

September 9, 2019

Columbia Shuswap Regional District  
555 Harbourfront Drive NE  
PO Box 978  
Salmon Arm, BC, V1E 1P1

**ATTENTION: LYNDA SHYKORA  
DEPUTY MANAGER CORPORATE ADMINISTRATION SERVICES**

Dear Ms. Shykora:

**REFERENCE: SORRENTO-BLIND BAY INCORPORATION STUDY  
PROPOSED WORK PROGRAM**

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Thank you for inviting me to submit a proposed work program to conduct the *Sorrento-Blind Bay Incorporation Study*. As you know, I led the consulting teams that completed the *Electoral Area C (South Shuswap) Governance Study* in 2017, and the *Electoral Area C Boundary Analysis Study* in 2018. My colleague, Sherry Hurst (Leftside Partners Inc.), played significant roles in both assignments. Over the course of these studies, and through our other work in the South Shuswap, we developed an in-depth understanding of the governance, local service, and financial frameworks in place in Electoral Area C. We also gained important insight into the character of the South Shuswap communities, including Sorrento and Blind Bay.

This letter sets out our proposed work program for the *Incorporation Study*. The letter begins by setting out our understanding of the assignment, then presents the work program, timeline, and budget. The letter ends with a brief profile of the consulting team.

#### **UNDERSTANDING OF ASSIGNMENT**

##### **► Background**

In 2017, the South Shuswap Governance Committee submitted its final report on the *Electoral Area C (South Shuswap) Governance Study* to the Columbia Shuswap Regional District (CSRD) Board of Directors. In its report, the Committee made the following recommendation:

*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 Minister of Municipal Affairs and Housing for a restructure study. The Minister responded to the CSRD's request with funding and the terms of reference for a *Boundary Analysis* to define the potential study areas for the alternatives recommended by the Committee.

The *Boundary Analysis* examined four restructure scenarios to address the Committee's alternatives. For each scenario, the *Analysis* recommended a potential boundary based on an assessment of quantitative and qualitative data, and driven by a set of boundary criteria. The *Analysis* also identified, at a high level, the restructure implications that would be explored through a full restructure study.

The final report on the *Boundary Analysis* was presented to the CSRD Board of Directors at its February 21, 2019, meeting. Based on the information in the report, the Board asked the Minister for funding in support of an incorporation study to examine the potential creation of a new Sorrento-Blind Bay Municipality. The Board also requested that, in the event the Sorrento-Blind Bay incorporation were deemed to be unfeasible as a result of the study, or did not receive the support of the Sorrento-Blind Bay electors, the Minister support the division of Electoral Area C into two electoral areas. The Minister accepted the Board's requests, and approved terms of reference to guide the *Sorrento-Blind Bay Incorporation Study*.

### ➤ **Incorporation Study**

The purpose of the *Incorporation Study* is to provide the electors of Sorrento and Blind Bay, within the study area defined by the *Boundary Analysis*, with the information and understanding required to make an informed decision on incorporation. To fulfill this purpose, the *Study* will feature a thorough, objective, and technical examination of the incorporation option and its implications for service provision, governance, finances, and property taxes in Sorrento and Blind Bay.

The *Study* will present these implications against the service provision, governance, financial, and property tax situations associated with the division of the existing Electoral Area C into two electoral areas. The creation of two electoral areas in place of the current Electoral Area C is the "default option" that will result in the event that incorporation does not proceed.

A Sorrento-Blind Bay Incorporation Study Committee will be established by the CSRD Board of Directors to conduct the *Incorporation Study*. The Committee's membership will be representative of the community demographics and interests that exist within the incorporation study area. In all, the Committee is expected to have ten to twelve voting members; the

Electoral Area C Director will serve on the Committee as a non-voting, *ex officio* member. The Committee will be assisted in its task by an independent consultant with extensive experience in local government restructure work, and a strong understanding of the governance and service provision frameworks in the South Shuswap. The consultant will be selected by the CSRD Board of Directors, but will report to the Incorporation Study Committee.

➤ **Terms of Reference**

The CSRD has developed terms of reference to articulate the purpose of the *Incorporation Study*, and to guide the Committee and the consultant in their approach to the assignment. The terms, which have been approved by the Ministry, outline a study process and information requirements, and identify the project deliverables. Key deliverables include:

- an outline of the current state of service provision, governance, service funding, and property taxes in the study area, compared to the current state under the default option (i.e., two separate electoral areas)
- a full description of the service, governance, financial, property tax, and other implications associated with the incorporation of Sorrento-Blind Bay
- an overview of the financial assistance program that would be provided by the Provincial Government under the incorporation option to facilitate the transition of the area to municipal status
- an outline of the process through which incorporation would be implemented
- a multi-year operating budget to project the financial implications for a new Sorrento-Blind Bay Municipality
- sample tax notices for residential, business, and agricultural properties to compare the projected property taxes under incorporation against the property tax situation under the default option
- a *Preliminary Report* to present the information collected, as well as the results of the analyses conducted
- a comprehensive *Community Engagement Strategy* aimed at ensuring that the electors of Sorrento and Blind Bay have ample opportunity to review, understand, and question the implications of incorporation
- a *Final Report*, which will include a synopsis of the community engagement process and findings
- a public information document, prepared at the conclusion of the *Study*, to summarize the findings, report on the outcome of the referendum, and set out next steps

The terms also set out important milestone dates that are expected to be met, and an upset (i.e., maximum) budget for the assignment.

**PROPOSED WORK PROGRAM**

This section of the letter outlines our proposed, eight-stage work program to conduct the *Incorporation Study*. The program has been designed to produce the information and deliverables identified in the *Study's* terms of reference.

Our work program features nine Committee meetings, four community open houses, one facilitated panel discussion, and one Committee presentation to the CSRD Board of Directors. The program also features the development of a set of *Fact Sheets* to outline the service, governance, financial, property tax, and other implications of incorporation for Sorrento and Blind Bay. One *Fact Sheet* would be produced for each local government service provided to residents in the study area, including services provided by the CSRD, provincial government ministries and agencies, regional bodies, and other entities. Additional *Fact Sheets* would be developed to address specific incorporation-related issues, such as the differences in the availability of grants between municipalities and electoral areas.

The *Fact Sheet*-based approach to incorporation studies was developed by Neilson Strategies Inc. (formerly Neilson-Welch Consulting Inc.) and Victoria Consulting Network Ltd. (consultant Peter Adams) for the *Westside Governance Study* in the Central Okanagan. It has been used since for several other restructure and incorporation studies in the province since that time. The approach is described further under Stage 3 in our proposed work program (see below).

### **Work Program**

Each of the stages in the eight-stage work program is outlined in detail as follows:

#### **➤ Stage 1**

##### **Inaugural Committee Meeting**

The process would begin with the inaugural meeting of the Sorrento-Blind Bay Incorporation Study Committee to discuss:

- the purpose of the *Study*
- the roles of the Committee, the consultants, the CSRD, the Ministry of Municipal Affairs of Housing, and the public
- the deliverables to be provided over the course of the *Study*
- the proposed work program, including key dates and timeline

We would seek a Committee resolution to endorse the work program as presented, or with amendments suggested by the Committee.

