Defining the City of Kelowna's Role in Social Planning

Report Prepared for:
City of Kelowna
Community Development and Real Estate

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(SPARC BC)

S P A R C   B C

TABLE OF CONTENTS

1.0 Introduction

Cities across Canada are under increasing pressure to address the growing prevalence of social issues, typically related to poverty, in their communities. Communities struggle to devise new models of service provision as the impacts of a growing income disparity become increasingly visible. Municipal governments have typically focused resources on physical infrastructure to ensure a high quality of life for citizens. Local governments are increasingly being asked to develop responses to community institutions and residents as they turn to their closest level of government to address the issues of social development they see as directly impacting on their quality of life. Through pressure or political will the roles of local government in Canada are evolving to be inclusive of a social infrastructure, and cities have developed their own unique roles in ensuring social well-being.

Since 1992 the City of Kelowna has had a social planning function in some capacity, for which responsibility has shifted from a Social Planner in the early 1990s to a Community Planning Manager in 1995. Activities in the last decade have included: producing the province's first social plan in 1996; expanding the grants-in-aid program; ongoing input into development processes; creating new affordable housing policies; completing a social needs assessment and housing study; and developing guidelines for crime prevention, accessibility and childcare.

The City of Kelowna is not unique in the pressure it faces from citizens, social-service agencies, and the business community to work collaboratively to address critical social issues in the city. With City staff being directed by Council to address issues as they arise, the perception that the municipal response in Kelowna has been akin to crisis-management without a long term comprehensive strategy for social planning has been a source of frustration for everyone. Staff and Council have identified the need for a clearer definition of the municipal role in social planning. As such, the Social Planning and Research Council of BC (SPARC BC) has been retained by the City of Kelowna to "define the role of the City in providing social/community planning and to recommend a strategy to deliver those services."

SPARC BC developed a strategy that would encompass various methods to determine community priorities for both social issues and processes through which the City can play a role in addressing those issues. Part of this process involved determining priorities within the social development community with respect to social and community planning. In setting community priorities, engagement of community is imperative and by working closely with Community Development and Real Estate (CDRE), the consultants were able to identify internal and external stakeholders to ensure the process was an inclusive one. Two primary methods, interviews and a community stakeholder workshop, were created to develop a sense of the issues and dynamics in Kelowna and to turn ideas into priorities. By assessing similarly sized and positioned communities in BC together with Kelowna context and priorities, SPARC BC developed a set of recommendations that define the role of the City of Kelowna and provide a framework

through which the City can work collaboratively with others to address social issues and provide citizen access to municipal decision-making.

The following report outlines SPARC BC's methodology and a summary of findings from each of the two key elements of public process – stakeholder interviews and the community stakeholder workshop. The documents developed to establish context for the project (the annotated bibliography and a comparison of four municipalities) can be found in the Appendixes. The summary of interview and workshop findings leads into an overview of existing human resources at the City of Kelowna, including the Community Planning Manager (CPM) and the Social Planning and Housing Committee (SPHC). Finally, a recommendations section outlines activities and processes that would enable the City to act upon community social development priorities.

2.0 Research Process and Methods

Through its project design, SPARC BC sought to develop inclusive structures to ensure the voices of community stakeholders were heard. Beginning the process with a literature review of relevant materials in Kelowna allowed the project team to develop an understanding of social issues in the city. In determining the range of municipal responses to social issues, a review of social and community planning processes in similarly sized municipalities was undertaken. Both of these reviews thereby provided the context for the two key methods of gathering data: interviews to solicit information on social issues and community perceptions of the City's work in addressing issues; and a workshop to identify community priorities related to social issues and the directions the City can take in addressing those issues. In this section we outline each of the methods in turn, including the rationale for pursuing each, before turning to the findings from each of the methods, where community priorities are outlined.

2.1 Literature Review

The review of literature pertaining to Kelowna allowed the consultants to develop a preliminary understanding of the Kelowna context, including current social issues and highlights of the municipal processes that exist to address such issues, prior to conducting the primary research. Literature included that which was provided by the City of Kelowna as well as those documents that came to our attention through internet-based research.

The documents surveyed indicate that the City of Kelowna has long been involved in addressing a broad range of social planning issues of concern to the community. Documents external to the City, but on which the City assisted and cooperated, emphasized the desire for greater collaboration amongst all sectors in addressing various social planning issues. These calls come generally from documents external to the City but on which the City has assisted and cooperated, such as the 4 Pillars Framework, the Homelessness Plan and the Planning for Safer Communities Workshop Report. City of Kelowna documents do not typically include discussion of the processes through which they were compiled, which has been the direction received from the City Clerk's office. Exceptions to this include the Social Plan that outlines the involvement of the Social Planning and Housing Committee and the Strategic Plan that details a participatory process. The documents are helpful in indicating the areas in which the City has been active. However, they do not provide an overall vision of social planning processes for the City of Kelowna.[1]

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[1] A summary of City of Kelowna public consultation procedures provided by the City can be found in Appendix A.

2.2 Review of other Municipalities

Members of the project team worked with CDRE at the initial project meeting to identify other municipalities in BC that were of a similar size and have faced similar issues, for the purpose of conducting a review of their social and community planning process. Kamloops, Nanaimo, Prince George, and Victoria were selected for comparison and a search of their websites proved effective in gathering preliminary information such as population, operating expenditures, staffing, and committee structure and mandate. Telephone interviews were conducted with representatives from each of these four communities, typically with social planners or managers within the municipality, and in the case of Prince George with the Executive Director of the Community Planning Council of Prince George. The interviews were informal and supplemented the information available on municipal websites, such as community involvement processes.[2]

The comparison of other municipal social planning structures was effective in illustrating the varying level of financial and staff supports to communities. Also clear is the number of structures in place through which to address community social issues, with some emphasizing a 'grassroots' approach and other, namely Prince George, outsourcing a significant portion of this function through their funding of the Prince George Community Planning Council. All municipalities in the matrix work collaboratively with partners to varying degrees, with several communities working on comprehensive strategies related to social development and overall quality of life. This can be perceived as a move away from targeting specific issues in the community through support for comprehensive solutions with a view of social issues as inter-related.

2.3 Stakeholder Interviews

The context established through the literature review and municipal comparison exercise, and in consultation with CDRE staff, interviews were designed to explore various perceptions of social issues in Kelowna, as well as perspectives on the municipal role in social planning, the City's current activities directed at social planning, and the City's capacity to undertake social planning. In addition to stakeholders identified by our own understanding of the Kelowna context, SPARC BC worked closely with CDRE to identify community stakeholders with a broad understanding of social issues and activities in Kelowna. The interviews were conceived as a means of exploring community perceptions around a number of issues, and were meant to inform the community stakeholder workshop set for the fall.

Although the internal and external stakeholder interview designs were largely similar, two interview templates were created with slight variation in questions. The questions were centred around the City's current engagement with social issues, constructive ways the City could engage in social planning, the City's capacity for addressing social issues, perceptions on key policy documents, processes that exist for community engagement,

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[2] The comparison matrix can be found in Appendix B.

and opportunities for partnership to be considered by the City.[3] Each interviewee was sent the interview questions in advance of their scheduled interview and was asked to solicit feedback from his or her networks as a means of broadening participation with limited resources. The interviews allowed the consultant to gain a sense of current organizing around social issues in Kelowna and to identify issues requiring further exploration during the workshop, where community priorities would be set.

During the month of August, 32 interviews were conducted with a blend of internal and external stakeholders. Where possible, interviews took place in person with only four needing to be scheduled as telephone interviews. Ten interviews took place with internal participants, including City staff, City Council and the Chair of the Social Planning and Housing Committee. The remainder were conducted with external stakeholders comprised of business representatives, government agencies and community organizations involved in a range of issues. Because Residents' Associations typically do not function during summer months, scheduling interview time proved difficult.[4] Ultimately, the interview questions were sent to each of nine Residents' Associations in survey form and three completed surveys were returned and incorporated into the interview data.

Approximately one hour in length, each interview was tape-recorded and thematically transcribed with the data then inputted into an interview matrix through which themes were readily identifiable. With some exceptions, remarkable similarities in external and internal interview data occurred, thereby strengthening the themes that emerged from the context review. The themes will be explored in detail in section 3.0. Through the interview analysis, a number of issues were identified and in many cases what appeared to be community priorities had already begun to emerge. These issues and priorities were further explored during the community stakeholder workshop.

2.4 Community Stakeholder Workshop

Initially conceived as a way of introducing the project to community stakeholders, timing considerations had SPARC BC redevelop the methodology to include the creation of priority-setting exercises around the issues that emerged through the interviews. It is imperative in any process that the setting of priorities happens in forums through which people can discuss ideas and engage one another in developing strategies for addressing community needs.

A community workshop was scheduled for Tuesday, September 13th 2005 to coincide with the SPHC's regular meeting time. Held in the Martin Centre gymnasium, the workshop was designed to identify community priorities around the social issues facing Kelowna as well as processes through which the City can participate in solutions to key issues. The workshop had three goals:

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[3] Internal and external interview questions can be found in Appendix C.
[4] A complete list of interview participants can be found in Appendix D.

1. To provide an update on the project including background information on social planning issues, the role of municipal governments in supporting social development and to report back on key themes emerging from stakeholder interviews.
2. To review the processes currently in place to address community issues in Kelowna and identify strategies for strengthening those processes.
3. To develop community priorities on the role of the City of Kelowna to improve the effectiveness of its policy direction in the area of social and community planning.

Similar to the interviews, a broad range of participants were invited to the workshop, representing the City, social service organizations, Residents' Associations, senior levels of government, the business community and the local school district. The workshop was not intended to be a broad public process, but rather invitations were sent to those who have specific expertise concerning social issues in Kelowna. While the interviews sought participants with a broad understanding of social issues in the city, the intention of the workshop was to expand upon previous participation levels in order to ensure that all interested stakeholders were represented during priority-setting exercises. This strategy proved successful to the extent that representatives from each of the above stakeholder groups were able to attend during a busy time of year, and yet it would have been encouraging to see greater representation from the business community and the City.

The first section of the workshop provided an overview of social planning and the various roles municipal governments can play in supporting social development, and emerged through SPARC BC's commitment to the City to provide an educational component in order to ensure that stakeholders engaged one another from the same point of departure.

The second half of the workshop involved a series of exercises created to develop priorities around issues and strategies. The exercises were outlined in a workshop workbook, and over 50 participants were pre-assigned to six tables, ensuring a diversity of stakeholders in each group.[5] Participants were also grouped by interest area so that individuals were discussing issues relevant to their work, as several exercises were issue-specific. Each of six tables had a self-appointed note-taker and was facilitated by a SPHC member or City staff, which allowed SPARC BC staff to circulate from table to table in order to get a flavour of the overall dialogue.

Each table was provided a scenario based on situations from communities around BC, with the intention of removing participants from specific issues and dynamics unique to Kelowna. These scenarios were used to work through a number of exercises that highlighted the responsibilities of various players and the various roles municipalities can play in addressing issues. It was stressed from the outset that the exercises were not a means to solve specific issues, but rather the exercises were developed to identify processes through which issues could be solved. The workshop largely confirmed what had been heard through the interview process, and allowed the project team to more definitively identify community priorities. The following section outlines key findings from the research process.

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[5] A copy of the workshop workbook can be found in Appendix E.

3.0 Consultation Process Outcomes

The findings from the research process were extensive and served to develop an overall understanding of the existing structures through which social planning is done in Kelowna, including weaknesses in those structures and community priorities around how social issues can be addressed. As mentioned previously, there were strong similarities in responses between internal and external stakeholders. Where divergence occurred, it is indicated in the summary.

3.1 Interview Findings: Social issues and perceptions of social planning in Kelowna

Participant responses have been grouped into the following four categories, each of which will be explored in detail: (1) key issues affecting Kelowna; (2) perceptions of City policy, current activities, community engagement processes and tools; (3) perceptions of the municipal role in addressing social issues; and (4) perceptions of the City's capacity for engaging with social issues.

