--|--|
| the development of efficient infrastructure. | | the combined Sorrento-Blind Bay Scenario is anticipated to be comparable with that of many municipalities in BC. | |
| Local Government Services and Service Areas | | | |
| Includes the whole of individual local service areas for water, the South Shuswap LWMP, the Sorrento-Blind Bay Fire Department, and other local services that are provided to the community. | • | The three local water service areas in the Blind Bay area, and the single Sorrento Water service area, are entirely contained within the recommended boundary. So, too, is the whole of the South Shuswap LWMP service. The Sorrento and Blind Bay potions of the Sorrento-Blind Bay Fire Department area are contained within the boundary, as are the Sorrento and Blind Bay Street Lighting service areas (not shown on maps). | |
| Potential Future Infrastructure Development | | тару. | |
| Accommodates the need for future infrastructure development, in particular the development of a public sewage treatment plant. | • | Sufficient land area is included to accommodate potential future infrastructure. | |
| Local Road Networks | | | |
| Includes only those roads that are required to facilitate proper transportation and land use planning, and that are important to the local community. | • | The recommended boundary is particular strong when assessed against local road criteria. | |
| Includes complete local roads, and does not create "orphan" road-ends. | • | | |
| Property Assessment Classes | , | | |
| Includes properties that together cover a range of property assessment classes. | 0 | As much diversity as possible in property types has been included within the recommended boundary. | |

○ — Partly Meets Criterion

≭ — Does Not Meet Criterion



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| Evaluation Criteria | Grade | Comments | |
|---|-------|---|--|
| Property Assessment Values | | | |
| Creates an assessment base that is significant in value. | • | At close to \$1.3 billion, the assessment base of the proposed incorporation area is considerable. It is greater than the base in 94 of | |
| Creates an assessment base that is significant in diversity. | | the 160 municipalities in BC today. It is also well above the median municipal assessment value in the province of \$850 million. At 97.1% residential, the assessment base would make the jurisdiction highly dependent on residential property tax revenues. Ten | |
| | 0 | municipalities in the province today have total assessment bases with a greater percentage in residential value, and a lower level of diversity. The 97.1% figure, however, is very similar to that which is in place today for the whole of Electoral Area C. | |
| | | The boundary maximizes the potential value and diversity of the assessment base, given the existing assessment base characteristics for Area C as a whole. | |
| Agricultural Land Reserve | | | |
| Minimizes the amount of ALR land included within boundary. Excludes Class 9 farm properties from municipal boundaries. | 0 | Some ALR land has been included to avoid creating "property peninsulas", to align the recommended boundary with the local service area boundaries, to capture outlying commercial properties, and to accommodate potential future infrastructure. One small Class 9 property within the boundary would be difficult to exclude; a second would be impossible. | |
| Community Input | | | |
| No criteria specific to the incorporation scenarios. | n/a | n/a | |



TWO ELECTORAL AREAS SCENARIO

The recommended boundary for the Two Electoral Areas Scenario is presented in *Appendix IV*. Six separate maps, all focused on the new electoral area, are included. These maps have the same titles, and show the same data layers, as the maps presented earlier for each of the incorporation scenarios. The maps are:

- Map 1: Base Map
- Map 2: Assessment Classes
- Map 3: OCP Designations
- Map 4: Agricultural Land Reserve
- Map 5: Service Areas
- Map 6: Census Areas

The insert on every map in the series presents the total size (km²) of the each proposed electoral area, the total length of local roads in each, and each jurisdiction's total estimated population. The insert also shows the total assessment base (land and improvements) for the proposed jurisdictions, broken out to highlight the Class 1 (residential) base, Class 4 (major industry) and Class 5 (light industry) assessment base (combined), Class 6 (business) base, Class 8 (recreation/non-profit) base, and the base for all other assessment classes combined.

General Description

In developing the recommended boundary, efforts were taken to:

- create geographically-smaller electoral areas that can be easily travelled by an electoral area director
- provide for a good level of balance in population in the areas
- keep whole existing individual settlement areas
- keep whole the all existing individual local water service areas, as well as the entire Shuswap Lake LWMP local sewer area, and all fire department response areas
- include lands in a variety of property assessment classes in each area
- capture an assessment base for each area that is as sizable and diverse as practicable
- keep together communities with similar perspectives and wishes related to service levels and urban development

Evaluation

Figure 3.4 assesses the recommended boundary against the evaluation criteria. The number of criteria is smaller for this scenario than for the previously-assessed incorporation options.

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Figure 3.4 Two Electoral Areas Scenario Evaluation of Recommended Boundary

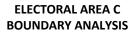
| Evaluation Criteria | Grade | Comments |
|--|-------|--|
| Future Development | | |
| Does not result in the splitting of any individual settlement area, including the primary Sorrento Village Centre, the Blind Bay Secondary Settlement Area, and the secondary settlement areas identified for Eagle Bay, Sunnybrae and White Lake. | • | All individual primary and secondary settlement areas remain intact in the new electoral area. |
| Existing Settlements and Regulations | | |
| Existing settlement areas are kept whole, and within the boundary. | • | |
| Population and Population Density | | |
| Avoids a significant imbalance in the populations of the two new areas. | * | Based on Census 2016 data, the estimated population for the new electoral area is 5,470; the remainder of Area C has an estimated population of just over 2,450. To achieve greater balance, the communities of Sorrento and Blind Bay would need to be placed in separate electoral areas. These communities, however, both seek a higher level of urban servicing and development — a common desire that outweighs the criterion for greater population balance. It is worth noting that even at 2,450 people, the remainder of Area C would have a population greater than that of three existing electoral areas of the CSRD. |
| Local Government Services and Service Areas | | |

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| | Places the whole of individual local service areas within one or the other electoral area. | Grade | The three local water service areas in the Blind Bay area, and the single Sorrento Water service are entirely contained within the new electoral area. So, too, is the whole of the South Shuswap LWMP service. The entire Sorrento-Blind Bay Fire Department area is also contained within the new electoral area. Three other fire department areas, as well as the Kault Hill fire service area, are within the remainder of Area C. Street lighting service areas are kept whole in one or the other electoral area. | |
|-----|---|-------|---|--|
| Pot | ential Future Infrastructure Development | | | |
| _ | Accommodates, in each new area, the need for future infrastructure required to service local communities. | • | Sufficient land area is included in each area to accommodate potential future infrastructure. | |
| Loc | Local Road Networks | | | |
| _ | No criteria specific to the Two Electoral Areas Scenario. | n/a | n/a | |
| Pro | Property Assessment Classes | | | |
| _ | Ensures that each area has some diversity in assessment classes. | 0 | Both areas contain as much diversity in property types as practicable, given the range of types available. | |
| Pro | Property Assessment Values | | | |
| _ | Ensures that each area has a sufficiently- sized and -diverse assessment base. | 0 | Both the new area and the remainder of Area C has sufficiently-sized assessment bases, at \$1.42 billion and \$1.08 million respectively. Neither, however, as a significantly diverse base — in both cases, residential assessments account for over 97% of total value. | |
| Agr | Agricultural Land Reserve | | | |
| _ | No criteria specific to the Two Electoral Areas Scenario. | n/a | n/a | |

○ — Partly Meets Criterion

≭ — Does Not Meet Criterion

● — Fully Meets Criterion



| Evaluation Criteria | Grade | Comments | |
|--|---|--|--|
| Community Input | | | |
| Divides Area C based on community preference for urban services and development. | 0 | The recommended boundary separates Sorrento and Blind Bay from most of the other communities in the remainder of Area C. Sorrento and Blind Bay have expressed a desire for higher service and | |
| Divides Area C on the basis of population and geography in a way that allows two new electoral area directors to effectively represent and travel throughout their respective jurisdictions. | development levels. Notch Hill is placed with Sorrento and Blind Bay in the new area, but may not share the same interest in servicing and development. | | |
| | | Notch Hill's inclusion reflects the desire to limit the geographic size of the east area in order to facilitate effective representation. | |

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CHAPTER 4 POTENTIAL RESTRUCTURE IMPLICATIONS

Each of the recommended boundaries represents a study area for a particular restructure scenario. A decision to pursue restructure in accordance with one or more of the scenarios would result in various implications for the proposed new jurisdiction, and for the remainder of Electoral Area C. In a full-scale restructure study, all of the implications would be identified and assessed in detail. This *Boundary Analysis*, by contrast, presents a high-level overview.

The high-level overview is presented in this chapter of the report. For each scenario, three types of implications are considered:

- service finance
- governance
- property tax

SORRENTO MUNICIPALITY SCENARIO

Service Finance Implications

A decision to pursue the development of a Sorrento Municipality, as defined by the recommended boundary, would have a range of financial implications for the new jurisdiction and, to a lesser degree, the remainder of Electoral Area C. Consider the following points:

- The new municipality would assume responsibility for providing, within the
 recommended boundary area, all local services that are today provided by
 the CSRD.⁸ Only two of these services Sorrento water and Sorrento street
 lighting are provided exclusively to areas within the new jurisdiction.
 Most are provided to areas that exceed the proposed boundary.
- Within the recommended boundary, the new municipality could choose to directly deliver the services for which it assumed responsibility. The jurisdiction could, however, choose to be a participant in several of the services, and continue to have them delivered by the CSRD.
- Costs incurred to provide the various local services to the new jurisdiction would be a function, in part, of the service delivery model chosen (i.e., who delivers the services, how they are delivered). Costs would also be influenced by economies or diseconomies of scale, and assumptions regarding service levels. A decision by the new municipality to become a service participant, and to leave service delivery with the CSRD, would limit

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⁸ Appendix V presents a list of all local services that are provided within the recommended study area today. Local services provided by the CSRD are identified.



any potential cost impacts.

- Some of the local services provided by agencies other than the CSRD would be unaffected by a Sorrento restructure initiative. Local policing, for example, would not be impacted by any structural change. The population within the recommended boundary, at 1,300 people, would fall well below the 5,000 population threshold at which responsibility for local policing transfers from the province to municipalities.
- A Sorrento restructure would have implications related to local roads. The
 responsibility for, and the costs associated with, local road construction,
 improvement and maintenance would be automatically transferred from the
 province to the new jurisdiction. Based on restructure experiences
 elsewhere in the province, these costs could be substantial.
- There are important potential implications related to local sewer and fire services for both the Sorrento study area and the remainder of Area C. The service areas for these services exceed the recommended scenario boundary, and include many ratepayers other than those within the Sorrento community. In all likelihood, these services would remain with the Regional District; the new Sorrento municipality would become a participant in the services.
- A Sorrento municipality would incur some administration costs, over and above any service costs, to function as a separate jurisdiction. A municipal hall, a core staff, vehicles, a basic public works yard and other start-up costs are examples.
- The remainder of Electoral Area C, outside of the Sorrento municipal boundary, would face potential financial implications as a result of restructure. Specifically, the loss of population and tax base in affected local CSRD services could result in higher costs for remaining taxpayers. The ultimate financial impact would depend on the ability of the CSRD to offset losses in revenue with reductions in service cost.

Governance Implications

A new Sorrento Municipality would replace the CSRD as the local government for the area within the recommended boundary. The Municipal Council would replace the CSRD Board as the primary local governing body, responsible for setting service levels, and for all other key local decisions in the community. With a population of 1,300, the Council would consist of five members, including one mayor and four councilors.

Development services is one of the more important areas of local service over which the new Council would assume decision-making authority. Local decisions concerning long-term land use planning matters, in particular, would set in place

ELECTORAL AREA C
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future development levels and settlement patterns within the new boundary. Following incorporation, the existing CSRD OCP, zoning and building regulations would remain in effect as municipal bylaws. The new Council, however, would have the authority to review, modify or completely replace these legislative documents.

The new municipality would automatically become a member municipality of the CSRD, with one municipal director. For weighted corporate votes on financial and other matters, and for weighted stakeholder votes on local service administration, the jurisdiction's sole director would have one vote (the CSRD's voting unit is 2,500).

With the loss of 1,300 people to the new municipality, Area C would be left with a population of just over 6,600. For weighted votes, the Area C director would receive three votes instead of the four that are currently allotted. In stakeholder votes on local services that involved Area C and the new municipality, the Area C director would outweigh the Sorrento municipal director.

Property Tax Implications

Based on restructure experiences elsewhere in the province, is likely that property owners within the study area would face increased local taxes as a result of incorporation. This prediction is driven largely by the transfer of the local roads to the new municipality.

Residential property owners in the new jurisdiction could be expected to shoulder a slightly lower part of the local service tax burden than at present. This potential implication is based on the fact that residential assessment values would account for 94.6% of the total property tax base, which is lower than the 96.9% for the whole of Area C today. This finding, however, needs to be balanced by the expectation that a slightly higher percentage of non-residential assessment would result in an small upward shift in the overall converted assessment value for the area, relative to the converted assessment for the remainder of Area C. The new area could, therefore, pay a slightly higher proportion of shared, CSRD service costs than property owners within the area pay today.

BLIND BAY MUNICIPALITY SCENARIO

Service Finance Implications

The potential service finance implications associated with the Blind Bay Municipality Scenario would be the same in nature as those identified for the Sorrento Scenario. Responsibility for providing and funding all local services that are currently provided in the community by the CSRD would transfer to the new Blind Bay Municipality. The new municipality could directly provide all such services; alternatively, the jurisdiction could continue, as a service participant, to rely on the CSRD for the delivery of some or all of the services. The new jurisdiction would become responsible for all local roads. With a population of 3,300, however, the jurisdiction would not be responsible for policing.

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The potential implications for local sewer would differ from those anticipated for the Sorrento Municipality Scenario. Most of the existing South Shuswap LWMP service, including the future potential site for a new treatment plant, is contained within the recommended Blind Bay Scenario boundary. A new Blind Bay Municipality would most likely seek to assume responsibility over the sewer service, and provide it through a service agreement to properties outside of the Blind Bay boundary.

Governance Implications

A new Blind Bay Municipality would replace the CSRD as the local government for the area within the recommended boundary. The Municipal Council would become the primary local governing body, responsible for setting service levels, and for all other key local decisions in the community. With a population of 3,300, the Council could have seven members; alternatively, it could be limited to five members.

As with the previous scenario, development services is one of the more important areas of local service over which the new Council would assume decision-making authority. Local decisions over long-term land use planning matters, in particular, would set in place future development levels and settlement patterns within the recommended boundary area. Immediately following incorporation, the existing CSRD OCP, zoning and building regulations would remain in effect as municipal bylaws. The new Council, however, would have the authority to review, modify or completely replace the key bylaws.

The new municipality would automatically become a member municipality of the CSRD, with one municipal director. For weighted corporate votes on financial and other matters, and for weighted stakeholder votes on local service administration, the jurisdiction's sole director would have two votes.