At this first meeting — Committee Meeting 1 — we would briefly review findings of the *Electoral Area C (South Shuswap) Governance Study*, and the *Electoral Area C Boundary Analysis Study*. As part of this review, we would identify and explain the Sorrento-Blind Bay incorporation study area, and would outline the default option of two electoral areas in place of the existing Electoral Area C. The inaugural meeting would also provide an opportunity for the Committee members to select a Committee Chair and Vice Chair. The Chair, supported by the Vice Chair, would be responsible for chairing Committee meetings, and for presenting information on behalf of the Committee at key points in the study process.

➤ **Stage 2**

**Description of Current State**

At Stage 2, the we would undertake the research necessary to outline the current state of service provision, governance, service funding, and property taxes in the incorporation study area compared to the current state under the default option. A considerable amount of research on current state factors was undertaken during the *Governance Study* in 2017 for the whole of Electoral Area C. The research findings would need to be updated and re-packaged to break out the study area, as well as the two separate electoral areas under the default option.

We would present the updated research findings in the form of a *Current State Briefing Paper* which we would review with the Committee at Committee Meeting 2.

➤ **Stage 3**

**Service & Issue Fact Sheets**

Stage 3 would involve the development and presentation of a series of *Fact Sheets* to outline the service, governance, financial, property tax, and other implications associated with the incorporation of Sorrento-Blind Bay. One separate *Fact Sheet* would be produced for each of the local, sub-regional, and regional services currently provided to residents in the study area by the CSRD.<sup>1</sup> Separate *Fact Sheets* would be produced for local services provided by regional agencies (e.g., Okanagan Regional Library), provincial ministries and agencies (e.g., Ministry of Transportation and Infrastructure, BC Assessment), and by non-profit and private groups.<sup>2</sup>

Each service *Fact Sheet* would begin by reviewing the individual service as it is provided today in the study area. Five questions would be addressed, including:

- what is the scope of the service provided
- who makes decisions
- who delivers the service
- what is spent on the service
- who pays for the service (and how much)

The *Fact Sheet* would then outline the changes to service's governance, delivery, cost, and tax impact that could be expected in the study area as a result of a decision to incorporate a Sorrento-Blind Bay Municipality. Following this outline, the *Fact Sheet* would profile the service under the default option that will exist in the event that incorporation does not proceed. The *Fact Sheet* would end with a comparison table of the property tax implications, associated with the individual service, for study area residents under the incorporation and default options.

Separate issue-specific *Fact Sheets* would be developed to identify and describe the implications of incorporation for the local governing body (i.e., the make-up, role, and authority of a

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<sup>1</sup> In some cases, there may be an opportunity combine two or more similar services into single *Fact Sheets*.

<sup>2</sup> Examples of local services provided by the province include policing (i.e., RCMP), local roads, and subdivision approval. Examples of privately-provided local services include water distribution and sewage collection.

municipal council), implications related to sources of revenue (including the availability of grants), the process through which incorporation would be implemented, and the financial assistance that would be provided by the provincial government to facilitate the transition to municipal status. Of particular importance to the Committee would almost certainly be the level of provincial assistance to expect regarding local roads. This item would be highlighted for discussion.

Stage 3 would be the most time-consuming stage of the study process. Five to six months would be required to undertake all of the necessary research and analysis. Five Committee meetings — Committee Meetings 3, 4, 5, 6, and 7 — would be needed over the course of Stage 3 to properly present and discuss the separate *Fact Sheets* with the Committee. One meeting would be held each month.

➤ **Stage 4**

**Operating Budget & Sample Property Tax Notices**

Using the information from the *Fact Sheets*, the consultants would produce a multi-year operating budget for a new Sorrento-Blind Bay Municipality. The budget would include, but would also extend beyond, the transition period over which provincial financial assistance would be provided. Sample property tax notices for residential, business, and agricultural properties would also be prepared to compare the total (i.e., all services) projected property taxes under incorporation, against the property tax situation under the default option.

Importantly, the operating budget and accompanying property tax notices would be constructed to project the financial and tax changes that would be expected to occur simply as a result of the decision to incorporate. The budget and tax notices would not include the impacts of potential future decisions taken by a new municipal council to change the number, scope, or level of services provided within the study area. Any such decisions, or lack thereof, would be the prerogative of the new council, guided by the needs and wishes of the new municipality's electors.

The operating budget and property tax notices would be presented to the Committee at the end of the presentation of *Fact Sheets* at Committee Meeting 7.

➤ **Stage 5**

**Presentation of Preliminary Report**

The information and analyses from the earlier stages of the *Study* would be brought together into a *Sorrento-Blind Bay Incorporation Study: Preliminary Report*. The report would be presented to, and reviewed with, the Committee at Committee Meeting 8.

➤ **Stage 6**

**Community Engagement**

All of the Committee's meetings would be advertised and open to the public. Space would be made available at each meeting to allow for questions from residents in attendance. In

addition, all materials produced for the *Study* would be posted on a dedicated portion of the CSRSD's website for the *Study*. Materials would include:

- copies of the final reports for the *Electoral Area C (South Shuswap) Governance Study*, and the *Electoral Area C Boundary Analysis Study*
- the *Sorrento-Blind Bay Incorporation Study* terms of reference
- the *Current State Briefing Paper*
- the individual *Fact Sheets* for the services and key issues
- the multi-year operating budget and sample property tax notices
- the *Sorrento-Blind Bay Incorporation Study: Preliminary Report*
- the Committee's meeting calendar, agendas, and minutes

The dedicated page on the CSRSD's website would be created at the outset of the *Study*, before Committee Meeting 1. The bulk of community engagement, however, would not occur until after the presentation of the *Preliminary Report* at Committee Meeting 8. It is after this meeting that the Committee would have all of the information and impact analyses with which to properly engage the public.

Engagement would proceed in accordance with a comprehensive *Community Engagement Strategy*. The *Strategy* would be developed and presented for Committee discussion, refinement, and approval at Committee Meeting 8. In addition to the *Study* website, the *Strategy* would provide for:

- one comprehensive mail-out to every residence in the study area, to highlight key findings from the *Study*, to advertise community open houses, and to outline possible next steps (e.g., referendum process)
- four community open houses within the incorporation study area<sup>3</sup>
- a facilitated panel discussion on the pros and cons of incorporation, featuring leaders from other British Columbia jurisdictions that either chose to incorporate, or chose to remain unincorporated, following restructure studies
- a series of information sheets, available online and in hard copy, to highlight the service, governance, financial, property tax implications associated with a decision to incorporate, and with the default option
- an information sheet to outline the referendum process and timing that would occur based on a recommendation from the CSRSD Board to the Minister of Municipal Affairs and Housing
- an information sheet to outline the incorporation process and timing that would be followed as a result of a referendum decision to incorporate
- social media notices using existing CSRSD platforms

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<sup>3</sup> Each open house would display poster boards and information hand-outs, feature a presentation by the consultants, and provide ample time for Q&A.