3.1.1 Key social issues affecting Kelowna

Interviewees identified a number of key social issues affecting Kelowna. Many did so by also noting the fact that there is a great deal of interconnectivity between the various concerns, and that viewing the problems in isolation is problematic. A number also noted that many of these problems "fit into" one another (for example, food insecurity and homelessness could be manifestations of poverty). Many interviewees indicated that the social issues outlined below have long existed in Kelowna, but that rapid growth is making them more pronounced. The key issues identified are as follows:

- **Affordable housing** – This issue emerged most frequently during interviews, though it is understood in a number of different ways. Affordable housing to some interviewees encompassed a range of housing options spanning *core housing* needs for those with significant barriers, *supported housing* for seniors and disabled individuals, *shelter beds, transitional housing*, and a range of other options through to very broad concerns around the state of Kelowna's *housing market*. Additional concerns were expressed about the need for efficient *property maintenance*, and the specific housing needs of youth, seniors, and aboriginal people.
- **Homelessness** – Often linked with rapid growth, homelessness emerged as a key concern for many interviewees. Related closely to a lack of affordable housing, homelessness is a growing concern for many stakeholders but there is some disagreement as to the root causes, with some linking the issue to mental health and substance misuse.
- **Substance misuse and addictions** – Addictions issues were also a key concern for interview participants, with many indicating a lack of recovery services in the

community. Many respondents also linked the issue to criminal activity related to the production, distribution and street-level retailing of drugs.

- **Poverty** – The general effects of poverty have direct links to various other social issues outlined through the interview process. Interviewees commented specifically on the widening gap between rich and poor in Kelowna. The 'sunshine tax' was mentioned specifically in reference to this growing gap, and highlights the difficulty many residents have in securing jobs with livable wages. The working poor were identified by many as the true, but hidden, crisis in Kelowna, as many families struggle to make ends meet and are at risk of becoming homeless.
- **Food security** – A small number of interviewees noted that food security concerns were growing in concert with the increasing lack of affordable housing. A number of service providers who run food programs noted a growing number of clients who make use of their services because the bulk of their wages go to pay for rent and utilities, leaving insufficient funds to cover the cost of groceries.
- **Crime** – This issue ranges from petty to organized crime. Increases in property crime have been felt for some time. Community safety has also been a growing concern, and while some have directly linked this issue with homelessness, others indicate that crime rates have not increased, while acknowledging that the perception of safety is as important as safety itself.
- **Accessibility** – Several respondents indicated that accessibility issues for people with disabilities is a growing concern, with specific reference to the availability of designated parking and the lack of universally designed homes.
- **Mental health** – Also closely linked to homelessness for many, interviewees noted a lack of services and programs available for people with mental health issues. Of growing concern for some is the connection between mental health issues and addictions, and the lack of treatment facilities for those who have been dually diagnosed.

The following social issues were expressed by a small number of participants:

- Youth suicide and services for youth
- Childcare and early childhood development programs
- Family and elder abuse
- Sexual exploitation and the sex trade
- Diversity and ethno-cultural sensitivity
- Transportation
- The social impacts of pollution and the loss of green space

3.1.2 Perceptions of City policy, current activities, community engagement processes and tools

The interviews asked a series of questions to gauge the current level of understanding, both internally and externally, of the City's policy directions, its current activities related to social planning, and the tools and resources available for the City to engage in community social planning. Later questions sought to understand participant perceptions

of community engagement processes. The responses linked closely to current activities and policies, and have been combined here to avoid duplication.

Policy

As a particular set of social planning tools, policy, by-law and planning provisions represent a key area of municipal activity. One of the interview questions was designed to explore this facet of social planning. Specifically, the question was developed to determine the degree of familiarity that interviewees had with the existing social planning policies and planning provisions, their opinions on the efficacy of these tools and any improvements that they felt might be made to strengthen them.

All interviewees expressed some familiarity with both the 1996 Social Plan and Chapter 17 of the Official Community Plan (OCP), hardly surprising given the question's direct reference to both documents. Few other documents were mentioned, and these were limited to the Building Code and by-laws and guidelines related to accessibility. A small number of interviewees mentioned the City's revised Strategic Plan, although awareness of this document appears fairly limited.

Where interviewees did comment on the Social Plan and OCP, most noted that they felt it necessary to revisit documents for the purposes of the interview. A handful of interviewees suggested that they used the documents on a limited basis, and primarily for the purposes of writing grant applications.

The primary comment that interviewees had for both documents was that they seemed largely out of date. One interviewee suggested that both documents were "dead" in the sense that they no longer reflected the key social issues that the City faced. This notion of relevancy was repeated by many interviewees, and can be interpreted in a number of ways. A number of the issues discussed in the OCP have been the subject of additional work on the part of the City in the last few years. Accessibility and childcare are two examples of this, and several interviewees suggested that the City "has done a lot" in the key policy areas mentioned in the documents.

On the other hand, concerns about the relevance of the documents for today's social planning climate were also tempered with concerns about the language of the documents themselves. While a few respondents did not feel there were any overall gaps in policy from a planning perspective, most interviewees, particularly external ones, noted that the language of the documents was more general and less active than they felt was appropriate to social issues. These two comments are not necessarily in contrast to one-another. As with any community plan or social plan, the potential span of issues is fairly broad under the OCP and Social Plan.

Areas of concern for respondents involved the OCP's perceived lack of detail rather than the guiding principles of the documents. In particular, interviewees felt that some action-oriented statements were vague and open to any number of interpretations. Both internal

and external interviewees indicated that the document could be further strengthened through the inclusion of detailed projects with appropriate goals, objectives, benchmarks and timelines.

Concerns over language, coupled with little mention of the City's recently revised Strategic Plan, are particularly interesting given that the latter document was developed with a view to designing key benchmarks and outcomes, and to describing projects in a more active, goal-oriented fashion. The Strategic Plan contains provisions for a number of projects connected to social planning.

Current Activities, Engagement Processes and Tools

Both internal and external interview participants noted that the City has been active in a number of areas relating to community social planning, and highlighted the tools that facilitate the City's activities. Despite being seen by some as taking a reactive approach to social issues in some cases, several interviewees noted that the City of Kelowna was the first municipality in BC to create a social plan.

Perhaps most significantly, every interviewee with whom SPARC BC met took time to acknowledge the efforts of the City's Community Planning Manager. Interviewees reported a high degree of satisfaction with the Manager's activities, including involvement with community organizations, committees and networks and a capacity for producing solid research. Along side this enthusiasm, however, was an almost universal concern about the capacity of any one individual to undertake the range of work required to address pressing social issues in a sustainable fashion. (This issue is further discussed in section 3.1.4)

Internal and external respondents collectively made note of a number of current municipal activities around social planning, summarized below.

- **Social Planning and Housing Committee** – The most frequently noted activity was the presence of the Social Planning and Housing Committee, though comments spanned a range of opinions. Where some interviewees felt that the Committee was proactive, worked on a range of activities (including policy work, developing incentives to encourage affordable housing, reviewing municipal activities and liaising with community groups and organizations), others commented that the Committee seemed to be too "focused on housing" (versus a broader array of social issues), "neutered in its abilities to work on issues" and more geared towards "rubberstamping" municipal policy, rather that working in a more active role on social issues. In addition, there also seemed to be a lack of clarity amongst interviewees about the exact purpose of the Committee, and the extent of its mandate.
- **Development of policies, bylaws and guidelines** – Participants were aware of the 1996 Social Plan and the Chapter 17 provisions for social issues in the Official Community Plan, as discussed above.

- **Tax relief and provision of space** – Most external interviewees suggested that the tax relief benefit was a substantial boon to their work, and represented a significant help. Others noted that the tax exemptions applied only to those organizations that own space, and did not benefit the many groups in rental or lease agreements. The provision of land and space for organizations appeared to be slightly more contentious. Many external respondents indicated that their displeasure was rooted in the perceived lack of an open and transparent process in determining which groups receive low-cost City-owned space. Internal participants largely indicated that space provision is made for those groups who assist the municipality in fulfilling its mandate.
- **Affordable housing fund** – Participants noted that the despite its uncertain start the existence of this fund represents a proactive approach for the City, though a number of interviewees were unsure how the fund is being administered and noted that funds had yet to be disbursed.
- **City involvement in range of committees, taskforces and working groups** – Together participants noted nearly all of the committees on which the City is represented, typically through the Community Planning Manager function. Such involvement is perceived to include: the Central Okanagan 4 Pillars Coalition; Poverty Task Force; Premier's Taskforce on Homelessness, Mental Health and Addictions; Access Awareness Team; and acting as a liaison with Residents' Associations. The regular attendance of councillors at some events and on several committees was mentioned by many respondents.
- **Community grants** – Most interviewees noted the City's positive efforts in providing grants for projects involved in community social development and the sexual exploitation of youth. Many indicated that the amount of these grants had not increased in a number of years, and most felt that the annual allotment for grants is too low. Others, however, noted that in some years not all funds are completely disbursed. A number commented that the grants do not allow for sustained programming approaches, and that those organizations that are successful in fundraising are frequently turned away.
- **Liaising with community groups** – Many participants understood a component of the Community Planning Manager function to be that of liaison with community groups and organizations. A key municipal activity related to this work is informing the community of available resources, and services provided by non-profit organizations and other levels of government.
- **Project specific activities** – Many interviewees mentioned the City's work in negotiating a change of venue for the Gospel Mission as an example of its work on social issues.
- **Protective services** – A small number of interview participants noted protective services as they relate to social issues (including RCMP, fire and emergency services), with specific reference to an emphasis on the enforcement pillar in the four pillars approach.
- **Support for arts and recreation initiatives** – A small number of interviewees commented on the City's work in fostering a good quality of life vis-à-vis community arts and leisure initiatives. Some interviewees used municipal

involvement in the arts as an example of the positive investment the City is able to make when they have community support.

- **Consultation process** – A small number of interviewees noted that the City engages in consultation with communities. Examples include Citizens' Surveys, special needs housing bus tours, workshops on community safety and first time home ownership, and feedback opportunities on public projects. The opportunity for individuals or groups to approach either the Social Planning and Housing Committee or Council directly with concerns was also mentioned.

In general, respondents seemed well aware that the City has a limited range of responsibility for social issues in comparison with more senior levels of government, and does not always have the tools to address issues in a comprehensive manner. It is important to note that many external, and a small number of internal, interviewees expressed concern about the City's overall approach to social issues, which was often described as reactive, happening when issues reach "the crisis stage" and thereby creating a dynamic wherein the key issue at any given time seemed to take precedent over other pressing issues.

A second concern involved equity, in that some respondents felt that the City had different arrangements and levels of accountability with different groups, fostering the perception that some groups appeared to get preferential treatment over others (such as land leasing, funding, involvement on committees, and engagement with particular projects). This concern spoke more to the process behind decision-making than with the decisions themselves.

3.1.3 Perceptions of the municipal role in addressing social issues

As a municipality, the City of Kelowna has a limited role and mandate with regard to social issues. Nevertheless, there are a number of areas in which municipalities do engage with community and other stakeholders in addressing the social issues outlined above.

Interview participants were asked to identify constructive ways for the City to engage in social planning within its mandate, and the role the City should have in social and community planning. Interviewees noted that the City has been proactive in some areas, such as its involvement on certain committees, in taking the lead role in the Gospel Mission relocation, and in providing tax relief and other financial inputs to organizations. In addition to these points of engagement, interviewees made note of several ways in which the City could be more active in its work on community social planning issues.

The following highlights the perceived roles of municipal government and methods for constructive engagement with community, as seen by both internal and external participants. There is some overlap between the roles outlined here and the current social planning activities outlined in the previous section, meaning that the City has already

taken on some of the roles and constructive methods for community engagement identified by participants.

