TO: Regional Board
FROM: Brian Reardon
Chief Administrative Officer
DATE: March 17, 2015
SUBJECT: Application to Strategic Priorities Fund – Capacity Building

Purpose: To seek Board approval to make an application for Strategic Priorities Funding under the Capacity Building Stream for a Regional Strategic Transportation Plan.

Executive Summary:
The Strategic Priorities Fund (SPF) program was launched in December 2014. This funding program has a 'Capital Infrastructure Projects' and 'Capacity Building' stream that provides access to 'pooled' Gas Tax funding for communities outside of the Lower Mainland on an application basis. Each local government is allowed up to two capital and one capacity building applications per year.

As a member of the Sustainable Transportation Partnership of the Central Okanagan (STPCO) Regional District staff have identified the Regional Strategic Transportation Plan as a key project with regional significance and hereby nominate it, on behalf of the STPCO partners as our 'Capacity Building Project' under the SPF Program for 2015.

One of the specific objectives set out in the MOU creating the STPCO was 'to establish region-wide unified policies and strategic transportation plans'. The completion of the Regional Strategic Transportation Plan will accomplish that objective.

RECOMMENDATION:

THAT the Regional Board approve the 'Capacity Building' application to the Union of BC Municipalities' Strategic Priorities Fund for six hundred thousand dollars ($600,000) for funding the Regional Strategic Transportation Plan.

Respectfully Submitted,

Brian Reardon

Atts: Memorandum from Ron Westlake dated March 16th, 2015
Regional Strategic Transportation Plan PowerPoint Presentation Slides
Sustainable Transportation Partnership of the Central Okanagan

MEMORANDUM

Date:   March 16, 2015
File No.: 0705-25
To:   Brian Reardon, CAO Regional District of Central Okanagan
From:   Ron Westlake
Subject:   Application to Strategic Priorities Fund

Recommendation

THAT the Regional Board approves of a capacity building application by the Regional District of Central Okanagan to the Union of BC Municipalities’ Strategic Priorities Fund for six hundred thousand dollars ($600,000) on behalf of the Strategic Transportation Partnership of the Central Okanagan for funding of a Regional Strategic Transportation Plan (RSTP).

Background

The local governments of the Central Okanagan have collaborated on regional transportation for a number of years. Sustainable mobility across the region is a common interest of all these local governments for access to employment, goods, services, education, recreation/culture and even to other external destinations. This collaboration led to the formation of the Sustainable Transportation Partnership of the Central Okanagan (STPCO). In 2012, the local governments agreed upon a Memorandum of Understanding (MOU) on regional transportation and formally established the STPCO Partnership in 2013.

Since the beginning of the Partnership, the collaboration has grown stronger through its shared interest in regional transportation planning. The scope of the Partnership was described in the MOU as ‘the general domain of regional transportation planning…’. One of the specific objectives of the Partnership set-out in the MOU was ‘to establish region-wide unified policies and strategic transportation plans.’

The local/regional government CAO Committee has steered the early pre-planning phase of a regional strategic transportation plan through direction from the Local Government Advisory (LGA) Board which provides oversight to the Partnership.

Phase 1 (pre-planning) of the RSTP was completed mid-2014 and some additional work was approved by the LGA Board in June 2014 in preparation for a funding application for Phase 2, the regional plan development. Phase 2, has been estimated to cost in the order of $500,000. However, in light of the need to incorporate a regional strategic marketing for transit and alternate transportation will increase the funding request to $600,000.
Strategic Priorities Fund – Renewed Gas Tax Program

The Strategic Priorities Fund (SPF) program was launched in December, 2014. This funding program provides access to ‘pooled’ Gas Tax funding for communities outside the Lower Mainland on an application basis. There are two project funding categories:

- SPF Capital Infrastructure Projects Stream; &
- SPF Capacity Building Stream

Each local government is allowed up to two capital applications and one capacity building application. The STPCO is not considered an eligible applicant and therefore would need to apply for the RSTP as a capacity building application through one of the eligible local government partners. Funding for capacity building projects within the SPF program have been set aside and so applications for capacity building do not compete with capital applications.

Regional District of Central Okanagan – Lead Applicant

The Regional District is an ideal lead candidate in applying for funding for this initiative. Their recently completed Regional Growth Strategy (RGS) sets the stage for other regional plans. The Discussion Paper on Transportation & Mobility (2012) in the RGS clearly recognized the formation of the STPCO to improve coordination and transportation planning region-wide. It also noted the need for a region-wide strategic transportation plan.

Summary

Transportation impacts many areas of society and is a vital component to the economic competitiveness, the overall livability and future of the Central Okanagan. As the blueprint for the collective transportation goals and desires of neighbouring communities, the development of a RSTP has been proposed and would support the plans and legislative requirements of local, regional, and provincial governments to manage and support growth. It is recommended that the RDCO apply for funding to develop a RSTP through the Strategic Priorities Fund (SPF) – Renewed Gas Tax Program. The RSTP not only meets every criteria for the SPF, but as a transportation plan, is the ideal capacity building investment to apply this transportation-based funding source towards.

