South Okanagan

Aquatics Facility Feasibility Study

September 2022









Sierra Planning and Management
advice • strategy • implementation

MAD
MEIKLEJOHN ARCHITECTURAL DESIGN STUDIO INC

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Acknowledgements

The South Okanagan Aquatics Facility Feasibility Study is the culmination of significant input from community members within the South Okanagan Region, regulatory and affected stakeholders, and municipal staff from the Osoyoos Indian Band, the Town of Oliver, and the Town of Osoyoos. These efforts drove the outcomes and recommendations of this Feasibility Study.

Aquatics Facility Advisory Committee

Mayor Sue McKortoff, Town of Osoyoos

Councillor Jim King, Town of Osoyoos

Councillor Myers Bennett, Town of Osoyoos

Barry Romanko, Community Representative, Town of Osoyoos

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Executive Summary

Why Undertake the Study Now?

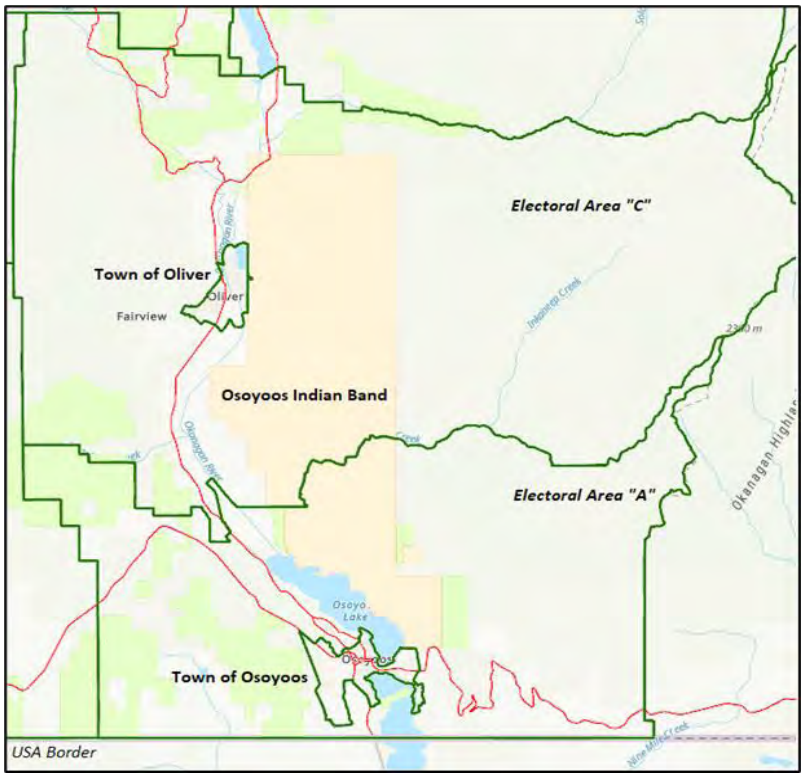
The primary objective of this report is to deliver an Aquatic Centre Feasibility Study which meets the individual needs of the partner organizations that have funded this exercise: The Towns of Oliver and Osoyoos and the Osoyoos Indian Band (OIB). By meeting the needs of each, it is intended that the depth of research, analysis, and design appreciation included in this report can inform the next phase of the project. The next phase of work comprises a commitment to determine the most effective governance and operational model for the facility, and from this, a sustainable range of options for effectively sharing both the risks and the rewards associated with an important community and regional tourism asset.

Specifically, this report addresses the quantitative and qualitative costs and benefits associated with the implementation of a municipal facility that will, in the normal course of operations, yield an annual deficit. Such is the nature of operating public indoor aquatic facilities.

The report includes a community needs analysis, financial feasibility assessment and indicative business plan for a prospective new regional aquatic facility. The report also identifies the optimal site characteristics, locational attributes and potential synergies with other recreational assets that should underpin the final decisions as to the scale and range of activities at the centre, as well as the choice of location.

Establishing a plan to introduce a major new recreation service to the region is also well timed. The Regional District of Okanagan-Similkameen (RDOS) has a brand new recreation master plan, completed earlier in 2022. This provides an important lens for the RDOS to consider its priorities and determine the extent to which a regional aquatic centre (and potentially other recreational uses developed alongside) can benefit the residents of Electoral Districts A and C. The report identifies considerable benefits to all four communities from sharing in the capital costs, governance and operations of a joint venture facility.

South Okanagan Municipalities, Osoyoos Indian Band, and Electoral Areas



Cost shared solutions to regional infrastructure challenges are more likely to receive the important attention that they deserve from government when such partnerships are forged at the outset. As such, this report is an important milestone in seeking a sustainable funding plan for the capital development of the facility.

Antecedents

Two separate and independent aquatic centre feasibility studies were conducted a decade and a half ago: A study for the Town of Oliver and the District (2006) and one for the Town of Osoyoos (2007). Both studies identified the need for a localized solution:

- The closest public indoor pool facility is in Penticton – and therefore represents a considerable investment of drive time in different seasons. This option does not suit all households.
- The closest public outdoor pool is in Oliver (an excellent amenity but seasonal and deemed more adequate for leisure and classes than competitive swimming).
- The absence of a comprehensive indoor solution comprising a Municipal Class A indoor aquatic centre is a gap partially filled by the private Class B pools (smaller, less functional and often without, programming and lifeguards) in hotels.

Both studies identified the need for a combined leisure and lap pool with four 25-metre lanes. Fifteen years later, it is common practice for community pools to be built with 6 lanes (or 8 if competition is important). In each of these studies, suggested options included standalone buildings on municipally-owned sites or development through addition to existing community recreation buildings (for example, the Sonora Community Centre in Osoyoos and the Oliver Community Centre).

The present assignment discounts those options, including the notion of independent facilities in each of the Towns. The starting point of the current exercise is a recognition that a new aquatics centre is regional in nature and must be expected to meet the needs of each of the partners including the potential addition of the RDOS to the stakeholder group.

A History of Cost Sharing and Best Practice

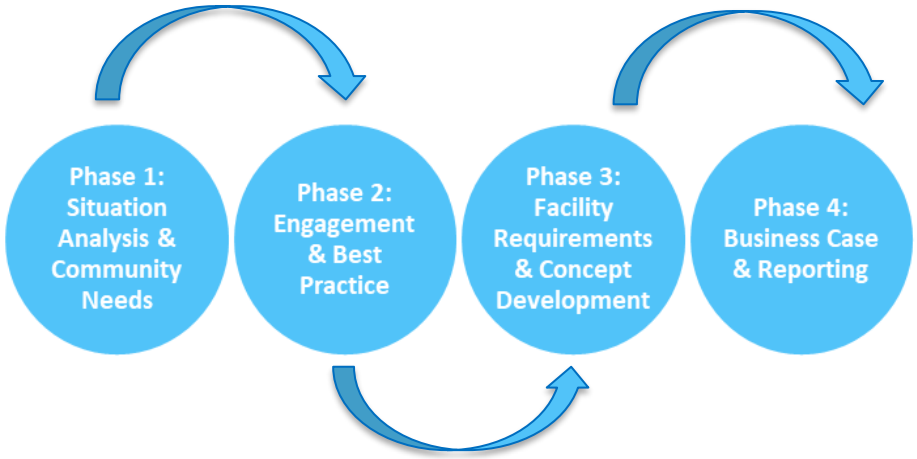
The opportunity for partnership to be carried through from design to construction and subsequent operations, is important and is supported by past practice. There are several important recreation agreements between the municipal levels of government that set precedent in developing a new agreement for funding a regional aquatics centre.

- ***An agreement between the Regional District and the Oliver Parks and Recreation Society (2015).***
- ***An Agreement between the Regional District and the Town of Osoyoos for Recreation and Leisure Opportunities (signed in 2021):***
- ***A cost-sharing Agreement between the RDOS and the Town of Osoyoos for the management and operations of the Osoyoos Sun Bowl Arena (signed in 2019).***

A Multi-Dimensional Approach to Testing Feasibility

This report has benefitted from the oversight of the South Okanagan Aquatics Facility Advisory Committee and the adoption of a multi-phased work plan. The result is a detailed and expansive assessment of the issues and opportunities, and recommended path forward in developing the facility. This includes a detailed assessment of community needs, a comprehensive locational assessment and site analysis of a long list of potential sites. Through detailed review, a short list of three (3) sites emerges, one of which is identified as the preferred site.

The study was undertaken through a linear work plan:



The Importance of Recreation Infrastructure and Services

- **Demographic shifts that impact how we recreate:** Across the country, Canadian communities are experiencing a combination of aging populations, growth in ethnic diversity, rapid urbanization, and depopulation in rural and remote areas. These shifts impact how residents choose to be active at different stages of their lives and, accordingly, how recreation providers must respond to community needs. Community Health, Recreation and Access policies are supported by investment in new facilities.

- **Health challenges:** Societal shifts have led to a rise in sedentary living and more unhealthy eating practices, which have increased the incidence of chronic diseases like diabetes and heart disease. This is paired with a rise in mental health concerns such as depression and youth suicide.

- **Rising economic inequality:** The gap between the wealthier residents and lower income communities or community members has been increasing over the past few years across Canada. This raises unique challenges in terms of promoting equal access to recreation opportunities.

- **Social challenges** can cause feelings of isolation and have a bearing on well-being and mental health:
  - Sedentary lifestyle (due to automobilization and reducing levels of physical activity, more recently, exacerbated by COVID-related restrictions);
  - Consequent mental and physical health issues;
  - Persistent unemployment;
  - Busy schedules;
  - Rapid development;
  - Use of social media instead of face-to-face interaction; and
  - The loss of traditional supports.

- **Infrastructure deficits** in many communities that hamper access to recreation opportunities due to deficits in both quality and quantity.

All of these cross currents of challenges and opportunities speak to the reality that municipalities and first nations, regional districts and provincial governments are invested partners in sustainable recreation, sport and cultural development.

The Cost of Doing Nothing

To tackle these and other issues, policy encourages decision-makers and communities to identify inclusive, equitable, accessible, and affordable solutions to increase opportunities for physical activity and active recreation for all.

The Canadian Infrastructure Report Card provides an assessment of the health of municipal infrastructure as reported by communities across the country through a voluntary survey to help decision-makers "identify cracks in the important foundation", and guide solutions to address them. Municipalities own nearly 60% of the core infrastructure assets that are critical to quality of life in Canada, and 30% of this infrastructure is in fair, poor or very poor condition. Key findings for sport and recreation facilities (including aquatic facilities – indoor, outdoor and wading pools) are:

- One of the asset classes most in need of attention, with more than 30% in fair, poor or very poor condition;
- Large proportion of some facility types are more than 50 years old.

The partners to this project will need to act upon their respective recreation mandates to replenish the existing assets, to maintain services and to ensure value for money for residents. The feasibility of a new pool complex should not be viewed in terms of additional costs relative to a zero-cost base case of "do nothing". Do Nothing comes at a cost too, and delayed decision-making on critical community infrastructure can result in far higher costs over the long-term.

None of this is to suggest that a cost-shared pool will solve the problems of funding existing liabilities. However, a pool complex can offer significant ways to meet the recreation needs of the resident base – from the youngest to the oldest. In the absence of clear interests from the institutional and non-profit sectors to fill this need, the Towns, Regional District and the OIB should capitalize on their potential for partnership.

The notion of the social Benefit-Cost Ratio (BCR) as a means to assess the overall merit of investing in new public infrastructure is relevant. Besides the capital costs and operating deficits, the economic impact and community health advantages of new recreational facility investments have established positive impacts on society.

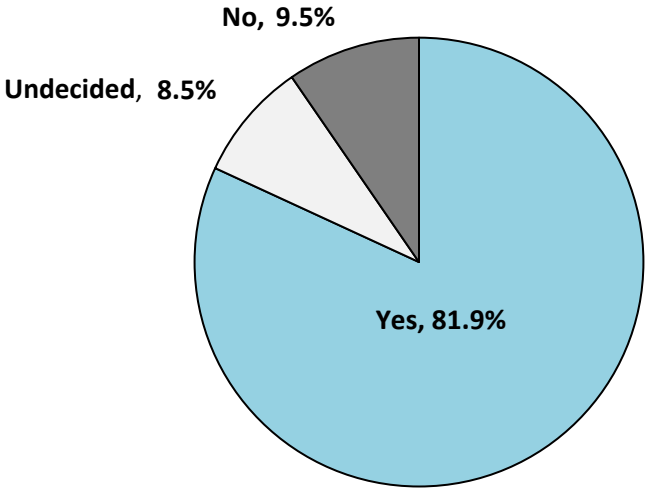
New recreational infrastructure is also a clear example of economic development in action – the development of quality of life opportunities that directly impact the capacity of an area to attract and retain employers, employees and residents.