- **Advocate** – Respondents overwhelmingly indicated that a key role of municipalities is advocating to senior levels of government to address social issues in fulfilling their mandated responsibilities. Some interviewees indicated that this activity happens regularly through bodies such as the Union of BC Municipalities, while others suggested that this role should be expanded to include advocacy around social issues, something they perceive is currently lacking.
- **Champion** – Closely related to advocacy, many participants identified a 'champion' role for the City, not strictly to other levels of government but within the community as well. Participants felt that when the City champions causes, action on issues is much more likely to happen throughout the community, and several gave the City's involvement with the Central Okanagan 4 Pillars Framework for Action as an example.
- **Policy creator/monitor** – Where many of the other roles and constructive methods for engagement involve a more collaborative approach to social issues, one the key roles that the City can and does play is the creator of policy and by-laws connected with social planning matters. Again, the realm of mandated responsibility is fairly narrow, yet the City can develop policies that encourage affordable housing and the inclusion of social considerations in the development process, as examples. Several participants went on to note that policies and by-laws are empty without strict enforcement and monitoring to ensure compliance.
- **Provider of space** – Many interviewees, and most external interviewees, identified the provision of space as critical to supporting the service provision provided by non-profit groups, including: the municipal purchase of land for this purpose; using land in partnership with public or private sector initiatives designed to alleviate social issues; and preferential lease rates for non-profit organizations. As highlighted above, there is some level of discontent regarding the process behind current space provision decisions.
- **Facilitator/Coordinator** – Given the complexity of social issues, many participants indicated that an important role for the City involves bringing together different stakeholders by creating a forum for dialogue. For many, such a role allows the many different voices connected with social issues to be heard, and to enable brainstorming around solutions. Others felt that the City's role could be to facilitate dialogue between social service organizations and different levels of government, enabling service providers to connect with senior levels of government. The idea that the City play a coordinating role for non-profit organizations in the community was not widely supported by either internal or external respondents for two reasons: (1) it is not be feasible for a municipality to coordinate provincial and federal dollars; and (2) the idea that there is a need for municipal coordination due to duplication of non-profit services is not accepted by most.
- **Funder** – Many participants saw the funding mechanism of local government as way for the City to constructively participate in community social planning

activities in the community. By funding essential community services, they felt a municipality could support community initiatives without becoming a direct service provider, although at least one internal candidate viewed this role, coupled with the provision of space, as akin to providing social services directly.

- **Researcher** – Several interviewees, primarily internal, indicated that the City has a role in producing solid and accessible research on social issues and the quality of life in Kelowna.
- **Educator** – Several interviewees noted that the City should not only play the role of communicator, but should also more actively engage with the idea of inculcating a high level of awareness about social issues within the citizens of Kelowna. A number of external interviewees commented that it is important to ensure that citizens "are aware of the work we do and don't see us as the problem." Both internal and external interviewees also noted that on-going and regular dialogue beyond open houses might better assist in creating a shared understanding of complex social issues.
- **Partner** – A number of interviewees viewed partnership as an important role of municipal government in addressing social issues, particularly where the solutions are not directly within municipal mandates. Reserve funds, similar to the recently established fund for affordable housing, were seen as a means through which to leverage partnerships with senior levels of government.
- **Leader** – Different form the role of champion, several participants saw the City as a potential leader in the creation of safe and healthy workplaces, with the idea that other employers will follow. Such initiatives might include provisions for work/life balance, childcare, and workplace health.

3.1.4 Perceptions of the City's capacity for dealing with social issues

As outlined in section 3.1.2, the City of Kelowna has a range of resources and tools it can use to engage with community social planning. Of course these tools are finite in nature and collectively contribute to the City's capacity to address social issues. One interview question sought to gain a general sense of stakeholders' perceptions of the City's resources and capacity in this regard.

Where many felt that the City's activities were "on the right track" and represented "good intentions" and "the best use of resources" it was also clear that interviewees perceived significant areas of short-fall, primarily in the area of staffing and human resources.

In discussing the issue of capacity with internal and external stakeholders, it became clear that almost every interviewee felt that the City's capacity to deal with social issues was of particular concern. Interviewees described the capacity as "stretched", "needing more resources", "needing benchmarks" and "very low." Most interviewees went on to suggest that the expectations for one full-time position were simply too high, and although they supported the work of the CPM (as discussed previously), they noted almost universally that the work involved is "too much for one person".

Most participants felt that capacity gaps could best be addressed by hiring additional staff, though there were different feelings surrounding both the number of additional staff required and the nature of those roles. Some interviewees suggested that part-time administrative support might be a good starting point, while others suggested up to three additional staff. One participant felt that until enough political will existed to address social issues in a meaningful way, the number of staff would make little difference. A number of other participants echoed concerns over a lack of political will and indicated that this is more of a barrier to social planning in Kelowna than resources or capacity. Others agreed that political will has been an issue in the past, but has begun to change in recent years.

Few participants had a clear sense of what new human resources would entail and the nature of the roles, with some expressing a desire for someone with a social work background that could take on more of the liaising and community-building responsibilities to allow the CPM to focus energies in other directions, including policy research to support innovative solutions. Interviewees suggested a range of roles new staff might take on, and these are not dissimilar from the municipal roles outlined above: researching; liaising with community groups and organizations; negotiating and lobbying with upper levels of government; coordinating social planning initiatives, activities, or funds; and bylaw enforcement and building inspection, particularly relating to safe and accessible streets and living spaces for at risk individuals.

3.2 Workshop Findings: Community priorities

With the range of issues and themes that emerged from the interviews, the workshop became a critical means of establishing community priorities around social issues and approaches to social planning. As described in section 2.4, the second half of the workshop involved tables of participants working through a number of scenario-based exercises. The scenarios were designed to let participants to identify stakeholder responsibilities and to develop processes through which scenario-specific issues could be resolved. Similar to the interview results, the workshop notes from each of the six tables were reproduced and inputted into a matrix that facilitated the identification of overarching themes in the priority areas listed in this section. The priority issues and social planning approaches are indicated in bold.

3.2.1 Priority Social Issues

Although specific strategies for addressing social issues were intended to be explored in later exercises, groups tended to focus less on specific issues and more on strategies from the outset, with municipal government playing part of the role. At least two tables indicated that choosing issues was a misguided approach, noting rather that energy should be directed toward improving the processes through which issues are addressed; social issues will change over time, but the key lies in developing flexible processes and frameworks through which governments can play a role in creating solutions to issues. These two tables perceived that to achieve long-term outcomes from this research

process, the issues themselves, while important, are not as critical as the framework through which they are addressed. In the short term, however, the identification of priority issues remains part of this research process, as it will ultimately guide Council priorities.

Priority issues identified in the workshop largely supported those that emerged through interviews, and were focused on housing. Both **affordable housing** and **homelessness** were key priorities in the community, with most participants recognizing that **poverty** — also a priority issue — as the root of these issues and many others in the city. **Mental health** also featured prominently in discussions, with many groups linking it to homelessness and a lack of care facilities. Surprisingly, substance misuse was recorded as a priority by only one of six groups.

3.2.2 Priorities for Supporting Solutions

Citizens are typically cognizant that governments have finite resources for addressing any issue, and stakeholders in Kelowna are no different. Each of the six tables involved in the workshop were given a hypothetical pool of $100 for supporting solutions to social issues in Kelowna. Participants were asked to identify ways the City could best use a limited pool of resources to address social issues. **Leveraging funding for affordable housing and direct investment into affordable housing** were the key priorities for supporting solutions to the affordable housing crisis. Other suggestions for spending the remainder of the $100 were: investing in community agencies and projects, increasing City staff, addressing systemic causes by providing public education and directly investing in the reduction of systemic issues.

3.2.3 Priorities for Municipal Human Resources

As explored previously, interviewees were unanimous in their understanding that one community planning staff person was insufficient to effectively participate in creating meaningful solutions to social issues in Kelowna. When asked how they would spend a set amount of staff hours, the workshop participants emphasized strongly the **communicative aspect of social planning as it relates to residents, agencies, senior levels of government and the support and coordination of advisory committees**. A much smaller emphasis was placed on the research, policy analysis and development application review aspects of social planning.

Comments among the workshop participants suggest that these priorities emerged from their perception of what is lacking now, particularly the extent of collaborative action and consultation they would like to see. Recognizing that the City's research and policy analysis and the review of development applications through a social lens are substantive contributions to resolving social issues, the priorities identified through the workshop suggest that the City balance community engagement and collaboration with its research function.

3.2.4 Priority Roles for the City of Kelowna

Each of the six workshop tables were given a prepared discussion scenario not directly related to what is happening in Kelowna, as a means of moving people away from the dynamics specific to Kelowna. Each of the scenarios involved some aspect of the key social issues identified through the interview process and ranged from crime to childcare and homelessness. Participants were asked to work through the roles and responsibilities of all levels of government in addressing the issue presented in the scenario, with the overall focus being on municipal government. Groups were asked to break down their responses into the following categories: leadership, funding, support, by-laws, zoning and policies plus any other actions they could identify.

The priority activities under leadership were **collaborating and partnering to ensure response coordination, advocating to senior levels of government, and educating citizens and council about the issues and its underlying causes**. Again, the themes of collaboration and dialogue emerge as critical in a municipal response to social issues.

A number of activities related to funding were also given voice, with funding priorities focused on **increasing grants-in-aid programs and advocating to other levels of government.** Related to this, it was indicated that there is not a considerable appetite within the workshop group for the City to coordinate or manage funding for social issues from all sources as had been suggested for discussion by the Chamber of Commerce in the summer of 2005.

Priority activities emerging from discussion on the City's role in providing support focused again on **collaboration and partnership**. The only area where collaboration did not emerge as a priority was the area of policy tools, where participants outlined a number of by-laws and zoning provisions through which the City can address issues, many of which were related to affordable housing. There were no clear priorities emerging from the section on policy tools. The cause of this is likely related to the fact that each table was presented with a different scenario (as described above).

3.2.5 Priorities for Collaborative Process

Collaborative processes were identified through the interviews as a focus area where participants would like to see further action. As a result, workshop participants were asked a number of questions about collaborative processes currently in place to address community issues. Each table listed a number of committees on which the City has representation, although no mention of other processes through which collaboration occurs were identified. When asked how these processes could be improved, participants identified their desire for **a greater variety of collaborative processes whereby the City supports the work of social agencies through partnership and greater links between committees, particularly where there is overlap** as priorities.

3.3 Consultation Process Summary

The City of Kelowna is faced with a number of pressing social issues that require action from various levels of government and community partners, the most critical of which is affordable housing. With the fourth most expensive housing market in the country and average household incomes below the provincial average, the shortage of affordable housing in Kelowna contributes to a myriad of other social concerns and leaves thousands of families and individuals vulnerable. Only in recent years has the City identified a role for itself in the provision of affordable housing, and stakeholders generally would like to see an expansion of the work currently underway, although there is an appreciation for the limited role the municipality can play in working with senior levels of government.

A close cousin to affordable housing, and certainly a more visible one, homelessness has grown in Kelowna in recent years and has been the source of a great deal of networking and organizing in the community. With the relocation of the Gospel Mission and some committee involvement, the City has moved recently to address issues related to homelessness, with growing pressure from a number of community sectors acting as a catalyst for such action. Also related to a lack of affordable housing and homelessness is the growing income disparity seen across the city, with poverty emerging as a primary contributing factor to the housing crisis. Substance misuse and mental health, together with a lack of treatment facilities, also played a prominent role in discussions of social issues. And while substance misuse was not identified as a priority issue during the workshop, its inclusion is important as there is a great deal of organizing around the issue in Kelowna and its relationship to other priority issues merits its inclusion. Although it is often difficult to distinguish where one priority issue ends and the other begins, affordable housing, homelessness, poverty, mental health and substance misuse are Kelowna's current community priorities, as outlined previously.

Participants placed particular emphasis on the processes through which priority issues could be addressed by the City. Throughout both the interview and workshop processes, key weaknesses identified were municipal dialogue with community groups and stakeholders beyond single education-oriented events. Many participants, both internal and external, and familiar with the City's current activities relating to social planning, noted the absence of ongoing processes through which the City can engage the community of expertise in social development over the long-term.

While interviewees outlined a range of municipal roles that could be explored, these roles were more narrowly defined at the workshop as participants began to focus their responses on issues of collaboration, partnership, ongoing communication and access to decision-making. While capacity to address issues was still of concern, both within the City and within the community as a whole, above all people wanted to be acknowledged as having a role in local government process and to feel they have access to the deliberations at City Hall. They believe, however, that increases to human resource capacity and community resources will be essential in ensuring that community priorities are met.

4.0 Overview of Existing Human Resources

Research participants, internal and external interviewees and those at the workshop, underscored continuously that human resource capacity at the City of Kelowna is not sufficient to undertake meaningful collaboration with community partners to address social issues in the city. While participants were able to summarize the City's current activities related to social planning, as outlined above, the issue of human resource capacity merits further attention. A component of SPARC BC's commitment to the City of Kelowna was the review of the CPM function, which is found in the following section. A brief overview on the role of the SPHC follows in order to explore more clearly their role in the provision of social planning for the City.

4.1 Community Planning Manager

In 2003 CDRE was established, its design including the community planning function. With some administrative support, the CPM undertakes primary responsibility for carrying out the City's community planning function.