Ron Westlake, P.Eng.
Director, STPCO
Regional Strategic Transportation Plan (RSTP): Phase 2 Funding Application

Sustainable Transportation Partnership of the Central Okanagan
Regional District Board Briefing
March 23, 2015

Sustainable Transportation Partnership of the Central Okanagan (STPCO)

- We're in this Together
- Enhance Livability and Quality of Life
- Efficient & Safe Movement of Goods and People
- Sustainability – Economic, Social & Environmental
- Proactive & Collaborative Regional Transportation Planning

RSTP Expectations

1. Use of the RSTP
   - identify investments and scope out projects,
   - define programs
   - specify budgets and required funding
   - provide business cases for an improved transportation system

2. Local Policy Foundation
   - build on local and provincial plans previously developed
RSTP Expectations

3. Local Plans and Autonomy
   - to support and synchronize the various plans into a coordinated and collaborated regional strategy

4. Implementation & Partners
   - to guide the implementation of projects and programs
   - identify partners and their contributions, timelines of initiatives and ultimately used to evaluate the outcomes of transportation investments.

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Strategic Planning Process

1. Pre-Planning Phase
   - Define Current State
   - Identify Needs & Define Vision
   - Identify Gaps

2. Plan Development Phase
   - Identify Solution Scenarios
   - Select Scenario
   - Develop Business Case

3. Post-Planning Phase
   - Communicate Value of Investments
   - Attract Funding
   - Scope Projects & Implement
   - Monitor & Evaluate Outcomes

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Phase 2 - Plan Development

SCOPE

PROCESS

TERMS OF REFERENCE
### RSTP Scope

- **Study Area:** Central Okanagan
- **Horizon Year:** 2040 (i.e. 25 yr plan – base 2015)
- **Local Values/Regional Context:** The consideration and balance of regional goals with local values, identifying the collective identity of the region.
- **Multi-Modal:** Consideration of all modes of transportation under an integrated "multi-modal" framework.

### RSTP Scope.../2

- **Land Use-Transportation Interaction**
- **Demand Management**
- **Infrastructure and Investments**
  - Regional Network
  - Technologies
- **Funding**
- **Performance Indicators & Evidence-Based Planning**

### RSTP Elements

- **RSTP in a nutshell:**
  - considers balance of needs & desires (policy) vs. ability (direct costs) vs. impact (indirect costs)
  - consider input from stakeholders at all levels
  - develop strategy based on options assessments (walk through process with stakeholders)
  - level of effort, detail and deliverables equal to a "Master Plan"
**Master Plan**

- A “Master Plan” consists of a number of “sub-plans”:
  - Capital Plan
  - Implementation Plan
  - Operating Plan
  - Communications Plan
  - Funding & Financial Plan
  - Monitoring & Evaluation Plan (could be under operating plan)

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**RSTP Process Road Map**

1. Initiate Planning Process: Evaluate for “road trip” desire to control decisions for the region’s transportation future

2. Decision Point: Reach crossroads, consider consultation and technical inputs

3. RSTP Correlation: Reach final destination – result of cross roads is a strategy and blueprint to realize the region’s desired transportation future

**RSTP Process Road Map & Streams Overview**

- Planning & Policy Stream
- Communication Stream
- Technical Stream
Term of Reference Elements

- Plan scope & project duration
- Plan parameters
- Core work streams
  - planning
  - technical
  - consultation
- Budget/expected levels of effort
- Steering committee/project management structure & reporting
- Deliverables

Funding Application

STRATEGIC PRIORITIES FUND
FEDERAL GAS TAX/UBCM

Background

Renewed Gas Tax Program
- Pooled funding
  - All local governments outside the GVRD are eligible
  - Limited to two capital projects and one capacity building per local government
  - Deadline: April 15, 2015
- Purpose
  - Fund strategic investments that are large in scale, regional in impact or innovative
Eligible Projects – Capacity Building

- Asset management planning
- Long-term infrastructure planning
- Integrated community sustainability planning

Capacity Building Scoring Criteria

- Supports:
  - Productivity/economy
  - Clean environment
  - Strong cities/communities
  - Large in Scale
  - Regional in Impact
  - Contributes to innovation
  - Long term thinking

- Integrates with other plans, planning & sustainability activities
- Collaborative elements:
  - Engaging community members/partners
  - Implementation program
  - Monitoring & evaluation
  - Links to capital plans
  - Supports efficient use of infrastructure & resources

STPCO Applications

- STPCO is not an eligible applicant
  - Need to apply through one of the partners.
  - RSTP & marketing strategy would use up capacity building application of one partner.
Lead Applicant

- Consultation with CAOs
- Regional nature of RSTP
  - Leads to RDCO as most suitable applicant
- Regional District is supportive of project
  - Board approval still needed

Recommendation

- THAT the Regional Board approves of a capacity building application by the Regional District of Central Okanagan to the Union of BC Municipalities' Strategic Priorities Fund for six hundred thousand dollars ($600,000) on behalf of the Strategic Transportation Partnership of the Central Okanagan for funding of a Regional Strategic Transportation Plan (RSTP).