With the loss of 3,300 people to the new municipality, Area C would be left with a population of just over 4,600. For weighted votes, the Area C director would receive only two votes instead of the four that are currently allotted. In stakeholder votes on local services that involved Area C and the new municipality, the Area C director and the new municipal director carry equal weight. Consensus on decisions would need to be established in all cases.

Property Tax Implications

It is likely that property owners within the study area would face increased local taxes as a result of incorporation. As before, this prediction is driven largely by the transfer of local roads to the new municipality.

Residential property owners in the new jurisdiction may be expected to shoulder a slightly higher part of the local service tax burden than at present, based on the fact that residential assessment values would account for over 98% of the total property tax base, compared to 96.9% for the whole of Area C today. A slightly lower percentage of non-residential assessment could result, however, in a small

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downward shift in the overall converted assessment value for the area, relative to the converted assessment base for the remainder of Area C. The new area could, therefore, pay a slightly lower proportion of shared, CSRD service costs than property owners within the area pay today.

SORRENTO-BLIND BAY MUNICIPALITY SCENARIO

Service Finance Implications

The potential service finance implications associated with the Sorrento-Blind Bay Municipality Scenario would be the same in nature as those identified for the other two incorporation scenarios. Responsibility for providing and funding all local services that are currently provided by the CSRD would transfer to the new municipality. Given its relatively large size, the municipality may choose to directly provide many of these local services. The jurisdiction would likely, however, continue as a service participant to rely on the CSRD for the delivery of some services.

The new jurisdiction would become responsible for all local roads. With an estimated population of 4,700, the jurisdiction would not be responsible for policing; however, the eventual transfer of responsibility for this service would be anticipated to occur in the short- to medium-term following an incorporation.

The entire South Shuswap LWMP service, including the future potential site for a new treatment plant, is contained within the recommended Sorrento-Blind Bay Scenario boundary. The new municipality, therefore, would automatically assume responsibility over this service.

Governance Implications

A new Sorrento-Blind Bay Municipality would replace the CSRD as the local government for the area within the recommended boundary. The Municipal Council would become the primary local governing body, responsible for setting service levels, and for all other key local decisions in the community. With a population of 4,800, the Council would likely have seven members, including one mayor and six councilors.

All local decisions over long-term land use planning matters would set in place future development levels and settlement patterns within the recommended boundary area. Following incorporation, the existing CSRD OCP, zoning and building regulations would remain in effect as municipal bylaws. The new Council, however, would have the authority to review, modify or completely replace the key bylaws.

The new municipality would automatically become a member municipality of the CSRD, with one municipal director. For weighted corporate votes on financial and other matters, and for weighted stakeholder votes on local service administration, the jurisdiction's sole director would have two votes (this number would increase to three when the new municipality's population reached 5,000).

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With the loss of 4,700 people to the new municipality, Area C would be left with a population of just over 3,200. For weighted votes, the Area C director would receive only two votes. In stakeholder votes on local services that involved Area C and the new municipality, the Area C director and the new municipal director carry equal weight.

Property Tax Implications

It is likely that property owners within the study area would face increased local taxes as a result of incorporation. As before, this prediction is driven largely by the transfer of the local roads service to the new municipality.

Residential property owners in the new jurisdiction would be expected to shoulder a higher part of the local service tax burden than at present, based on the fact that residential assessment values would account for over 97.1% of the total property tax base, compared to 96.9% for the whole of Area C today. A slightly lower percentage of non-residential assessment, however, could result in an small downward shift in the overall converted assessment value for the area, relative to the converted assessment for the remainder of Area C. The new area could, therefore, pay a slightly lower proportion of shared, CSRD service costs than property owners in the area pay today.

TWO ELECTORAL AREAS SCENARIO

Service Finance Implications

Under this scenario, the CSRD would remain responsible for providing the same, full set of local services it provides to Area C today (see *Appendix V*). Service costs, therefore, would not be expected to change as a direct result of restructure. No changes would be expected related to road or policing costs, since responsibility for both of these services would remain with the province. No changes would be expected, either, to fire or sewer costs, since the existing service areas are not affected under the scenario.

In the years following restructure, the CSRD could be called upon to deliver a broader range, and a higher level, of local services to the new electoral area. This prediction reflects the community input received in the earlier governance study. The establishment of new services and/or service levels, however, would be a matter for future discussion in each new area, and would not occur as a direct result of restructure.

Governance Implications

The CSRD would be the local government for both electoral areas. The CSRD Board would become the primary local governing body, responsible for all key local decisions in the communities, including those decisions related to development services. The existing Area C OCP and building bylaws would apply to both electoral areas immediately following restructure. The Board would ultimately need, however, to create separate plans and bylaws for each area.

ELECTORAL AREA C
BOUNDARY ANALYSIS







Each electoral area would have its own electoral area director. For all stakeholder votes, the director for the new area would have three votes, on account of the area's estimated population of 5,470. The director for the remainder of Area C would have only one vote on weighted decisions, given the area's relatively small population of 2,450.

Significantly, this restructure scenario would result in many decisions for shared, South Shuswap services (i.e., services with the two areas as the sole participants) being made by the two electoral area directors, not the entire CSRD Board. This result would mark a major departure from the existing situation in which the full Board is involved in South Shuswap decision-making.

Property Tax Implications

Given that costs to provide local services would not be impacted as a direct result of restructure, property taxes would not be expected to change significantly. Some slight changes in the distribution of the local tax burden between electoral areas, and among property types, could be expected. Changes would be driven, specifically, by differences in the composition of the areas' assessment bases (and converted assessment bases).

ELECTORAL AREA C
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CHAPTER 5 SUMMARY AND CONCLUSION

This report presents a set of four recommended boundaries, one for each of the four restructure scenarios in Electoral Area C of the CSRD. The boundaries were developed based on a set of ten factors including:

- future community development plans and land use categories, as outlined in the *Electoral Area C (South Shuswap) Official Community Plan*
- existing settlement patterns and land use regulations
- population and population density for Area C and its communities, as collected by Statistics Canada in the 2016 Census
- local government services (all types) and service areas
- potential future infrastructure developments
- local road networks
- property assessment classes
- property assessment values
- the Agricultural Land Reserve (ALR) inventory in Area C
- community input

A total of 25 evaluation criteria were identified to further define the factors, and to guide the boundary-setting efforts.

RECOMMENDED BOUNDARIES

The recommended boundaries for the restructure scenarios are shown in the report's appendices using separate sets of maps. Each of the incorporation scenarios is displayed on a set of six maps, each of which presents specific data. In developing the boundaries, efforts were taken to:

- create compact incorporation areas, while also providing for some future growth potential
- minimize the number of "property peninsulas" that result from right-angle turns in the boundary route
- capture any existing primary and secondary settlement areas, all current development areas, and all potential urban development areas as identified in the OCP
- minimize the amount of ALR land included
- exclude rural resource lands
- contain all local water service areas, and as much of the Shuswap Lake LWMP local sewer area and Sorrento-Blind Bay Fire Department area as possible
- include lands in a variety of property assessment classes
- capture assessment bases that are as sizable and diverse as practicable

ELECTORAL AREA C
BOUNDARY ANALYSIS

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The Two Electoral Areas Scenario is displayed on six separate maps. In developing the recommended boundary for this scenario, an effort was taken to:

- create geographically-smaller electoral areas that can be easily travelled by an electoral area director
- provide for a good level of balance in population in the areas
- keep whole existing individual settlement areas
- keep whole the all existing individual local water service areas, as well as the entire Shuswap Lake LWMP local sewer area, and all fire department response areas
- include lands in a variety of property assessment classes in each area
- capture an assessment base for each area that is as sizable and diverse as practicable
- keep together communities with similar perspectives and wishes related to service levels and urban development

The evaluations of the recommended boundaries for all four scenarios revealed strengths and weaknesses for each boundary. None of the recommended boundaries fully meets all criteria. All boundaries, however, fully or partly meet as many of the criteria as practicable given the assessment base, agricultural, settlement pattern, and service provision dynamics in Electoral Area C.

RESTRUCTURE IMPLICATIONS

The report provides a high-level overview of potential restructure implications associated with each of the scenarios. Potential implications are presented as:

- service finance implications
- governance implications
- property tax implications

The overview of implications sets the stage for detailed examination as part of any full-scale restructure study that may occur in 2019.

NEXT STEPS

This report will presented to the CSRD Board of Directors on February 21, 2019. The CSRD Board will determine at that time whether to reaffirm or withdraw its request for a full restructure study, based on the information presented. If the Board chooses to reaffirm its request, the Board will consider whether it wishes to endorse specific restructure scenarios for further study. The final decision to proceed with a full-scale restructure study, on one or more of the scenarios, will be made by the Minister of Municipal Affairs and Housing.

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APPENDICES

ELECTORAL AREA C
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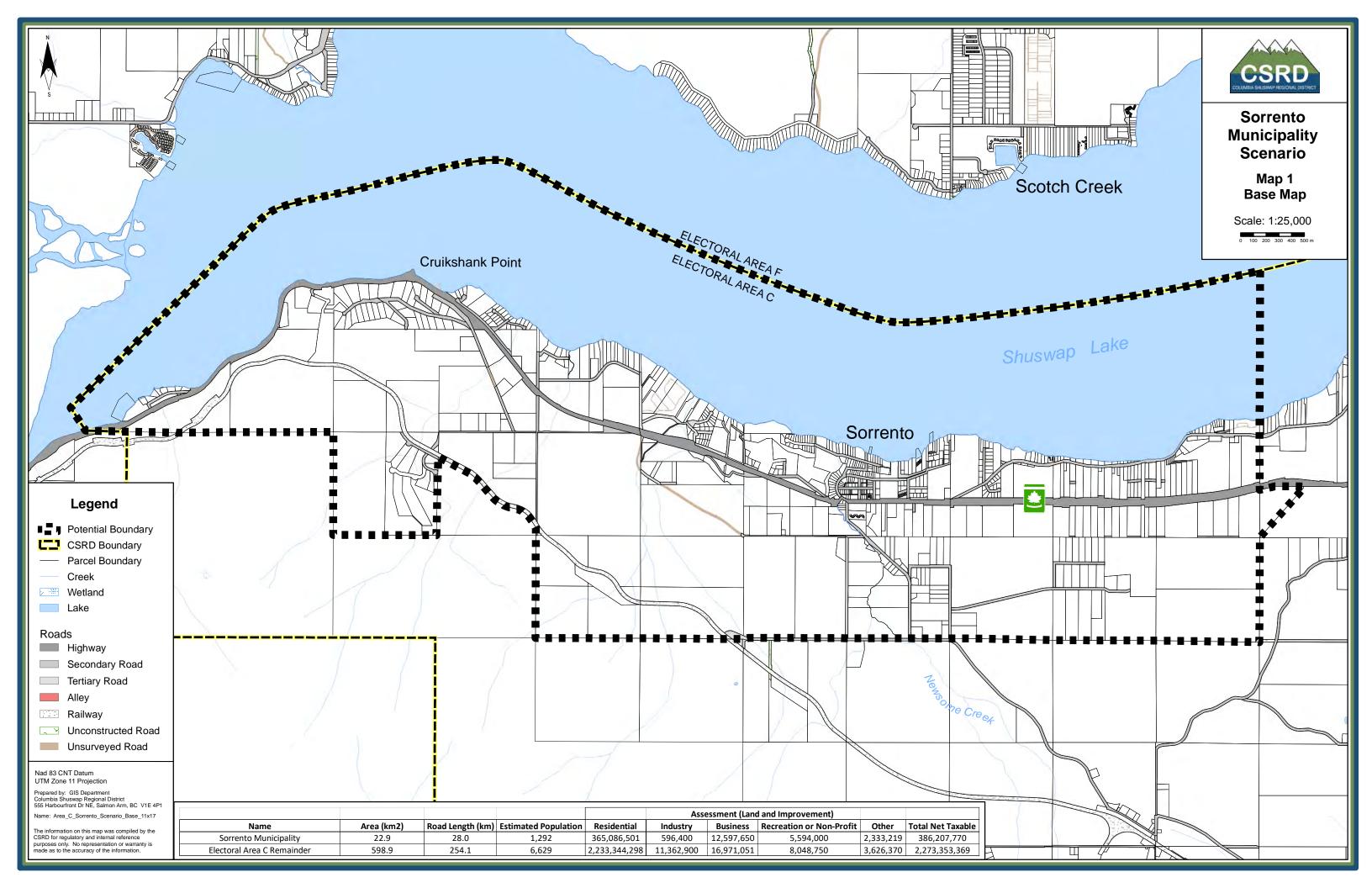
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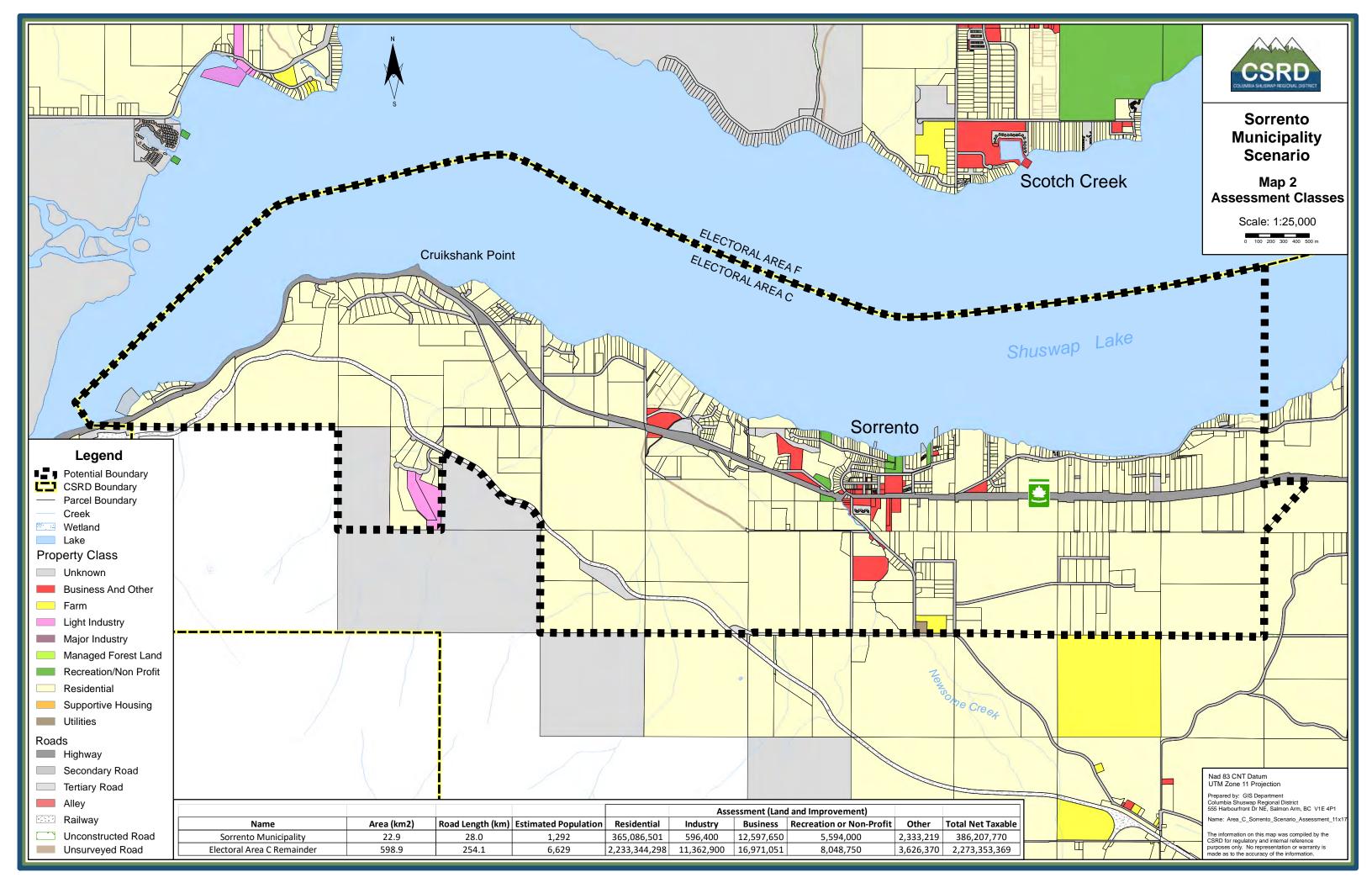
SORRENTO MUNICIPALITY SCENARIO MAPS

