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# CITY OF KELOWNA

## MEMORANDUM

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**Date:** January 17, 2005  
**To:** City Manager  
**From:** Planning and Corporate Services Department  
**Subject:** City of Kelowna Strategic Plan (2004)  
Report prepared by Greg Routley

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### RECOMMENDATION

THAT the City of Kelowna Strategic Plan (2004), as outlined in and attached to the report of the Planning and Corporate Services dated January 17, 2005, be endorsed by Council.

### BACKGROUND

A Strategic Plan is one of the most important 'big picture' documents that a community can have. A Strategic Plan assesses the changing needs of residents, the ways in which those needs can best be met, and how to implement strategies to address those needs in the most efficient and effective way.

Council recognized the need to revisit the City's original 1992 Strategic Plan in view of the many changes that have occurred in the city since it was approved. Over the past decade, the City has obtained considerable community feedback through annual Citizen Surveys and two Official Community Plan processes. Council has indicated that it wishes to take a more comprehensive and proactive approach to obtain public feedback on the suitability of City activities and the principles that guide civic decisions and actions. To help do this, the City commissioned the consultant services of IER-Planning Research and Management Services, a company with municipal strategic planning and process facilitation experience.

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

The 1992 Strategic Plan is an 'umbrella' document that has provided guidance and direction for the City's plans, programs and services. For example, over the last ten years, the 1992 Plan has guided major policy initiatives such as the City's Official Community Plan, the Transportation Plan and the Social Plan. The Plan has also guided major program initiatives such as the Partners in Parks, Community Policing, road maintenance, Citizen Survey, Cultural District and environment programs. Appendix II of the 2004 Strategic Plan shows the progress of the 24 Action Items outlined in the 1992 Plan.

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

## PROCESS

The City began work on developing the 2004 Strategic Plan over one year ago. The Plan is meant to reflect information collected from background research on trends and issues affecting Kelowna and from Council, staff, resident, community group and external agency input which was received through a telephone and mail-back survey, several visioning sessions and an open house. The following lists the community groups and external agencies which the City solicited input: all Resident Associations, Okanagan College, UBC Okanagan, School District 23, Central Okanagan Regional District, Ministry of Transportation, Economic Development Commission, Interior Health, Westbank First Nations, Urban Development Institute, Canadian Home Builders Association, Okanagan Mainline Real Estate Board, Tourism Kelowna, Chamber of Commerce, Downtown Kelowna Association, Far West Transit Services, Central Okanagan Heritage Society, Okanagan Historical Society, Central Okanagan Naturalists Club, Kelowna Cycling Coalition and Okanagan Innovation Forum.

The first complete draft of the Kelowna Strategic Plan (2004) was presented to the community for review and comment on October 1, 2004. Letters and emails were sent to community groups, external agencies and interested individuals with an announcement that the draft Plan was available for viewing and that comments were welcome. In addition, advertisements were placed in the local newspapers and a news release was issued. Copies of the draft Plan were made available at City Hall and on the City website.

The final version of the Kelowna Strategic Plan (2004) was made available to the community on December 23, 2004. Those interested in commenting on the final version were asked to forward their remarks to the City Clerk's Office by Thursday, January 21, 2005. Comments on the final version were solicited in the same way comments were solicited on the first draft.

A more detailed description of how the Plan was developed is outlined in the *Key Steps in the Planning Process* section of the Strategic Plan (see pages 10-12).

## CONTENT

The 2004 Strategic Plan is divided into five main components:

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

The Strategic Plan describes a vision of what residents hope Kelowna will be like in the future. Three themes emerged from the input received from the community, which helped in developing this vision and the goals. Overall and as was generally expressed in 1992, residents aspire to live in a community that:

- aims to co-exist with the **physical environment** and minimize negative impacts to air, land, and water resources, including Okanagan Lake and the surrounding natural and agricultural areas.
- works to develop and maintain a **strong, diversified local economy** that offers residents opportunities for high-paying jobs.

- embraces the **social, cultural and physical well-being** of its residents through the delivery of quality services at a reasonable price, the development and maintenance of quality infrastructure and built forms, and meaningful opportunities to be involved in major decisions made by the City.

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

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

From these themes, a vision was developed and a number of goals and objectives were identified in support of achieving the vision. For each objective, a number of action steps were identified. Each action step represents an activity that must be carried out by the City in order to support the vision, goals and objectives. The vision, goals, objectives and action items are outlined in the *Kelowna Strategic Plan 2004* section of the Strategic Plan document (see pages 19-37).

## IMPLEMENTATION

In order to ensure that the Strategic Plan is used as a guiding document to influence and shape the City's decision-making, a clear implementation process must be put in place. In this regard, it is proposed that each department responsible for implementing an action item develop operational work plans, including performance measures and multi-year budgets to support implementation of the action items. The consulting team hired to help prepare the Strategic Plan will assist City staff in developing the performance measures.

To help monitor the development of the performance measures and the implementation of the action items, it is proposed that Senior Management meeting agendas have a standing item that deals directly with the Strategic Plan. In addition, it is proposed that the City Manager report progress on an annual basis to City Council.

Finally, as was the case with the 1992 Strategic Plan, it is proposed that relevant staff reports and budget submissions to Council conform to the Strategic Plan. Recommendations that do not conform should be explicitly described so that a fully informed decision can be taken.

## SUMMARY

Input from Council, staff, residents, community groups and local agencies has been solicited in effort to comprehensively evaluate community values, priorities and overall expectations on the direction of City policies, programs and services. City Council is asked to consider endorsing the attached 2004 Kelowna Strategic Plan, which has been developed in response to this input.

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Gary L. Stephen, Acting Manager  
Policy Research and Strategic Planning

Approved for inclusion

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

Attach.