Committee members would be encouraged to attend each of the four community meetings. Following each of these events, a de-brief with the Committee would occur.

➤ **Stage 7**

**Presentation of Final Report**

Based on input provided by the community through the engagement process, the consultants would produce the *Final Report* for the *Study*. The report would include the information from the *Preliminary Report*, but would also feature a complete synopsis of the community engagement process and findings. Finally, the report would present a proposed Committee recommendation to the CSRD Board of Directors on an incorporation referendum.

The *Final Report* would be circulated to Committee members electronically for review. If deemed necessary by the Chair, the Committee would be brought together for Committee Meeting 9 to discuss the report's contents and proposed recommendation. Following Committee endorsement, the *Final Report* would be submitted to the CSRD and the Ministry. The Board Chair, supported by the consultants, would then present the *Final Report* to the CSRD Board at an open Board meeting. The Board at that time would determine what recommendation to make to the Minister regarding an incorporation referendum.

➤ **Stage 8**

**Summary & Next Steps**

Following an incorporation referendum, the consultants would produce a summary document to report on the *Incorporation Study*, the process followed, the findings from the impact analyses, the community engagement process and findings, and the outcome of the referendum. Next steps would be listed. The document would be provided to the CSRD for distribution.

**TIMELINE & BUDGET**

**Timeline**

The *Incorporation Study* must be completed and delivered to the CSRD and the Ministry by the beginning of 2021 (preferably, by the end of 2020). Figure 1 on the following page sets out our proposed timing that would allow us to meet the completion deadline, as well as other milestone dates identified in the terms of reference. Stage 1 in the figure would begin in October, 2019.

**Figure 1  
Proposed Timeline**

Work Program Stage	2019		2020				2021
	Fall	Winter	Spring	Summer	Fall	Winter	
1. Inaugural Committee Meeting	█						
2. Description of Current State	█						
3. Service & Issue Fact Sheets		█	█	█	█		
4. Operating Budget & Tax Notices				█			
5. Preliminary Report				█	█		
6. Community Engagement					█	█	
7. Final Report						█	█
8. Summary & Next Steps							█

**Proposed Budget**

The total proposed consulting budget for the *Incorporation Study* is \$118,500.00, plus GST. Figure 2 provides a breakdown of this amount by work program stage. The figures assigned to the individual stages are estimates; however, the total budget of \$118,500.00, plus GST, is an upset price that will not be exceeded.

**Figure 2  
Proposed Budget**

Work Program Stage	Consultant Fees	Disbursements	Total
1. Inaugural Committee Meeting	5,000.00	1,000.00	6,000.00
2. Description of Current State	7,500.00	1,000.00	8,500.00
3. Service & Issue Fact Sheets	48,000.00	4,000.00	52,000.00
4. Operating Budget & Tax Notices	4,500.00	-	4,500.00
5. Preliminary Report	7,500.00	1,000.00	8,500.00
6. Community Engagement	19,500.00	9,500.00	29,000.00
7. Final Report	6,000.00	1,000.00	7,000.00
8. Summary & Next Steps	3,000.00	-	3,000.00
<b>Total</b>	<b>\$101,000.00</b>	<b>\$ 17,500.00</b>	<b>\$ 118,500.00</b>

The proposed budget includes all professional fees, billed at the following hourly rates:

- Allan Neilson \$225.00
- Sherry Hurst \$150.00

Also included are all printing and mailing costs associated with one community mail-out, all printing costs for poster boards and information sheets, and all travel disbursements to attend up to nine Committee Meetings, four community open houses, one facilitated panel discussion, and the presentation of the *Final Report* to the CSRD Board of Directors. The budget provides for the disbursement costs, including modest honoraria, to bring three speakers to the facilitated panel discussion. The budget includes, as well, the cost to rent space for the Committee meetings and community open houses. The budget does not include:

- GST (the CSRD receives a 100% GST refund)
- the cost of any CSRD staff time involved in the *Study*, including such costs associated with the production of mapping and other technical information, the development and monitoring of the website, posting of notices to social media, and *Study* administration
- the distribution of the public summary document at the end of the *Incorporation Study*

## CONSULTING TEAM

Sherry and I comprise the two-person consulting team that would work with the Incorporation Study Committee on the *Sorrento-Blind Bay Incorporation Study*. This final section of letter provides information on each of us, and identifies our respective roles in the *Study*. Additional information is presented in *Attachment I*.

### ► Allan Neilson, MPA

I am the head of Neilson Strategies Inc., a local government consultancy based in the Okanagan and active throughout British Columbia. For over 25 years, I have advised regional district and municipal leaders on matters of governance, service provision, local government policy, finance, and community engagement. I have led and participated in several governance and restructure studies in past years, including key projects in the Central Okanagan (*Westside Governance Study*, *Okanagan Governance Review*), North Okanagan (*Greater Vernon Governance Review*), Islands Trust (*Islands Trust Governance Review*), Fraser Valley Regional District (*Cultus Lake Governance Review*), Metro Vancouver (*Township of Langley Regional District Participation*), and Cariboo Regional District (*Williams Lake Growth Management and Governance Study*, *South Quesnel Restructure Study*). Most importantly, I headed the consulting teams that completed the *Electoral Area C (South Shuswap) Governance Study* and the *Electoral Area C Boundary Analysis Study* that set the stage for the *Sorrento-Blind Bay Incorporation Study*.

On the *Sorrento-Blind Bay Incorporation Study*, I would serve as the project lead. I would be the chief contact with the Incorporation Study Committee, the CSRD, and the Ministry of Municipal Affairs and Housing. I would be involved at every stage of the *Study*, and would be responsible to the Committee, CSRD, and the Ministry for all project deliverables. I would attend all

Committee meetings and all community open houses, and would facilitate the panel discussion. I would present the *Final Report* with the Committee Chair to the CSRD Board of Directors.

► **Sherry Hurst, M.Pl., MCIP**

Sherry is a planner and local government consultant with Leftside Partners Inc., based in Victoria. Sherry has been advising local governments on governance, planning, and service delivery for 20 years, and has worked on several restructure projects, as well as service reviews involving local and regional service delivery, governance, and finance. In 2016, Sherry led a team of consultants examining governance options in an electoral area of the Regional District Okanagan Similkameen. She has worked closely with me on many studies, including the *Cultus Lake Governance Review* and the *Township of Langley Regional District Participation*. Sherry was also a key team member on both the *Electoral Area C (South Shuswap) Governance Study* and the *Electoral Area C Boundary Analysis Study*.

Sherry's knowledge of the South Shuswap and the factors that prompted the *Incorporation Study* is considerable. On the *Study*, Sherry would collect the information required for the *Current Situation Briefing Note*, and undertake the research and analysis for several of the *Fact Sheets*. Sherry would participate in developing the multi-year operating budget and sample property tax notices, and would attend several Committee meetings.

**IN CLOSING**

Thank you, again, for inviting me to submit a proposed work program to conduct the *Sorrento-Blind Bay Incorporation Study*. Please contact me directly if you have any questions of points for clarification. Sherry and I look forward to the opportunity to work with the CSRD and the Incorporation Study Committee on this important assignment.