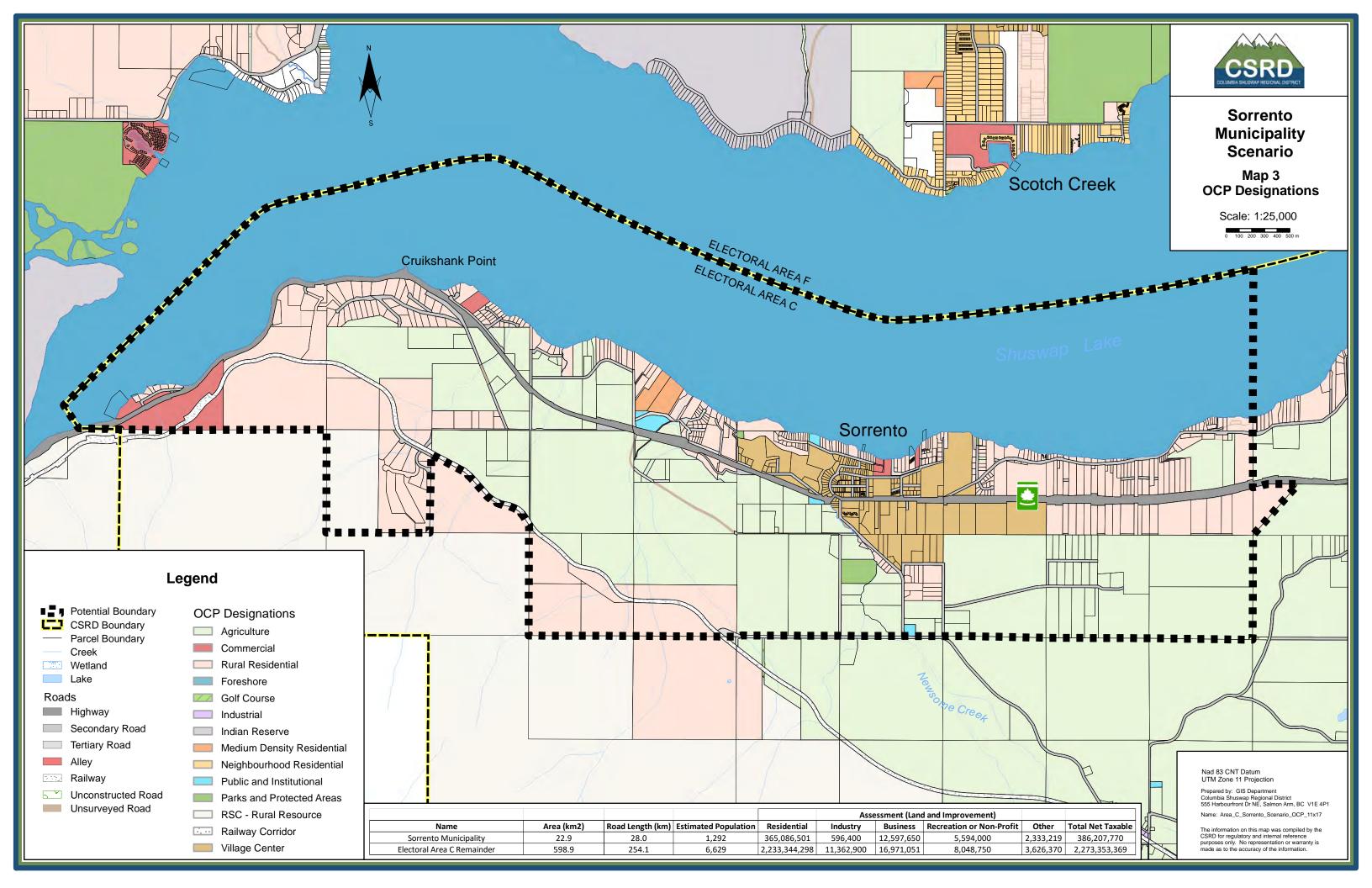
ELECTORAL AREA C
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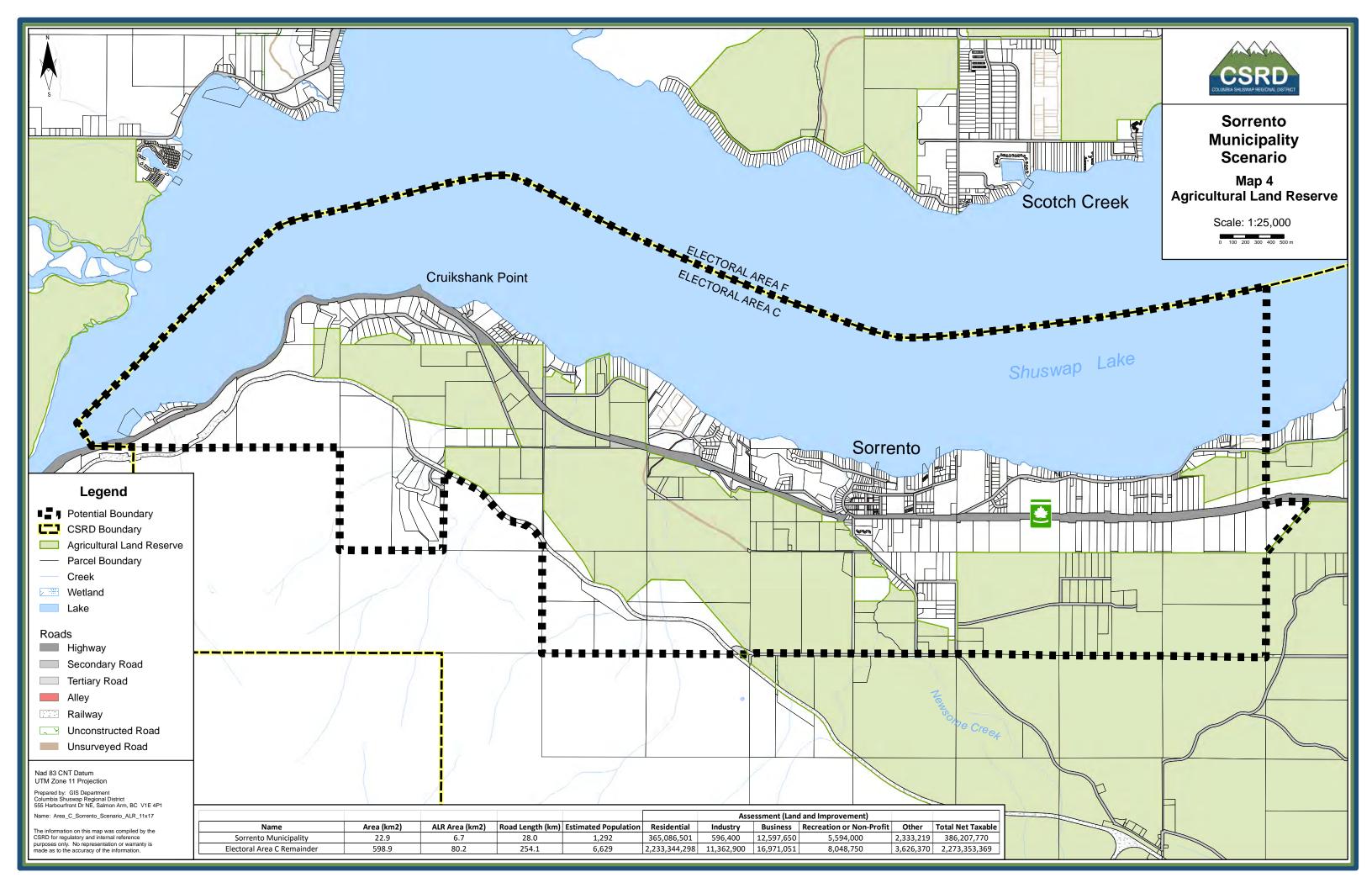
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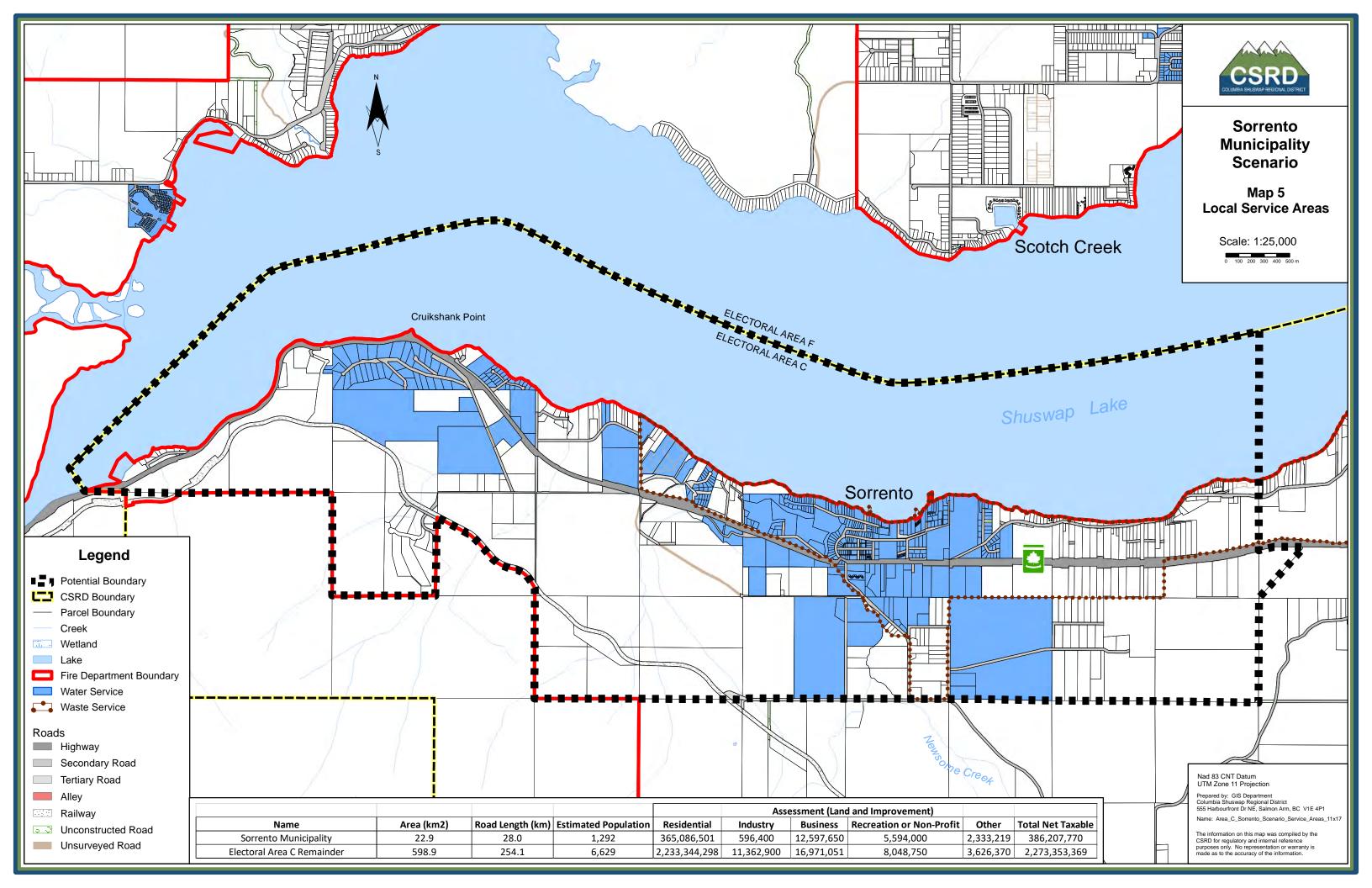