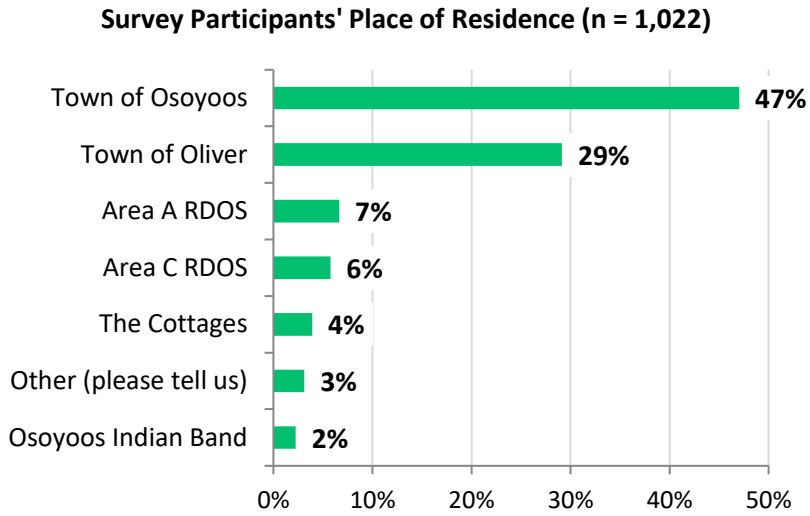
For these reasons it is important to frame the discussion regarding the pool in terms of its overall value proposition. The traditional logic that municipal pool deficits are not sustainable compared to facilities with lesser cost (e.g. community arenas) is less certain when the number of people using each facility is considered. Community pools have the potential to be in high demand with person-visits well in excess of those in community arenas.

Comprehensive Consultation Process

The public survey conducted in September-October 2021, received 1,022 responses. Survey participants were from across RDOS. A plurality were from the Town of Osoyoos (47%) followed by the Town of Oliver (29%). The portion of responses from the rest of the Region and the OIB were proportionate to their population distribution in RDOS.

The survey asked whether the new aquatics centre is warranted. Out of 949 survey participants, who answered this question, **82%** support the idea, **8.5%** are undecided and 9.5% - disagree.





Meeting the greatest need: Modern, state of the art facilities are based on multi-tank designs. Typically, but not exclusively this includes leisure pools, along with a lane pool, and either therapeutic tanks or zero-entry learn to swim pools.

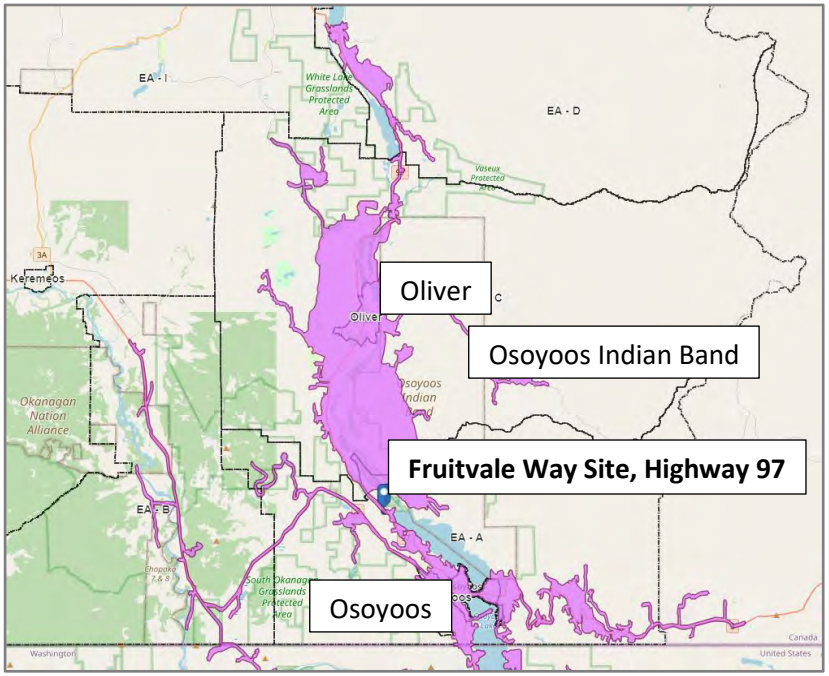
Based on the various engagement activities undertaken, there is a clearly expressed demand for:

- A multi-use, multi-generational facility where seniors, adults, youth and children are able to participate in aquatic and non-aquatic activities.
- A facility to accommodate recreational needs, family swimming programs and swimming lessons, as well as aquatic fitness, with some demand for lane and competitive swimming.

Preferred Site

The preferred site is located at Highway 97 and Fruitvale Way. The lands are highly visible and offer the potential for a high profile institutional building, but their out-of-town location can be expected to generate higher servicing costs. Most importantly, the lands are currently controlled by the B.C. Government (Ministry of Transportation and Infrastructure) which has signaled its willingness to consider the disposition of the lands from their ownership.

Fruitvale Way site, Highway 97



Facility Use and Design Objectives

The core program was developed from key design principles which were based on input from the committee, the public and from the consultant team's analysis of current practices and future trends. Some of the key principles are noted below:

- Provide a range of core aquatics programs that provide opportunities for all potential users;
- Create a destination, multi-use facility with a focus on health and wellness for all ages and abilities;
- Provide an inclusive facility to promote use by all members of the region to reflect diversity of background and different types of participation;
- Locate the facility for maximum exposure of public spaces and opportunity to see activities within; and
- Arrange the sequence of aquatic spaces to allow for the inclusion of a future gym.

The Resulting Space Program

Components	Core Program	Phase 2 Plus Programming	Phase 3 Future Programming
	Sq. M.		
Program Aquatics (m^2)	2,293		
Public Space	236		
Administration	165		
Multi Purpose	842		
Non-Aquatic Components			
Gym Addition		1,120	
Ice Arena Addition			3,525
Circulation / Walls	544	493	176
Total Gross Floor Area (m2)	4,080	1,613	3,701
Total Area – Facility in Phase 3 (m2)			**9,394**

Estimated Capital Costs and Operating Deficit

The report contains an order of magnitude capital cost estimate for the project based on the functional space program above (indicating the overall scale of the building, and potential site development costs). These costs are also subject to a significant contingency (addition) which reflects the necessity to carry higher estimated costs pending the development of a detailed design and site infrastructure strategy.

A summary of the Capital Costs is as follows:

CAPITAL COST ESTIMATES BY PHASE (PHASE 1 AND 2 ONLY)

CORE PROGRAM (PHASE 1) ***$42,400,000***

CORE PLUS PROGRAM (PHASE 2) ***$12,100,000***

PHASE 1 + 2 COMBINED ***$54,500,000***

Annual operating costs and revenues for the facility based on Phase 1 and Phase 2 combined, result in annual deficits which should be considered typical for this type of regional recreation facility.

Year	Estimated Annual Operating Deficit
Year 1	($612,656.96)
Year 2	($631,036.66)
Year 3	($649,967.76)
Year 4	($669,466.80)
Year 5	($689,550.80)

Illustrative Concepts of Capital and Operating Cost Sharing Between Prospective Partners

In order to provide a link to the next steps involved in moving toward project funding, design, site selection and eventual development, the project Steering Committee has requested the development of two examples of potential cost sharing between prospective municipal partners and the OIB.

These formulae are not prescriptive, but illustrative in nature and designed to enable continued discussion regarding all aspects of the project.

Methods Used for Cost Sharing

Among the many methods, the Committee has identified two for analytical purposes:

A. A blend of property tax assessment and current (2021) population. Based on this approach, 50% of costs are allocated to each jurisdiction and the OIB based on their respective share of total population; the remaining 50% of costs are based on the share of property assessment accounted for by each jurisdiction and the OIB;

B. Cost sharing based on a simple metric of the number of property parcels located in each community.

At this stage, and without prejudice, the participants assumed for the purposes of cost sharing include the three project sponsors as well as the Regional District of Okanagan Similkameen (RDOS) and potentially (specifically), Electoral Districts A and C. Residents in the RDOS are expected to be users of a regional facility such as this.

The two alternatives generate broadly similar results.

Illustrative Participant	A - Blended Population and Assessment Model		B - Parcels	
	Percentage Share	Capital Share	Percentage Share	Capital Share
Town of Oliver	25%	$13,410,606	22%	$12,195,357
OIB	9%	$4,747,799	7%	$3,827,606
Town of Osoyoos	34%	$18,416,729	33%	$18,174,279
RDOS Electoral District A	14%	$7,573,981	15%	$8,107,400
RDOS Electoral District C	19%	$10,350,886	22%	$12,195,357
Total	**100%**	**$54,500,000**	**100%**	**$54,500,000**

In terms of annual operating deficit support under the blended population/assessment model, the results in each of the first 3 years of operations are as follows. Note that operating deficits are indicative only at this stage and will be subject to change as the timing of the project, its potential governance structure and the range of inclusions in the building becomes clearer.

Operational Share – Based on Phases 1 and 2 Combined				
Method A Only	**%**	**Year 1**	**Year 2**	**Year 3**
Oliver	25%	($150,754)	($155,277)	($159,935)
OIB	9%	($53,372)	($54,973)	($56,622)
Osoyoos	34%	($207,030)	($213,241)	($219,638)
RDOS A	14%	($85,142)	($87,697)	($90,327)
RDOS C	19%	($116,359)	($119,849)	($123,445)
Total	100%	($612,657)	($631,037)	($649,968)

Report Outcomes and Next Steps

Based on the findings of this report, should the Committee support the concept of a regional indoor aquatic centre, the following is recommended:

- **Seek the participation of the Regional District of Okanagan-Similkameen as a potential partner in the next phase of design planning, location confirmation, and business planning**
- **Develop a Funding Plan**
- **Further Site Assessment -** as an immediate next step, the Committee should initiate the process with MOTI to potentially acquire the Graveyard Pit site
- **Develop a Process for Establishing Commitment to Capital and Operating Cost-Sharing amongst Partners**

1 Introduction

1.1 Project Background & Purpose

The Town of Oliver, the Town of Osoyoos, and the Osoyoos Indian Band (OIB) have been working together to explore the potential of adding an indoor aquatic facility to the South Okanagan community. It is recognized that development of an aquatic centre would assist in the social and economic growth of the region's residents, however there are many planning, asset and financial factors that need to be understood.

For some years, the South Okanagan communities have discussed the idea of building an indoor aquatic centre. The Towns of Oliver and Osoyoos each conducted aquatic facility feasibility studies in 2006 and 2007. The cost of building and operating an indoor pool facility is considered a significant financial commitment for any single municipality. Hence, the Towns of Oliver and Osoyoos and the OIB have partnered to look into opportunities that would benefit their communities and the region.

> *"Carefully defining services ensures that all partners in the service arrangement share the same vision for the service and agree on the contents and limits of that service. The service definition should include information on the: scope of the service; level of service; service area; and lifespan of the service."*
>
> *Designing Regional Service Arrangements: An Introduction (gov.bc.ca)*

An Advisory Committee was established to administer the feasibility study grant, move the project forward and report progress to the member constituencies. The steering committee includes representatives from member councils and staff from the Service Area Participants (the Towns of Oliver and Osoyoos and the OIB).

This report presents the results of the Aquatic Centre Feasibility Study conducted by Sierra Planning and Management and MAD Studio in close cooperation with the Advisory Committee.

The primary objective is to deliver an Aquatic Centre Feasibility Study which identifies: potential key features of the aquatic centre, initial cost estimates, public input, and key data / analysis, in order to determine if there is sufficient community support for the Service Area Participants to proceed with the project.

The study includes a community needs analysis, financial feasibility assessment and indicative business plan for a prospective new regional aquatic facility.

The study identifies the optimal site characteristics, locational attributes and potential synergies with other recreational assets that should underpin the choice of location for the proposed facility.

The report discusses several scenarios; the core scenario includes the aquatic facility and core and additional scenarios explore the potential of a multi-use space as a modular addition that can be developed either in conjunction with the aquatics centre or as a future addition.

Reflecting the regionality of the project and the Service Area Partnership, the feasibility study explores potential cost-sharing and governance models.

The feasibility study is the first step in the process of decision-making regarding a potential indoor aquatic facility. As noted in the initial project description, proceeding with the project could include: gaining elector consent and commencing schematic/concept design phase services.

There is a need to ensure that the final composition of users is inclusive, serves diverse user needs / interests and represents a partnership-based approach to the determination of activity components, the capital funding, operating model, and the creation of multi-generational recreational space for the community.

1.2 Previous Work Undertaken

Two Aquatic Centre feasibility studies were conducted for the Town of Oliver and the District (2006) and the Town of Osoyoos (2007). Both studies identified the supply of aquatic facilities at the time:

- The closest public indoor pool facility is in Penticton.
- The closest public outdoor pool is in Oliver (not deemed adequate for competitive swimming).
- Residents and tourists also make use of indoor pools in local motels, hotels, and new residential complexes (townhouses and condominiums) and Lake Osoyoos (summer).

Both studies identified the need for a combined leisure and lap pool with four 25-metre lanes (90 sq. m.), accessible change rooms, office space, and mechanical space. Additional features include a 15-person hot tub, multipurpose space (e.g. fitness and physio space), and an outdoor sundeck with overhead doors from the indoor pool. The total recommended facility area including office and mechanical space was estimated at 17,000 – 19,000 sq. ft. (in the 2007 Osoyoos study) and at 18,000 – 24,000 sq. ft. (in the 2006 Oliver study).

