

---

# CITY OF KELOWNA

## MEMORANDUM

---

**Date:** February 18, 2004  
**To:** City Manager  
**From:** Planning and Corporate Services Department  
**Subject:** Revised Work Plan for the Strategic Plan Update

---

In follow-up to the input received from Council at the February 9, 2004 Strategic Plan meeting, staff and the consulting firm of IER propose the following revised work plan. The revised work plan is intended to reflect Council's expressed interest to expand the number of opportunities whereby the general public can provide input to the strategic planning process. Costs associated with the expanded format have been provided.

### Strategic Plan Update – Proposed Revised Work Plan

1. Start-up meeting with project coordinators; review of background materials; interviews with key staff and external agencies; analysis of information obtained through background research and input received through interviews; and orientation session with Council and SMT. These items have been accounted for in the existing budget.
2. Guest Speaker – organize one evening event where a guest speaker can provide a thought provoking overview of community and world wide trends and issues. This event would also provide an opportunity to encourage people to take part in the strategic planning process.

**The above noted item is not in the existing budget. It is estimated that \$2,500 would be required to bring in a guest speaker.**

If an appropriate guest speaker cannot be obtained for \$2,500 or less, the information about community trends and issues, as well information about how people can take part in the strategic planning process will still be provided online and/or at City Hall or some other venue.

3. Design, conduct and analyze community survey (includes completion of 500 telephone surveys, posting online version of the survey and making available hard-copy versions of the survey). This item is accounted for in the existing budget.
4. Online bulletin board – used to obtain feedback from the community on questions / scenarios not used in the survey.

**The above noted item is not in the existing budget. It is estimated that \$2,500 would be required to develop and analyze the input.**

5. Self-directed workbooks – similar to the online bulletin board in that the workbooks would be used obtain feedback from the community on questions / scenarios not used in the survey.

**The above noted item is not in the existing budget. It is estimated that \$4,000 would be required to develop and analyze the input.**

6. Visioning Sessions – groups will meet in structured sessions to provide input to the strategic plan. Participants will receive an agenda and information to consider prior to the meetings.

The current work plan has budgeted for three separate visioning sessions. Two (2) hired facilitators would conduct the sessions, which would see 20-30 participants attending each session. **If IER were to provide additional facilitators to accommodate larger sessions (assuming the sessions are 4-5 hours in length), the cost would be \$1,125 per facilitator.**

If the City provides facilitation support there would be no additional fees. Use of the self-directed workbooks at the visioning sessions would also reduce the need for extra facilitators.

7. Open House – opportunity to report back to the community on the input received through the surveys, online bulletin board, self-directed workbooks and the goals and objectives developed through the visioning sessions.

**The above noted item is not in the existing budget. It is estimated that \$5,225 would be required to organize / host the open house and to analyze the input.**

As a cost saving alternative to having IER host an open house at this stage, the information that would be provided at the open house could be displayed online and/or at City Hall or some other venue, without the use of facilitators. Opportunities would still be provided to allow for input.

8. Develop draft Strategic Plan – includes vision, goals, objectives, actions, implementation items, priorities and timing. Meetings to be held with staff to develop action and implementation items. This item is accounted for in the existing budget.
9. Open House – opportunity for the community to review and comment on the draft Plan. Input received will help shape final version of Plan. This item is accounted for in the existing budget.

Costs associated with advertising during key stages of the strategic planning process are included in the existing budget and in the above noted costs associated with an expanded work plan.

## RECOMMENDATION

After a review of the above, it is submitted that the proposal to revise the work plan to update the strategic plan appropriately responds to the project needs and to the input received from Council. It is therefore recommended that the consulting firm of IER be commissioned to expand the work plan at a cost not to exceed \$16,475 (not including taxes and disbursements) funded from available funds within the Neighbourhood Planning Account No. 311 10 162 0 371.

This amount represents a “worst-case” scenario in that opportunities may arise whereby costs can be reduced if it is determined that savings could be made on such things as the guest speaker and the additional open house.

---

R.L. (Ron) Mattiussi, ACP, MCIP  
Director of Planning and Corporate Services

GDR

Community Telephone Survey

Hello, my name is \_\_\_\_\_ and I am calling on behalf of the City of Kelowna. The City is in the process of developing a Strategic Plan to provide direction for the future of Kelowna and to plan for services that meet present and future needs. We are conducting a random survey of individuals who live in the City; and I would like to take a few minutes of your time to ask you some questions. Please be assured that we are not selling anything and that all the information you provide will be held strictly confidential. As a token of thanks for your participation, we can enter your name in a draw to receive either two tickets to a Kelowna Rockets, two tickets to a live performance at the Kelowna Community Theatre or dinner for two at the Giusachan House Restaurant.

*Interviewer note: If unsure if the respondent is 18 years or older, ask. If they are under 18 years, ask to speak to an adult. If the respondent is busy and would like to participate, make arrangements to phone another time and/or provide them with the website address where they can fill in a questionnaire online at their convenience.*

*Interviewer Record the following (DO NOT ASK)*

Telephone # \_\_\_\_\_ Gender: M or F

Because we need to speak to people in different areas, could you please indicate in which area of Kelowna you live?