Yours truly,

**NEILSON STRATEGIES INC.**



Allan Neilson, MPA  
Principal

cc: Charles Hamilton, MPA, CSRD Chief Administrative Officer  
Sherry Hurst, MCIP, Leftside Partners Inc.

encl.

**ATTACHMENT I  
CONSULTANT PROFILES**

**AREAS OF PRACTICE**

- Service Reviews
- Governance & Restructure Studies
- Policy Analysis
- Facilitation & Strategic Planning
- Communications
- Local Government Finance

**EDUCATION**

Master of Public Administration  
Queen's University, 1992  
*Ontario Graduate Scholarship*

Bachelor of Arts  
Urban Geography  
University of British Columbia, 1990

**PROFESSIONAL BACKGROUND**

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|----------------|--|
| 2016 – present | Neilson Strategies Inc.  |
| 2002 – 2014    | (formerly Neilson-Welch Consulting Inc.)<br>Principal                  |
| 2014 – 2016    | Metro Vancouver<br>General Manager<br>Planning, Policy and Environment |
| 1999 – 2002    | Urban Systems Ltd. (Kelowna)<br>Senior Consultant                      |
| 1997 – 1999    | City of Quesnel<br>Director of Corporate Services                      |
| 1995 – 1997    | Urban Systems Ltd. (Vancouver)<br>Local Government Advisor             |
| 1992 – 1995    | Neilson-Welch Research Assoc.<br>Principal                             |

**PROJECT EXPERIENCE**

**Service Reviews**

- City of Nanaimo — *Economic Development Service Delivery Model Assessment*
- University of British Columbia — *Community Centres and Athletics Access Fee*

- University of British Columbia — *UNA Operations and Staffing Analysis*
- University of British Columbia — *UNA Services Review*
- City of West Kelowna — *Development Services Review*
- City of Abbotsford — *Solid Waste Operations Management Plan*
- City of Abbotsford — *Abbotsford Fire Rescue Master Plan*
- Regional District of Central Okanagan — *Dog Control Service Review (2012, 2018)*
- City of Victoria — *Human Resources Service Review*
- City of Victoria — *Core Area Service Integration (Fire Dispatch)*
- Regional District of Columbia-Shuswap — *Building Inspection Service Business Case*
- Metro Vancouver — *Regional Parks Service Review*
- Regional District North Okanagan — *Greater Vernon Recreation Facilities & Programming Service Review Facilitation*
- Regional District of Squamish Lillooet — *Pemberton & District Community Recreation*
- City of Nanaimo — *Integrated Risk Management Model (Fire Service)*
- Cowichan Valley Regional District — *Organizational Assessment*
- Alberni-Clayoquot Regional District — *First Nation Participation in ACRD Services*
- Regional District Fraser-Fort George — *Library Service Review*
- City of West Kelowna — *Review of Development Approval Process*
- Resort Municipality of Whistler — *Service Review Program*
- Regional District Columbia-Shuswap — *Review of Development Services*
- Regional District Kootenay Boundary — *City of Trail / Area B Cost-Sharing Mediation*
- Regional District North Okanagan — *Greater Vernon Water Service Review*
- Regional District North Okanagan — *Greater Vernon Parks & Recreation Service Review (2010)*
- City of West Kelowna — *Westside Regional Wastewater Treatment Plant Review*

- Regional District North Okanagan — *City of Enderby / Area F Services Review*
- Regional District Columbia Shuswap — *Organizational Review*
- Regional District Kootenay Boundary — *Recreation Service Review Mediation*
- City of Kelowna — *Review of Qualifications for Bylaw Service Officers*
- Islands Trust — *Corporate Services Review*
- Sterile Insect Release Program — *SIR Program Structure Post-2007*
- Regional District Nanaimo — *Organizational Structure Review*
- Town of Ladysmith — *Review of Cost-Sharing for Town Services*
- Regional District Sunshine Coast — *Regional Recreation Facilities: Cost-Sharing & Governance*
- Regional District Okanagan Similkameen — *Oliver & District Parks and Recreation Mediation*
- City of Nanaimo — *Review of Municipal Insurance Services*
- Alberta Municipal Affairs — *Regional Partnerships Initiative Review*
- City of Quesnel — *Policy Options Reports (Sub-Regional Recreation Service; Regional Library Service)*
- Regional District Nanaimo — *Service Level & Staffing Review*
- Alberta Municipal Affairs — *Regional Partnerships Initiative: Municipal Bank of Resources*
- Village of Montrose — *Sustainable Community Services Study*
- Regional District Nanaimo — *Regional Services Review*
- BC Ministry of Municipal Affairs — *A Guide to Regional Service Arrangements & Service Reviews*
- Cariboo Regional District — *Library Service Review*
- City of Quesnel — *Corporate Business Plan*
- Resort Municipality of Whistler — *Organizational Review*
- City of Fort St. John — *Regional Emergency Measures Study*
- City of Rossland — *Solid Waste Management Review*
- City of Surrey — *Bylaw Enforcement Practices & Procedures Review*

#### **Governance & Restructure Studies**

- Columbia Shuswap Regional District — *Electoral Area C Boundary Analysis*
- Comox Valley Regional District — *Utilities Governance Options*
- Sterile Insect Release Program — *Governance Review*
- Columbia Shuswap Regional District — *Governance Study*
- City of Kelowna — *Utilities Governance Review*
- Township of Langley — *Regional District Participation*
- City of Kelowna — *Boundary Rationalization*
- City of Campbell River — *Boundary Restructure Phase I*
- City of Trail — *Council Committee Structure Review*
- Regional District Squamish Lillooet — *Boundary & Governance Study*
- Capital Regional District — *Core Area Wastewater Treatment Project: Assessment of Governance Models*
- City of Chilliwack — *Cultus Lake Park Governance Study*
- Regional Districts Central Okanagan, North Okanagan, Okanagan-Similkameen — *Okanagan Regional Governance Study*
- Islands Trust — *Governance Review*
- Regional District Central Okanagan — *Westside Governance Study, Phase II*
- City of Nanaimo — *Water Supply Governance Options*
- Regional District North Okanagan — *Regional Issues Identification Study*
- Regional District North Okanagan — *Electoral Area Services Commission*
- Regional District North Okanagan — *Review of Governance & Organizational Structures*
- City of Nanaimo — *Parking Service Governance Study*
- Regional District North Okanagan — *Greater Vernon Governance Study*
- City of Quesnel — *South Quesnel Restructure, Phase III*
- City of Grand Forks — *Master Airport Plan: Governance*
- City of Williams Lake & Cariboo Regional District — *Growth Management & Governance Study*

- City of Quesnel & Cariboo Regional District — *Local Government Restructure Study*