The following review of the CPM function explores the seven current functions of the CPM, including committee involvement, then turns to a current time allocation recently completed by the CPM. A look at the 2005 CDRE Work Plan for community planning provides a means of determining the activities and projects that comprise the CPM's role. A comparison of social planning positions in three similarly sized municipalities allows for a snapshot into the approach taken by other Cities, and finally, an assessment of the community priorities on City staffing provides direction on the community/social planning function.

4.1.1 Seven Functions of the CPM

Originally conceived as a planning position, the current CPM has seen this function periodically broaden to include new activities over the last decade. Given the evolving social role of municipalities, this experience is not uncommon. The CPM position for the City of Kelowna currently has seven functions attached, as follows:

Research and development

The CPM's research and development responsibilities include:

- Social policy framework and background research including, but not limited to:
    - Ongoing update of social policies in the OCP, including the last OCP review
    - Strategic Plan participation and input from social perspective.
- Annual identification of work programs, based on direction of policy documents:
    - Child care policies and zoning

- Community indicators reporting.
- Review of policy and research produced by the City for social context, including:
  - Downtown washroom study
  - Needle disposal task force
  - Review of secondary suites policies and zoning and introduction of design guidelines
  - Use of downtown alleys and safety issues, including program to remove dumpsters
  - Downtown plan.
- Housing policies, zoning and research, including:
  - Affordable housing
  - Seniors' housing
  - Secondary suites
  - Housing agreements and density bonusing.
- Preparation and implementation of design guidelines (crime prevention and accessibility) and enabling other City staff and departments, and outside agencies to use guidelines.
- Use of other design guidelines where Kelowna specific ones have not been created (e.g. adaptable housing).

Work in other areas, such as extensive committee involvement, is felt by internal participants to have taken time away from the continuation of earlier research and policy development work, such as the 1996 Social Plan and the implementation of accessibility and design guidelines. While some external participants felt that a great deal of research is currently being undertaken in the community by service providers and there is no need to duplicate those efforts, there is a sense internally that research remains an important municipal contribution to community/social planning.

Grants-in-aid administration

The grants-in-aid administration function has changed considerably due to a recent agreement with the Central Okanagan Foundation to administer the provision of grants. The responsibilities now include:

- Maintaining a new agreement with the Central Okanagan Foundation
- Managing the desire of community and committees to create new grants (such as an affordable housing grant)
- Other recommended actions.

The recent agreement developed with the Central Okanagan Foundation to administer the grants has taken considerable time pressure off of the CPM and appears to be working well. While this function used to comprise 15% of the CPM's job, it is now takes considerably less time (less than 1%), thereby making the CPM available for other activities. Participants in the research process typically viewed the grants-in-aid as an important role for the municipality, despite considerable concern over a lack of growth in available funds.

Involvement in development review process

The CPM's involvement in the development review process carries the following responsibilities:

- Participation in Monday morning meetings
- Provision of comments on development applications, dependent upon:
    - Need for community planning staff time
    - Ability of current planning staff to address the relevant issues
    - Possible role of other CDRE staff.

Reviewing development applications through a social development lens is an important, although somewhat less recognized, role of the CPM. Although new development was of particular concern to Residents' Associations, external participants were less likely to acknowledge this as a current function of community/social planning than were internal participants. Involvement in this function makes up 18% of the CPM's work, and through policy direction for accessibility, child care, crime prevention, community amenities, affordable housing needs and design issues relating to quality of life, the CPM has made significant contributions to development processes and plays the role of educator as it relates to these issues. The development of guidelines for accessibility, crime prevention and child care has been helpful in this work.

Land responsibilities

The land responsibilities function has several responsibilities attached:

- Assisting with identification of lands suited to housing
- Acquisition of lands for housing
- Financial resources and funds
- Administration of projects involving housing on City owned land
- Definition of role to bring more land involvement to community planning policy direction, examples of which include:
    - Inclusion of child care facilities by joint use of buildings and land following the example of the current Central Okanagan Boys and Girls Club
    - Community meeting space and other amenities
    - Employment opportunities for community
    - Education services in the community.

With the 2003 merging of real estate and community development functions, the CPM's land responsibilities were more sharply focused. Concentrating primarily on housing, a key community priority, land development processes are seen as the primary tool through which the provision of affordable housing will occur. Indeed, this is an area where the City has considerable tools at its disposal. While the relationship between land and community development is still being defined, there are examples in the community –

such as the relationship with the Boys and Girls Club – that can potentially be built upon. Recognized within this function is the community's desire for the City to expand upon the relationships it has with community organizations by providing additional space for non-profit groups, which would necessarily require an additional commitment of time to facilitate and maintain such relationships.

Coordination of services

The CPM has primary responsibility for the coordination of some services within the City structure, which includes the following:

- Analysis of existing non-profit social and community services
- Role of other government service agencies
- Appropriate involvement of the City in coordination of services
    - Past and present committees intended to perform a coordinating function
    - Referral by staff (of services to each other)
    - Information resources produced or facilitated by City of Kelowna (homelessness service directories and the use of Community Resource guide as examples)
    - Other and future appropriate actions.

Participants frequently remarked upon the CPM's ability to stay in touch with the activities happening in the community and the services provided by agencies. And yet, the desire for greater relationship development and facilitation between agencies themselves and between the City and agencies was expressed. Part of this work happens formally through extensive committee involvement, and somewhat less formally through referral. There is some desire for greater coordination of non-profit organizations in the community based on a perceived duplication of services, although the perception is not widely supported. Support does exist for relationship-building between organizations and the City through collaboration and partnerships that would support the contributions that service-providers make to the community. This is an enhancement of current functions, which does not appear possible at current staffing levels.

Services to Residents' Associations and community organizations

Although this function is currently being restructured, current responsibilities include:

- First contact for RAs to coordinate with City services
- Education of RAs (Resources Handbook, for example)
- Work with communications staff to determine future role of City staff with regard to RAs.

The need for further clarification of this role is made clear within the activities listed here, and although the CPM has historically been the first point of contact for Residents'

Associations the relationship has not fully developed. Some concern exists internally as to the amount of support RAs receive from the City, with several participants indicating that more can be done in this regard. This function is being transferred to the Corporate Communications Division, and little of the CPM's time is spent in this function.

Emergency Recovery

Emerging in response to the 2003 fire, this function currently involves the following:

- Recently appointed Recovery Manager, and in the case of an emergency would be redirected to recovery efforts
- Maintain training in emergency recovery
- Establish and oversee a recovery operation during an emergency, including establishment and operation of recovery centre
- Short term and long term recovery action identification and delivery including preparation of recovery plan
- Coordinate work through EOC
- Coordinate disaster financial assistance
- Demobilize recovery when no longer needed.

During the 2003 fire, the department immediately agreed to coordinate efforts in this area, not realizing the long-term nature of this commitment. Recovery efforts took the better part of the following year, and the CPM was appointed Recovery Manager for Kelowna in August 2005. Should another emergency situation arise, the CPM would resume the coordination of recovery efforts indefinitely, with the other functions receiving limited time commitments. Not a focus during the research process, it is difficult to know where thoughts lay in regard to this function. It is recognized, however, that recovery efforts require significant time commitments and mean that other issues cannot be addressed with the same attention they might typically receive.

Committee Involvement

Within these seven functions, the CPM is involved in a number of committees that contribute to overall engagement with community agencies, comprising almost half of CPM work time and increasing dramatically with involvement on the Premier's Task Force. Current committee involvement includes:

- Administrative support to the SPHC reporting to City Council
- Partners in a Healthy Downtown
- Needle Disposal Task Force
- Community Against Sexual Exploitation of Youth
- Kelowna and District Child Care Committee
- Real Estate Foundation and Green Building Fund
- Central Okanagan Access Awareness Team
- Central Okanagan Four Pillars Coalition

- Homelessness Network
- Homelessness Steering Committee (associate member)
- Premier's Task Force – Mental Illness and Addictions
- National Housing Policy Options Team – FCM
- Seniors' Housing Initiative – UBCM

4.1.2 Time Allocation Breakdown

The CPM allocates time in two categories: committees and tasks. For ease of comparison, these two categories have been further broken down to reflect the seven functions outlined above. The following chart outlines the CPM's current time allocation.

Activity	% of total work hours[6]
Premier's Task Force, including committee meetings, preparation and project activities	24
Research and policy development, including statistical updates	21
Committee meetings, including preparation, follow-up, and associated projects and activities	20
Development review process and meeting with developers	18
Public education, including events, presentations and media interviews	4
Council reports and speeches for Mayor	4
Referrals to social service and housing agencies	4
Disaster recovery	1
Grants consultation	1

One of the most drastic changes in time allocation over the last two years came with the outsourcing of grants-in-aid administration to the Central Okanagan Foundation. While this program's administration used to comprise 15% of the CPM's total job activities, the maintenance of the relationship now requires less than 1% of all hours. The time freed by outsourcing has been consumed by committee meetings and project activities related to the Premier's Task Force, which makes up slightly less than 25% of the CPM's work time. Combined with the Premier's Task Force, committee meetings and related activities now amount to nearly half of the CPM's work. The Premier's Task Force is the only committee for which there are associated tasks; all other committee involvement relates strictly to meeting time, preparation and follow-up.[7]

There appears, through conversation with the CPM, to be intense pressure to maintain committee involvement as it is seen to be representative of the City of Kelowna's interest in addressing social issues. Indeed, the CPM's move from full member to associate member status with the Homelessness Steering Committee was perceived as a message of

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[6] Total hours worked is exclusive of internal activities such as staff and mangers' meetings and professional development, which account for 14% of the CPM time allocation. Totals do not equal 100% due to rounding.

[7] The CPM also dedicates approximately 200 hours of personal time to the Real Estate Foundation, which is not included in the allocation of work time.

diminished interest of the City' in homelessness. Internally, however, it is felt that the City provides significant resources to homelessness and the CPM attends Steering Committee meetings as requested and provides human resources such as research.

With no permanent increase in capacity for over a decade, the CPM appears to be stretched increasingly thin as the City begins to address more and more of the issues that impact quality of life for its citizens. Committee work is an important way to engage with other levels of government and members of the social service agencies, but does not in itself address the need for long-term dialogue with community that came through the interviews as a weakness for the City. Emerging through the time allocation exercise is the CPM's heavy involvement in committees that address a range of social issues. The City does provide opportunities for public engagement (see Appendix A for an overview), although the CPM appears under-resourced to engage with residents and organizations not involved in committees, task forces, and working groups.

4.1.3 CDRE Community Planning Work Plan

The 2005 CDRE work plan for community planning illustrates the types of activities with which the CPM is engaged in five corporate focus areas: financial, human resources, products and services, partnerships, research and development. Some overlap between the CDRE work plan and the seven core functions exists, making a full exploration of the activities highlighted in the workplan redundant. The CDRE work plan is effective in exemplifying the range of activities that fall within the purview of the CPM, and this role is indicated as the project lead for each of the activities falling within the realm of community development. As the primary City resource involved in social/community planning, the CPM's activities have increased as the municipality responds to external pressure from a number of sources. This has happened without corresponding increases to staff resources, and as commitments to committees are added there is less time to commit to research and policy development, consultative processes or collaboration with community stakeholders, which form important contributions to the City's overall approach to social planning and understanding of social issues.

4.1.4 Job Description Comparison for Four Municipalities

Before looking at community priorities surrounding capacity issues, it is useful to look at similar positions in other mid-sized municipalities in BC to understand the nature of their social planning functions. The chart below provides a comparison of job descriptions from social planners in North Vancouver, Abbotsford, Richmond and Kelowna. Job descriptions were obtained by contacting the social planners in each municipality directly. Job descriptions do not necessarily capture the day-to-day activities involved in a position, and people's perceptions of their jobs also often differ from the institutional description. The direct comparison is further complicated by the differing nature of job descriptions used by the City of Kelowna. Where others include only a brief overview of responsibilities inherent to the position, Kelowna's is more exhaustive and includes dimensions of decision making, a summary of decisions made and a comprehensive list

of the activities undertaken. Nonetheless, the snapshot below assists in determining how similar municipalities carry out their community/social planning functions.