Potential aquatic program suggestions included the following:

- rehabilitation and therapy activity to accommodate the increasing share of retirees and seniors making use of the facility;
- programs and facilities for all ages and interests;
- accessibility - design of the pool, other spaces, and change rooms should consider people with different abilities;
- water temperatures and depth; and
- social interaction.

The studies found that a potential location of the aquatics facility should allow for synergies with existing surrounding uses and easy access to other amenities and be accessible for seniors and children. Suggested options included municipally owned potential locations in each community or expanding existing facilities (e.g. the Sonora Community Centre in Osoyoos or the Oliver Community Centre).

1.3 Scope of Service: Service Area and Regionality of the Facility

The Okanagan-Similkameen Regional District Growth Strategy (2018) identifies the South Okanagan region as the southern-most reaches of the Okanagan Valley, including the municipalities of Oliver, Osoyoos, Penticton and Summerland, and Electoral Areas “A”, “C”, “D”, “E”, “F” and “I”.

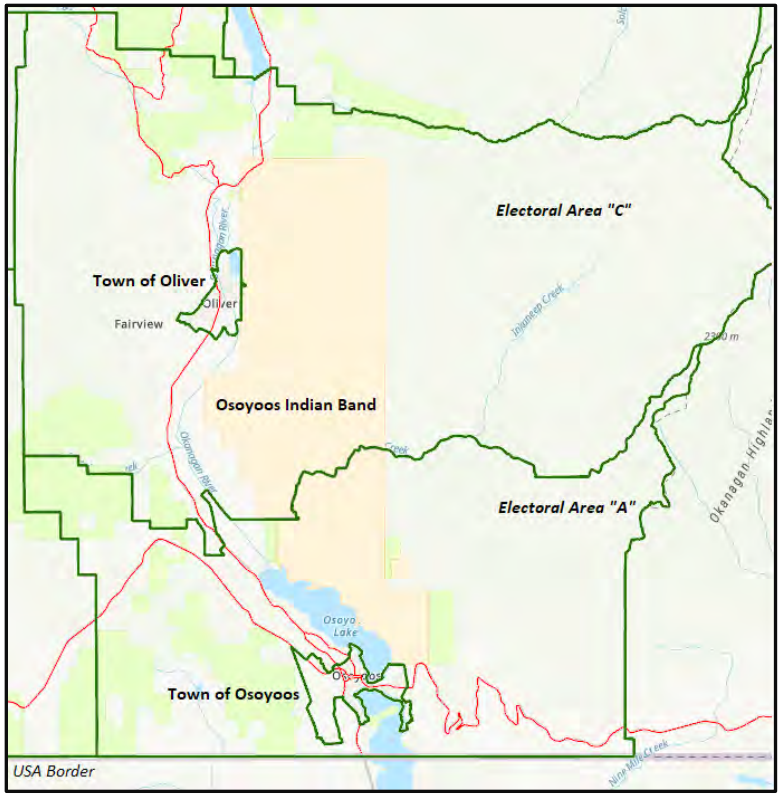
The Okanagan Nation has lived on its traditional territory from British Columbia to Washington for thousands of years. The Osoyoos Indian Band’s (OIB) territory is located in the Okanagan Valley from Osoyoos to Gallagher Lake, north of Oliver. The OIB has been successfully developing self-sustaining economic projects and businesses, including agriculture, eco-tourism, and commercial, industrial and residential developments.

This feasibility study focuses on the South Okanagan Service Area, which includes the Towns of Oliver and Osoyoos and the OIB as well as Electoral Area “A” (Rural Osoyoos) and “C” (Rural Oliver) (as shown on Exhibit 1).

> *A Service Area is defined as “the geographic area where the service is provided and across which the service is funded.”* *Designing Regional Service Arrangements: An Introduction (gov.bc.ca)*

This study, and its analysis, is based on the assumption that the development of an aquatics facility will serve the three participating communities in the Service Area, as well as Electoral Areas “A” (Rural Osoyoos) and “C” (Rural Oliver).

Exhibit 1: Participating Communities



However, it is recognized that regional recreation services, such as a new aquatics facility, extend beyond the existing service area boundaries, which therefore may need to expand as a result of the development and desire of non-service area municipalities to be part of a potential service area agreement.

1.4 Limitations of Analysis

The contents of this Report and the analysis herein is based, in part, upon a range of primary analyses and secondary sources of information, supplemented where required by investigative discussions with municipal staff and community organizations as well as public consultations. While every effort is taken to ensure the accuracy of secondary sources of information, neither Sierra Planning and Management, nor its sub-consultants, can warranty the accuracy of this information. In the event that secondary source information is inaccurate or incomplete, Sierra Planning and Management will not be held liable for original errors in data.

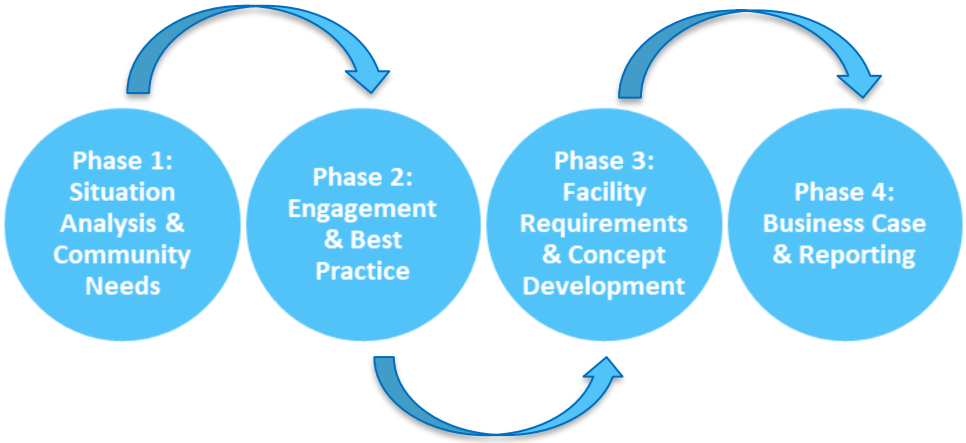
This feasibility report is presented on the condition that the recommended additional studies and analysis outlined in the report are undertaken as part of the next steps toward realization of a South Okanagan Aquatics Facility. Accordingly, the reader is advised that final decisions regarding the commitment of capital dollars to the construction of the facility should be based on further design, site planning and costing as recommended in this report.

The report and the information contained within it, is prepared specifically for the purposes as laid out in this report. Reliance on information and opinions contained in this report for other purposes, or extracted in part from the entire report, is not permitted.

The financial feasibility analysis is undertaken as a baseline assessment of costs and revenues under normalized operating conditions after a period of 1 or 2 years of ramp-up in both costs and revenues to operate at maximum utilization. The capital costs identified in this report represent an order of magnitude assessment based on a Class D estimate of costs.

1.5 Study Process

The study was undertaken through a linear work plan:



1.6 Report Outline

The report is comprised of 9 sections, and includes the following information:

Section 2 summarizes the growth dynamics of the Aquatic Facility market area; summarizes the policy framework in which the facility is being planned; provides a review of the form, function and utilization of the existing pool facilities; and summarizes the community's anticipated indoor recreation needs which this plan should, in part, aim to fulfill.

Section 3 reviews how engagement activities have informed and helped to develop the functional program and concept design.

Section 4 presents analysis of a potential aquatics centre location, including site options and evaluation criteria. The section presents an analysis of a preferred site, describes the current status of the site and details the development opportunities and challenges.

Section 5 details the rationale and design considerations of the concept designs and provides the order of magnitude capital cost estimates for each concept. This section introduces "a phasing approach": a CORE program, a Plus program and a Future program for a potential aquatics facility.

Section 6 provides an assessment of operating financials, including indoor aquatics as a value proposition and presents a framework for financial analysis and operating results.

Section 7 discusses partnership and governance options which will impact the delivery. The section outlines a range of operating scenarios and recommends approaches to cost-sharing; provides models and solutions, and outlines considerations of issues specific to the potential South Okanagan Aquatics Centre.

Section 8 addresses elements for consideration related to the implementation of the facility, specifically the capital funding, risks and due diligence.

Section 9 concludes the report with key recommendations and next steps.

2 Situation Analysis

2.1 Service Area Profile

The Service Area is located in the southern part of the Okanagan-Similkameen Regional District (RDOS) and encompasses the Towns of Oliver and Osoyoos and the Osoyoos Indian Band. Adjacent unincorporated areas are Electoral Areas A, B and C.

Two types of geography are considered in this analysis: a Service Area and a Market Area.

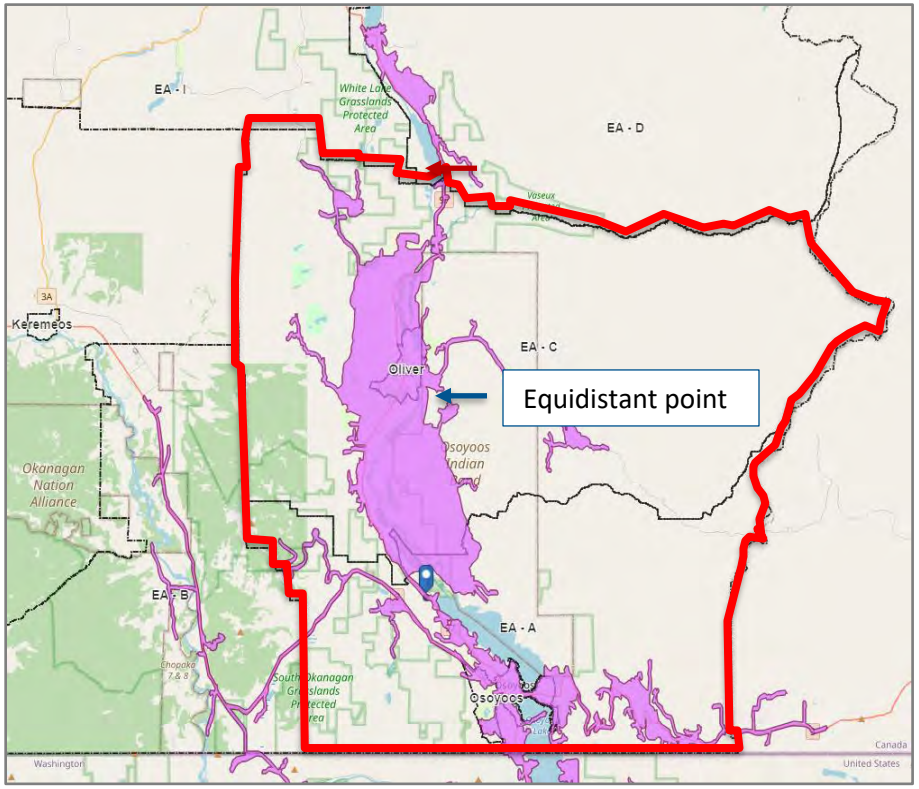
A **Service Area** (SA) is a more formal arrangement that defines the geographic region of the service provided and funded based on a distribution of responsibilities and cost allocation outlined in a service agreement. Hence, a service area may be delineated by administrative boundaries. In this study, SA includes Towns of Oliver and Osoyoos, the OIB area, Electoral Areas A and C (shown on Exhibit 2 as an area delineated in red).

A **Market Area** (or a catchment area) is a geographic region where services are offered and the demand for such services exists. A market area may extend beyond the Service Area to include potential users who may not be covered by a potential service agreement.

Due to the regionality of use for recreation facilities, the market area for a South Okanagan aquatics facility can potentially extend to include areas within a 30-minute drive time from a point equidistant from the Towns of Oliver and Osoyoos and the OIB (shown on Exhibit 2 as a purple area).

The market area reaches Okanagan Falls in the North (hence, includes Electoral Area "D"); extends to Electoral Area "B" to the West and beyond the USA Border to include Oroville,

Exhibit 2: Service Area and Market Area



SPM, Source: ESRI Business Analyst

Washington, to the South. The market area 2021 population is estimated at about 19,600, of whom 17,900 reside in Canada (ESRI Business analyst 2022).

Considering those who benefit from the service within both the identified Service Area and Market Area may help pay for the cost of the services.