#### **Policy Analysis**

- City of Vancouver — *Property Tax Policy Reform Commission*
- Town of Ladysmith — *Extra-Territorial Service Extensions*
- Columbia Shuswap Regional District — *Acquisition of Surplus Assets*
- Sterile Insect Release Program — *Legislative Reform*
- City of Prince George — *Revitalization Tax Exemption Analysis*
- City of Nanaimo — *Commercial Advertising at Vancouver Island Conference Centre*
- Social Planning Council for North Okanagan — *Affordable Housing Initiative*
- City of Vernon — *Attainable Housing Strategy*
- City of Nanaimo — *Social Services Study*
- District of Tofino — *Attainable Housing Strategy*
- City of Nanaimo — *Liquor Control Strategy*
- City of Nanaimo — *Treaty Process Policy Options*
- City of Quesnel — *Corporate Policy Manual*
- City of Nanaimo — *City Policy Positions*
- City of Nanaimo — *Port Authority PILTs & Ports Competitiveness*
- City of Kelowna — *DCCs & Kelowna's Urban Centres*
- City of Surrey — *Regulating Vehicles for Hire*
- City of Surrey — *Building Design Regulations Task Force*

#### **Facilitation & Strategic Planning**

- City of West Kelowna — *Community Meeting on Homelessness*
- District of Tofino — *Council Strategic Planning*
- North Coast Regional District — *Board of Directors' Strategic Priorities*
- Sterile Insect Release Program — *Strategic Planning Session*
- City of Kelowna — *Imagine Kelowna*
- City of West Kelowna — *Council Strategic Priorities (2017, 2018)*
- City of Langley — *Council Strategic Plan*
- District of West Kelowna — *Development Roundtable*

- Village of Harrison Hot Springs — *Council Strategic Planning Session*
- Town of Ladysmith — *Partners for an Economically Vibrant Community*
- Regional District Fraser Valley — *Board Strategic Planning Workshop*
- Regional District Columbia Shuswap — *Board Orientation Session*
- District of Peachland — *Council Strategic Planning Workshop (2012, 2009)*
- Regional District Central Okanagan — *Board Strategic Planning Workshop (2012, 2009)*
- City of Kelowna — *Public Art Program Review Workshop*
- Kelowna Joint Water Committee — *Workshop on Governance*
- Columbia Shuswap Regional District — *South Shuswap OCP Process*
- Okanagan Basin Water Board — *Strategic Planning Workshop (2012, 2011, 2009)*
- Sterile Insect Release Program — *Board Workshop with Local Elected Officials*
- Resort Municipality of Whistler — *Council Strategic Planning Workshop (2011, 2009)*
- Resort Municipality of Whistler — *Senior Management Team Retreat*
- District of Peachland — *Management Team Retreat*
- Union of BC Municipalities — *Local Government Elections Task Force Workshop*
- Resort Municipality of Whistler — *Additional Hotel Room Tax Policy Discussion*
- Salmon Arm Economic Development Society — *Strategic Planning*
- City of Revelstoke — *Council Strategic Planning Session*
- Regional District Columbia Shuswap — *Regional Economic Development Discussion*
- City of Prince George — *Council Strategic Planning Session*
- Local Government Management Association — *Board of Directors Strategic Planning Session (2009, 2008)*
- Regional District Fraser-Fort George — *Priorities & Planning Workshop (2009, 2006)*
- District of Mackenzie — *Strategic Planning Workshop (2009, 2006)*
- City of Trail — *Council Strategic Planning*

- City of Kelowna — *Mayor's Event on Homelessness*
- Ministry of Community Services — *Building Effective Regional Districts*
- District of Coldstream — *Priorities & Planning Workshop*
- City of Kelowna — *TDM & Public Transit Workshops*
- District of Coldstream — *Capital Works Review Session*
- City of Kelowna — *Disabled Parking Workshop*
- City of Nanaimo & District of Lantzville — *Process for Initiating Inter-Jurisdictional Supply of Water*
- Union of BC Municipalities — *Regional District Issues & Non-Legislative Solutions*
- District of Coldstream — *Council & Fire Services: Discussion Session*
- Village of Salmo — *Community Health Centre Sustainability Initiative*
- BC Ministry of Community, Aboriginal & Women's Services — *Community Charter Workshop*
- City of Quesnel — *Priorities & Planning Workshop*
- Town of View Royal — *Priorities & Planning Workshop*
- BC Ministry of Community, Aboriginal & Women's Services — *Communities' Resource to the Community Charter*
- City of Quesnel — *Council Orientation Session*
- Regional District North Okanagan — *Workshop on Alternatives to Waste Disposal*
- City of Coquitlam — *Participation Workshop*
- City of Quesnel — *Forum on Crime in the Downtown Area, Parts I & II*

#### **Communications**

- Union of BC Municipalities — *Council & Board Remuneration Guide*
- Columbia Shuswap Regional District — *Building Inspection Service Extension (2017, 2018, 2019)*
- City of Kelowna — *Kelowna Electrical Utility Restructuring Opportunity*
- City of Nanaimo — *Supported Housing Initiative*
- BC Ministry of Community Services — *BC-Asia Twinning Tool Kit*
- Union of BC Municipalities — *Regional District Took Kit*

- City of Nanaimo — *Nanaimo Conference Centre Communications Strategy*
- City of Kelowna — *BC Gas Legacy Fund Communications Strategy*

#### **Local Government Finance**

- Regional District of Nanaimo — *Parks Funding Review*
- Fraser Valley Regional District — *Hospital District Funding Model*
- City of West Kelowna — *Development Cost Charges*
- City of West Kelowna — *Latecomer Agreement Policy*
- Regional District Kootenay Boundary — *Beaver Valley Amalgamation Feasibility Study*
- Union of BC Municipalities — *Local Government Fiscal Management Study*
- City of West Kelowna — *Review of Development Fees*
- City of Prince George — *Review of Planning Fees*
- Resort Municipality of Whistler — *Long Term Financial Plan*
- City of Kelowna — *Review of Planning Fees*
- Town of Ladysmith — *Development Cost Charges Review*
- BC Ministry of Community, Aboriginal & Women's Services — *Parkland Acquisition Best Practices*
- City of Chilliwack — *Financial Analysis of Governance Options*
- BC Ministry of Community, Aboriginal & Women's Services — *DCC Guide for Elected Officials*
- City of Coquitlam — *Transportation & Parkland DCC Review*
- BC Ministry of Water, Land and Air Protection — *Financial Review of Water Agencies*
- BC Ministry of Municipal Affairs — *Development Finance Choices Guide*
- City of Quesnel — *DCC Review*
- City of Chilliwack — *ALC Economic Impact Analysis*
- City of Williams Lake — *DCC Review*
- BC Ministry of Municipal Affairs — *Public- Private Partnerships Consultation Study*
- Town of Gibsons — *DCC (Sewer) Review*

## Planning &amp; Local Government Consultant

## EXPERTISE

- Development and Infrastructure Finance
- Policy, Governance and Service Delivery
- Land Use Planning
- Land and Economic Development

## EDUCATION

**Masters of Planning (M.Pl.)**

School of Urban and Regional Planning  
Queen's University

**Bachelor of Arts (B.A.)**

Writing and Political Science, Honours  
University of Victoria

## PROFESSIONAL AFFILIATIONS

Member and Registered Professional Planner – Canadian Institute of Planners  
Certified Member – Planning Institute of British Columbia