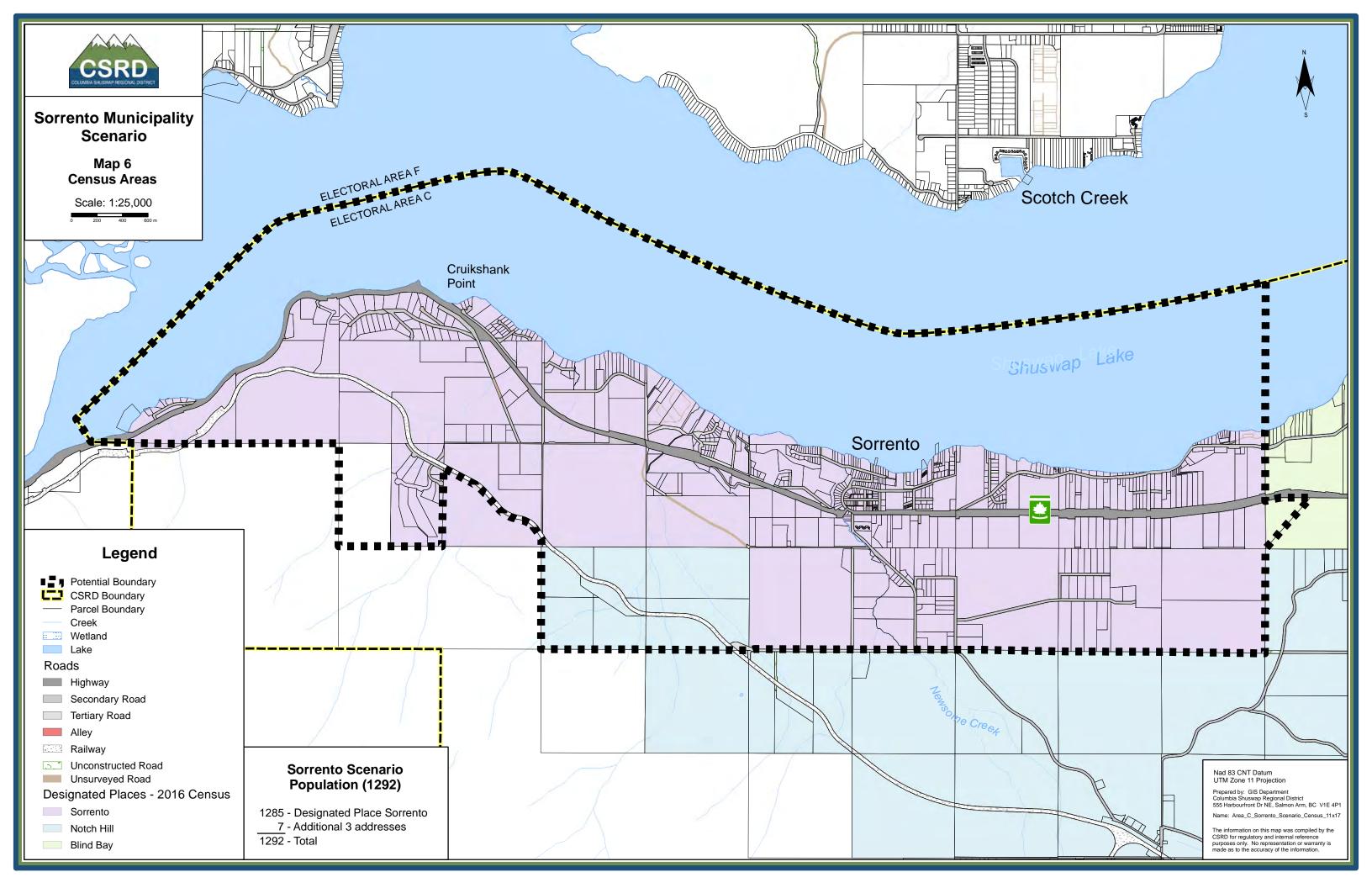














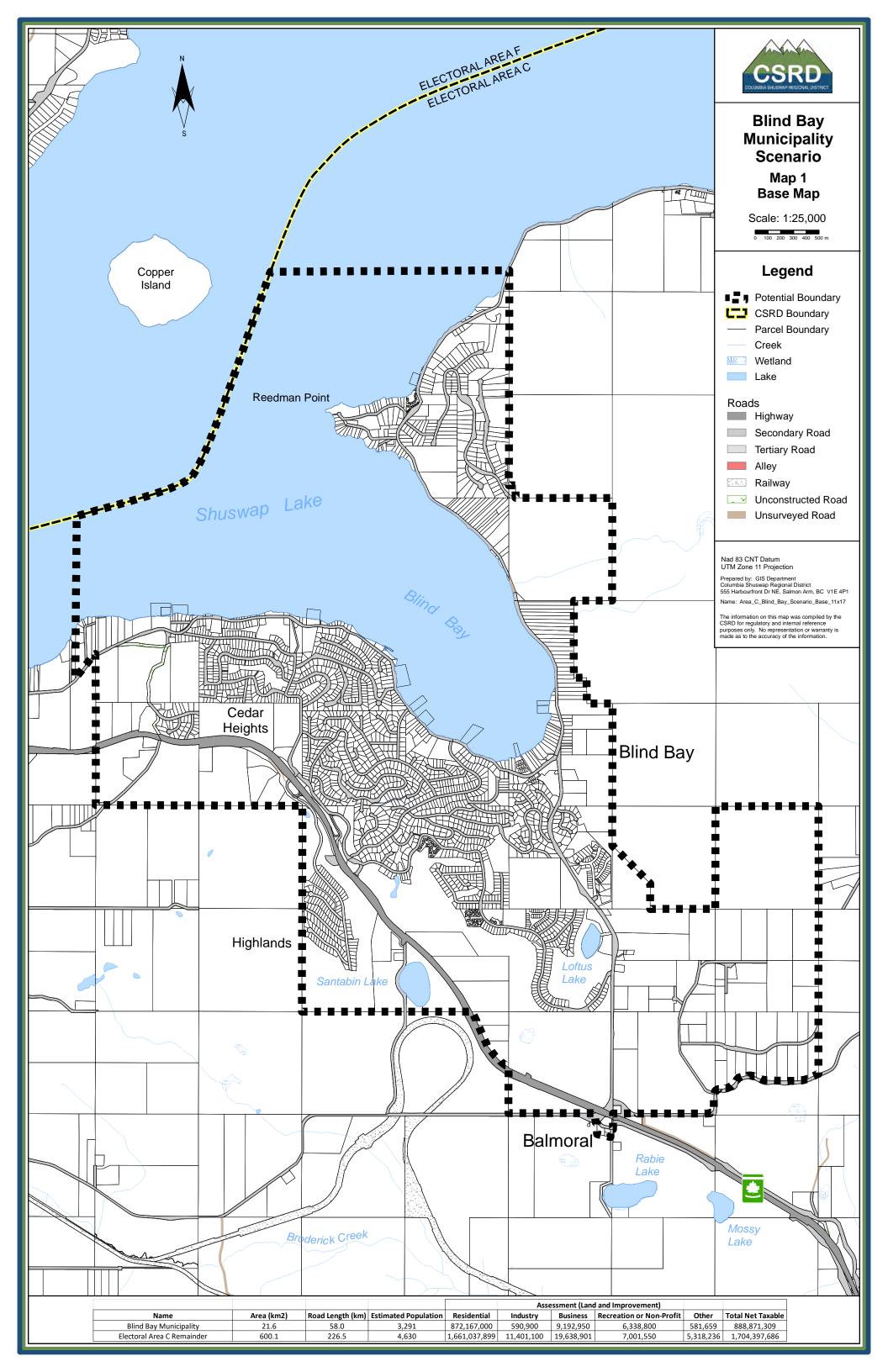
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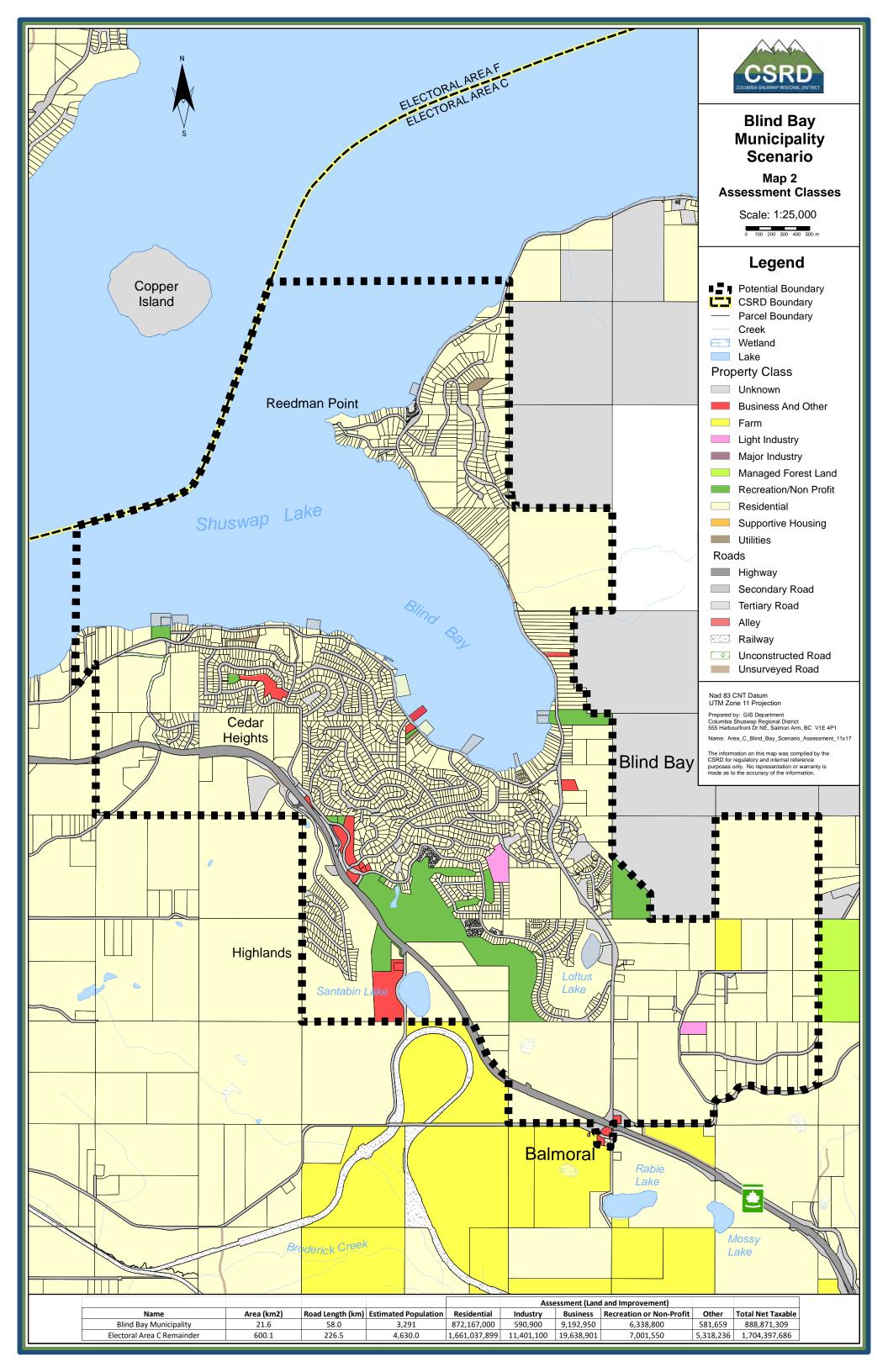
BLIND BAY MUNICIPALITY SCENARIO MAPS