- (18.3% of households) Airport/McKinley/Dilworth/Glenmore (N of Bernard/W of Gordon) ☐
- (27.5% of households) Belgo / Black Mountain / Rutland ☐
- (25.4% of households) Central City (N of Giusachan Rd / S of Glenmore area) ☐
- (14.6% of households) South Pandosy (S of Giusachan Rd / N of Mission Creek) ☐
- (14.2% of households) Mission / SE Kelowna / SW Kelowna (S of Mission Creek) ☐

*Interviewer Note: If respondent identifies another area which is not listed above, thank them for their time and terminate the interview. Also, if respondent is from an area which has been overrepresented, thank them and terminate interview.*

Because we need to speak to people of different ages, could you please tell me your age?

*Interviewer Note: do not read list, check the appropriate response*

- (12.8% of population) 15-24 ☐
- (11.9% of population) 25-34 ☐
- (15.2% of population) 35-44 ☐
- (14.0% of population) 45-54 ☐
- (9.9% of population) 55-64 ☐
- (9.3% of population) 65-74 ☐
- (9.8% of population) >75 ☐
- No Response ☐

*Interviewer Note: If respondent is from an age group which has been overrepresented in the survey responses, thank them for their time and terminate interview.*

Q.1 How long have you lived in Kelowna?

*Interviewer Note: do not read list, check the appropriate response*

- 0-2 years ☐
- 3-5 years ☐
- 6-10 years ☐
- 10-20 years ☐
- More than 20 years ☐
- No response ☐

Q.2 If you weren't born or raised here, what brought you to Kelowna?

*Interviewer Note: do not read list, check the appropriate response*

- always lived here ☐
- job or business opportunity ☐
- educational opportunities ☐
- lifestyle / climate ☐
- family ☐
- other ☐

Q.3 How do you generally feel about the City as a place to live? Are you:

- Very Satisfied ☐
- Satisfied ☐
- Dissatisfied ☐

Very Dissatisfied ☐  
No Opinion ☐

Q.4 What, in your opinion, would you say are the most appealing things about Kelowna? **Interviewer note: do not read list, let respondent answer and check the appropriate item(s). If their response is not listed, write it down.**

- Outdoor recreation opportunities ☐
- Indoor recreation opportunities ☐
- Arts and Cultural opportunities ☐
- Employment opportunities ☐
- Educational opportunities ☐
- High Tech / Communications opportunities ☐
- Shopping opportunities ☐
- Climate ☐
- Location ☐
- Natural Setting ☐
- Access to backcountry / open spaces ☐
- Multicultural Community ☐
- Size of community ☐
- Community Spirit ☐
- Clean place to live ☐
- Safe place to live ☐
- Quiet place to live ☐
- Affordable place to live ☐
- Housing options ☐
- Close to family ☐
- Access to health care ☐
- Access to Public Transit ☐
- Amount of Traffic ☐
- Quality of Life ☐
- Other ☐

Q.5 When you talk about Kelowna to friends and family living elsewhere, how do you describe the City?

\_\_\_\_\_

\_\_\_\_\_

Q.6 On a scale of 1-10, with 1 being least successful and 10 being most successful, how *successful* do you feel the City has been in the past ten years (or the time you've lived in Kelowna if that is less than ten years) in achieving the following:  
**Interviewer note: Leave box blank if respondent doesn't have an answer.**

- ☐ growing in harmony with the natural environment
- ☐ protecting significant natural areas
- ☐ preventing deterioration in quality of Okanagan Lake water and beaches
- ☐ improving access along Okanagan Lake shoreline
- ☐ preserving viable agricultural holdings
- ☐ encouraging economic opportunities and prosperity for all residents
- ☐ growing at a pace that allows government agencies to provide services such as schools, parks, roads, emergency services etc.
- ☐ growing in a way that takes advantage of existing infrastructure
- ☐ supporting growth which ensures a full range of housing types
- ☐ providing transportation options which are safe and convenient
- ☐ supporting heritage preservation
- ☐ supporting the arts
- ☐ supporting multi-cultural diversity
- ☐ working cooperatively with other jurisdictions to tackle common challenges
- ☐ providing high-quality, well-managed municipal services
- ☐ using a range of financing options to fund municipal services
- ☐ facilitating communications between residents and the City

Q.7 On a scale of 1-10, with 1 being least important and 10 being most important, how would you rate the *importance* of achieving each of the following objectives?  
**Interviewer note: Leave box blank if respondent doesn't have an answer.**

- ☐ growing in harmony with the natural environment
- ☐ protecting significant natural areas
- ☐ preventing deterioration in quality of Okanagan Lake water and beaches
- ☐ improving access along Okanagan Lake shoreline
- ☐ preserving viable agricultural holdings

- ☐ encouraging economic opportunities and prosperity for all residents
- ☐ growing at a pace that allows government agencies to provide services such as schools, parks, roads, emergency services etc.
- ☐ growing in a way that takes advantage of existing infrastructure
- ☐ supporting growth which ensures a full range of housing types
- ☐ providing transportation options which are safe and convenient
- ☐ supporting heritage preservation
- ☐ supporting the arts
- ☐ supporting multi-cultural diversity
- ☐ working cooperatively with other jurisdictions to tackle common challenges
- ☐ providing high-quality, well-managed municipal services
- ☐ using a range of financing options to fund municipal services
- ☐ facilitating communications between residents and the City

Q.8 What would make living in Kelowna more enjoyable?