## EMPLOYMENT BACKGROUND

2005 – present Planner and Local Government Consultant, Leftside Partners Inc., Victoria BC

2001 – 2005 Planner, Urban Systems Ltd., Vancouver BC

1999 – 2001 Land Development Consultant, Royal LePage Advisors, Toronto ON

1997 – 1999 Real Estate Analyst, The Morassutti Group, Toronto ON

1996 Junior Planner, Borough of East York, East York ON

## REPRESENTATIVE PROJECT EXPERIENCE

Policy, Governance and Service Delivery

- **Columbia Shuswap Regional District – Area C Boundary Analysis**  
This analysis examined two options for Electoral Area C – the incorporation of a portion of the electoral area (including determination of where the appropriate boundaries would be), and the division of the current electoral area into two electoral areas. For each option, the Boundary Analysis recommends a study area, based on a comprehensive assessment of quantitative and qualitative data.
- **Comox Valley Regional District – Utilities Governance Options**  
This study examined the governance of the regional water and sewage services provided in the Valley. Service participants (staff and elected officials) as well as the K'ómoks First Nation were interviewed to determine concerns with the current model, and desire to become involved in decision-making for these services. Based on the feedback, an *Issues Paper* was prepared, followed by a more comprehensive review of proposed governance models, including process flow charts, strengths and weaknesses, examples, and how each option addressed the issues identified by the participants.
- **Town of Ladysmith – Development Application Process Review**  
Completed a review of the Town's development application processes, together with Defero-West Consulting, including review of the Town's current processes, interviews with Council, staff, developers and applicants, an online survey, a developer's forum to report back on the results and provide for additional feedback, and a final report. The final report identified both successes as well as issues, and identified options for improvement in the areas of communication, processes and relationship building.

- **City of West Kelowna – Development Application Process Review**  
Completed a review of the City’s development application processes, together with Neilson-Welch Consulting Inc., to examine the processes through which the City receives, reviews and, ultimately, approves development and building permit applications. The process included interviews with Council, staff, and applicants, a review of application files, discussions with other municipalities, and research into recent development process initiatives and best practices in municipalities in Metro Vancouver, Vancouver Island and the United States.
- **Columbia Shuswap Regional District – Area C Governance Study**  
Completed a study that examined how services are provided within Area C, and considered whether other models or changes would better respond to local service needs, allow for efficiencies, and empower local communities with greater control or voice in service delivery. The study was led by a volunteer committee, and involved public engagement through open houses, survey, and newsletter. The final report recommended the Regional District request an incorporation study for a portion of Area C.
- **City of Abbotsford – Abbotsford Fire Service Review**  
Assisted Neilson-Welch Consulting Inc. with the City’s comprehensive review of fire services, including background papers on Abbotsford growth and factors affecting fire services, as well as innovative fire practices.
- **District of Metchosin – Boundary Change**  
Assisted the District in analyzing and preparing its rationale, submission to the Ministry (and cabinet) and process to facilitate a boundary change (reduction) with the City of Langford. The boundary change was part of a unique agreement between the District, City and Beecher Bay (Scianew) First Nation and a private land owner to provide each party with benefits. The proposed change involved an amendment to the regional growth strategy (requiring unanimous support by 13 municipalities) as well as a referendum in Metchosin, which was ultimately supported by 76% of the District’s residents.
- **Columbia Shuswap Regional District – Building Inspection Service**  
Prepared business case and public consultation materials to establish a building inspection service in two electoral areas, and increasing service levels in one electoral area.
- **City of Abbotsford – Solid Waste Master Operations Plan**  
Assisted Neilson-Welch Consulting Inc with the City’s solid waste master operations plan including research and evaluation of curbside collection delivery models, options and costs as well as processing options and costs.
- **Central Coast Regional District – Governance & Service Delivery Study**  
Completed a study to examine how services are provided and governed within the CCRD, and consider whether other models or changes could better respond to local service needs, allow for efficiencies, and if desired, empower local communities with greater control or voice in service delivery. The study involves public engagement through surveys, newsletters and a series of fact sheets detailing regional district services and governance concepts.
- **Regional District of Okanagan-Similkameen – Area D Governance Study**  
Undertook a study to examine how services are provided within Area D, and consider whether other models or changes would better respond to local service needs, allow for efficiencies, and if desired, empower local communities with greater control or voice in service delivery. The study was led by a volunteer committee, and involved extensive public engagement through governance forums, surveys, newsletters and service fact sheets.

- ***Columbia Shuswap Regional District – Multi-Regional Shuswap Watershed Water Quality Monitoring Service***  
Undertook a study to determine the feasibility of establishing a service to monitor and examine water quality issues based on watershed boundaries that encompassed portions of three regional districts, six municipalities and six First Nations. Researched and assessed options on governance, service delivery and cost sharing, and made recommendations. The study culminated in the establishment of a new service.
- ***Comox Valley Regional District – Mount Washington Fire Service Feasibility***  
Worked on a study to determine the feasibility of establishing a fire service for the Mount Washington community, including recommendations on the approach, preliminary costs, and approval process. A referendum on the service is planned for the fall of 2016.
- ***Comox Valley Regional District – Sandwick Waterworks Conversion Review***  
Worked on the conversion review study and process to determine the current situation, challenges, options and implications for dissolving the Sandwick Waterworks District and creating a service under the Comox Valley Regional District, and addressing the portion of the system not included within the City of Courtenay's boundary extension.
- ***Metro Vancouver – Regional Parks Service Review***  
Assisted Neilson-Welch Consulting Inc on the Parks Service review by conducting research of other regional park systems and costs including locations in BC, Canada and the USA.
- ***City of Campbell River – Phase 1 Boundary Extension Analysis***  
Prepared preliminary analysis of the implications of a boundary extension, including the financial impacts and service implications.
- ***Village of Cumberland – Engineering Service Review***  
Conducted a review of the engineering service at the Village, and how it is delivered. The review involved interviewing staff to identify concerns and explored the benefits and implications of different approaches to engineering service delivery. The report identified concerns, examined options and offered recommendations.
- ***Regional District of Central Okanagan – Dog Control Service Review***  
Conducted a review of the Regional District's dog control service, including an examination of the service, research into best practices and alternate delivery models, financial implications, and recommendations for a redesigned service.
- ***Alberni Clayoquot Regional District – First Nations Participation in Regional Services***  
Prepared a paper and presentation identifying potential Regional District services in which the Huu-ay-aht First Nation and Yuu-tluth-aht First Nation may want to participate, in response to the First Nation governments providing notice of their intention to become full members of the ACRD, as per the terms of the Maa-Nulth First Nations Final Treaty Agreement. In addition to examining the benefits and challenges to participation by the First Nations in a variety of services, the report evaluated and proposed appropriate cost-sharing arrangements for the services.
- ***Regional District of Fraser-Fort George – Library Service Cost Sharing***  
Assisted in the preparation of a discussion paper regarding the variety of approaches to cost sharing in the City of Prince George's library service, including an evaluation of the different bases for contributions such as usage, circulation, population, assessment; review of other existing cost-sharing arrangements; consideration of issues such as capital costs, proximity to services, disparate service levels; and exploration of alternative service delivery models.