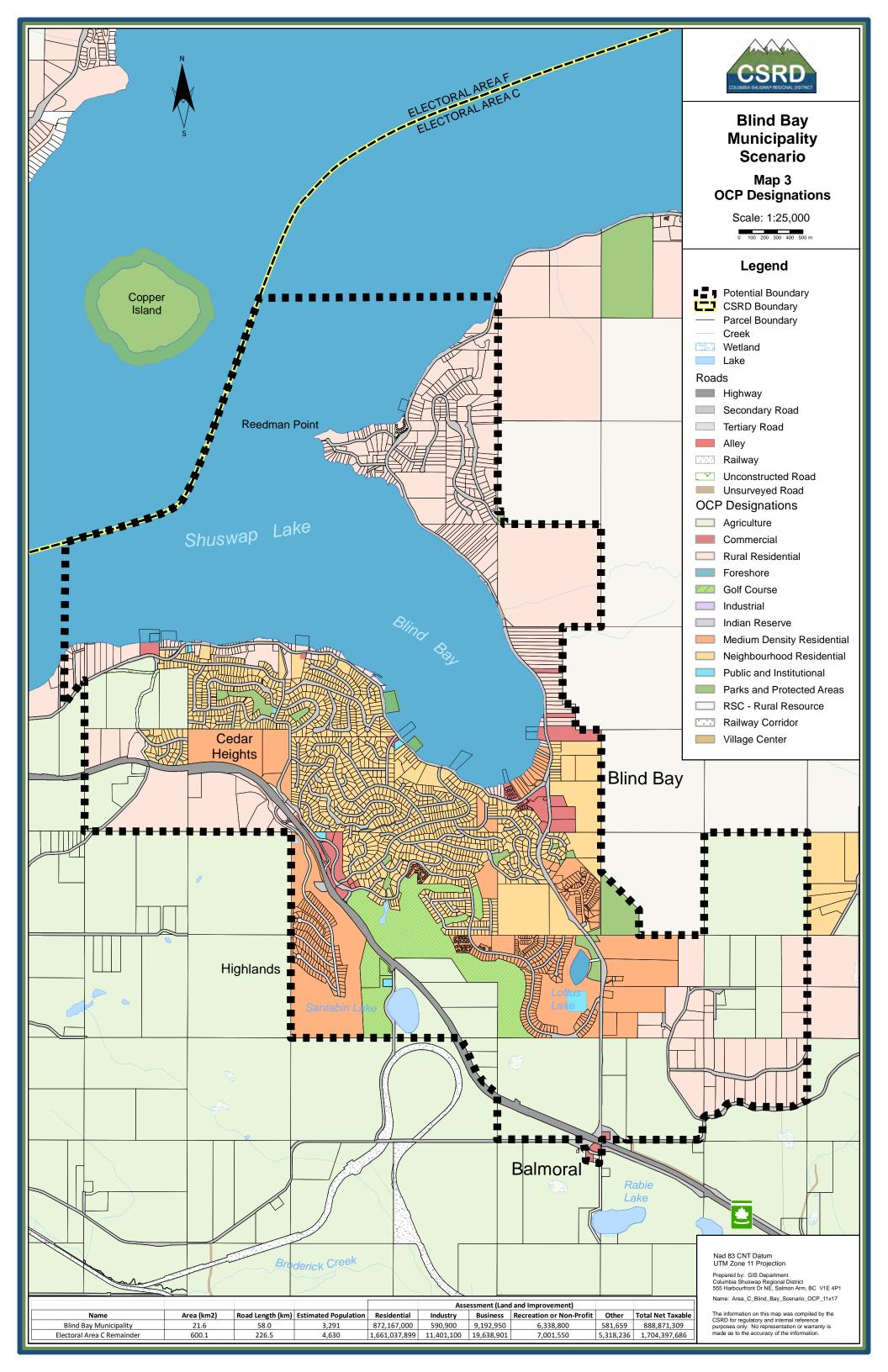
ELECTORAL AREA C
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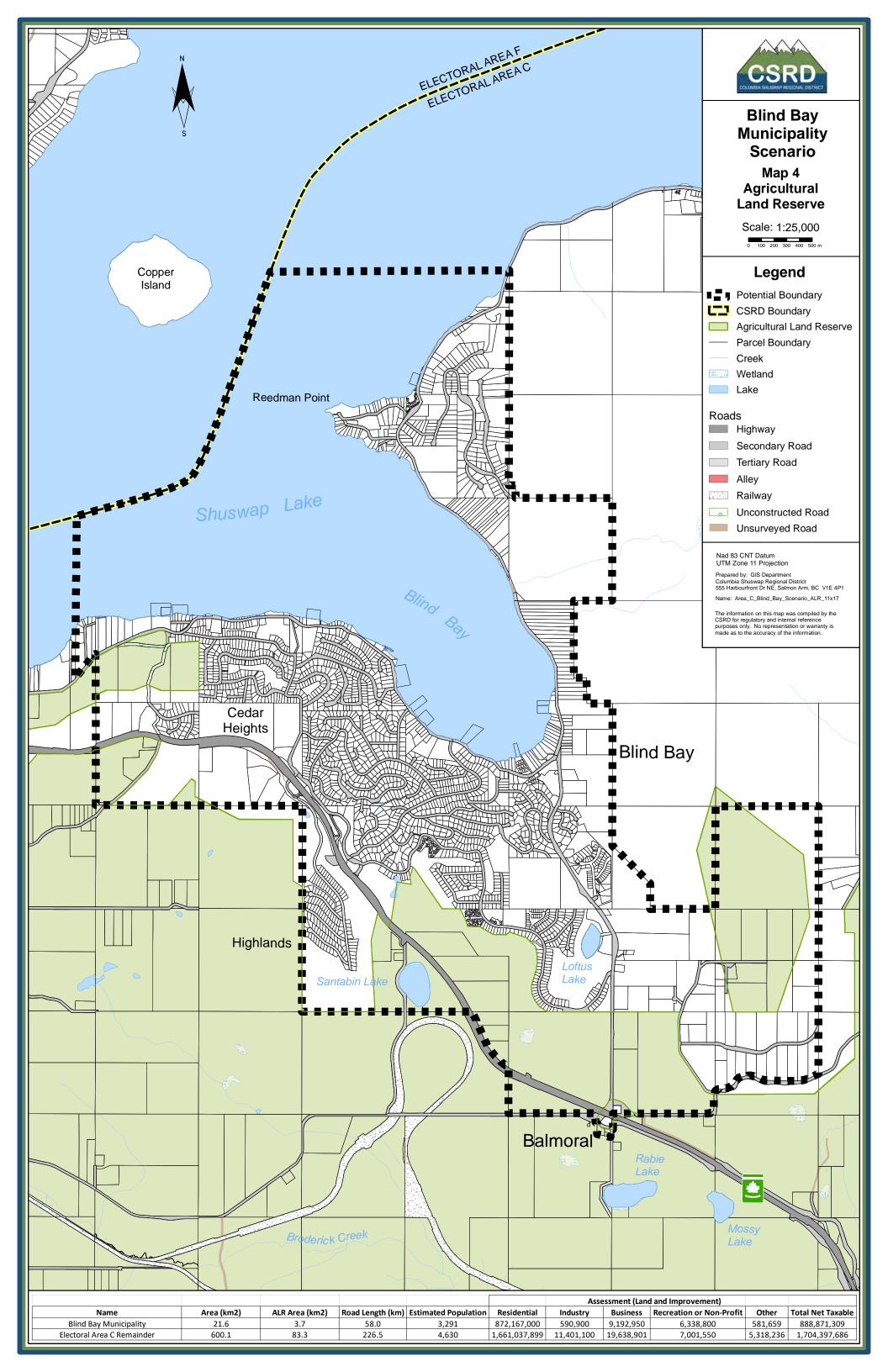
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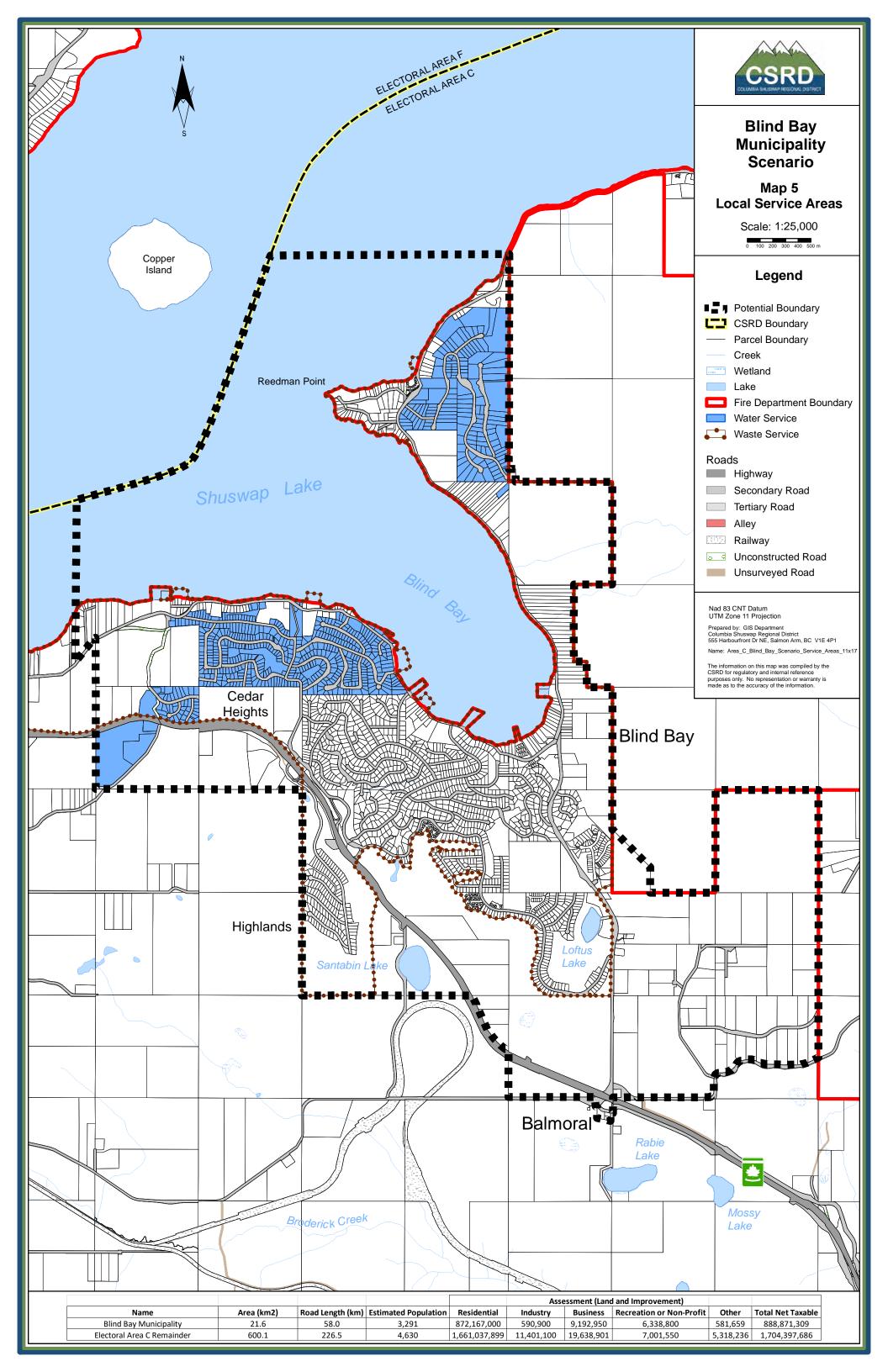


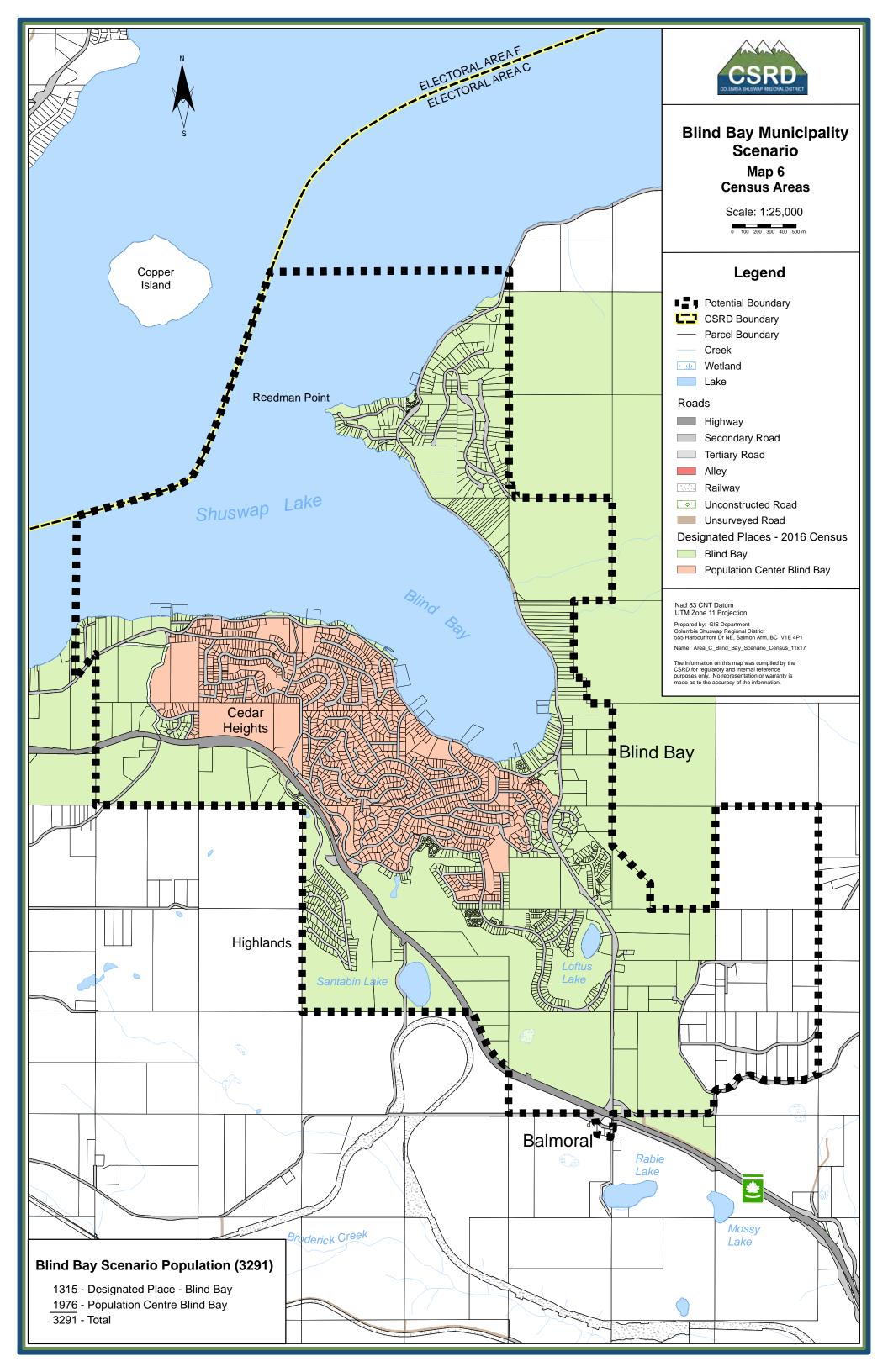














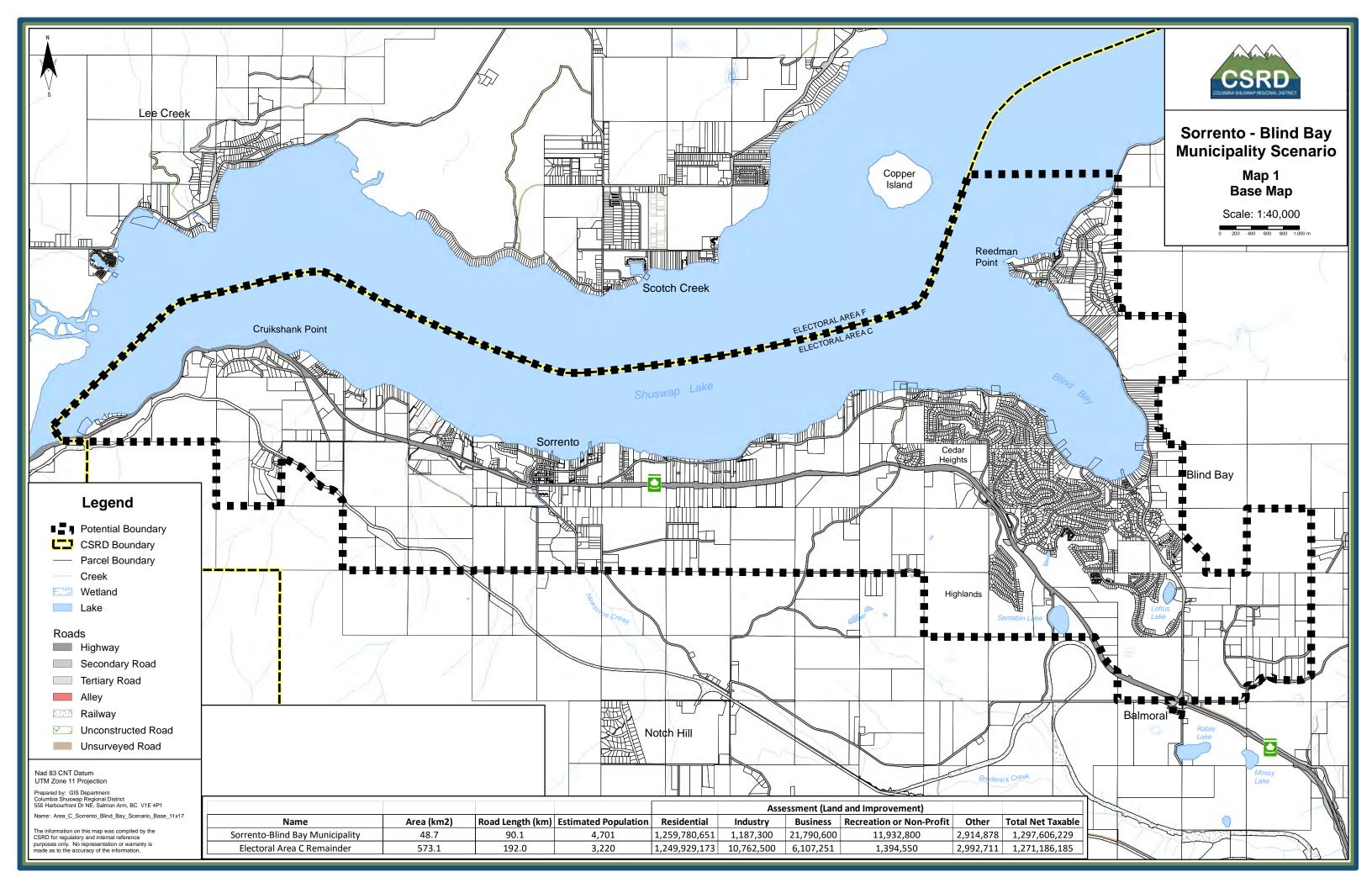
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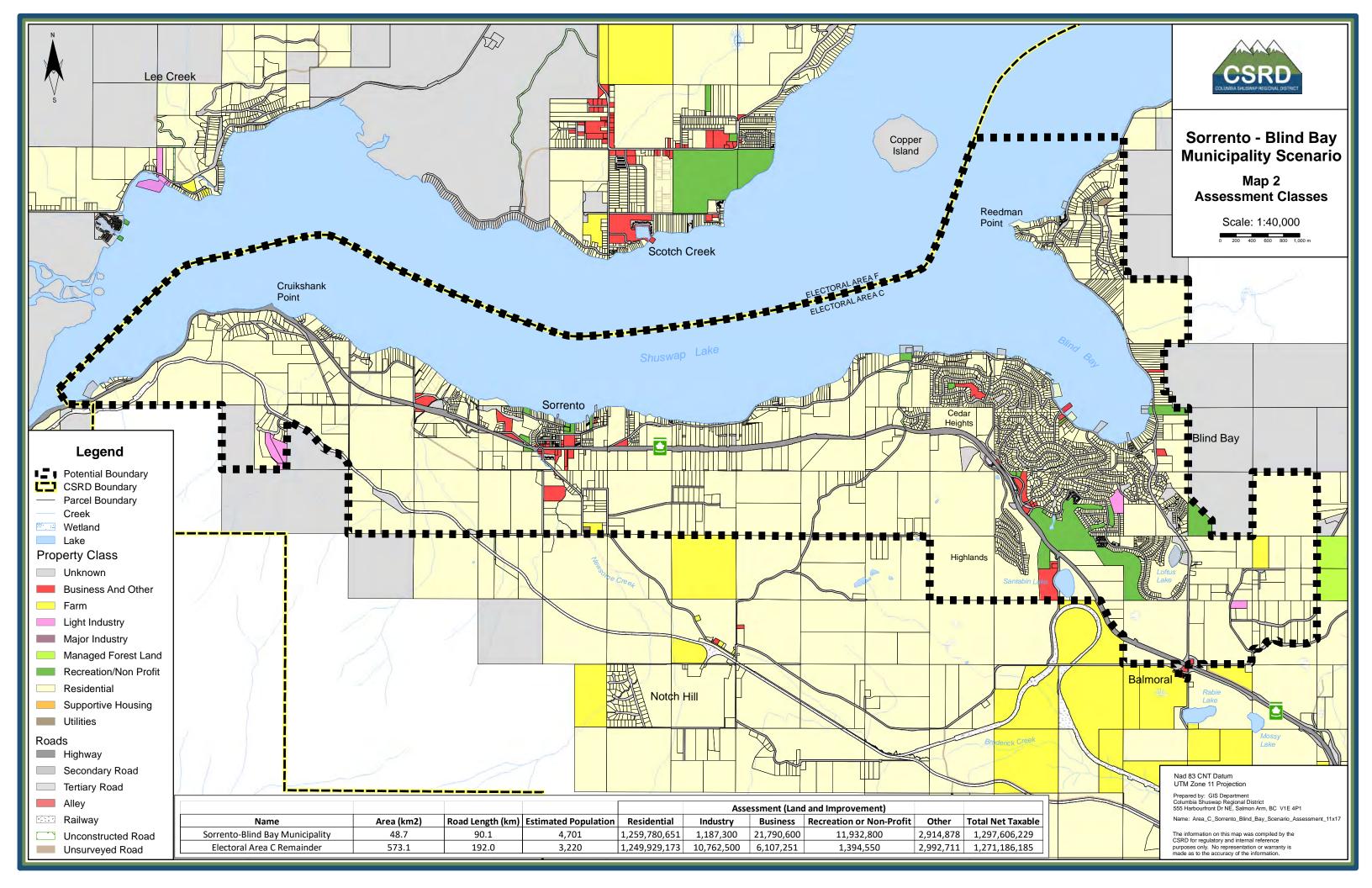
SORRENTO-BLIND BAY MUNICIPALITY SCENARIO MAPS