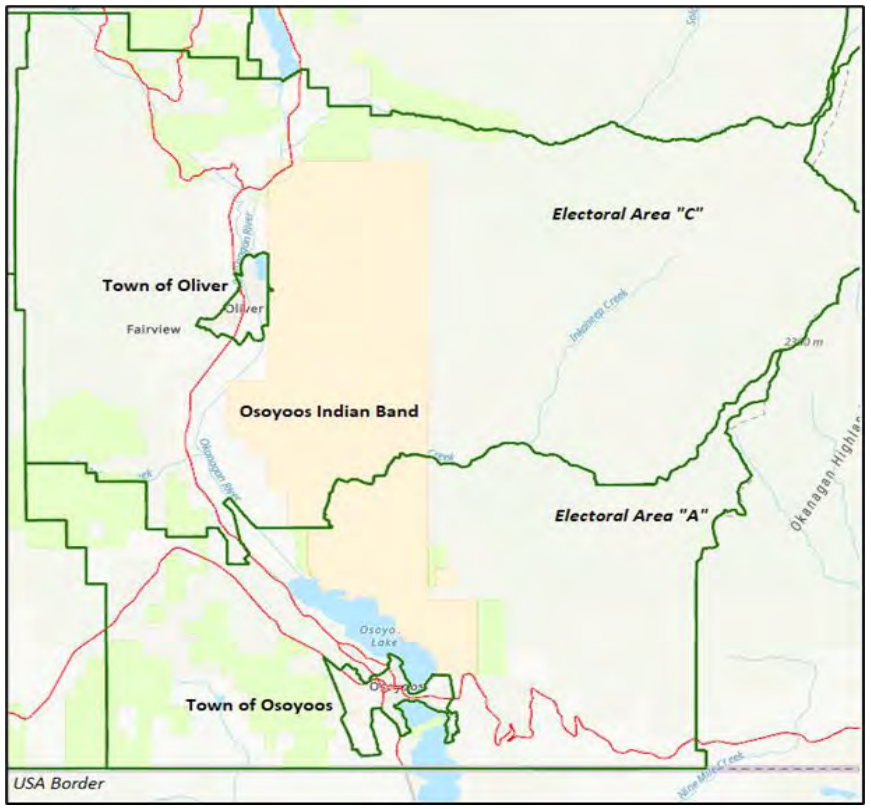
2.2 Population Dynamics

For the purposes of analysis within this section of the report various data sources have been utilized and noted as such, including:

- BC Stats - Province of British Columbia (gov.bc.ca);
- Statistics Canada Census (2016, 2021);
- Environics ESRI Business Analyst Data (2022);
- Okanagan-Similkameen Regional District's (RDOS) Growth Strategy (2018).

It should be noted that the data obtained from ESRI Business Analyst enables a finer level of analysis (at the Census Subdivision and Dissemination Area levels) and reflects the years 2024, 2026, and 2031, providing the most up to date information available at the time of reporting.

Exhibit 3: Map of South Okanagan Municipalities, OIB, and Electoral Areas



2.2.1 Population Growth

Population in South Okanagan communities has been increasing since 2011. The population growth trend is similar to the trend in the RDOS and in the province (as Exhibits below show).

Exhibit 4: Population RDOS and South Okanagan Communities

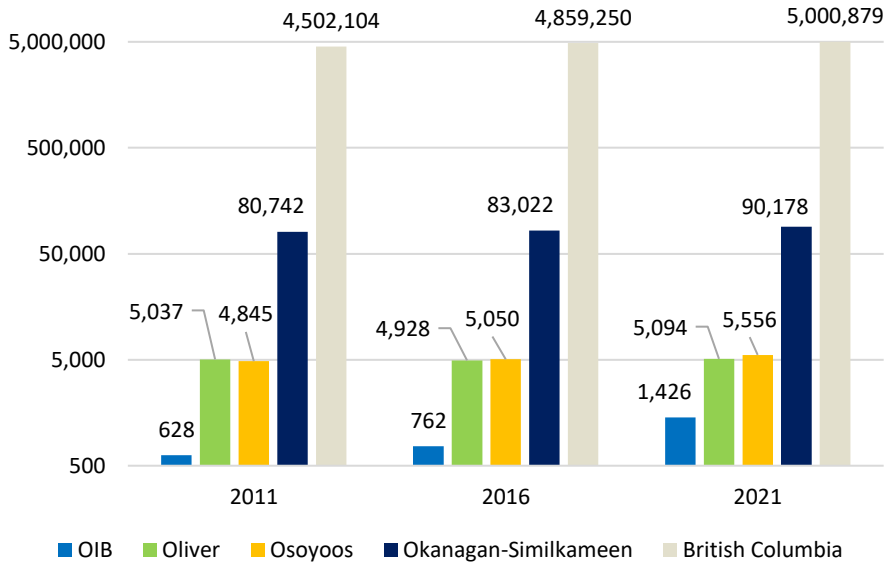
Municipality / Area	2016 Pop.	2016 % of total Regional pop.	2021 Pop.	2021 % of total Regional pop.	5-Year Change
Oliver	4,928	6%	5,094	6%	3.4%
Osoyoos	5,050	6%	5,556	6%	10%
Osoyoos Indian Band	762	1%	1,426	2%	87%
Electoral Area A	1,858	2%	2,139	2%	15%
Electoral Area C	3,557	4%	3,986	4%	12%
Service Area Total	***16,155***	***19%***	***18,201***	***20%***	***13%***
Penticton	33,761	41%	36,885	41%	9%
Princeton	2,828	3%	2,894	3%	2%
Keremeos	1,502	2%	1,608	2%	7%
Summerland	11,615	14%	12,042	13%	4%
Okanagan-Similkameen	**83,022**	100%	**90,178**	100%	9%
British Columbia	*4,648,055*		*5,000,879*		*8%*

SPM, *Data Source: Statistics Canada, 2022.* *Census Profile. 2021*

Combined population of Oliver, Osoyoos, OIB and Electoral Areas A and C represent 20% of the total RDOS population (Exhibit 4). Population in all these communities has been increasing since 2011 (Exhibit 5).

The 2021 Census data demonstrate that the population continues to increase in the Service Area. The OIB has seen the fastest growth in population from 762 in 2016 to 1,426 in 20211. Town of Oliver and Town of Osoyoos population increases were 3% and 10%, respectively. Population in the Electoral Areas - A and C increased by 15% and 12%. The overall RDOS population increase of 9% is comparable to B.C.'s 8% increase.

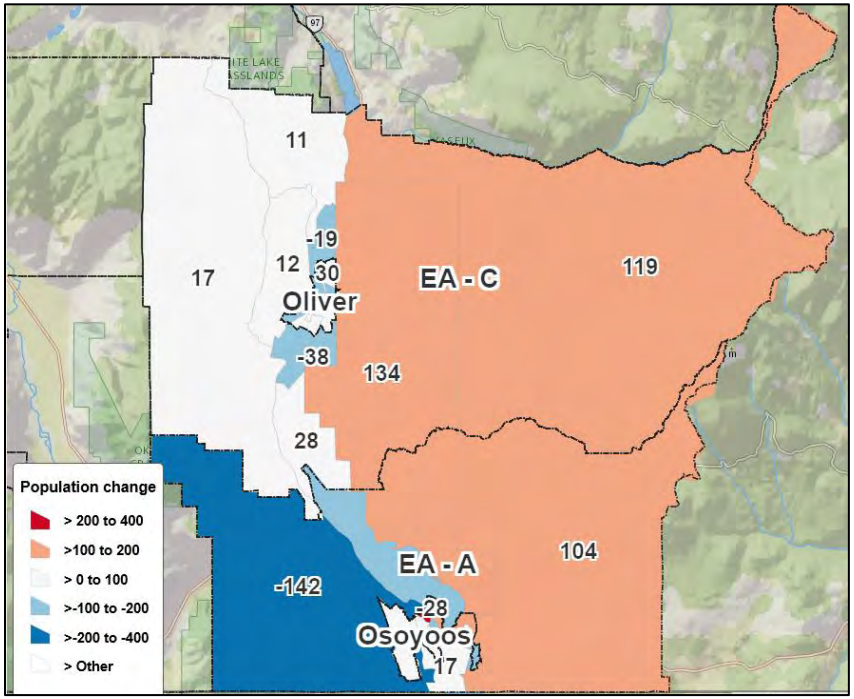
Exhibit 5: Population Growth, Comparison



SPM, *Data Source: Statistics Canada, 2022.* *Census Profile. 2021*

[1] Census records primary place of residence, not seasonal residential population.

Exhibit 6: Population Change 2011-2016: Change in the Number of People by Dissemination Area



SPM Source: Statistics Canada Census 2016, 2021

By 2031, the Regional District population is projected to increase from the current 90,178 people (2021) to over 99,000 according to B.C. Statistics projections or to just over 108,000, according to the RDOS Growth Strategy (2018). The projected increase is a minimum of 10% and as high as 20%.

Populations of the Towns of Oliver and Osoyoos and the Region are expected to increase in the next 10 years. Similar to the region, population in the Towns of Oliver and Osoyoos is projected to increase by over 10%. Since 2011 the OIB population has more than doubled (from 628 to 1,426 people), with an 87% increase in 2016-2021. Considering historic trends and the projected increase in the overall regional population and the current growth, the OIB population is expected to continue growing.

Exhibit 7: Forecast Population Growth in the Region and Service Area

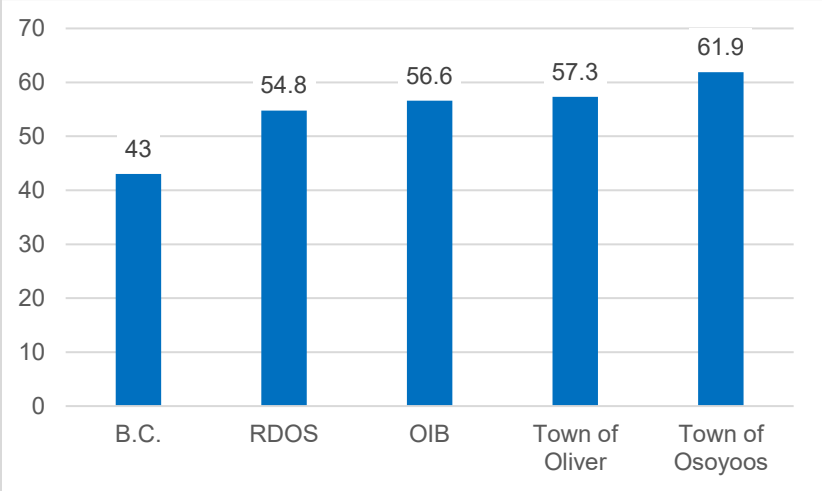
	2021		2031		
	Pop.	**% Change 2016 - 2021**	**Pop. Projected**	**Pop. Change 2021-2031**	**% Change 2021-2031**
RDOS	90,178	8.6%	99,000 - 108,000*	9,000 – 18,000	10% - 20%
South Okanagan					
Town of Oliver	5,094	3.4%	5,808**	750	14%
Town of Osoyoos	5,556	10%	6,562***	1,006	18%
The OIB, EA-A, EA-C	7,551	87%	*n.a.*		

SPM, Data Sources: Statistics Canada Census 2021
**Lower estimate - B.C. Statistics Population Forecast for RDOS (accessed in 2022), higher estimate - RDOS Growth Strategy (2018).*
***SPM Calculations based on projections in the Town of Oliver Housing Needs Report (2020). Change from 2027 to 2031 calculated based on the assumption of 1% annual increase (an average estimated increase in the Housing Needs Report for 2021-2027).*
**** Town of Osoyoos Official Plan (Medium Growth Scenario).*

2.2.2 Age Profile

When considering the median age of population within the Service Area, median age in the Town of Oliver is 57.3 years, 56.6 in OIB, and 61.9 in the Town of Osoyoos. The age profile of these communities is comparable to the Region (median age 54.8 years) yet higher than British Columbia's median age of 43 years.

Exhibit 8: 2016 Population Median Age Comparison

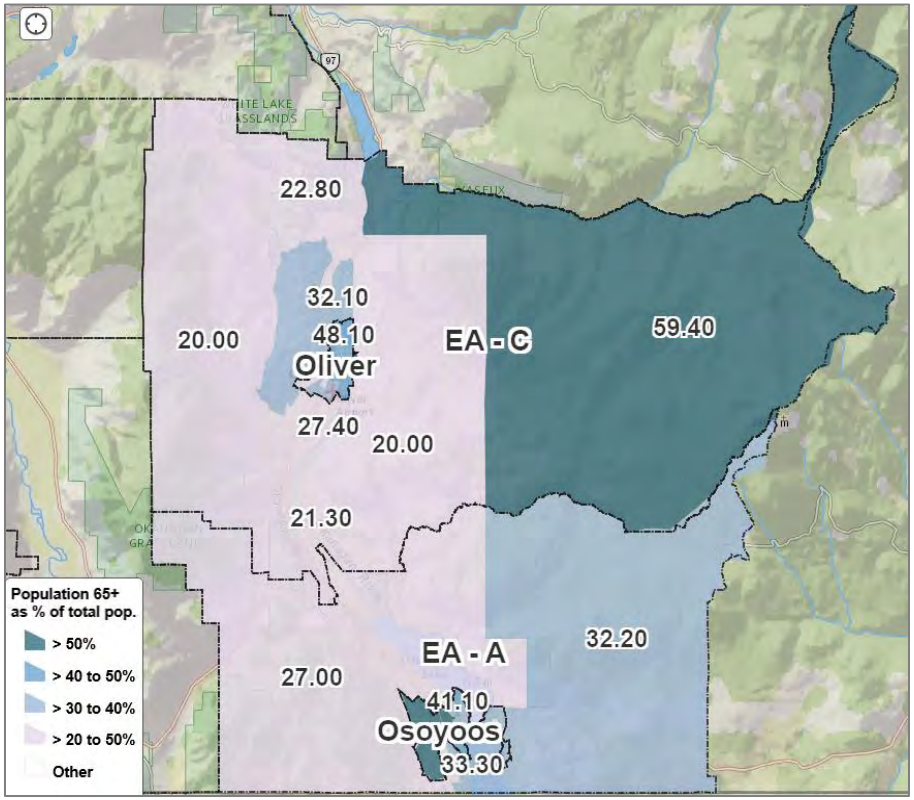


Source: SPM based on Statistics Canada Census 2016

The distribution of children and youth (0-19 years), and in turn younger families, indicate that higher concentrations are found in the OIB and the Town of Oliver municipalities. Share of population under 19 years old in the Town of Osoyoos is 12% and RDOS - 14%. Higher in the Town of Oliver - 16% and the OIB - 17%, which are closer to but still lower than B.C.'s 20%.