1.

2.

3.

Q.9 What do you think are the most important issues that the City of Kelowna will have to deal with in the next 20 years?

*Interviewer note: do not read list, let respondent answer and check the appropriate item(s). If their response is not listed, write it down.*

- Amalgamation

Cost of Living

Affordable Housing

Crime / Safety / Policing

Air Quality

Water Quality

Forest Fire Threats

Improving / Maintaining Road Network

Traffic Congestion

Ability to provide alternative means of transportation

Sprawl / Overcrowding

Local economy / unemployment

Protecting Natural Areas

Privatization of Services

Waste Reduction and Disposal

Other

Q.10 Do you have any comments or suggestions about what Kelowna should try to achieve in the next few years?

Q.11 I am going to read you a list of services provided by the City of Kelowna. I would like to know how satisfied you are with the quality of these services. Please indicate whether you are very satisfied, satisfied, dissatisfied, very dissatisfied or have no opinion.

	Very satisfied	Satisfied	Dissatisfied	Very Dissatisfied	No Opinion	
sidewalks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
bicycle lanes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
landscaping along streets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
public transit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
road network / circulation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
traffic flow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
drinking water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
recreation facilities / programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
arts and culture facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
bylaw enforcement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
police services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
fire protection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
public consultation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
marketing the local economy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Q.12 On a scale of 1-10, with 1 being least important and 10 being most important, how would you rate the *importance* of spending public money on the following items ? **Interviewer note: Leave box blank if respondent doesn't have an answer.**

- ☐ new roads
- ☐ existing roads
- ☐ transit system
- ☐ sidewalks
- ☐ bike paths
- ☐ recreation facilities / programs
- ☐ arts and culture facilities / programs
- ☐ community centres
- ☐ police services
- ☐ bylaw enforcement
- ☐ landscaping along residential streets
- ☐ landscaping along commercial streets
- ☐ preserving heritage buildings
- ☐ preserving natural areas
- ☐ preserving agricultural lands
- ☐ acquiring access along Okanagan Lake
- ☐ acquiring parkland
- ☐ building park trails
- ☐ promoting urban revitalization
- ☐ building affordable housing
- ☐ seeking public input on City projects
- ☐ providing information about City initiatives / programs

Q.13 In addition to services provided by the City of Kelowna, residents have access to services provided by other publicly funded bodies. How satisfied you are with the quality of these services. Again, please indicate whether you are very satisfied, satisfied, dissatisfied or very dissatisfied. *(add very dissatisfied and other to table below)*

	Very satisfied	Satisfied	Dissatisfied	No opinion
School District No. 23	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Okanagan University College	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Federal and Provincial Offices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Highways 33 and 97	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other: \_\_\_\_\_

**Interview note: If respondent identifies a service that they are dissatisfied with, ask them why they are dissatisfied.**

\_\_\_\_\_

Q.14 The population of Kelowna is currently around 100,000. In the next 20 years, it is expected to reach 150,000. Do you feel this will have a negative or a positive impact on your quality of life and why?

Negative:  
\_\_\_\_\_

Positive:  
\_\_\_\_\_

☐ Don't Know / No Opinion

Q.15 How do you usually find out about City activities in Kelowna?  
*Interviewer Note: do not read list, check all that apply.*

- Daily Courier ☐
- Capital News ☐
- TV (CHBC, SHAW) ☐
- City Newsletters/flyers/brochures ☐
- Radio ☐
- Word of Mouth ☐
- Internet (Castanet) ☐
- City Website ☐
- Other ☐

Q.15a Which is your preferred source? (*Interviewer Note: put asterisk beside above answers*)

Q.16 How many people live in your household?

**Interviewer Note: do not read list, check the appropriate response**

- One ☐
- Two ☐
- Three ☐
- Four ☐
- Five ☐
- More than Five ☐
- No Response ☐

Q.17 What type of home do you live in?

- Apartment ☐
- Townhome ☐
- Single Unit House ☐
- Two Unit House ☐
- No Response ☐

**Interviewer Note: Read the following**

As part of awareness building, and in an effort to engage the broader community in the Strategic Plan, we would like to invite you to participate further. I want to let you know that two **Open Houses** will be held for the Strategic Plan. Information about the exact time and place of these Open Houses will be in the local newspapers and on the City website at [www.city.kelowna.bc.ca](http://www.city.kelowna.bc.ca). It is anticipated that the first one will be in April 2004. The results of this survey will be made available at that time.

Also, if you have friends or family that would like to complete this survey, please let them know that they fill out an online version of the survey at the City website.

**Interviewer Note: Thank the respondent for the time and patience, it is very appreciated.**