- **Resort Municipality of Whistler – Boundary Adjustment Analysis**  
Prepared preliminary analysis of the implications of a boundary extension, including an examination of the services and financial responsibilities that would transfer to Whistler.
- **Resort Municipality of Whistler – Organizational Assessment**  
Assisted in a high-level organizational assessment examining staffing levels and organization of staffing resources given the anticipated trends and challenges for the municipality and resort community.
- **Columbia Shuswap Regional District – Planning Department Review**  
Prepared a report evaluating the existing organizational structure of the Development Services Department, and recommended a new structure for the department.
- **Regional District of North Okanagan & City of Enderby – Electoral Area F Services Review**  
Assisted in the preparation of a report on the options for delivering three electoral area services including using the previously untested Section 13 of the *Community Charter*. Prepared the bylaws to implement the option selected by the Region.
- **Islands Trust – Governance Review Report**  
Prepared a report regarding representation of the Islands Trust Council and Local Trust Committees, as well as coordination with Regional Districts. The report identified concerns with the structure and options for change, to facilitate a request for legislative changes from the Province. Prepared materials and survey for the public input process.
- **Cultus Lake Governance Committee – Boundary Extension**  
Prepared the detailed financial analysis of the implications of extending the boundaries of the City of Chilliwack to encompass the Cultus Lake area.
- **City of Chilliwack (joint committee) – Cultus Lake Financial Sustainability and Governance Alternatives**  
Prepared a comprehensive analysis regarding the long term financial sustainability of the Cultus Lake community under the *Cultus Lake Park Act* legislation, including a 10-year financial projection, and capital works and infrastructure upgrading program. The second phase of the study considered the implications of various alternative governance options, including amalgamation with Chilliwack and incorporating as a Village municipality.
- **City of Chilliwack (joint committee) – Cultus Lake Incorporation Study**  
Prepared detailed financial analysis of the implications of incorporation as a new municipality and dissolution of the Park Board boundaries to become part of the FVRD in preparation for a referendum on incorporation.
- **City of Fort St. John – Government Reform Workbook**  
Assisted in the background paper outlining local government services and the basis for various services and approaches to service delivery policy. The study was part of a large restructuring initiative undertaken by the City.
- **Ministry of Water, Land and Air Protection – Financial Review of Water Service Agencies**  
Conducted a survey of water purveyors in BC regarding their financial situation relative to the demands of providing safe drinking water. This information was supplemented with research regarding assistance programs in Canada and the US, and culminated in recommendations regarding the suitability of various policies in BC relative to water service delivery.

- **Regional District of Okanagan Similkameen – Drought Management Bylaws**  
Assisted the RDOS and Earthtech in the preparation of drought management bylaws for various water systems in the Regional District.

#### Development and Infrastructure Finance

- **Town of Ladysmith – Infrastructure Finance Tools**  
Provided a workshop and presentation for Council to review the tools available for financing infrastructure in an undeveloped neighbourhood of the Town, including latecomer agreements, local area DCCs, development works agreements and subdivision conditions. Presentation discussed the tools, advantages and disadvantages, and implications for the owner/developer.
- **Town of View Royal – DCC Review and Bylaw**  
Completed a review of the Town's DCC bylaw, including consideration of new land use categories and DCC sectors. The review included preparation of a policy rationale, allocation of growth and infrastructure costs, consultation with staff, Council and stakeholders, and calculation of new rates, in addition to a bylaw and background report for approval by the Ministry (Inspector of Municipalities).
- **Capital Regional District – Saanich Peninsula Water & Wastewater DCC Review**  
Worked on a team with Kerr Wood Leidal to review the subregional DCC for sewer and water on the Peninsula. The review included re-examining the policy framework and establishing new rates that reflect the future sewer and water infrastructure needs. The review involves consultation with three municipalities, the CRD, as well as broader consultation with stakeholders and the public.
- **Metro Vancouver (GVS&DD) – DCC Review**  
Working with Metro staff to review the regional DCC for sewer and drainage works, established (and last reviewed) in 1996. The review includes re-examining the policy framework and establishing new rates that reflect the region's future sewer infrastructure needs. The review involves consultation with member municipalities, including the creation of a DCC Review Committee with representatives from municipalities throughout the region, as well as broader consultation with stakeholders and the public.
- **Regional District of Nanaimo – Park Funding Service Review**  
Reviewing funding models in use at the Regional District of Nanaimo (RDN) for Regional and Community Parks, including research of alternate funding models and financial tools in use in other local governments. The review will result in recommendations on funding model(s) and financial tools for both the Regional Parks Service and the Community Parks Service.
- **Town of View Royal – DCC Credit Review**  
Worked together with View Royal staff to review the background and supporting documentation for the Town's DCC Bylaw, and determine what works were eligible for a DCC credit.
- **City of Port Moody – DCC Options Review**  
Worked together with Port Moody staff and a team from Kerr Wood Leidal to identify options for updating the City's DCC to reflect current projects and best practices, and the implications for the City's DCC rates.
- **Ministry of Community, Sport and Cultural Development – Development Finance Choices Guide**  
Assisted the Ministry with a re-write of the Development Finance Choices guide, including providing case studies and examples, and updating the information in the guide. The guide focuses on the financing tools available to local governments, how they are used, when and

why they are used, as well as lessons learned and considerations to take into account when selecting financing tools.

- ***District of Squamish – Development Cost Charge & RTE Bylaw***  
Working with the District of Squamish to update the District's Development Cost Charge bylaw, including a review of the policy rationale, stakeholder consultation and bylaw preparation. Also evaluated the impacts of a proposed Revitalization Tax Exemption Bylaw.
- ***Greater Vernon Water – Development Cost Charge Bylaw***  
Working with Greater Vernon Water to update the Development Cost Charge bylaw, consistent with the Master Water Plan, including calculation of new rates, stakeholder consultation and preparation of a background report.
- ***City of West Kelowna – Comprehensive Development Cost Charge Review***  
Completed the City's Development Cost Charge review, including consideration of new land use categories and smart growth strategies, as well as provisions for DCC exemptions and reductions. The review established the City's first DCC for some infrastructure categories, and included preparation of policy rationale, engineering infrastructure cost estimates, consultation with a staff and stakeholder review committee, council workshops, and rate calculation, in addition to a new bylaw and background report.
- ***City of West Kelowna – Latecomer Policy***  
Prepared a policy for the District for guide the District's use of latecomer agreements, and identified an application and approval process for the individual agreements. The report provided staff and Council with the key elements of latecomer agreements, the options, and the rationale behind the proposed policy.
- ***City of West Kelowna – Development Fees and Charges Review***  
Assisted the District in assessing its development fees and charges, including comparative analysis, understanding of the impacts of raising and lowering fees, and an evaluation of the levels of cost recovery achieved by the Development Services Division.
- ***Town of Ladysmith – DCC Waiver Policy and Bylaws***  
Prepared the policy and associated bylaws to take advantage of DCC legislative changes allowing for the reduction of DCCs for developments with low environmental impact as well as affordable housing.
- ***Ministry of Community Services – DCC Harmonization Legislation***  
Assisted the Ministry in writing and evaluating enabling legislation to guide DCC practices and facilitate a more regional and cooperative approach to DCCs in the Comox Valley Regional District (incorporated into Bill 43, *Miscellaneous Statutes Amendment Act, 2008*).
- ***Ministry of Community Services – DCC Policy Review***  
Researched and advised on potential DCC policy changes contemplated by Cabinet.
- ***Ministry of Community Services – DCC Best Practices Guide***  
Prepared Best Practices for the Ministry's DCC Best Practices Guide regarding the introduction of new rates, protecting in-stream applications and the use of grace periods.
- ***Ministry of Community, Aboriginal and Women's Services – Parkland Acquisition Best Practices***  
Conducted a survey of municipalities to identify parkland acquisition practices, and developed best practices regarding the use of DCCs, 5% dedication and cash-in-lieu for review by a sub-committee, and subsequently the Development Finance Review Committee.