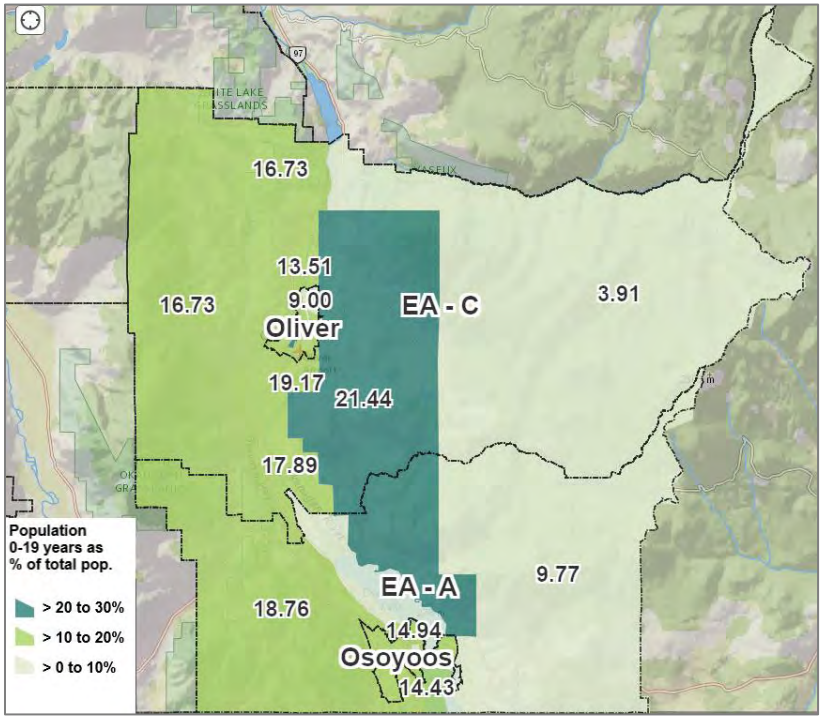
The Town of Osoyoos has a more senior profile, followed by the Town of Oliver. Percentage of adults 65+ years is higher in the Towns of Oliver (38%) and Osoyoos (43%).

Exhibit 9: Population Over 65 Years of Age: Share (%) of Total Population by Dissemination Area (2016)



SPM, Data: Statistics Canada Census 2016

Exhibit 8: Population Under 19 Years of Age (%) by Dissemination Area, 2016



SPM, Data: Statistics Canada Census 2016

2.2.3 Income Profile and Spending Patterns

Other characteristics of the Service Area include average household size, average total income per household, and prevalence of low-income cut-off. Average total income in the Service Area municipalities and the OIB are lower than in RDOS and the province.

At the same time the low-income cut-off prevalence in the Service Area municipalities is lower than in the Region and nearly half as low as in British Columbia (Exhibit below). The Low-income cut-off prevalence means prevalence of families or persons who would likely have devoted a larger share of their after-tax income than average to the necessities such as food, shelter and clothing.

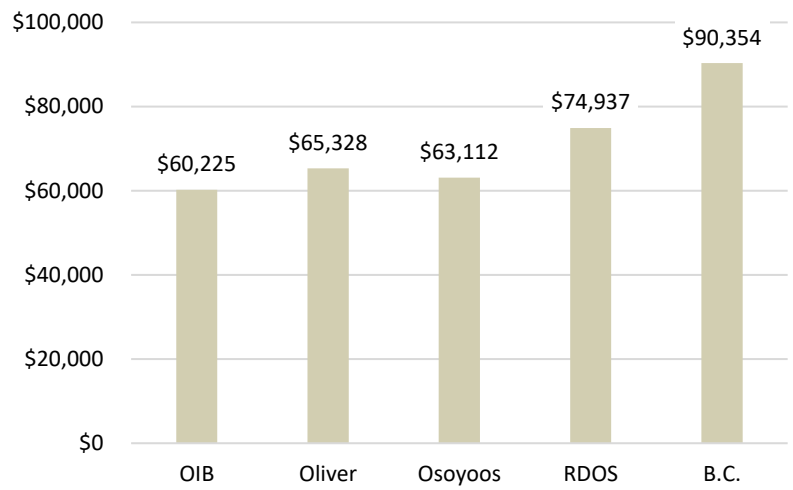
Note: the following exhibits utilize income data (latest available is 2016 Census) and ESRI estimates for spending (variables which are not available in the Census).

Exhibit 9: Household and Income Characteristics, 2016

Town of Oliver	Town of Osoyoos	Osoyoos Indian Band	RDOS	Province of British Columbia
AVERAGE HOUSEHOLD SIZE				
2.2	2	2.2	2.1	2.4
AVERAGE TOTAL INCOME OF HOUSEHOLDS				
$65,328	$63,112	$60,225	$74,937	$90,354
PREVALENCE OF LOW INCOME BASED ON LOW-INCOME CUT OFFS (LICO-AT) (%)				
6.2%	5.8%	--	6.9%	11%

Data: Statistics Canada Census 2016

Exhibit 10: 2016 Average Total Household Income, Comparison



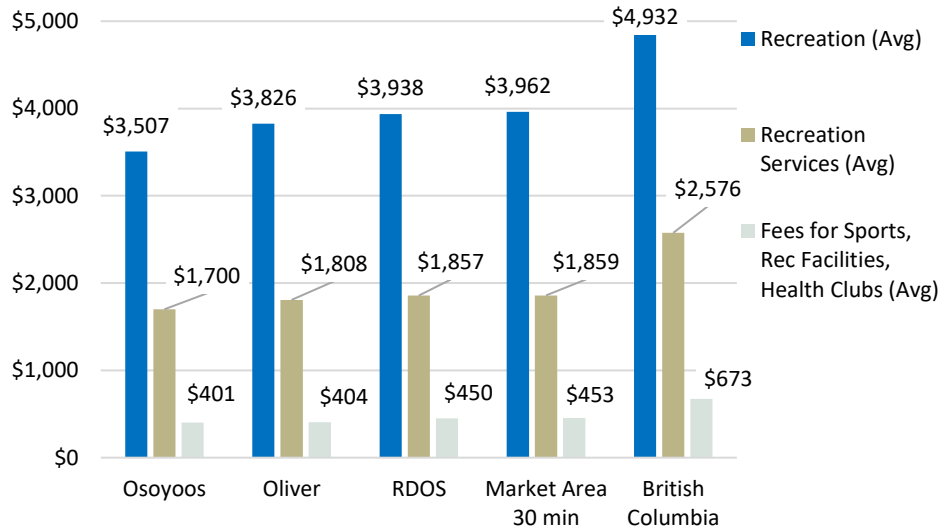
Source: SPM based Statistic Canada Census 2016

The average household spending on recreation in the Towns of Osoyoos and Oliver is estimated at $3,500 and $3,800. Spending estimates for the two municipalities are close to RDOS and the market area (30-minute drive) - $3,940 and $3,960, respectively. Average spending in RDOS and the market area are lower than in the province; estimated household spending on recreation in B.C. is $4,930.

Average household spending on sports and recreation facilities fees is just over $400 in the Towns of Osoyoos and Oliver, around $450 in RDOS and the market area, compared to $670 in B.C.

Average recreation expenses are shown on the following Exhibit.

Exhibit 11: Average Household Spending on Recreation, 2021



Source: SPM based on ESRI Business Analyst, Select Categories (Accessed 2022)

An Exhibit below shows total recreational spending estimates for the Towns of Oliver and Osoyoos, compared to the Region and two market areas within 30-minute drive.

Households in both municipalities spend over $9 million on recreation. Residents in the Region spend over $14.2 million on recreation and in the market area it is 15.8 million. (Note: As indicated above, a part of the market area reaches out to the United States. This may explain higher spending on recreation services compared to the region.)

Expenditures on fees for sports and health clubs are estimated at over $2 million in the Towns of Oliver and Osoyoos combined and nearly $3.5 million in RDOS and $3.9 million in the 30-minute drive market area.

Exhibit 12: Household Spending on Recreation, 2021

2021 Estimates	Osoyoos	Oliver	RDOS	Market Area 30min drive
Live Sporting Events	$29,282	$31,713	$89,951	$112,123
Children's Camps	$49,959	$49,017	$159,314	$180,801
Fees for Sports, Rec Facilities, Health Clubs	$1,113,173	$955,519	$3,455,744	$3,855,079
Use of Recreation Facilities	$1,163,132	$1,004,536	$3,615,058	$4,035,879
Recreation Services	$4,713,480	$4,273,646	$14,261,059	$15,818,073

Source: SPM based on ESRI Business Analyst, Select Categories (Accessed 2022)

These data are estimates from ESRI and their primary value is in enabling a comparison between areas. Compared to the Province as a whole, household spending on recreation in the market area is lower and may reflect a number of influences including demographic profile and the greater relevance of self-directed, outdoor-based recreation compared to larger urban centres.

2.2.4 Conclusions of Market Profile

Based on the information presented above, several conclusions can be drawn:

- Population in both the Region as well as in the Towns of Oliver and Osoyoos and the OIB has been increasing and is expected to continue to grow;
- The Service Area has a similar age profile to the Region but a higher median age, compared to the province;
- The OIB population is the youngest and the fastest growing;
- Compared to both the province and the Region, the Town of Oliver, the Town of Osoyoos and the OIB have lower average income rates combined with a significantly lesser low-income prevalence.

Younger and growing population in the OIB and a significant share of 65+ population in the two Towns combined with lower prevalence of low-income households may indicate a propensity to use recreational services.

Estimated spending on select recreation activities support this by demonstrating the engagement and usage of sports and recreation facilities.

2.3 Policy Context

Each community that allocates public resources, whether funding or facilities, does so with the intent to meet the public interests that are served as a result. A collaborative approach, designed to achieve efficiencies in the planning and delivery of facilities and services, can extend these resources and increase their beneficial impact. The following policy framework outlines the benefits of and supports the need for investment in recreation infrastructure.

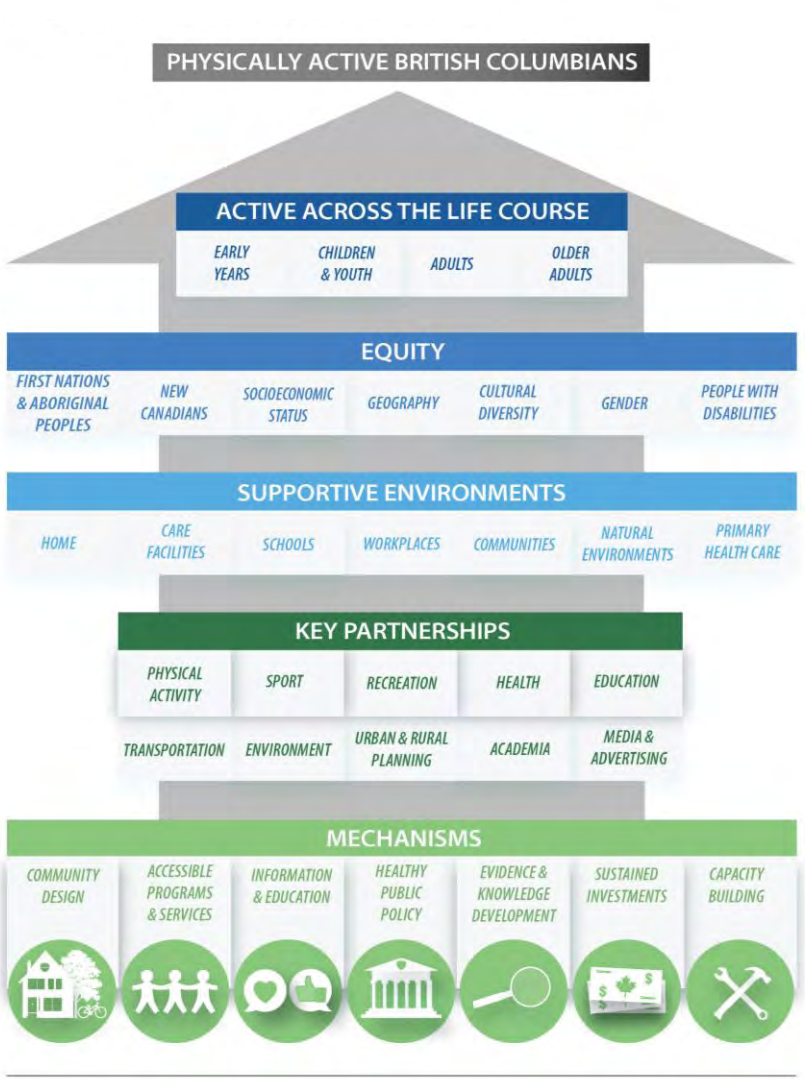
2.3.1 National and Provincial Recreation Framework Policies

Both the Federal and Provincial governments have created policy documents to guide investment in, and provision of, recreation facilities, programs and services:

- Federal Strategy: 'A Framework for Recreation in Canada: Pathways to Wellness' (2015)
- Federal Strategy: A Common Vision for Increasing Physical Activity and Reducing Sedentary Living in Canada (2018)
- British Columbia Physical Activity Strategy: Active People, Active Places (2015)
- South Okanagan Regional Growth Strategy - BYLAW 2770, 2017 (2018 Consolidation)

The Federal 'Pathways to Wellness' Strategy and the 'Common Vision' for increasing physical activity convey a set of concepts, principles and roles to guide the use and evolution of recreation and sport delivery system into the next decade in communities across Canada. These frameworks encourage communities to build the relationships necessary to ensure that citizens fully benefit from the system's potential to enhance the quality of life and wellbeing, increase physical activity and address issues resulting from sedentary lifestyle.