Comparison of Social Planner Positions in Four Municipalities

Nature and Scope of Work	N. Vancouver	Abbotsford	Richmond	Kelowna
Coordinate major social planning projects	✔			
Research social planning issues and analyze community social issues	✔	✔	✔	✔
Identify, analyze and prioritize social issues, needs and trends	✔	✔		✔
Research, develop and implement programs			✔	✔
Review, develop and analyze City policy	✔	✔		✔
Prepare reports, studies, presentations	✔	✔	✔	✔
Provide expert advice internally and externally		✔		✔
Review and evaluate land use and development applications and long range plans	✔	✔	✔	✔
Promote social sustainability principles in plan development		✔		
Establish and maintain contact with community groups and organizations	✔	✔	✔	✔
Liaise with senior levels of government		✔		✔

Required Knowledge, Abilities, Skills	N. Vancouver	Abbotsford	Richmond	Kelowna
Knowledge of practices, principles, techniques, methods and objectives of social planning	✔	✔	✔	✔
Knowledge of analytical and research techniques and methodology of current trends and developments	✔	✔		✔
Knowledge of rules, regulations, policies, bylaw objectives and legislation governing planning	✔	✔		✔
Knowledge of social structure, social needs, social problems and social service network of cities	✔	✔	✔	
Knowledge of economics and/or sociology applicable to planning	✔	✔		
Knowledge of municipal government structure and federal and provincial legislation relating to social services		✔	✔	✔
Ability to apply statistical techniques	✔			
Ability to identify, analyze and prioritize social problems in city and implement action plans		✔		
Ability to prepare reports and recommendations on a variety of planning projects, policies, and programs	✔	✔	✔	✔
Ability to exercise consistent judgment and creativity	✔			

Desirable Training and Experience	N. Vancouver	Abbotsford	Richmond	Kelowna
University graduation at a Master's level in social planning or related discipline	✔		✔	
Undergraduate degree in social sciences and post-graduate degree in community planning		✔		
Undergraduate degree in planning or related discipline				✔
Related experience or equivalent combination	✔		✔	

Research and analysis of community social issues are a key component of all four social planner positions, with a strong emphasis on thorough knowledge of social planning being critical. Contributions to land use development applications and long range plans suggest a strong understanding of planning legislation and techniques. Policy analysis and the preparation of reports, studies and presentations also indicate a research emphasis in all four municipalities. The establishment and maintenance of contacts with community groups and organizations appear to be more heavily emphasized in the three comparison communities than in Kelowna. Sustained dialogue and engagement within the social service community and for other community stakeholders is identified as a weakness, due to a lack of capacity to manage that function or meet expectations.

Another apparent difference emerges in the background required for the community/social planning functions in these municipalities. With the introduction of the CPM position in 1995, Kelowna moved away from an emphasis on a social planning or social sciences background to a planning background. In each of the other three municipalities, a social or community planning education is emphasized, and in one case a social science degree is also required. Although all planning functions have an appreciation of community consultation and collaborative relationships, the qualifications in each of these positions emphasizes the understanding of the social structures, networks and issues that impact cities.

4.1.5 Community Priorities for Human Resources

As explored previously, there was a high degree of satisfaction with the work of the CPM although expressions of the need for additional staff were heard frequently by internal and external stakeholders. With the CPM being thinly stretched over a number of community planning functions, work is often dictated by current 'hot-button' issues, meaning that longer term community priorities are not being addressed. Over a number of years, such a strategy has the potential to create a sense of frustration, both within the social service community and the department itself.

The community priorities identified in this research al illustrate the need for additional capacity to assist with collaborative and consultative processes, perceived to be a significant gap in the CPM function. While the research and policy analysis component

of the CPM's work seemed to be less of a priority for external stakeholders, it remains important to not relegate social research and policy analysis to the backburner entirely, as it is part of the municipality's function. Depending on how it is undertaken, it can also serve as a good tool to build community capacity and collaboration as it provides a concrete project around which to gather and find solutions.

4.2 Social Planning and Housing Committee

In 2002, the Social Planning Board and the Community Housing Needs Committee were amalgamated to create the SPHC in an effort to respond to the growing community concern over the affordable housing crisis in Kelowna. When asked about the City's current social planning activities, participants in the research process unanimously acknowledged the existence of the SPHC as the primary vehicle through which the City engages in social planning. As highlighted in the section on findings, there is not a clear sense of the efficacy of the Committee in encouraging Council to address community needs as they relate to social planning and housing issues.

The amalgamation of the two previous committees saw the merging of two Terms of Reference verbatim without evidence of consideration of how affordable housing and other social issues might be addressed in tandem by the Committee. Given the Kelowna context, affordable housing has become the de facto focus of the Committee with the recent establishment of a housing reserve fund being a notable accomplishment. Such a focus has led to the resignation of Committee members whose interests lie in other social issues, thereby reinforcing the housing focus of the SPHC. While the focus is in keeping with some community priorities, consequences indicate that an array of social issues are not addressed from a long-term preventative perspective and could end up exacerbating the housing crisis. Such social issues include health, child care and employment, all of which are topic areas in the SPHC Terms of Reference.

There is not a clear sense within the community, and indeed internally, as to the function and role of the Committee. It is clear from the Terms of Reference that the Committee has the mandate to "advise Council on all areas of social and community needs and problems within the City" and to recommend "possible solutions to such needs and problems." Of course Council cannot be mandated to accept the recommendations of the Committee, however a sense of frustration that the expertise of Committee members is not accounted for continues to exist. The Terms of Reference do not indicate how this information on community needs is gathered and there is little to hint at process more generally. Despite the regular attendance of two Council members to SPHC meetings, the advising function itself does not appear to be regularized within the Committee structure. Presentations to Council are made by the staff liaison rather than Committee members themselves, although Committee members are asked if they wish to present.

As a point of comparison, the City of North Vancouver's Social Planning and Advisory Committee illustrates through its Terms of Reference how community access to decision-making processes can be facilitated by volunteer members. North Vancouver's

committee's Terms encourage input on relevant matters from individuals and groups serving the community. Further, they describe a process to involve the community in the development of their annual work plan, giving citizens an avenue to influence issues to be addressed from year to year. In contrast, one of the SPHC's activities is to "determine means of recognizing existing community or social service organizations that embody the policy direction of the City." The emphasis here is on the identification of organizations that already fit within the City's policy direction rather than the inclusion of various perspectives in informing City policy.

The SPHC also plays the role of educator and is mandated to "inform Council and members of the community of the City's social policies" and to "work at raising awareness within the community of City policy direction and initiatives on social and housing issues." The role of public education was perceived to be important within the research conducted for this project, largely as it pertains to social issues and their systemic causes. The Committee's role of education around existing City policy is an area that does not necessarily utilize the skills and knowledge of members and might better be conducted by the Corporate Communications Division. The emphasis here appears to be more on educating citizens rather than expanding the municipal framework by allowing citizen access to decision-making structures through consultative processes.

5.0 Conclusion

As the roles of municipal governments in the province evolve, each municipality is faced with carving out its role in meeting the needs of all citizens. The process outlined in this report exemplified a commitment on behalf of the City of Kelowna to review its social planning function and to more clearly define its own role in social planning according to community priorities. The research process allowed for the expression of a broad range of stakeholder perspectives, both internal and external. Despite a variety of perspectives, at times conflicting, overall themes were readily identifiable through the interview process. A range of ideas was presented to workshop participants who then moved quickly to determine community priorities around both social issues and the role the City of Kelowna should take in addressing those issues. No matter the questions posed, the constant refrain heard throughout the process was the need for further collaboration and partnership around social planning issues and more transparent decision-making structures through which consultation with social sector experts is seen as an imperative.

It should come as no surprise that the community identified collaboration as one of the key elements for social planning in Kelowna. Social planning itself is best described as an open and accessible process which can be used to help government, community organizations and citizens to plan for their present and future well-being. Indeed, "social planning includes a number of community processes and approaches which can help communities to: (1) identify their social issues resulting from growth or change; (2) explore the impact and outcomes of the issues in the community; and (3) develop solutions or appropriate responses."[8] Thus, the processes through which communities achieve outcomes are as important as the outcomes themselves, for the acceptance of solutions to social issues is often proportional to the level of community involvement in the process.

Community consultation and access to decision-making process is desired by many within the community, and the City's role as collaborator and partner has a number of implications. Accepting a role of collaborator and partner should be interpreted as an obligation to solve social issues. It is a role that can be managed within the limited mandate of a municipality to address social issue. What community stakeholders, both internal and external, desire is the knowledge that the City is responsive and concerned about the issues impacting quality of life in the city.

The recommendations outlined in the following section suggest for the City of Kelowna the opportunity to engage communities through collaborative models of community planning while broadening opportunities for the social sector to influence decision-making processes at the municipal level. Because the recommendations connect to the sense of community involvement and a concerted community effort to make change, the process by which they are implemented is as important as the implementation itself.

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[8] Social Planning and Research Council of BC / Ministry of Municipal Affairs. Social Planning for BC Communities: A Resource Guide for Local Governments. February 1996, page 5.

6.0 Recommendations

In developing tangible and workable recommendations, SPARC BC was guided by four key principles emerging from the research findings: (1) That it is important to ensure that municipal resources are used as creatively and effectively as possible; (2) That the City's role in social planning should be clear; (3) That the improvement in processes and access to decision making is important to community; and (4) That improvements in municipal collaborations and partnerships are critical to resolving social issues. A number of actions are critical if the City is to embrace its role as a collaborator and partner while providing greater access to decision-making structures. The recommendations below provide the framework through which the City can adapt its current approach to social planning to satisfy community priorities. While these actions might now be viewed as they relate to priority issues – namely affordable housing, homelessness, poverty, mental health and substance misuse – these priorities will change over time. Importantly, however, the processes through which the City addresses such issues can remain the same.

The thirteen recommendations outlined below have been grouped into four topic areas to highlight their interconnected nature. The following four topic areas are best viewed as a framework for engagement with social planning rather than as independent parts: (1) the Social Planning and Housing Committee; (2) planning for planning; (3) the City as collaborator; and (4) human resources.

Within each of the four sections, the recommendations are first outlined and then explained through the following narrative. Beside each recommendation is an indication of whether there are cost implications for the suggested action. The table at the end of the recommendations section provides a preliminary estimation of the costs associated with those actions.

The Social Planning and Housing Committee

Recommendation 1: Structure the SPHC to be a point of communication for community concerns by having members participate on the various social issue committees, task forces, and community tables as representatives of the City of Kelowna, relieving the CPM from attending as the City representative, while utilizing the skills and expertise of Committee members. [This recommendation does not have a financial cost, but could require a redirection of human resources to facilitate changes in Committee structure.]

Recommendation 2: Create regularized structures to facilitate the sharing of information on social issues between Committee members and between Committee and Council. [This recommendation does not have a financial cost, but could require a redirection of human resources.]

Recommendation 3: Review the effectiveness of the current Committee structure to ensure that a variety of social issues are addressed either through the re-division into two separate committees or by ensuring that key social issues are addressed in the

Committee's annual workplans. [This recommendation will have a financial cost if the determination is to support a second committee.]

Recommendation 4: Formalize the development of an SPHC annual workplan to ensure that its strategic direction fits within the strategic and operational plans of the City and that social priorities are addressed. [This recommendation does not have a financial cost.]

Recommendation 5: Include a public engagement process, such as a stakeholder consultation, within the development of SPHC annual workplans. [There are financial costs associated with this recommendation.]

The SPHC is one of the City's primary vehicles for engaging in social planning, and although it is the City's most widely recognized contribution to social planning, there is no clear sense in the community as to the Committee's role, function, and impact. The need to set processes by which the SPHC can develop community networks to facilitate the collection of information and report to Council is articulated by the perceived lack of transparency in decision-making. The development of such processes require a reconsideration of the role that the SPHC plays in addition to its review and advise function as outlined in the Terms of Reference.

There are several actions the City could take to enhance the efficacy of the SPHC, allow for greater public access to decision-making, and reduce the CPM's committee commitments. Involvement with various committees looking at a variety of issues comprises 46% of the CPM's role and her attendance at these types of meetings is the primary method for engagement with community organizations. Members of the SPHC collectively and individually have extensive networks within the community and considerable expertise in social planning issues. Members could maintain involvement as representatives of the City of Kelowna at a variety of committees and community tables. Not only is the expertise of SPHC members put to use, such action would allow the Committee to act as a point of communication for community concern, giving social service stakeholders access to the Committee to raise issues and ultimately having those concerns brought forward to the City.