- **Ministry of Community, Aboriginal and Women's Services – DCC Conversion Model**  
Conducted research to support the conversion of units to square metres for inclusion in the DCC Best Practices guide.
- **City of Prince George – Revitalization Tax Exemption**  
Explored how the Revitalization Tax Exemption could be used to further the City's revitalization objectives, and analyzed whether there was any benefit to requesting legislative changes to allow the City to offer tax exemptions with an increased time frame.
- **Town of Ladysmith – Development Cost Charge Review 2011**  
Conducted the Town's Development Cost Charge review, including preparation of new rates, incorporation of new land use categories and smart growth strategies, as well as consideration of new legislative provisions for DCC exemptions and reductions. The review included consultation and council workshops.
- **Town of Ladysmith – Development Cost Charge Council Workshop**  
Conducted a workshop with the Town of Ladysmith Council on Development Cost Charges.
- **City of Coquitlam – Parkland Development Cost Charge Policy Paper**  
Produced a policy paper outlining the rationale for and against a parkland acquisition and improvement DCC to non-residential categories of industrial and commercial land uses.
- **UBC – Development Permit Fee Review**  
Recommended new development permit fees and fee structure for UBC based on costs and a review of comparable rates in municipalities.

#### Land and Economic Development

- **Halfway River First Nation – Urban Land Market Feasibility Analysis**  
Evaluated the feasibility of a variety of economic development opportunities in Fort St. John to assist the Halfway River First Nation in understanding the opportunities and benefits of acquiring urban land as part of the Treaty Land Entitlement process.
- **Sliammon Treaty Society – Economic Development & Highest and Best Use Analysis**  
Considered economic development opportunities and the highest and best use of Sliammon's reserve properties as well as Treaty Settlement Lands.
- **Land and Water BC – SLRD Land Inventory and Economic Opportunities**  
Identified Crown land parcels in the lower Squamish-Lillooet Regional District with short-, mid- and long-term marketing potential. The study included an overview of site constraints, opportunities, market conditions and action plans to identify work needed prior to disposition.
- **Land and Water BC – FVRD Land Inventory and Economic Opportunities**  
Identified Crown land parcels in the lower Fraser Valley Regional District with short-, mid- and long-term marketing potential. The study included an overview of site constraints, opportunities, market conditions and action plans to identify work needed prior to disposition.
- **Land and Water BC – North Cowichan Development Potential**  
Evaluated the development and marketing potential of three Crown land parcels in North Cowichan, including site analysis, market evaluation and highest and best use determination.
- **Vancouver Port Authority – Berry Point Land Use Study**  
Considered the characteristics and history of the Berry Point site and determined and evaluated future development and economic opportunities for the property.

- **Vancouver Port Authority – Maplewood North Property**  
Considered the characteristics of the Maplewood North site, and evaluated land uses, development opportunities and leasing strategies based on existing market conditions. A second study evaluated the property's feasibility for various port-related uses.
- **Land and Water BC – Broom Hill Development Potential**  
Evaluated the development and marketing potential of a 250 ha parcel in Sooke.

#### Land Use Planning

- **District of Metchosis – Contract Planning Services**  
Function as Planner responsible for processing development applications, responding to Council and public requests and carrying out day-to-day planning services and bylaw preparation in addition to special projects, such as the OCP policy and Zoning Bylaw review and amendments. Represent the District in all Regional Planning activities and committees, including Integrated Stormwater Management, Climate Action, Regional Transportation and Regional Planning.
- **District of Metchosis – Detached Secondary Suites Policy**  
Prepared a survey, workshops, presentations, a public consultation program, and policy review and provided advice to staff and Council in preparation for a referendum on the issue of permitting detached secondary suites in the District.
- **Town of Ladysmith – Contract Planning Services**  
Functioned for 10 months as a planner for the Town, responsible for processing rezoning and development permit applications, including liaising with staff, Council, the Advisory Planning Commission and the Advisory Design Panel.
- **City of White Rock – Contract Planning Services**  
Functioned for six months as City Planner responsible for processing development applications, advising Council and public on planning matters, participating on Board of Variance and Design Panel, and carrying out day-to-day planning services.
- **City of White Rock – Secondary Suites Policy**  
Prepared a report for City Council discussing secondary suites, including White Rock's current policies, relevant legislation, issues, and practices in other municipalities. The report outlined a process for amending the Zoning Bylaw to add secondary suites as a permitted use, and set out a framework to legalize secondary suites.
- **City of Coquitlam – Industrial Parking Standards Review**  
Conducted research of municipalities throughout Pacific Northwest with respect to industrial parking standards, including the use categories, application, ratio, etc. as well as TDM strategies and the effectiveness of their application.
- **Corporation of Delta – Off-Street Parking Standards**  
Conducted a review of Delta's off-street parking standards and made recommendations for changes to standards and various parking policies within the Zoning Bylaw
- **Corporation of Delta – Ladner Parking Policy**  
As part of a larger examination of parking standards, prepared a parking policy for the Village of Ladner, including altered standards, cash-in-lieu and other relevant policies.

- ***Vancouver Port Authority – Main Street Dock Development and Use Options***  
Considered various development concepts for the Main Street Dock site, including cruise ship terminals, office uses and a transportation node. Concepts were evaluated based on a range of criteria including cost to develop.
- ***City of Chilliwack – Lickman Road East Industrial Subdivision Concept Plan***  
Prepared concept and implementation plan for a 35-hectare industrial subdivision on land excluded from the ALR. The report considered the City's vision for the property, opportunities and constraints of the site, and recommended appropriate land uses and restrictions, parcel sizes and a corresponding road network and concept plan.
- ***City of Port Coquitlam – South Shaughnessy Area Plan***  
Produced various residential and park concepts for an 11-hectare City-owned parcel.
- ***City of Chilliwack – Island 22 Recreation Plan***  
Considered the long term potential for land uses at Island 22 in the Fraser River. The plan considered the various opportunities an aggregate extraction operation may have for the viability of recreation uses on the Island, as well as partnership opportunities.