The *'Common Vision'* outlines strategic imperatives for all organizations, communities and leaders in six focus areas: **Cultural Norms, Spaces and Places, Public Engagement, Partnerships, Leadership, and Learning and Progress**. These strategic imperatives require collaborative attention and opportunities.



Source: B.C. Physical Activity Strategy: Active People, Active Places (2015)

The *Regional Growth Strategy* objective 4-A supports regional partnerships and collaboration for safe, healthy and active communities. Policies to achieve this objective include:

- 4A-2 Support the coordination of regional parks, recreation services, and trail networks to improve accessibility of recreational opportunities.
- 4A-8 Collaborate with regional partners to improve accessibility of public spaces.
- 4A-9 Collaborate with regional partners to ensure public spaces and events are consistent with changing demographics and community needs.

An important focus in these strategies is on physical activities among Members of First Nations and Indigenous Communities. Guidance emerging from the Truth and Reconciliation Committee Recommendations (2015) "include promotion of opportunities to participate in sports" (p.14) and "promotions of health and healthy lifestyle (p.6):

> *"… policies to promote physical activity as a fundamental element of health and well-being, reduce barriers to sports participation, increase the pursuit of excellence in sport, and build capacity in the Canadian sport system, are inclusive of Aboriginal peoples."* (TRC Recommendations, 2015)

Trends in Promoting Physical Activity and Well-being

These frameworks and recommendations are grounded in a series of principles and values to guide the continued development and provision of recreation. There is complementary overlap between the key principles and values of both the national and provincial frameworks for wellness and wellbeing. Relevant to this study, guiding principles for these frameworks comprise:

- **Focusing on Inclusiveness, Equity and Access**: Creating equal opportunities for success and participation for all (ages, genders, abilities, ethnic and cultural backgrounds, income levels, etc.).
- **Recreation as a Public Good:** Recreation has, through much of the twentieth century, been regarded as a public good – with an emphasis on accessibility for all, outreach to disadvantaged groups, and a belief in the universal benefits of recreation to the whole community. In the 1990s, this philosophy came under increasing pressure for cost recovery and revenue generation. Despite this shift, leaders in recreation have continued to stress the need for recreation as a public good, with equitable access to recreational experiences for all.
- **Lifelong Participation:** Opportunities to engage in physical activities has benefits for all community members at all ages. Accordingly, recreation providers and community leaders must plan for the provision of recreational experiences for community members at all ages.

- **Sustainability**: Physical activities and recreation must be provided through a system that is sustainable in terms of human resources, economics, and the environment.
- **Partnerships and Collaboration**: All stakeholders must be open to the formation and nurturing of effective partnerships and collaborative opportunities to grow the provision of recreation services that meet the needs of community members adhering to the above guiding principles and values. In this regard, the development of partnerships and collaborative exercises must be outcome driven.

Identified Challenges

Both documents provide guidance and direction for the provision and evolution of physical activity and recreation services in the context of the following challenges identified in the strategic documents:

- **Demographic shifts that impact how we recreate:** Across the country, Canadian communities are experiencing a combination of aging populations, growth in ethnic diversity, rapid urbanization, and depopulation in rural and remote areas. These shifts impact how residents choose to be active at different stages of their lives and, accordingly, how recreation providers must respond to community needs.
- **Health challenges:** Societal shifts have led to a rise in sedentary living and more unhealthy eating practices, which have increased the incidence of chronic diseases like diabetes and heart disease. This is paired with a rise in mental health concerns such as depression and youth suicide.
- **Rising economic inequality:** The gap between the wealthier residents and lower income communities or community members has been increasing over the past few years across Canada. This raises unique challenges in terms of promoting equal access to recreation opportunities.
- **Social challenges** can cause a feeling of isolation and have a bearing on well-being and mental health:
    - Sedentary lifestyle (due to automobilization and reducing levels of physical activity, more recently, exacerbated by COVID-related restrictions);
    - Consequent mental and physical health issues;
    - Persistent unemployment;
    - Busy schedules;
    - Rapid development;
    - Use of social media instead of face-to-face interaction; and
    - The loss of traditional supports.
- **Infrastructure deficits** in many communities that hamper access to recreation opportunities due to deficits in both quality and quantity.
- **Economic development that negatively impacts the natural environment:** This reduces the quality and quantity of high-quality outdoor spaces that Canadian can use for recreation and wellness pursuits.

To tackle these and other issues, all strategic documents encourage decision-makers and communities to identify inclusive, equitable, accessible, and affordable solutions to increase opportunities for physical activity and active recreation for all.

2.3.2 Investing in Infrastructure

All these strategic documents highlight the importance of collaboration, partnerships and investment in resources that will improve residents' ability to maximize their level of wellness and wellbeing.

Investment in recreation infrastructure is an important part of local economic and social development, particularly in Canada's small towns and cities. Documents consulted as a part of the development of this study include:

- *FCM Canadian Infrastructure Report Card (2019);*
- *Investing in Canada Infrastructure Plan (2019);* and
- *The B.C. Physical Activity Strategy (2015).*

The Canadian Infrastructure Report Card provides an assessment of the health of municipal infrastructure as reported by communities across the country through a voluntary survey to help decision-makers "identify cracks in the important foundation", and guide solutions to address them. Municipalities own nearly 60% of the core infrastructure assets that are critical to quality of life in Canada, and 30% of this infrastructure is in fair, poor or very poor condition. Key findings for sport and recreation facilities (including aquatic facilities – indoor, outdoor and wading pools) are:

- One of the asset classes most in need of attention, with more than 30% in fair, poor or very poor condition;
- Large proportion of some facility types are more than 50 years old.

In 2018, Canada and British Columbia signed a bilateral agreement for long-term infrastructure projects, with a commitment of up to $157,081,719 to Community, Culture, and Recreation Infrastructure and up to $903,194,721 to Green Infrastructure.

This agreement is set to provide this funding over the next 10 years in federal funding under the *Investing in Canada Infrastructure Program (ICIP)*. The projects supported through this agreement, which includes a community, culture and recreation infrastructure stream, will be cost-shared between the federal government, provincial government, municipalities and other partners. The Agreement acknowledges that Canada's contribution to community, culture and recreation projects is meant to accrue to the public benefit. B.C. can partner with regional and local governments, entities representing First Nations and Indigenous communities, organizations, and other entities eligible under the agreement:

> "British Columbia may further distribute Canada's contribution funding to the following Ultimate Recipients for Projects stated in the Agreement: a) A local or a regional government established by or under provincial statute; b) A public sector body established

by or under provincial statute or by regulation or is wholly-owned by British Columbia, or a local or regional government; c) When working in collaboration with a local government, a public or not-for-profit institution that is directly or indirectly authorized, under the terms of provincial or federal statute, or royal charter, to deliver post-secondary courses or programs that lead to recognized and transferable post-secondary credentials; d) A private sector body, including for-profit organizations and not-for-profit organizations. In the case of for-profit organizations, they will need to work in collaboration with one or more of the entities referred to above or an Indigenous government listed below; and e) The following Indigenous Ultimate Recipients: i. A band council within the meaning of section 2 of the Indian Act; ii. A First Nation, Inuit or Métis government or authority established pursuant to a self-government agreement or a comprehensive land claim agreement between Her Majesty the Queen in Right of Canada and an Indigenous people of Canada, that has been approved, given effect and declared valid by federal legislation; iii. A First Nation, Inuit or Métis government that is established by or under legislation whether federal or provincial that incorporates a governance structure; and iv. A not-for-profit organization whose central mandate is to improve Indigenous outcomes, working in collaboration with one or more of the Indigenous entities referred to above, a local government, or British Columbia." (ICIP Agreement, 2018)

The Government of Canada's *Green and Inclusive Community Buildings (GICB)* program is a national merit-based program that aims to improve "the availability and condition of community buildings in Canadian communities experiencing higher needs and who are currently underserved." The program is expected to stimulate the economy, create good job opportunities, and align to the goals of Canada's strengthened climate plan by improving energy efficiency, reducing GHG emissions, and enhancing the climate resilience of community buildings. Eligibility includes municipal government and Indigenous communities.

The B.C. Physical Activity Strategy (2015) outlines an action plan, which includes two priority areas for concrete action and strategic investments: active people and active places. The Action Plan builds on commitments and investments across a number of partners, including: health authorities; the recreation, sport, and environment sectors; various health-based not for profit organizations; and the private sector.

These policies make a strong argument that the social, economic and quality-of-life benefits of sport to the individual, community, and province, outweigh the economic investment required to increase participation in. They identify, however, that the age of existing facilities, and financial constraints of communities, mean that more strategic approaches to the provision of recreation infrastructure are required. It is in this context that regional planning has a strong policy foundation.

2.3.3 Conditions for Collaboration and Existing Cost-Sharing Agreements

Agreements between the Regional District and municipalities can facilitate cost-sharing and inter-municipal cooperation to provide services for sub-areas or the regional districts. Such cooperation aims to benefit local communities in electoral areas, member municipalities, or the entire regional district, including all member communities.

These cooperation or cost-sharing agreements address terms of ownerships of land, buildings and operational control of the facilities in the area – it is complicated. In the Service Area, RDOS-municipality agreements address recreation facilities and provision of recreation services. Examples of Co-operation between the Town of Osoyoos, the Town of Oliver and the Regional District include:

- An agreement between the Regional District and the Oliver Parks and Recreation Society (2015).
- An Agreement between the Regional District and the Town of Osoyoos for Recreation and Leisure Opportunities (2021).
- A cost-sharing Agreement between the RDOS and the Town of Osoyoos for the management and operations of the Osoyoos Sun Bowl Arena (2019).

An agreement between the Regional District and the Oliver Parks and Recreation Society (2015).

The Society shall manage and supervise and operation of the Oliver Arena, Community Pool and Community Centre, as well as community parks and recreation programming.

The Regional District owns these facilities.

The Agreement is not a lease but "a contract for the supply of services for the administration of properties."

Construction on lands, with the prior approval from the Regional District, and improvement of these facilities become the property of the Regional District.

The Regional District provides funds for the Society for costs of management, supervision and operation of the Oliver Arena, Oliver Community Pool and the Oliver Community Centre.

The Society responsibilities include:

- Managing, coordinating, conducting and organizing recreational programs for residents of Oliver and the surrounding area – Electoral Area-C.
- Managing scheduling of events, rentals, fundraising activities, and other uses of these facilities;
- Long and short-term planning.

The Society may retain surplus funds obtained from program fees and it is to use all income received from the use and programs in the facilities and miscellaneous revenues for recreation and community purposes.

An Agreement between the Regional District and the Town of Osoyoos for Recreation and Leisure Opportunities (signed in 2021):

- The Town provides various recreational and leisure opportunities for the greater community of Osoyoos.
- The Regional District provides funding by way of an annual fixed sum grant to the Town of Osoyoos as a contribution to recreation and leisure.
- Purpose: providing access for the Regional District residents to Town recreational services and facilities on the same terms and conditions as to the residents of the Town.
- Grant amount in 2021 – $70,000.
- Subject to compliance by the Town with all terms and conditions of the agreement, the Region will advance funding in the amount of $70,000 every year at the beginning of each calendar year in 2021-2025.