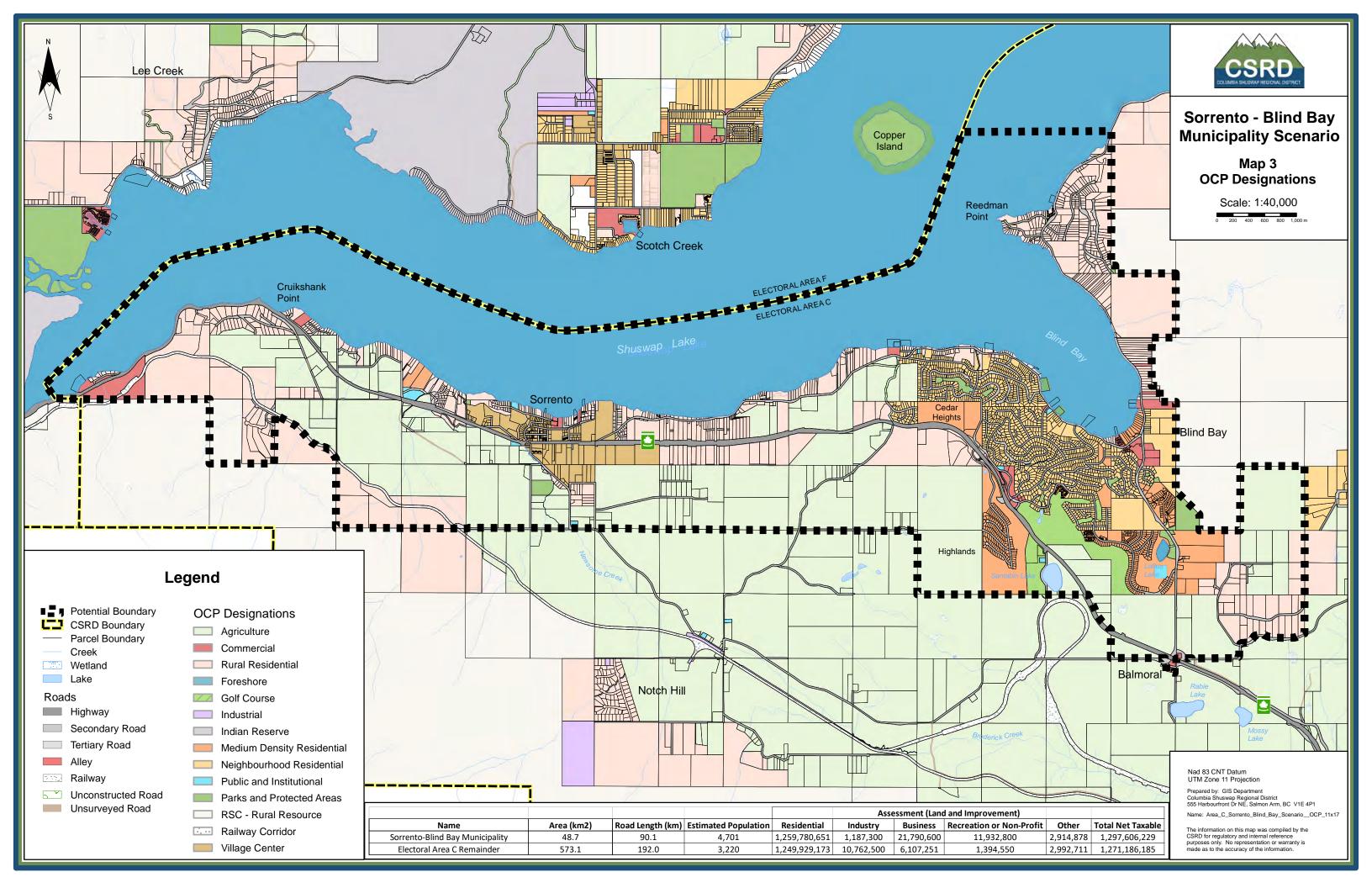
ELECTORAL AREA C
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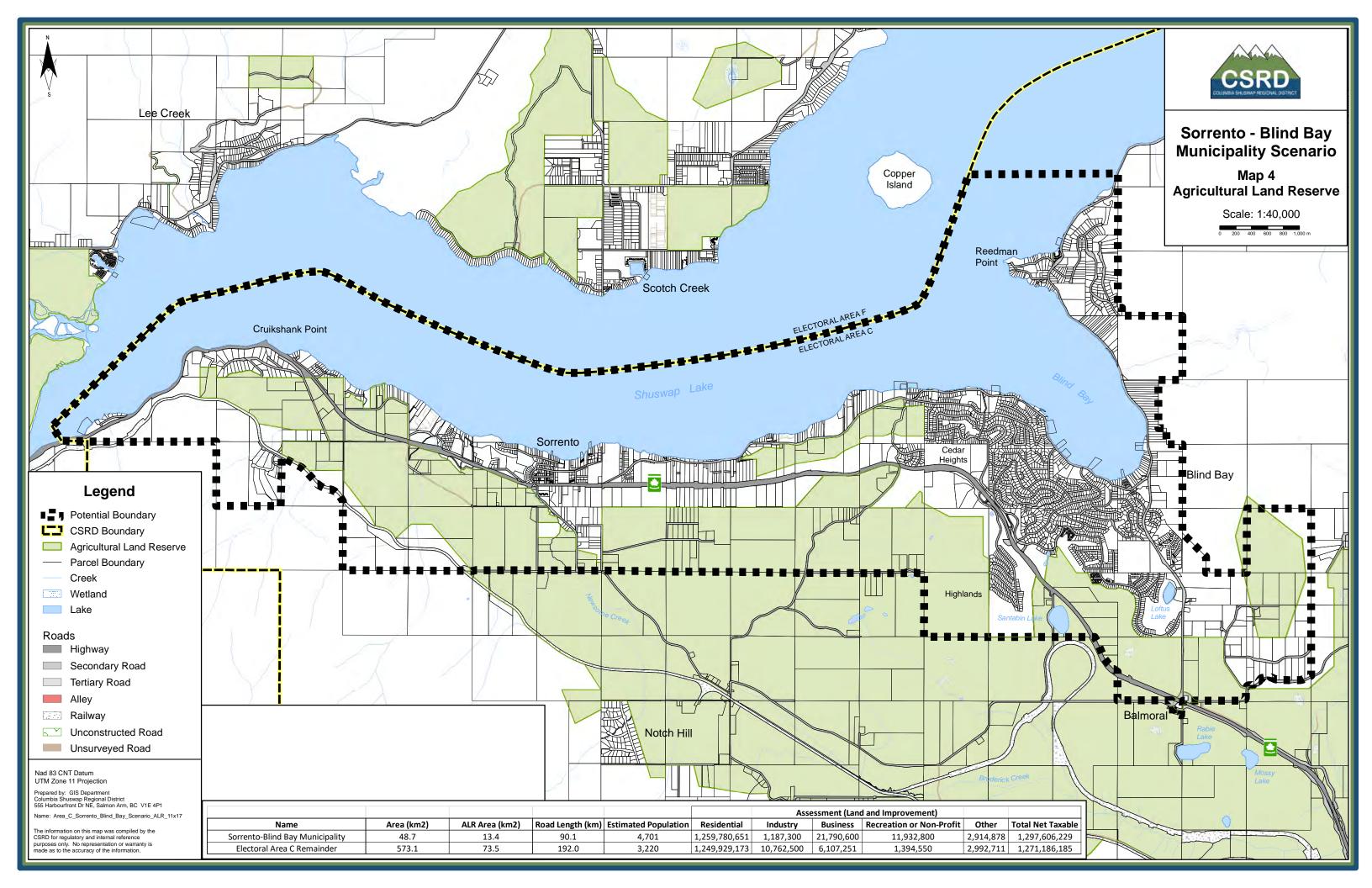
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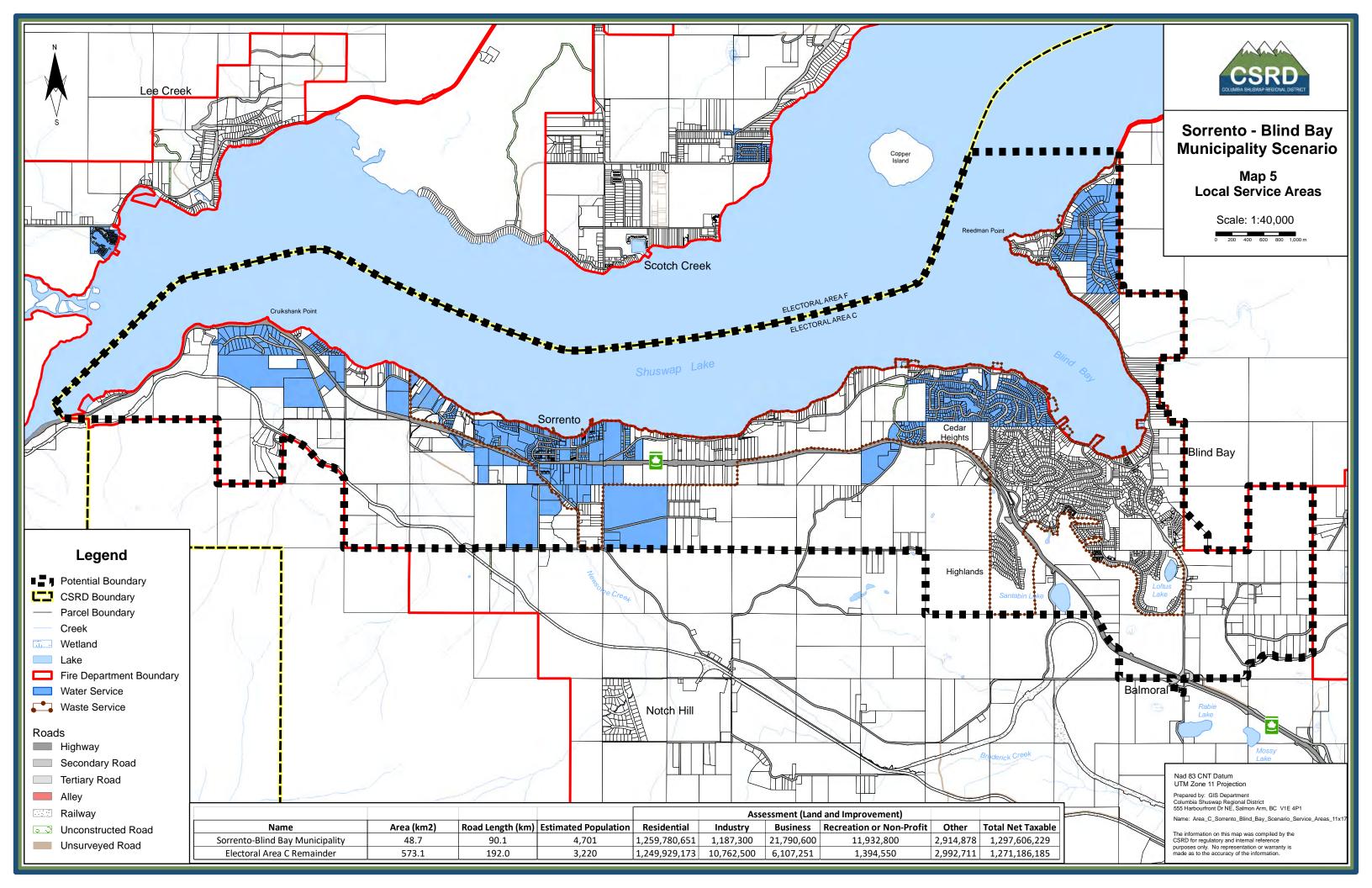