It is understood that the City has tried this approach with mixed results in the past, most recently with the Homelessness Steering Committee. There has been some reluctance on the part of members to represent the City in a formal sense, primarily because individuals often maintain similar committee involvement as representatives of their own organizations. By formalizing this role the City can begin to recruit members as active participants with committee responsibilities. As a means of phasing in such a function the City would explore avenues such as mentorship and training sessions to develop the capacity of Committee members to act as representatives of the City for those who are not immediately comfortable in this role.

With SPHC members acting as a network into the community, a formalized reporting procedure becomes essential. Regularized structures to facilitate the sharing of information between Committee members and between the Committee and Council will

need to be established. Suggestions include scheduled Committee meeting time for reporting back and recording in minutes for circulation the activities of other committees and considering a more formalized advising function to Council, where the Committee presents to Council directly.

Because it establishes an alternate flow of information and allows the Committee to be able to assist in discussing appropriate responses to emerging priorities, the establishment of community networks by the Committee could relieve the CPM from significant participation in community committee functions. The advantage to the City of an additional layer of information sharing is the City would be seen to have more involvement with community stakeholders in addressing priority issues. The service sector would benefit from greater involvement and discussion with the City on a regular basis, further contributing to overall transparency as it necessarily enhances the access of social service stakeholders to decision making.

With the merger of the Social Planning Board and the Community Housing Needs Committee in 2002, affordable housing has understandably become a primary concern which has resulted in the resignation of several members for whom affordable housing was not an area of interest or expertise. The primacy of housing and homelessness issues is supported by several current community priorities, and yet the importance of a preventative approach to social issues is diminished in light of the priority needs of the housing portfolio issues. There is a desire on the part of the community stakeholders involved in this research process to see other social issues addressed within the Committee's work and it is and important demonstration of Council's concern. The Committee's structure and workplan should therefore be reviewed to ensure recognition of the whole range of priority social issues. This could conceivably happen in one of two ways: (1) the re-creation of two separate committees, one focused on housing and homelessness and one focused on other social issues; or (2) a refocusing of the existing Committee to make express within the Committee's annual workplan the division of activities related to housing and other social issues. The first option would ensure that adequate attention is paid to a variety of issues, but of course there are obvious resource implications in terms of staff support.

The formalized development of an annual workplan for the SPHC would increase the transparency of the Committee's work and attention, and would ensure that its strategic direction fits within the strategic and operational plans of the City. In addition to the participation of Committee members, the development of an annual workplan could also include establishing a public engagement process. Such a process could take several forms: it could be tied to the reporting requirements for community grants; it might involve key stakeholder inquiries through meetings or questionnaires; or could be a stakeholder event to share concerns and ideas regarding community action on social issues. A cycle of planning approach could be developed that offered opportunities to report back as well as to seek input.

Written into the Terms of Reference, community engagement in developing annual workplans for the SPHC would put the Committee in the position of looking forward,

thereby addressing both internal and external stakeholder concerns that the City is reactive in its approach to social issues. Such an approach would not only create an avenue of decision-making access, it would move the role of the Committee away from educating the public about City policy direction and current initiatives related to social and affordable housing issues, and towards an approach that sees local organizations and the public at large as active participants in informing the direction that the City takes on social issues. Indeed, the City's engagement of community is in itself a component of the educative process it wants to achieve.

Planning for Planning

Recommendation 6: Develop an environmental scan process through which residents and institutional stakeholders can have a voice in planning around social issues. [There are financial costs associated with this recommendation.]

Recommendation 7: Coordinate with other City departments to streamline internal planning processes in order to develop a comprehensive framework that addresses quality of life issues. [This recommendation does not have a financial cost, but is a resource issue for staff.]

Recommendation 8: Develop information sharing relationships with other levels of government and their institutions to increase opportunities for coordination, collaboration, and partnership. [This recommendation does not have a financial cost, but is a resource issue for staff.]

Several actions are critical to ensuring community access to decision making processes and that community stakeholders are active participants in the cycle of defining priority issues. The City has been criticized, both through this process and in other arenas, as being reactive in its approach to social issues, creating a sense of frustration for both internal and external stakeholders. While SPARC BC's process addressed this concern at some level through the identification of priority issues, by nature social issues are not static and will fluctuate depending on a great number of variables both within the community and without.

While we know where current community priorities lie, this tells us little of what faces a community on the horizon. SPARC BC heard several times from participants that identifying priority issues is not as important as identifying the processes through which they can be addressed. Of course that does not provide immediate guidance to staff and Council, so we also committed to exploring issues in addition to processes. The priority issues of affordable housing, homelessness, poverty, and mental health may serve Council in setting their own budget priorities this year and next, but while it may be hard to see beyond the looming affordable housing crisis, it is conceivable that issues will need revisiting from time to time. Further, given the prominence of substance misuse as a priority issue during the interview phase of this project, and the community's interest in

the Premier's Task Force and the 4-Pillars Coalition, the project team suggests including substance misuse as a current priority issue.

The consultants heard concerns from stakeholders that the departmental and City strategic and operational plans do not involve processes of community consultation or input. While based on the OCP which is established through rigorous public process, stakeholders in the social sector continue to feel as though directions and priorities are being set without reference to their direct experience and expertise. The OCP is seen as too broad and out of date in relation to the shifting social scene. In contrast, the process of City and departmental planning is seen as much more responsive to emerging issues and more determinative of where resources will be allocated. As such, there is a real desire to have input into that process. Having processes in place that reference community considerations would be helpful in having institutional stakeholders feel they have access to municipal decision-making structures and some degree of influence over both the issues that are addressed by the City and the processes through which they will be addressed.

While the identification of social issues happens in a less formal sense through the CPM's ongoing interactions with members of Kelowna's various task forces and committees, such processes do not necessarily allow for the identification of community priorities. Environmental scanning – an analysis or evaluation of internal and external factors that affect the City and its citizens – is a technique that some municipalities employ in their planning processes around social issues, and can be structured to elicit stakeholder involvement in any number of ways. While such a scan would involve community stakeholders, it need not be as exhaustive as the research undertaken in setting the priorities outlined in this report. It might involve a community workshop, the interviewing of several different stakeholders each year, or, if broader public input is sought, additional questions added to the Citizens' Survey. Regardless of which method is used, environmental scanning allows citizens and organizations another avenue of access to City decision making. This is another area where SPHC members could be drawn upon, both for their own expertise in social issues, and for the expertise of those networks they will have developed through previous recommendations outlined above.

Internal cross-referencing is also critical to the development of departmental workplans that address community needs. Theoretically and practically, there are a great number of natural connections between the fields of parks and recreation services, arts and culture, and social planning particularly as they relate to community development. The City of Kelowna can more actively pursue such connections through coordinating the planning activities of each department in order to address social issues in a more cohesive manner. One illustration of where greater coordination could be possible is with Cultural Services. The Cultural Services Manager and the Community Planning Manager were hired in the same year, and the discrepancy in levels of growth and support received are drastic. Cultural Services has seen tremendous growth in the last decade while support received by the CPM has increased only marginally, itself indicative of City priorities.

As Cultural Services embarks on a year long strategic planning endeavour with a significant public engagement component, CDRE is uniquely positioned to participate in this process. Through conversation, SPARC BC has learned that Cultural Services intends to shift its provision of services to a model that links cultural development to social development and it is perceived that links between these two departments will naturally increase. However, such links must be actively pursued to have benefit to the community as a whole and to ensure seamless provision of community planning services.

This does not suggest that the roles between various departments should be married, for certainly as it relates to priority issues such as affordable housing, homelessness and poverty more generally, a community development approach can best be delivered by CDRE. Rather, interdepartmental coordination would ensure a cohesive approach to community well-being that addresses various aspects of quality of life. Moreover, cooperation and coordination can result in overall cost savings, and provide opportunities to share and leverage resources. By engaging community stakeholders in the cycle of defining priority issues and approaches, such a comprehensive framework will have the support of the citizens and organizations it seeks to serve.

Another important aspect of cross-referencing is the awareness of activity in other levels of government and their institutions. Building relationships for information sharing with the Health Authority, the School District, Regional District, federal and provincial government departments working in the social development sector can provide significant benefits.

City as Collaborator

Recommendation 9: Look for opportunities to be innovative in using City assets to support the space needs of community service providers either through property or through the negotiation of public space in the development process. [There are potential financial costs associated with this recommendation.]

Recommendation 10: Increase the funds available to community groups through the Community Social Development Grants and Grants to Address the Sexual Exploitation of Youth. [There are financial costs associated with this recommendation.]

Recommendation 11: Should any central urban policies be created in Kelowna, ensure that they have a strong social element, that the City brings community to the table and that it enhances social services in Kelowna. [This recommendation does not have a financial cost.]

Collaboration in the social sector provides a number of benefits to both municipalities and communities in that it brings with it the potential to leverage resources, it reduces duplication of services, it enhances coordination in service provision, and it decreases competition for available funds. By collaborating with and supporting collaboration among the community partners who have expertise in social development issues, the City

could develop its role in social planning that would see it provide leadership by bringing service delivery stakeholders to the table, provide recognition and encouragement to partners, and provide resources to the social development sector.

Municipal leadership in social development issues need not be solely about the provision of resources, but also includes involvement in the identification of priorities and the bringing together of community experts in social development. It also means supporting the collaboration of others. Collaborative planning can generate significant outcomes for the costs involved, but it should not be expected to be completed "off the side of a desk" and without any dedicated support resources. The coordination it requires needs adequate resources, either by designated staff, or providing some secretariat services to facilitate the process and the necessary communication. The City could provide leadership directly through resourcing internally or provide supports to existing leaders in the community. Through such a collaborative model, the development of capacity becomes an important benefit that increases the resources available in the community to address social issues and the City establishes working partnerships to develop leadership and ensure that increased capacity is nurtured and maintained over the long term.

Throughout the consultations undertaken for this process, stakeholders identified the need for the City to play a significant role in collaborations within the community, and to take leadership in this realm when necessary. SPARC BC has identified three areas through which the City can expand its collaborative role: the provision of space as a collaborative effort; an expansion of the grants-in-aid program to support community projects and initiatives; and the potential for increased collaboration with other levels of government if an Urban Development Agreement for Kelowna is pursued.

Municipalities across BC have increasingly explored their roles as community collaborators in service planning through the provision of space to community groups. A huge appetite for the expansion of this role exists in Kelowna. Limited access to these kinds of assets, and initiatives with mixed results in the past, has made the City reluctant to further explore such arrangements, according to several internal stakeholders. However, the creation in 2003 of the Community Development and Real Estate Department with the intent of "bringing land assets to the table to address community needs" raises the potential of focusing beyond affordable housing needs. Innovative and inclusive models of space provision could allow the City to support community service needs without being involved directly in service provision.

Space provision happens in some communities through municipal negotiation with developers for public space in new developments, similar in nature to affordable housing strategies. While this option bears little cost to the City, it does not ensure the appropriate location of facilities for social services in a city with the development patterns of Kelowna. The benefits of collaboration are often seen for service-providers that are co-located or clustered. Community agencies can more seamlessly deliver services to clients through a naturally collaborative approach when they are located together and can share supports such as administration.

Were the City of Kelowna to directly provide space to community service agencies, it would be in a position to mandate agencies to work collaboratively and build networks within the greater community as part of their space agreement, thereby allowing for the self-coordination of services provided to the community. Intra- and inter-sectoral coordination often emerges from regular, informal contact which is more likely to happen when agencies are housed together. Such an arrangement also benefits the community at large, as individuals are not required to move through different areas of the city to obtain services and the agencies from which they obtain services would have more stable-grounding without having to spend large portions of their budgets on rent, and administrative and technical support. Importantly, such uses are also supported by CDRE's own objectives, namely "to resolve land-related issues that have previously hindered advancement of projects or initiatives that will benefit the community" and "to prevent social problems from developing or worsening in the community by acting from a prevention perspective."

Another area where the City currently supports the work of local agencies is the grants-in-aid program. A review of four municipalities illustrated that the City of Kelowna's grants-in-aid program could benefit from additional dollars, a finding supported by community perceptions and the recent report from the Central Okanagan Foundation on learnings from their administration of the program this year. With a total of $79 800 available for distribution and the requested amount for 2005 being over $260 000, the need for an increase is felt by agencies throughout Kelowna. The provision of additional funds would allow the City to exemplify its responsiveness to the social issues that impact quality of life in Kelowna. Grants in aid programs are important to community organizations as a point of leveraging other funding. Demonstrated municipal support is appealing to other funders and supports increased resources being brought to the community. Again, the comparison of the City of Kelowna, with a considerably larger population than the four comparison municipalities, is a significantly lower contributor. Council has recently made significant contributions on the housing front which has involved dollars directed toward capital projects. Importantly, community grants offer important operating and project support and this is where the City's collaborative efforts can have great impact for those agencies involved in social development issues.