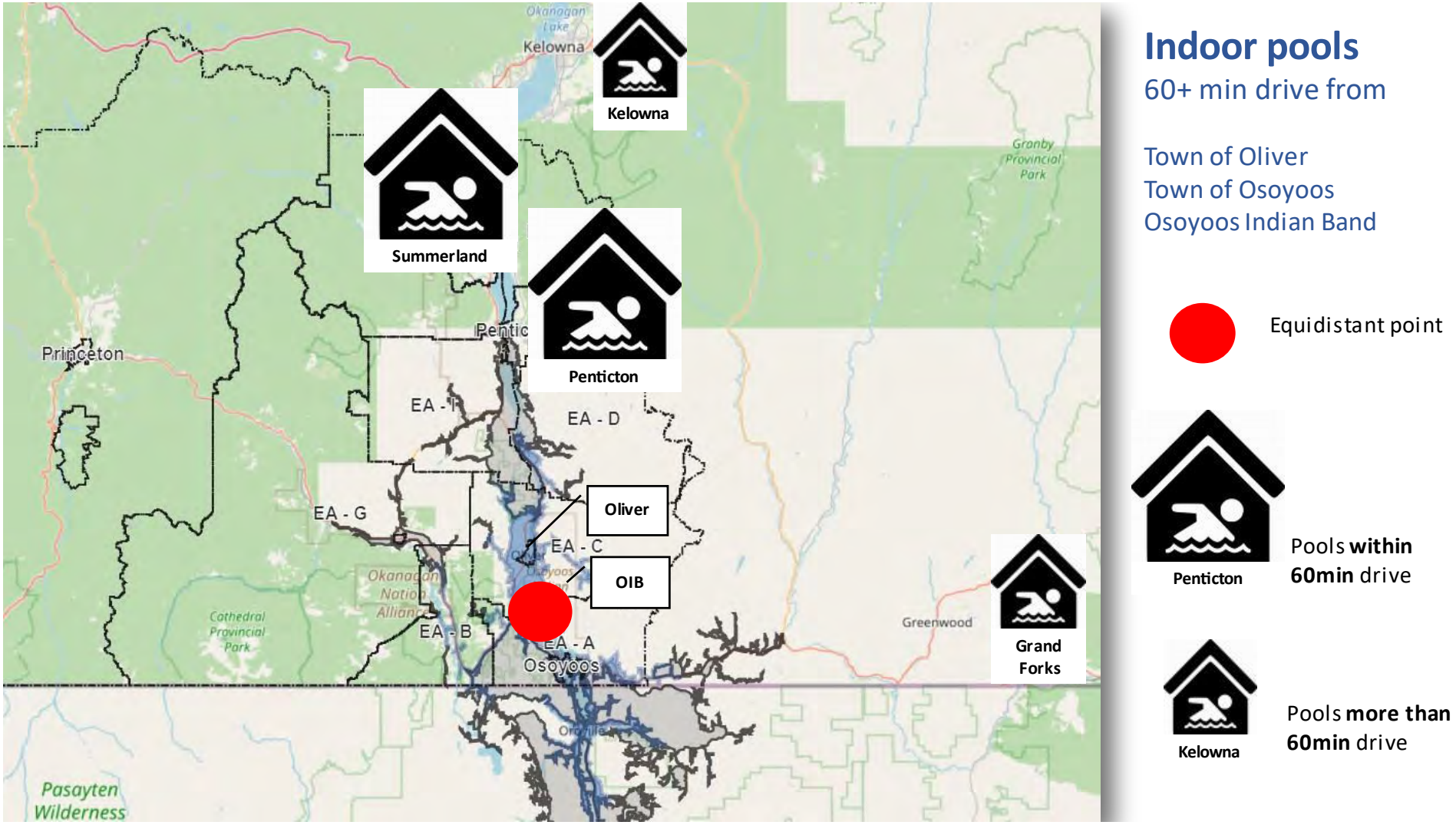
A cost-sharing Agreement between the RDOS and the Town of Osoyoos for the management and operations of the Osoyoos Sun Bowl Arena (signed in 2019).

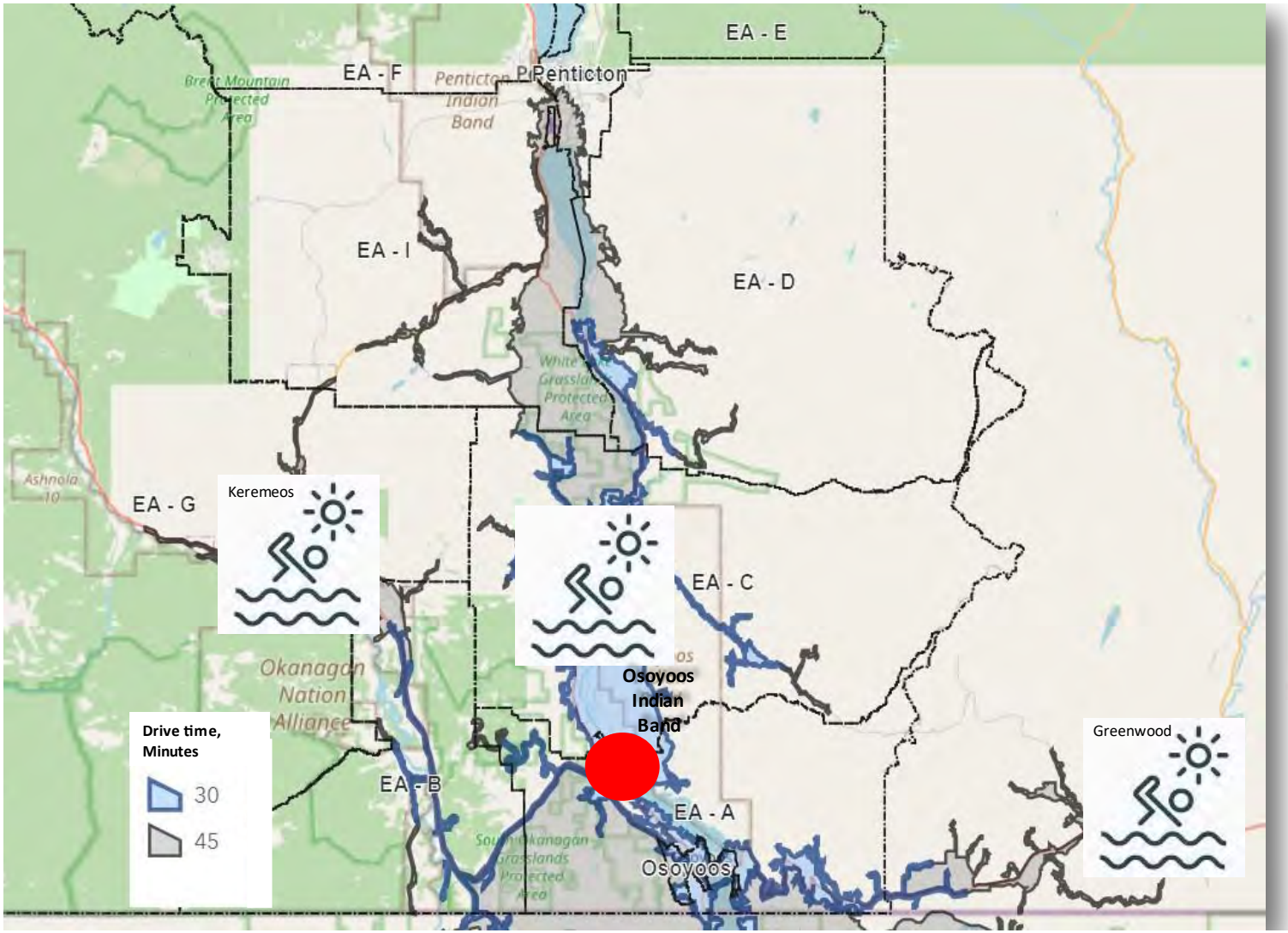
The Regional district agrees to reimburse the Town of Osoyoos for the RDOS's share of costs associated with the management, supervision and operation of the Osoyoos Sun Bowl Arena.

- The Town and the Region have established a joint community Services Advisory Committee with equal representation from the Town and the Electoral Area-A.
- The Town agrees to operate programs and facilities:
  - Together with the Advisory Committee responsible for the condition, operation, maintenance, management, and supervision of all facilities (as per the agreement).
  - Be solely responsible for supervision, employment, of employees.
- The Town agrees to lease facilities owned by the Regional District (as described in the agreement) for a five-year term - January 1, 2019 to January 1, 2024 - for the consideration of $1.
- The Regional District will pay administrative fees to the Town: a) $12,000 to the Town in consideration of accounting and management services; b) $1,000 to the Regional District in consideration of other administrative services.
- The Community Services Advisory Committee can recommend addition of other facilities – these recommendations will be subject to consideration and mutual agreement by the Town and the Regional District.
- Cost Sharing: "The annual cost sharing between the Town and the Regional District shall be based on the ratio of net converted value assessments of land and improvements for school and hospital purposes according to the B.C. Assessment Authority for each of the participating areas. "

2.4 Existing Aquatic Facilities

2.4.1 Existing Supply of Aquatic Facilities





Outdoor pools

Within 45 min drive from

Towns of Oliver
Town of Osoyoos
Osoyoos Indian Band

Equidistant point

Outdoor Pools

The current supply of Aquatics Facilities in the RDOS consists of two indoor Aquatics Facilities (in Summerland and Penticton) and two outdoor community pools (in Oliver and Keremeos).

Additional indoor aquatics facilities are located in the neighbouring regions outside the market area including a large aquatics centre in Kelowna, the H2O Aquatic Centre, the Grand Forks & District Aquatic Centre in Grand Forks, and an outdoor municipal pool in Greenwood.

- The closest public indoor pool facility is in Penticton (about 45- to 60-minute drive from the Service Area communities);
- The closest public outdoor pool is in Oliver (suitable for lane and leisure swimming, but not for competition or competitive swimming training);
- Indoor pools in local motels, hotels, and new residential complexes (townhouses and condominiums) and Lake Osoyoos (summer). In a typical year before COVID, Osoyoos rented a hotel pool to run lessons and organized lessons in the Lake.

Communities of similar size (4-5,000 residents) or smaller size, in the case of village of Keremeos (population 1,500), have 4 to 6 lane pools. Grand Forks (population 4,049) operates an indoor pool, which includes four 25 metre lanes, a large shallow water leisure area, sauna, whirlpool; dry uses include a fitness and wellness centre.

Indoor aquatics facilities can facilitate engagement in year-round aquatics activities. There is no such facility in the Service Area or within 30-minute drive time. The indoor aquatics facilities are located within a 45- to 60-minute drive or further from the Towns of Oliver and Osoyoos and the OIB. This makes year-round aquatics activities less accessible for residents in these communities and decreases levels of engagement in regular activities such as swimming lessons, therapy classes or aquatic fitness outside summer months.

Exhibit 13: Indoor Pools and Aquatic Amenities (within 60 min drive)

Facility	Supply	Aquatics Amenities	Programs
Penticton Community Centre, Penticton	1	25m, 10-lane lap pool, leisure pool with whirlpool hot tub, sauna and steam room, waterslide, accessible features, change rooms	Aqua Fitness, Swim Kids, Red Cross Swim, other swimming lessons for all ages and abilities
Summerland Aquatic Centre, Summerland	1	25m, 6-lane lap pool, whirlpool hot tub, sauna, change rooms	Lane Swim, Aquafit, Red Cross Swim, ORCA Swim Club, Masters Swim Club, Aqua Zumba, Learn-to-Swim Program
Total supply	**2**		

Exhibit 14: Outdoor Pools (within 60 min drive)

Facility	Supply	Aquatics Amenities	Programs
Oliver Community Pool, Oliver	1	6 lanes, 25m, Outdoor community pool facility, plus hot tub, change rooms Operates from May to first week of Sept.	Senior & Leisure Swim, Early Bird Swim, Aquafit, Red Cross Swim, Day Camp, Bronze Medallion, Oliver Eels Swim Club
Village of Keremeos Community Pool	1	4 lanes, 25m community pool This facility Operates from May to August.	Red Cross Swimming Lessons, Swim Club Rentals, Aquasize & Public Swim; available for private rent functions.
Greenwood Municipal Swimming Pool, Greenwood	1	6 lanes, 25m Outdoor community pool facility	Public swimming; Lane Swimming; Aquafit; Swimming lessons for children and adults; Rock Creek Medical Centre First Aid certification; Swim club; Junior Lifeguard Club
Total supply	**3**		

Exhibit 15: Private Aquatics Outdoor Facilities

Facility	Location	Supply	Aquatics Amenities/Description
Walnut Beach Resort	4200 Lakeshore Dr, Osoyoos	1	Luxury resort, outdoor pool
Lakeview Motel and Suites	6002 89 St, Osoyoos	1	Seasonal heated saltwater pool (May – September)
Super 8 by Wyndham Osoyoos	9130 Main St, Osoyoos	1	Outdoor pool
Spanish Fiesta and Falcon Resort	7106 Main Street, Osoyoos	2	Outdoor pools with hot tub
Safari Beach Resort	5815 Oleander Dr, Osoyoos	2	Outdoor pools
Maple Leaf Motel & RV Campground Resort	5457 BC-97, Oliver	1	Outdoor pool
Total supply		**8**	

Private indoor and outdoor pools are located in resorts and hotels.