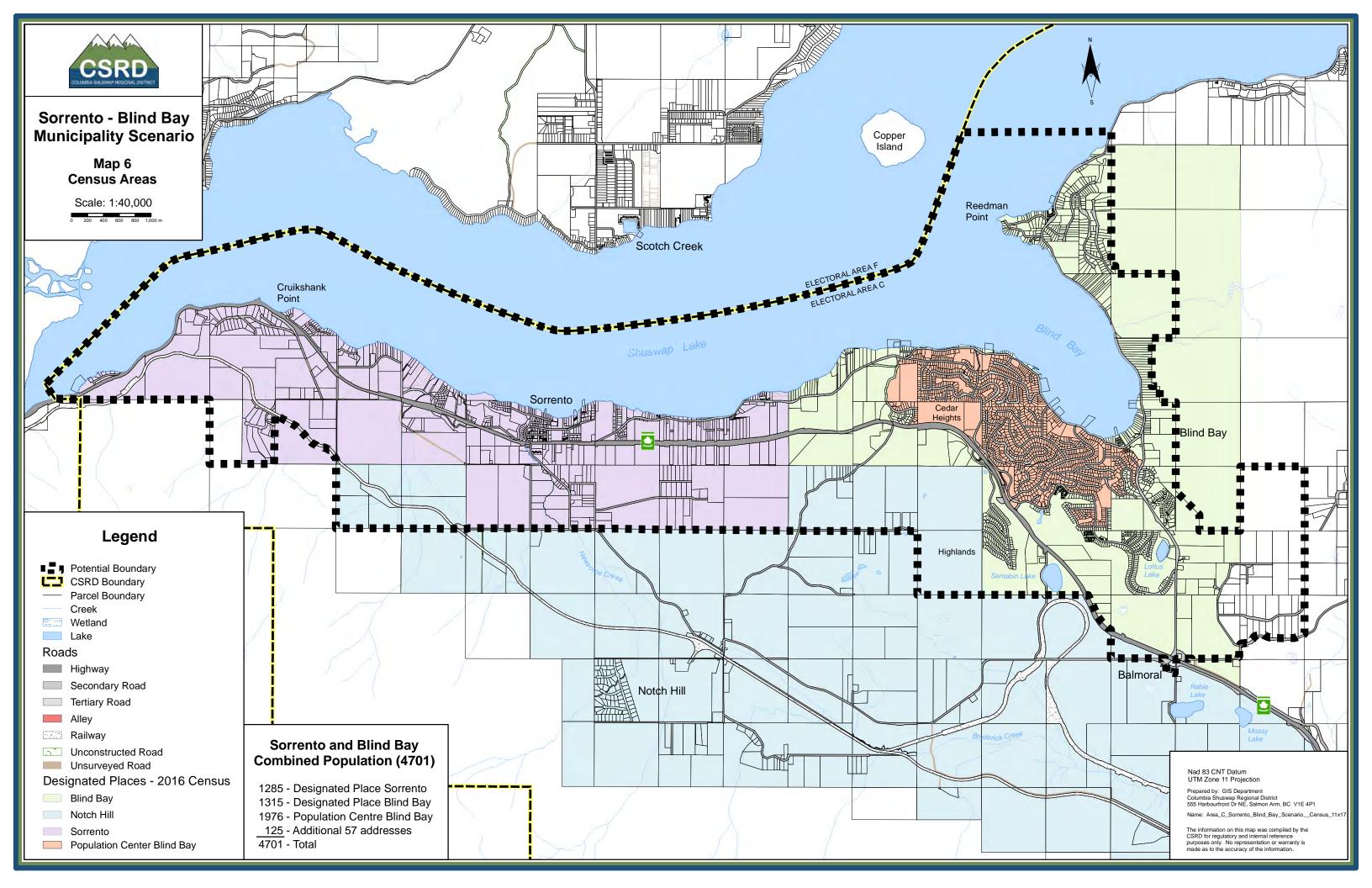














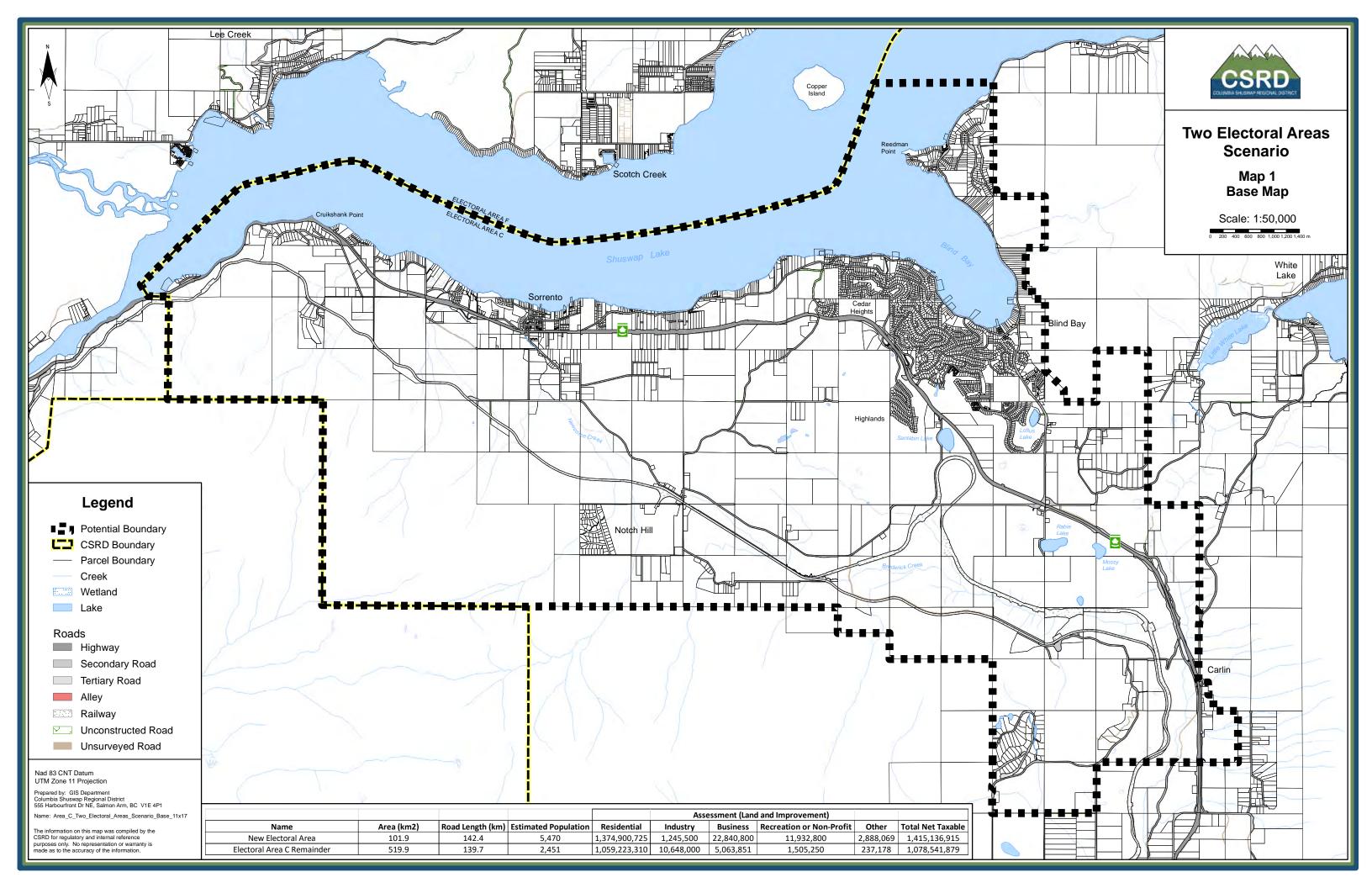
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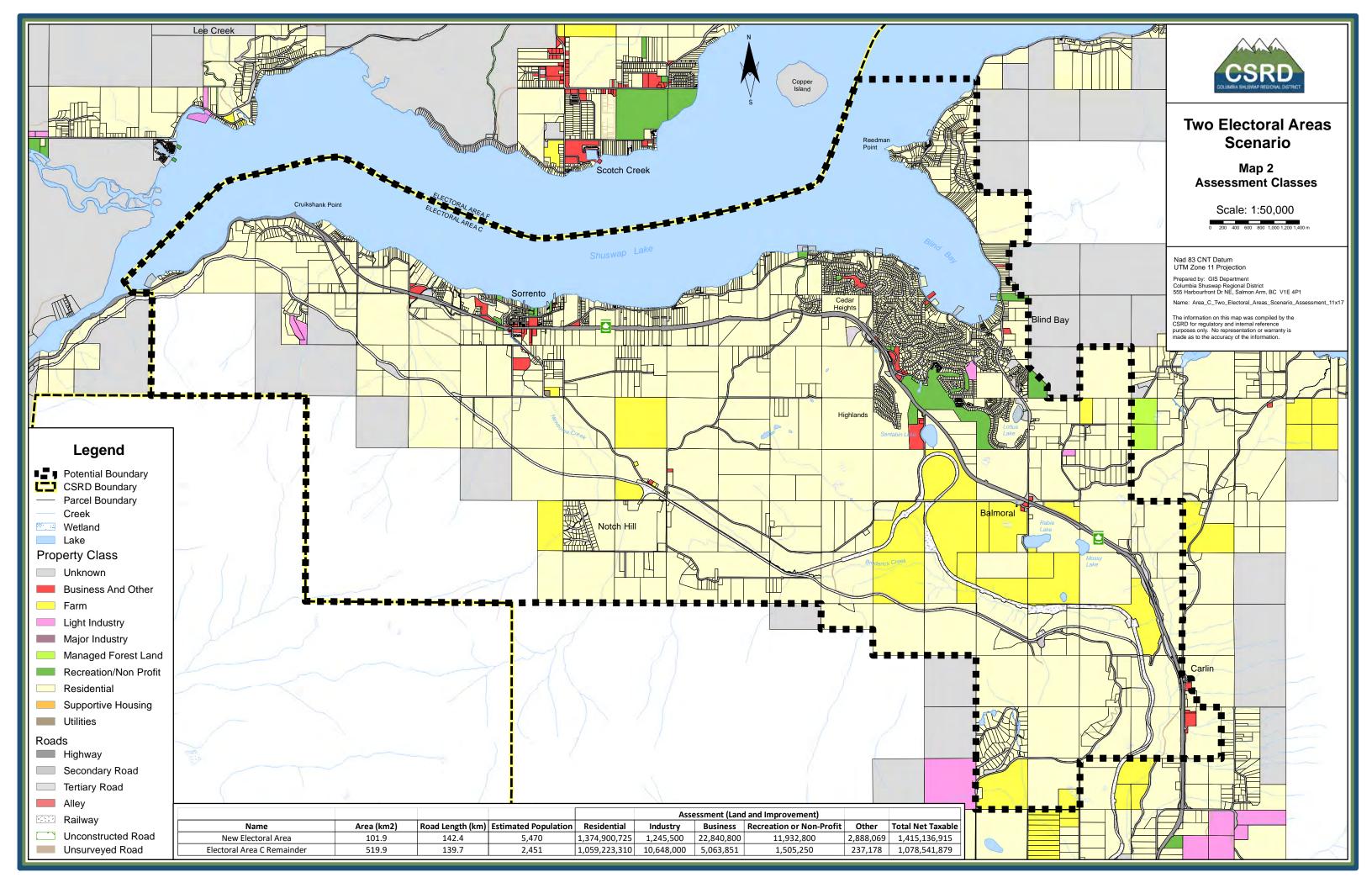
TWO ELECTORAL AREAS SCENARIO MAPS