A final area for potential collaboration comes as the City of Kelowna considers the creation of an Urban Development Agreement, modeled after those in Vancouver and Victoria. One of the advantages of such agreements is the provision of an established table at which issues are brought forward with processes for the respective roles of government in addressing urban development issues outlined. One of the identified deficiencies in Urban Development Agreements is the lack of a place at the table for communities. While difficult to address, local government is particularly well positioned to ensure that the expertise of community social institutions are brought forward, providing another example of the City's need to address engagement with community. By building an iterative public consultation process into the development of an agreement, and by bringing together organizations that span different sectors, the City has the opportunity to build partnerships through the creation of a strategy that will address the social, economic, and environmental needs of its citizens.

Human Resources

Recommendation 12: Consider hiring additional administrative support to provide assistance to community development staff. [There are financial costs associated with this recommendation.]

Recommendation 13: Consider hiring at least one additional full-time employee to assist the City with collaboration, partnerships and consultation. [There are financial costs associated with this recommendation.]

Whether the City maintains its previous approach to social planning or adopts a collaborative role through this process, it has become clear that human resources will need enhancement. Participants in the research process were unanimous in their belief that no one person could manage the social planning responsibilities required to meet community expectations, and certainly this was part of the impetus for SPARC BC being retained to guide this process. It is clear that the CPM requires additional administrative support, and a strong argument has been put forth for the enhancement of the community planning function itself through additional staff. There is an obvious desire for greater community consultation and collaboration around a number of issues, and committee involvement alone does not meet these expectations.

It also appears that the City of Kelowna is beginning to shift its community-engagement functions to the Corporate Communications Division, whose mandate it is to "increase awareness of City programs and services, by both employees and the public, to promote a better understanding of municipal operations and procedures." By enhancing current outlets for public consultation, the Department hopes to increase participation and input to decision-making processes. While each department has its own structures for engagement pertaining to department-specific issues, it is questionable whether the long-term dialogue desired by the community can happen through a communications department where the primary focus is on 'educating' rather than receiving input into issues. Shifting community engagement opportunities to the communications department is not a structure that would allow the City to work with communities to identify priorities through the skill of trained community developers or social planners.

Given that several recommendations have options around the approaches taken, it is difficult to determine precise activities that a new staff person would conduct. However, should these recommendations be adopted the research here indicates that the nature of the position would be collaborative and process-driven. Additional human resources in the community planning function should have a background in social development, a strong interest in working with communities and experience developing networks and working collaboratively with community partners. While some of the additional consultative work can be accomplished through the new roles for SPHC members outlined above, volunteers alone cannot carry this role. A new staff role would focus on building collaborative networks and facilitating community engagement in community social planning activities undertaken.

Appendix A: Public Consultation Summary

The following summary of public consultation procedures undertaken by the City of Kelowna has been provided by the City. It is intended to supplement the perceptions of municipal social planning activities that emerged through the internal and external stakeholder interview process.

Public Consultation Procedures Followed by the City of Kelowna, in addition to legislated public hearings (examples, but not limited to the following):

1. **Open Houses:**
- Widely advertised in local newspapers and media; sometimes mail-outs.
- Held on several days in several locations depending on the issue
- Staff from various departments or other agencies available to answer questions
- Use story boards to explain the issue, suggest change and ask for input
- Some open houses include presentations.
- Use questionnaires for public input at the event; also summarize results & incorporate input
- Examples: OCP review; changes to secondary suites policy & zoning; new zoning-by-law, sidewalk master plan; planning for KSS site; neighbourhood sector plans; beach park safety; supportive housing project; standards of maintenance by-laws for rental housing.

2. Workshops
- Written invitations extended to identified stakeholders, usually at least 200 agencies are identified and invited.
- May also include invitations to the public by media release and advertising following the mail-out.
- Workshop exercises conducted to review policy direction, provide new ideas and suggest change.
- Advance registration (no fee) required so the City can plan for the size of the event.
- Usually attended by 50 to 200 people:
- Examples: Social Plan; affordable housing; bike routes; accessibility design guidelines; handicapped parking issues; secondary suites policy and procedures, sustainability workshop on June 25. 06

3. Questionnaires:
- Usually a scientifically accurate random sample of the community is selected for mail-outs.
- A 30% response rate or higher has been experienced.
- Examples: neighbourhood satisfaction survey; annual citizen's survey, social needs assessment, child care needs assessment, strategic plan, sidewalk master plan,

4. Focus groups:
- Issue specific committees are established for the purpose of helping determine City direction & meet several times over the course of a few months to a year.

- Invitations are sent to interested stakeholders and advertisements are placed in the media.
- Example: Last OCP review included social policy and housing policy focus groups, as well as numerous other topic areas; Zoning By-Law re-write used similar process, in addition to open houses & mail-outs to every household; also used for shore zone protection review and sector plans.

5. Committees and other Groups Appointed by Council
- Statutory Committees: meet on a regular basis and required to report to Council on activities - includes Social Planning & Housing Committee, Advisory Planning Committee, Advisory Committee for People with Disabilities and many others
- Task Forces: Time limited, task specific task forces appointed by Council to review a specific issue and report back to Council. May undertake their own public consultation: e.g.
  - Mayor's Task Force on Youth – findings were carried forward into social policy
  - Site Review Task Force – to determine the best location for a housing facility for the homeless; all meetings were public and written and verbal input was solicited.
  - Special Needs and Affordable Housing Task Force – will hold a 2 day workshop with invited stakeholders in September

6. Charrettes:
- Intense brainstorming session with invited stakeholders and experts; used for Highway 97 Town Centre & Cultural District; all issues covered, including social

7. Information Events:
- Annual housing information events have been held, as required by policy, and are determined based on topical current issues
- Partnerships with non-profits, business sector and other levels of government help make these successful

Appendix B: Community and Social Planning Functions

A COMPARISON OF SELECTED BC MUNICIPALITIES

MUNICIPALITY	Kamloops	Nanaimo	Prince George	Victoria	Kelowna
Population:	80,416	76,736	75,609	76,387	109,000
Operating Expenditures:	$80,493,745	$67,059,011	$79,978,000	$106,548,894	$112,159,150
ORGANIZATIONAL AND STAFFING STRUCTURE					
Department responsible:	Corporate Programs and Projects	Development Services Division – Community Planning Department	Leisure and social services	Community Development Division – Parks, Recreation and Community Development Department	Community Development and Real Estate
Staffing:	Manager of Corporate Programs and Projects (25% of full time) Administrative support Planning Department (20% of one full time position spread across various planners) Recreation Department (1 full time position spread across 5 positions)	1 full time Social Planner 1 full time administrator (spends about 60% of time supporting social planner and Social Planning Advisory Committee)	Director of Leisure Services (20-25% of full time) Other staff in Leisure Services Department may spend 10-15% of full time on social issues	1 Manager of Community Development 4 Professional staff (2 Planners, 1 Community Recreation Development Coordinator, 1 Downtown Coordinator) 2 Admin staff (1 Clerk, 1 Administrative Assistant)	Community Planning Manager Administrative Support

	COMMITTEE STRUCTURE				
Committee:	Social Planning Council (Council Committee)	Social Planning Advisory Committee (Council Committee)	Prince George Community Planning Council (City of Prince George has negotiated a five-year memorandum of understanding with this non profit society that is established to address social planning issues in Prince George). Prince George CPC applies to council for funding each year ($35,000 has been provided in each of previous years).	Advisory Social Planning Committee Advisory Housing Committee (both committees replaced the Social Planning and Housing Advisory Committee in 2002)	Social Planning and Housing Committee
Membership:	Nine citizens-at-large, ex-officio members from the City's Development Services Department and various social service agencies.	9 community-at-large members and representatives from the School Board, Parks and Recreation and Culture Commission and City Council. Committee members are nominated by City Council following the municipal election and serve for a 3 year term.	Prince George CPC is governed by a 12 member board that includes a cross section of interested Prince George citizens	11 voting members plus representatives from School District 61, City Council, etc.	Twelve individuals committed to a healthy communities approach to planning for the City of Kelowna, representing a broad cross-section of interest and background, ranging from the social to the business perspective. Up to two members of Council as non-voting liaison members only.
Mandate:	Makes recommendations to the Mayor and City Council on a wide variety	Established by City Council in January 1991. Provides a broad-based	"A resource working with Prince George individuals and organizations who are	Advisory Social Planning Committee: To advise Council on	To address quality of life for Kelowna residents from the

	of social concerns, planning issues and development of municipal strategies to meet community social needs. Also assists with the development of the Community and Social Plans, and in the review of Social Planning Grant applications. Overall, is working towards enhancing community well-being and building a sense of community at the neighbourhood level.	social perspective to Council and Staff on community social needs and issues. Also acts as a liaison with community groups, agencies, the public and other government sectors.	striving to build a dynamic community that is reflective of all who live here and where all may thrive" [mission statement]	social planning issues affecting the overall well-being of the City and those matters referred to the committee by Council. To encourage cooperation and ensure a coordinated response from those community organizations and government agencies dealing with social planning.	prevention perspective, under the guidance of the social policies in the City's OCP.
COMMUNITY INVOLVEMENT					
Significant projects	Social Plan Homelessness (SCPI) Design charette for 400 Block Battle Street (to develop process for downtown block that includes commercial and social service uses) Community meetings on alcohol and drug issues Support for formation of community associations Crime prevention officer at the city reports to Manager of Corporate Programs and Projects and supports solutions to crime issues.	Social development strategy Early years coalition Food Line (Emergency food service providers) Nanaimo Homelessness Task Force (SCPI) Premier's Task Force on Homelessness, Mental Health, Addictions Alcohol and Drug Action committee	Premier's Task force on Homelessness, Mental Health and Addictions Social Plan	Harm Reduction Policy FASD education and prevention Roundtables and research on child care, housing and a brief overview of syringe management programs	Premier's Task force on Homelessness, Mental Health and Addictions Social Plan Child Care Accessibility issues

BUDGET					
Grants in Aid:	$60,000 Social Planning Grant $13,500 SHOPP (Social and Health Options for People involved with Prostitution) $50,000 affordable housing grant	Community Service Grants: $25,000 (maximum of $5000 per group) Social Development Grants Program: $90,000	Grants in Aid: $125,000 / year to social service agencies (Social Grants Committee makes recommendations to council)	Special Project Grants: $84,025 Neighbourhood Development Program Grants: $101,780 Social Services CRD Funding: $84,025 Other program funding: $155,750	Community Social Development Grants: $57,800 Grants to Address the Sexual Exploitation of Youth: $22,000 A grants reserve budget includes all funds that are not distributed from the above grants each year for emergency grants purposes.
In kind contributions and tax relief:	Provides meeting space and admin support to groups Decks waived on affordable housing projects Recently gave property to Habitat for Humanity project for half price Tax exemptions for specific uses related to social services ($300 - $400,000).	Contributes meeting space to community groups Can contribute administrative support Can access modest dollars for items such as meeting facilitation to support groups in transition Property tax exemption policy 50% reduction in development cost charges for affordable housing projects	Will offer meeting space as needed Tax relief program DCC waiver is available but not used regularly	Tax exemptions to about 60 non-profits Meeting space Capacity building and other supports for organizations where requested	Affordable Housing Fund (approx. $200 000) Property tax exemption policy Boys and Girls Club and Youth and Family Services receive more than $200,000 annually in operating funds Recently established a housing reserve fund to give grants of $5000/unit of subsidized rental housing and $2500/unit for

					affordable rental without senior government subsidy
Other		Can make municipal land available through lease for social housing projects Housing legacy fund (newly established to collect un-used grant money, housing funds, etc.)			
KEY PARTNERS					
Organizations and committees that work closely with the municipal government	Kamloops Homelessness Working Group (Supporting Communities Partnership Initiative) Kamloops Community Action Team Social Housing Sub-committee Kamloops Food Policy Committee	Community Partnership Towards Social Development in Nanaimo S.A.F.E.R. Downtown Nanaimo Project Nanaimo Working Group on Homelessness Issues	Native Friendship Centre Partners for Healthy Downtown CPC Family Centre Health Region Youth Around Prince George (YAPG) Social Research, UNBC Native Health Centre	Quality of Life Challenge Victoria Homelessness Steering Committee	Premier's Task Force Central OK Four Pillars Coalition Homelessness Steering Committee Boys and Girls Club and Youth and Family Services

Appendix C: Internal and External Stakeholder Interview Questions

Interview Questions – Internal Stakeholders

SPARC BC

1) What do you feel are the key social issues affecting the City of Kelowna?