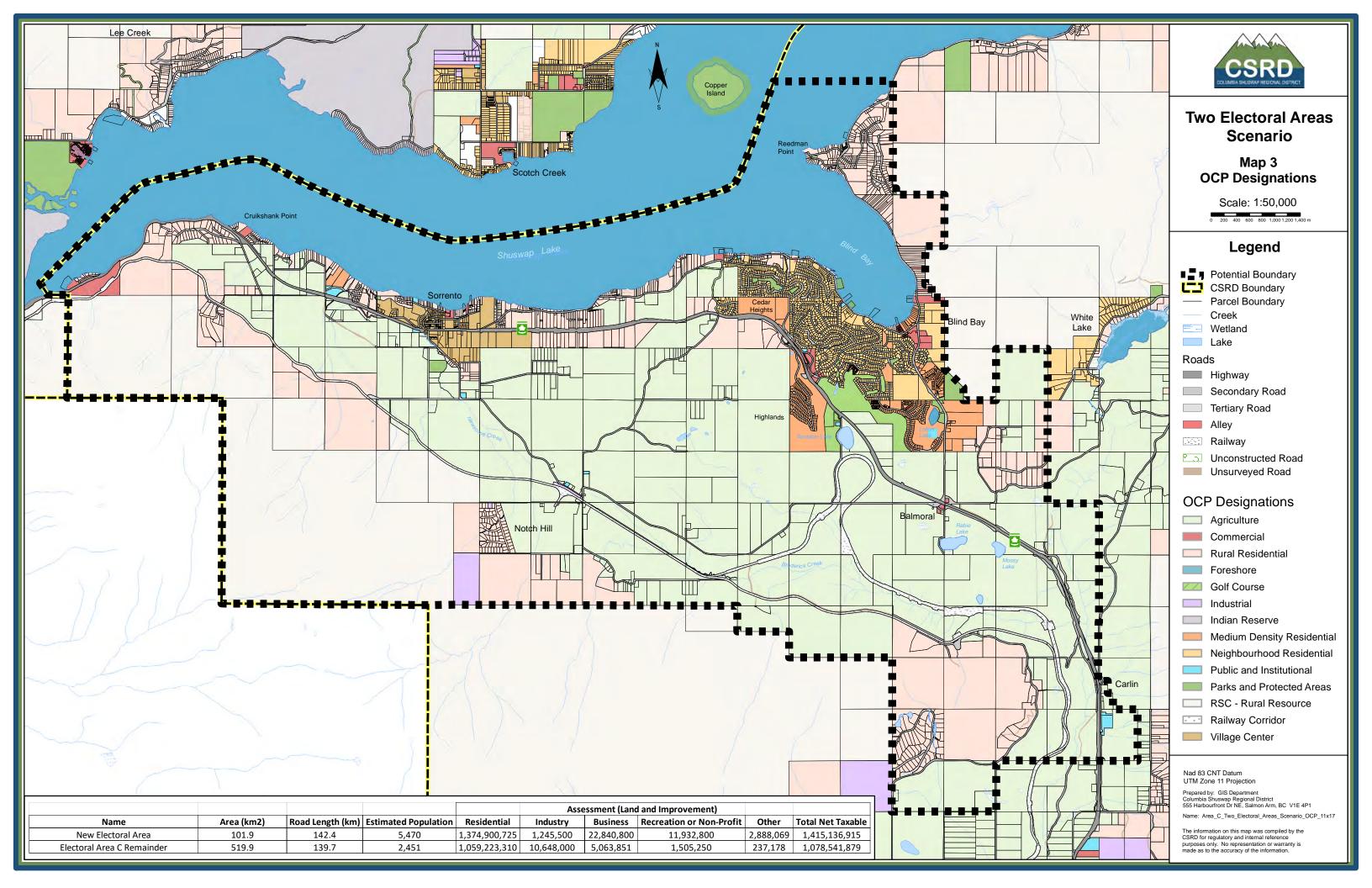
ELECTORAL AREA C
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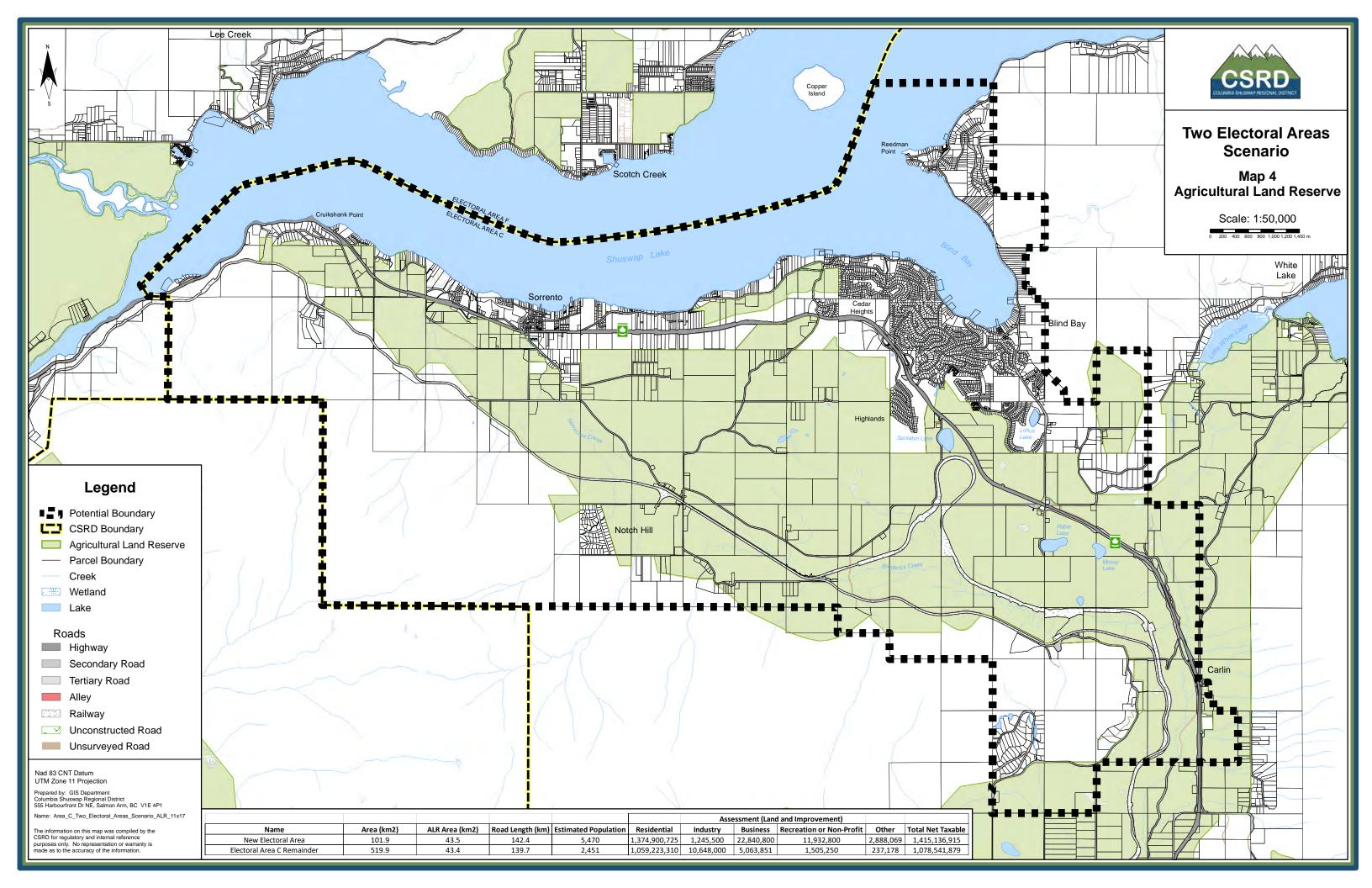
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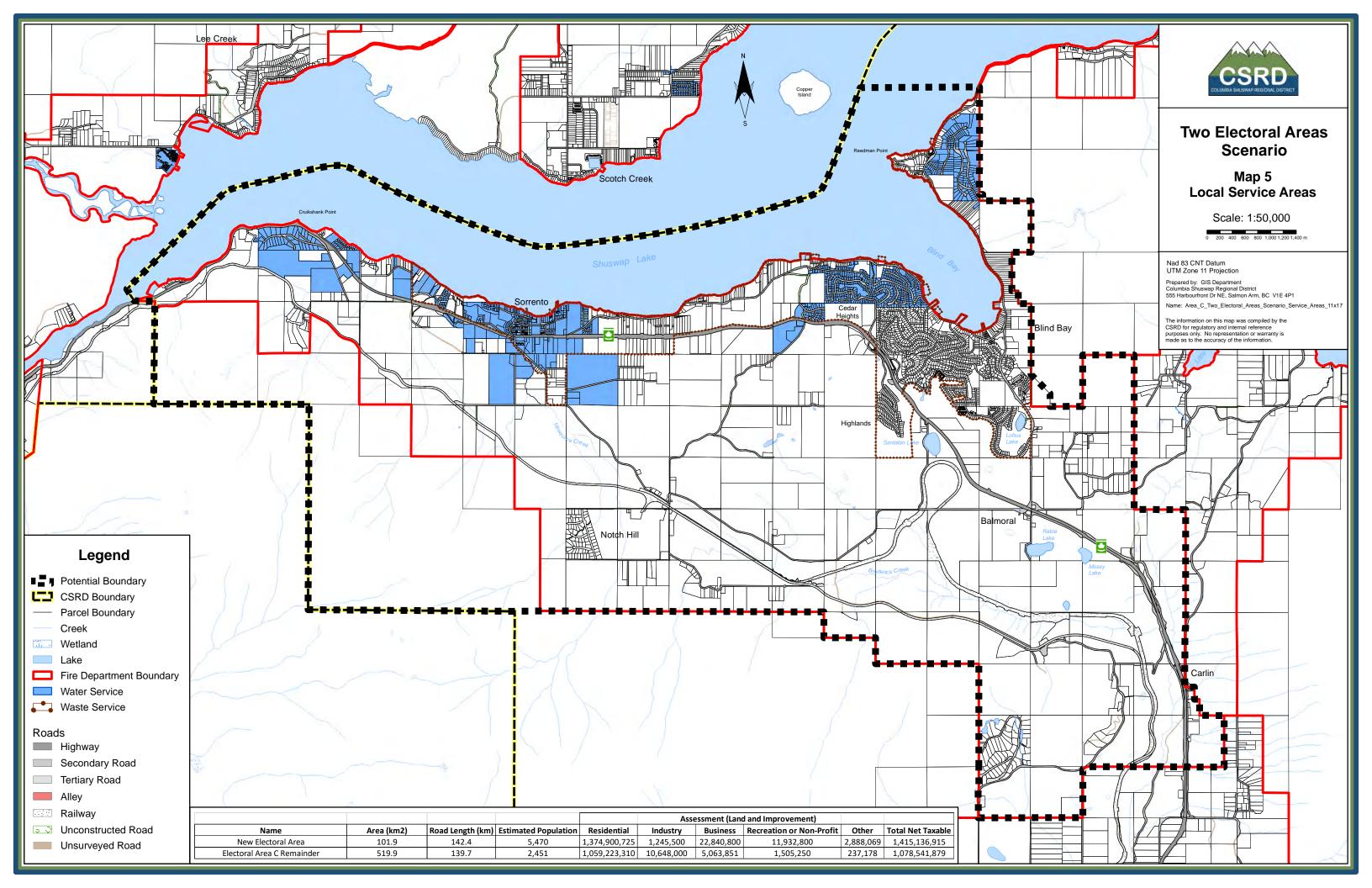


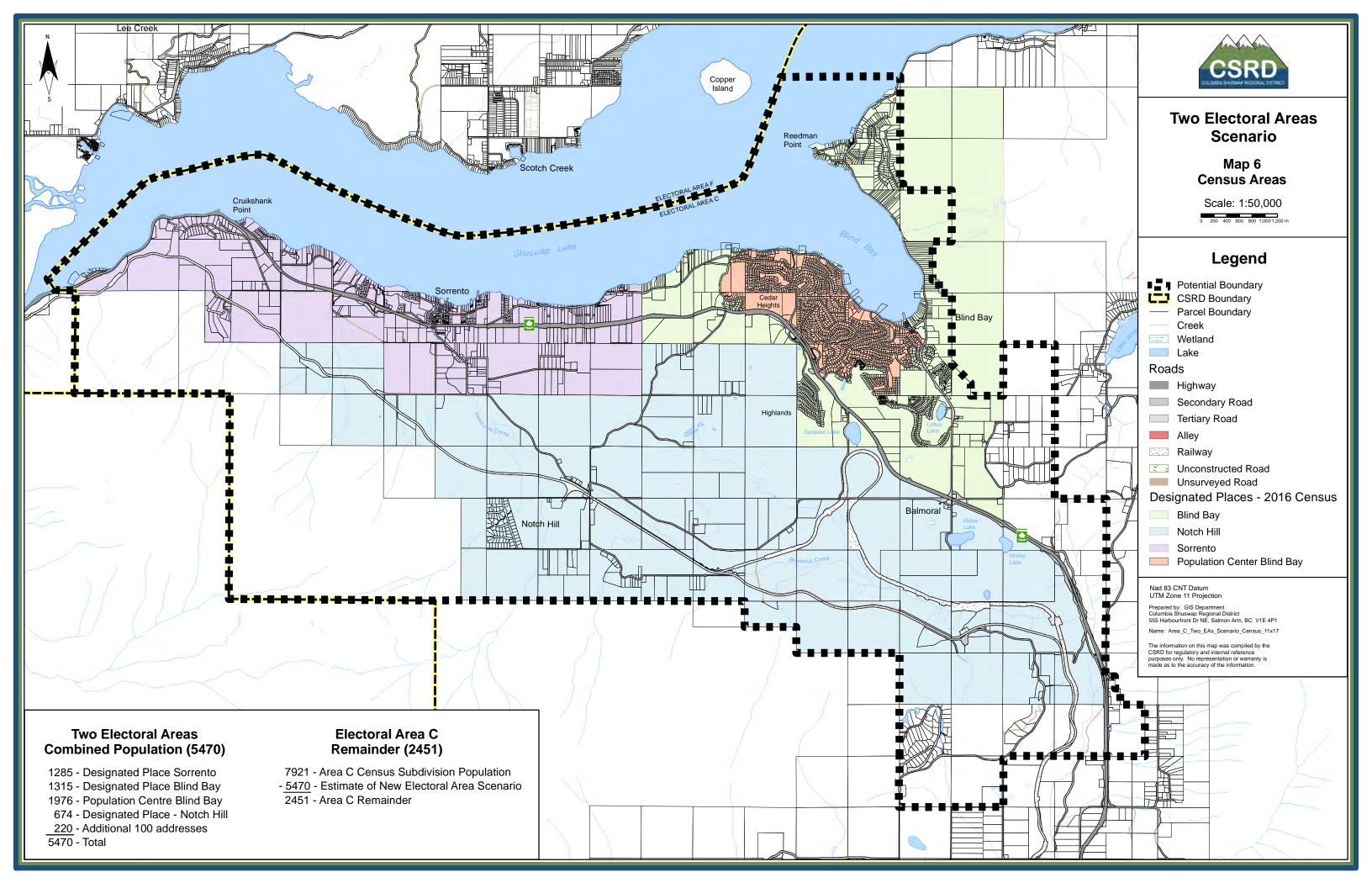














APPENDIX V

EXISTING LOCAL SERVICES IN ELECTORAL AREA C 2018

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AREA-WIDE SERVICES

The following services are provided by the CSRD throughout the whole of Electoral Area C, including the areas that are within the recommended boundaries for the incorporation scenarios.

- General Government & Administration
- Electoral Area Administration
- Feasibility Studies
- 911 Emergency Communications
- Solid Waste Recycling
- Bylaw Enforcement
- GIS Mapping
- House Numbering
- Development Services
- Planning Special Projects
- Electoral Area Grants in Aid
- Shuswap SPCA
- Shuswap Search & Rescue
- Emergency Preparedness
- Airport Shuswap Regional Airport
- Transit Area C Service
- Milfoil Control Program
- Weed Control & Enforcement
- Tourism Shuswap
- Economic Development
- Film Commission
- Shuswap Recreation Complex
- Area C First Responders
- Area C Dog Control
- Tourism Information Area C
- Area C Community Parks
- Rail Trail Corridor

SPECIFIED AREAS WITHIN ELECTORAL AREA C

The following services are provided by the CSRD within specific parts of Electoral Area C, and funded by property value taxes levied within those parts:

- Anti-Whistling Elson Road Crossing
- Fire Protection Area C Subregional
- Fire Protection Kault Hill
- Street Lighting Blind Bay
- Street Lighting Sorrento

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PARCEL TAXES WITHIN ELECTORAL AREA C

The following services are provided by the CSRD within specific parts of Electoral Area C, and funded by property parcel taxes levied within those parts:

- Cedar Heights Water
- Lakeview Place Water
- Eagle Bay Water
- MacArthur/Reedman Water
- Sorrento Water
- Waverly Park Water Users Loan
- Shuswap Watershed Council
- South Shuswap LWMP
- Sunnybrae Waterworks

PROPERTY TAXES FOR SERVICES PROVIDED BY OTHER AGENCIES

This section identifies the property taxes that are levied by the province, and other agencies, to fund services in Electoral Area C that are provided by public agencies other than the CSRD.

- Provincial School Tax (primarily for primary, elementary and secondary education services delivered by the North Okanagan School District #83)
- Provincial Rural Tax (primarily for local roads and subdivision services delivered by MOTI)
- Police Tax (for local policing services provided by the province, and delivered by the RCMP)
- BC Assessment Authority (to fund property assessment system)
- Municipal Finance Authority (to help protect local government infrastructure financing system)
- Okanagan Regional Library (levied by ORL to fund local library services)

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