2) *With regard to the City's current community social planning activities…*

    a) What sorts of activities is the City currently undertaking with regard to social and community planning?

    b) Within its mandate and capacity, what would be the most constructive way for the City to engage with social issues and community social planning matters?

    c) What sorts of tools and resources does the City have for dealing with community social planning issues?

    d) How would you describe the City's capacity for dealing with the aforementioned (question one) social issues?

    e) What roles do you think the City of Kelowna should have in social and community planning?

3) The City of Kelowna has a number of policy and planning provisions in place – such as the 1996 Social Plan and the OCP. How effective are existing policies in guiding community social planning? What's working? What's not? (Prompt: Are there any policy gaps?)

4) *With regard to other organizations in the community…*

    a) What are some of the ways in which the City engages with community organizations and the community? Describe the City's relationship with social issue organizations / agencies / service providers? (Prompt: Existing and historical relations? Current activities – e.g. committees? Provision of space? Grants?)

    b) What processes exist to facilitate this engagement with the community at large? What's working? What's not?

    c) Are there any opportunities for partnership that the City should consider? (e.g. with community organizations, agencies, societies, business community?)

5) Looking ahead, what do you think the important next steps are for the City to take within the area of community and social planning activities?

Interview Questions – External Stakeholders

SPARC BC

Your organization…

1) Please describe your organization/agency. What are its activities? What sort of social planning issues/areas does it focus on in Kelowna? (Prompt: policy, advocacy, service delivery and front-line activities)

2) What do you feel are the key social issues affecting the City of Kelowna?

3) Is your organization part of any local networks, partnerships or collaborative ventures (with the City or with other organizations)?

Your impression of the City and its activities…

4) With regard to the City's current community social planning activities…

   a) What sorts of activities is the City currently undertaking with regard to social and community planning?

   b) Given that the City does not have the capacity or mandate to provide social services, what would be the most constructive way for the City to engage in community social planning?

   c) What sorts of tools and resources does the City have for dealing with community social planning issues?

   d) How would you describe the City's capacity for dealing with the aforementioned (question one) issues?

   e) What roles do you think the City of Kelowna should have in social and community planning?

5) The City of Kelowna has a number of policy and planning provisions in place – such as the 1996 Social Plan, which has its policy direction expanded and updated in Chapter 17 of the Official Community Plan (OCP). How familiar are you with these documents? How effective are existing policies in guiding community social planning? What's working? What's not? (Prompt: Are there any policy gaps?)

6) *With regard to City/community collaborations…*

      a) What do you see as the most effective way for the City to collaborate with community organizations? (Prompt: Existing and historical relationships? Current activities – e.g. committees? Provision of space? Grants?)

      b) Within its mandate and capacity, what, if anything, could the City of Kelowna do to support the work you and your organization do?

      c) Are there any opportunities for partnership that the City should consider? (e.g. community organizations, agencies, societies, business community?)

7) Looking ahead, what are the best next steps for the City to take in refining its strategy for community social planning?

Appendix D: Interview Participants

Internal

Walter Gray	Mayor
Ron Cannan	Councillor
Robert Hobson	Councillor
Sharon Shepherd	Councillor
Brian Given	Councillor
Ron Born	City Manager
Ron Mattiusi	Director of Planning
Theresa Eichler	Community Planning Manager
David Shipclark	Manager, CDRE
Kelly Wolfe	SPHC Chair

External

Luke Stack	Society of Hope
Janice Henry	Central Okanagan Foundation
Shelley Inglis-Allen	Interior Health
Michael Loewen	United Way
Vi Sorenson	Seniors Outreach Services Society
Doug Findlator	Canadian Heritage
Brian Mairs	Okanagan Aboriginal AIDS Society
Catherine Williams-Jones	New Opportunities for Women Canada
Vonnie Lavers	Kelowna Community Food Bank
Alex Johnston	RCMP
Ian Graham	Kelowna Homelessness Steering Cmte.
Sherri Newcomen	BC Paraplegic Association
Leagh Edwards	Society for Community Living
Diane Entwistle	Boys and Girls Club
Micki Smith	Kelowna Women's Resource Centre
Cam Martin	Ki Low Na Friendship Society
Bill Downie	Kelowna Community Resources
Randy Benson	Gospel Mission
Clint McKenzie	Downtown Kelowna Association
Ben Lee	Central Okanagan Intercultural Society
Lynn Burgat	Kelowna Child Care Society
David MacLean	Chamber of Commerce

**Residents'
Associations
(written responses)**

North End
Glenmore Valley
Kelowna South-Central

Appendix E: Workshop Workbook

[Following 20 pages.]

SOCIAL PLANNING ISSUES IN KELOWNA

**Stakeholder Workshop
Tuesday, September 13, 2005**

WORKBOOK

**Please ensure that a recorder
keeps notes of all discussions and
turns those notes in at the end of
today's workshop**

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WORKSHOP GOALS

1) **Provide an update on the project including background information on social planning issues, the role of municipal governments in supporting social development and to report back on key themes emerging from stakeholder interviews.**

2) **Review the processes currently in place to address community issues in Kelowna and identify strategies for strengthening those processes.**

3) **Develop community priorities on the role of the City of Kelowna to improve the effectiveness of its policy direction in the area of social and community planning**

AGENDA

11:30	**Check-in and socialize**
12:00	**Lunch (provided)**

12:30   **Workshop introduction**
Municipalities and community social planning
- **What is community social planning**
- **Characteristics of collaborative community processes**
- **Roles and responsibilities**
- **How have other communities addressed these issues?**

Review results of stakeholder interviews
- **Key themes**
- **Capacity issues**

Discussion groups
Report out and next steps

4:00   **Conclusion**

GETTING TO KNOW EACH OTHER

Instructions

1. Do a round of introductions in your group including:
   - Name
   - What group you represent
   - Why you came to today's session
   - What you hope to get out of today's discussion

2. Appoint a spokesperson who will briefly introduce your table to the whole group?

ROLE OF FACILITATOR

1. Review discussion group guidelines with your group

2. Keep track of time

2. Summarize and articulate areas of consensus and areas for further discussion

3. Ensure that everybody gets a chance to speak.
   Note: because there is limited time, everybody may not have a chance to speak on all issues. To ensure full participation, perhaps those who have not spoken on one issue can start the discussion on the next issue.

ROLE OF NOTE TAKER

1. Please ensure the discussion results are clearly recorded

2. Pay particular attention to areas of agreement and areas for further discussion

3. Please ensure that the notes are turned in to the facilitator at the end of the workshop

THANK YOU FOR HELPING TO
MAKE THIS WORKSHOP A SUCCESS

DISCUSSION GROUP INSTRUCTIONS

The discussion group is scheduled to run for approximately ninety minutes. We are asking groups to accomplish three tasks:

1) Provide input into the prioritization of social issues to be addressed by the City of Kelowna (30-45 minutes)

2) Provide input into the role that the City can play in supporting responses to community issues. This will involve using a "scenario" as a starting point for identifying potential roles and activities. (20-30 minutes)

3) Identify next steps and action items (15 - 20 minutes)

Please use the instruction sheets on the following pages to guide you through the exercises. Remember that we are asking the group recorder to turn in a summary of the discussion at the end of the workshop.

DISCUSSION GROUP GUIDELINES

1) The purpose of this exercise is to ask for your assistance in identifying priorities for municipal action on social issues.

2) Remember:
   a. We are not trying to solve or resolve these issues. We are trying to identify strategies through which these issues can be addressed.
   b. We are not trying to reach consensus. We are trying to identify areas where consensus exists, where there is a need for further discussion, and where consensus does not exist.

3) As we have noted the issue of responsibility is complicated – there are a number of actors with responsibility to address various aspects of community issues. The workshop facilitator has access to detailed information on responsibilities for a variety of issues if necessary.

4) A word about consensus:
   a. One purpose of this exercise is to determine where there is strong agreement and where there is a need for further discussion.
   b. Consensus can be defined in a number of ways:
      i. There is strong agreement by all participants
      ii. There is general agreement by all participants with a note of issues for further consideration and discussion
      iii. There is no consensus on this issue.

   c. Focus is not on solutions, but on processes for developing solutions

EXERCISE #1:
WHAT ARE THE KEY ISSUES?

1) Based on interview results, background reports, and information provided by city staff, a number of community issues have been identified. These include:

- Affordable housing
- Homelessness
- Substance misuse and addictions
- Mental health
- Poverty
- Crime
- Accessibility
- Youth suicide and services for youth

- Childcare and early childhood development programs
- Family and elder abuse
- Sexual exploitation and the sex trade
- Diversity and ethno-cultural sensitivity
- Transportation
- The social impacts of pollution and the loss of green space

2) After reviewing this list and based on the presentation from earlier today, as a group please answer the questions on the following pages.

THE ELEVATOR SPEECH:

-- Please allocate 10-15 minutes for this discussion --

The Mayor of Kelowna has been invited to attend a meeting that will include Prime Minister Paul Martin and the entire federal cabinet, Premier Gordon Campbell and the entire provincial cabinet as well as leading philanthropical organizations. He has been given 3 minutes on the agenda to talk about social issues in Kelowna and the outside resources that are needed to address them. What are the key points that should be made during the talk?

Areas of agreement

Topics for further discussion

BANG FOR THE BUCK:

-- Please allocate 10-15 minutes for this discussion --

You have been allocated $100 to spend on supporting solutions to the community issues identified for Kelowna. How would you proportionately allocate these funds? (Some options to consider include identifying priority issues for funding, identifying strategies for "leveraging" funding from other sources, providing an equal amount to agencies working on each issue, or hire additional staff to support solutions)

Areas of agreement

Topics for further discussion

TIME MANAGEMENT:

-- Please allocate 10-15 minutes for this discussion --

You have been allocated 100 hours of staff time to support the community in finding solutions to the above issues. How would you proportionately divide the time:

___ HRS   Coordinate and support advisory and planning committees

___ HRS   Research and policy analysis

___ HRS   Communicatewith Kelowna residents

___ HRS   Communicate with other levels of government

___HRS   Review and comment on development proposals and other policy documents

___HRS   _____

___HRS   _____

___HRS   _____

Areas of agreement

Topics for further discussion

EXERCISE #2:
HOW SHOULD THE KEY
ISSUES BE ADDRESSED?

-- Please allocate 20-30 minutes for this discussion (Pages 13-15) --

1) Read out the "scenario" that has been prepared for your group and complete the exercises on the following three pages.

Identifying responsibilities and roles

In this "scenario" what are the responsibilities and roles of various actors:

a. Federal government

b. Provincial government

c. Health authority

d. Community based organzations and other key organizations

Responsibilities and roles of the municipal government

What specific actions can the municipal government take in the areas of:

LEADERSHIP including internal issues (such as convening and coordinating) and external issues (such as advocacy and communication with senior levels of goverment)

FUNDING (for example a grants in aid program)

SUPPORT including staff time and provision of other resources (such as space, property tax breaks, etc.)

BY-LAWS, ZONING & POLICIES (for example land use by-laws, Official Community Plan, etc.)

OTHER ACTIONS

Areas of agreement

Topics for further discussion

Collaborative Processes

What processes need to be in place to ensure that all of the actors working on this issue are working effectively to solve problems? (Some examples include Council commitee, advisory committee, public consultation process, social plannng committee)

Areas of agreement

Topics for further discussion

EXERCISE #3:
WHAT ARE THE NEXT STEPS AND ACTION ITEMS?

-- Please allocate 15 minutes for this discussion --

Reflecting on all that you have heard today (presentations, discussion groups, etc.)

1. What processes are currently in place in Kelowna to ensure on-going collaboration between the municipal goverent and other actors to address community issues?

2. How could those processes be improved or expanded?

3. What are the next steps, action items and benchmarks (i.e. how will you know that you've been successful?)

ACTION ITEM	COMPLETED BY	BENCHMARKS FOR SUCCESS

ADDITIONAL NOTES AND COMMENTS