Exhibit 16: Private Aquatics Indoor Facilities

Facility	Location	Supply	Aquatics Amenities/Description
Coast Osoyoos Beach Hotel	7702 Main Street, Osoyoos	1	Indoor pool with waterslide and hot tub
Best Western Plus Sunrise Inn	5506 Main Street, Osoyoos	1	Indoor pool with hot tub
Coast Oliver Hotel	6273 Station Street, Oliver	1	Indoor pool with hot tub
Holiday Inn & Suites Osoyoos	7906 Main St, Osoyoos	1	Indoor, heated pool with whirlpool. Aquafit classes offered November – April for long-term and overnight guests
Total supply		**4**	

2.4.2 Utilization & Programming

The Town of Osoyoos does not have an aquatic facility. In the Summer many residents use the lake and pools in Oliver, Penticton, and Greenwood in the Service area. In the colder months the Town of Osoyoos rents indoor facilities, including hotels, to offer swim classes.

Town of Osoyoos Pool/Lake utilization

Summer – Learn to Swim Program, Osoyoos Lake:

The Town of Osoyoos partners organize swimming lessons in Osoyoos Lake for children – "Learn to Swim Program". In 2021, the Town organized 5 courses for different age groups - 8 sessions over 10-days, cost - $98.80 per participant.

Exhibit 17: Town of Osoyoos Partners Swim Programs for Children

Courses	Age	Time	Description
Little Minnows	3-4 years	3:15-3:45pm 4:45-5:15pm	Equivalent to Red Cross Sea Otter, Salamander and Sunfish
Mini Ogopogo	5-6 years	4:00-4:30pm	Equivalent to Red Cross Crocodile, Whale and Swim Kids Level 1
Trout	6-7 years	3:30-4:00pm	Equivalent to Red Cross Swim Kids Level 2,3,4
Dolphin	7-10 years	4:15-4:45pm	Equivalent to Red Cross Swim Kids Level 5,6
Rattlesnake / Megaldon	10-13 years / 12-13 years	5:00-5:45pm	Equivalent to Red Cross Swim Kids Level 7,8,9,10

Source: Swim Lessons.pdf (civicweb.net), accessed February 2022

Fall, Winter, Spring – Swimming lessons:

The Town of Osoyoos also organizes swimming lessons in the Winter, Spring and Fall.

Three courses for children under 5 years old (Salamander and Sea Otter) and Sim Kids for children older than 5.

In 2018, over 100 children participated in these programs in the Fall, Winter and Spring seasons; 50 participants in 2019 in the spring and winter seasons; and 38 participants in the spring of 2020.

These Programs generated nearly $6,000 in revenue over the three seasons of 2018; $3,600 over two seasons in 2019; and $2,470 in the spring of 2020.

The increasing participation rates over the three years demonstrate demand for year-round swimming lessons and family aquatics activities.

These programs are organized in indoor aquatics facilities, including rented indoor hotel pools.

Exhibit 18: Osoyoos Swimming Lessons for Children

Note: This analysis is based on the available information; there may be other courses and additional revenue information, not included in the table.

	Program Details	Max. Participants	Cost	Enrolment	Revenue	Cost	Enrolment	Revenue	Cost	Enrolment	Revenue
Winter				**2018**			**2019**			**2020**	
Ages 0-5	Salamander (2 groups)	4	$ 57	7	$ 400	$ 65	6	$ 390	$ 65	12	$ 780
	Sea Otter (3 groups)	4	$ 57	7	$ 400	$ 65	8	$ 520	$ 65	12	$ 780
	Sea Otter - reduced fee	*4*				*$ 54*	3	*$ 162*			
Ages 5+	Swim Kids (6/4 groups in 2018/2019)	6	$ 57	13	$ 743	$ 65	11	$ 715	$ 65	14	$ 910
Subtotal				***27***	***$ 1,543***		***22***	***$ 1,787***		***38***	***$ 2,470***
Spring				**2018**			**2019**				
Ages 0-5	Salamander (2 groups in each year)	4	$ 57	7	$ 400	$ 65	8	$ 520			
	Sea Otter (2 groups in each year)	4	$ 57	8	$ 457	$ 65	8	$ 520			
Ages 5+	Swim Kids (5/2 groups in 2018/2019)	6	$ 57	22	$ 1,257	$ 65	12	$ 780			
Subtotal				***37***	***$ 2,114***		***28***	***$ 1,820***			
Fall				**2018**							
Ages 0-5	Salamander (2/3 groups in 2018/2019)	4	$ 60	7	$ 420						
	Sea Otter (4/3 groups in 2018/2019)	4	$ 60	10	$ 600						
	Sea Otter - reduced fee	*4*	*$ 56*	3	*$ 168*						
Ages 5+	Swim Kids (4 groups)	6	$ 60	18	$ 1,080						
Subtotal				***38***	***$ 2,268***						
Total				**102**	**$ 5,925**		**50**	**$ 3,607**		**38**	**$ 2,470**

Town of Oliver Community Pool

Oliver Community Pool is a local outdoor aquatics facility with a 6-lane, 25-meter pool, hot tub, and change rooms. The pool tank and hot tub are shown on pictures below.

The community pool operates during spring and summer months, starting at the end May and until the first week of September or approximately 15 weeks per year.

The pool schedule includes a spring schedule (May – end of June) and a summer schedule (July – end of August) and two transitional schedules (last weeks of July and First week of September).

Programs include Senior & Leisure Swim, Lane Swim/Parent & Tots, Early Bird Swim, Aquafit, Red Cross Swim, Day Camp, Bronze Medallion, and Oliver Eels Swim Club. Spring session schedule includes school rentals - school swims every weekday.

The Oliver community pool operates 11 hours/day during the work week and 6 hours/day on the weekends.

Pool Operation Hours	Hours #	Hours	
Weekdays - spring	13	6:30	19:30
Transition weekday – spring	13.5	6:30	20:00
Weekdays - summer	13.5	6:30	20:00
Transition weekday – summer	11.5	6:30	18:00
Weekends	6.5	12:00	18:30

A list of activities and a summary table below shows that drop-in sessions and swim lessons represent the larger part of the pool utilization. Details of programs and hours are presented in the following exhibits.

Oliver Community Pool



Photo credits: Oliver Community Pool | Explore Oliver BC
Stephenson Engineering Technical Report (2019)

Exhibit 19: Activities and Programs offered in 2021

Rentals:

Schools (Spring session only)
Private Rentals

Drop-ins:

Early bird swim
Leisure swim
Senior swim
Lane swim / Parent & Tots
Youth Swim
Family Swim
Day Camp Swim
Everyone welcome

Programs:

Oliver Eels Swim Club (9 or 10 sessions)
Aquafit (4 or 8 classes)
Bronze Medallion (mandatory 20 hours)
Bronze Cross (mandatory 20 hours)

Lessons:

Private Lessons (5 or 10 lesson packages)
Red Cross Preschool - all levels (9/10 sessions)
Red Cross Swim Kids Levels 1-10 (9/10 sessions)
Adult Red Cross Basics 1 & 2

Details about programs and hours per week are provided on the following exhibit.

Exhibit 20: Programs: Distribution of weekly hours by type of activity

Distribution of weekly hours	Spring 2021	Summer 2021
Hours per week	58 hours / week	98 hours / week
Rentals	14%	3%
Drop-ins	78%	47%
Programs	9%	4%
Lessons		46%

Oliver Community Pool



Photo credit: Oliver Recreation

Exhibit 21: Oliver Community Pool Programs and Hours

	Spring May 22-June 27, 2021		Summer July 5 - August 29, 2021	
	5 weeks		8 weeks	
	hours/week - programs		hours/week - programs	
Rentals:	**8**	**14%**	3	**3%**
Schools	5	9%	0	0%
Private Rentals	3	5%	3	3%
Drop-ins:	**45**	**78%**	46	**47%**
Early bird swim	10	17%	7.5	8%
Leisure swim	7.5	13%	6.25	6%
Senior swim	8.5	15%	7.25	7%
Lane swim / Parent & Tots	4	7%	6	6%
Youth Swim	3	5%	4	4%
Family Swim	6	10%	6.5	7%
Day Camp Swim			5	5%
Everyone welcome	6	10%	3.5	4%
Programs:	**5**	**9%**	4	**4%**
Oliver Eels Swim Club (9 or 10 sessions)	2	3%	2	2%
Aquafit (4 or 8 classes)	3	5%	2	2%
Bronze Medallion (mandatory 20 hours)	*not offered regularly*		*not offered regularly*	
Bronze Cross (mandatory 20 hours)	*not offered regularly*		*not offered regularly*	
Lessons:	0		45	**46%**
Private Lessons (5 or 10 lesson packages)			22.5	23%
Red Cross Preschool - all levels (9/10 sessions)			22.5	23%
Red Cross Swim Kids Levels 1-10 (9/10 sessions)	*not offered regularly*		*not offered regularly*	
Adult Red Cross Basics 1 & 2	*not offered regularly*		*not offered regularly*	
Total	**58**	100%	98	100%

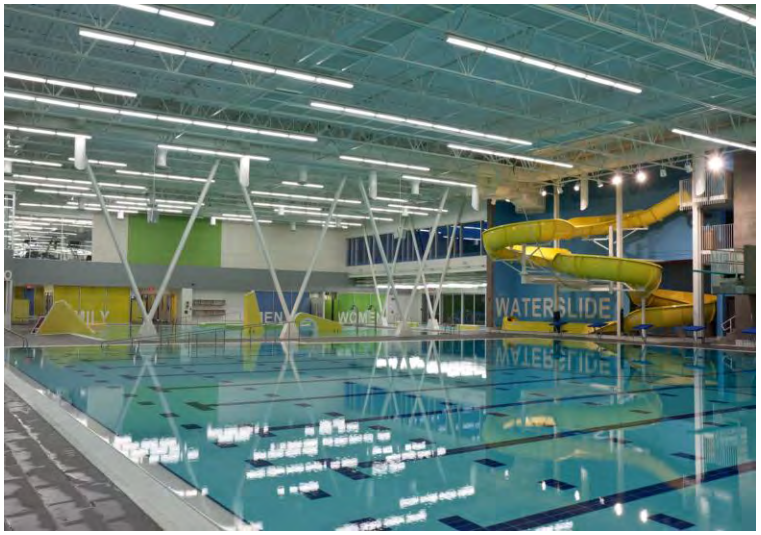
SPM, Source: Oliver Community Pool Schedule, 2021
2021 spring and summer session program distribution for illustration purposes; transition weeks are not included

2.5 Regional Examples of Pools

Penticton Community Centre, BC

Program Components

- 25m Lap pool with 10 lanes and 1m + 3m diving boards
- leisure pool with bubble pit, lazy river, and 3-lane therapy pool/ warm laps
- large hot tub, steam room and dry sauna
- waterslide
- fitness room, gymnasium, theatre, multipurpose rooms, and dance studio
- opened 2011 and cost $23.3 million



Summerland Aquatic & Fitness Centre, BC

Program Components

- 25m, 6-lane pool
- large inflatable pool toys
- jetted whirlpool hot tub
- sauna
- a well-equipped 2200 sq. ft. fitness studio
- a small meeting/party room
- pool facility constructed in 1976
- fitness room addition (1996).



2.6 Facility Trends & Best Practice

In general, aquatics facilities today are being built that function as multi-purpose community hubs – places that incorporate a number of major components where a variety of activities can occur under one roof.

2.6.1 Facility Trends

Regional community and competitive aquatics facilities are typically designed to be part of a larger recreation centre program. This affords the swim users the opportunity to augment their pool visit with access to the gym, fitness centres, multipurpose programs, group exercise rooms or libraries.

Developing multi-purpose facilities provides many benefits to both the users and the municipalities developing and operating them, including:

User Benefits

- Meets current expectations of users for modern recreation facilities;
- Opportunity for a larger variety of activities to be provided;
- Multi-generational – all family members can recreate in same facility; and
- Accessible and inclusive environment.











Municipal Benefits

- Operational efficiencies including a reduction in staffing requirements;
- Heating and cooling offsets through redirecting energy;
- Reduced capital costs;
- Improved utilization and revenue potential; and
- Increased sport tourism potential.

These trends and benefits form the basis for the metrics of which the options for a new aquatics facility in the Greater Fredericton Region should be assessed.

Where aquatic centres are being planned as 'stand alone' facilities, the programming should consider some core social and fitness spaces (e.g. multi-purpose rooms, group exercise space, small program rooms, food service, etc.). The support needs will differ for the type of user; competitive, learning, leisure or therapeutic.

Aquatic Program Trends

- Appeal to a full range of demographics and abilities
- Range of programs expanding
- Goal - to increase and maximize participation
- Less interest in thematic and unique forms
- Less interest in slides and larger water play
- Flexible to appeal to wider range of demographics, cultures and capabilities
- Flexible use of rectangular pools
- More storage for equipment and support













- Range, shape and size of pools determined by discussion on key goals and needs
- Decisions on aquatic program size is determined by expected number of users
- Change and viewing spaces should reflect and support key program goals.

Changeroom Trends

- **Accessible**
- **Universal**
  - Gender Neutral
  - More privacy and comfort
  - More accessibility options
  - Greater schedule flexibility
  - Better supervision
  - Easier maintenance
  - More transparency and security
- **Universal Hybrid**
  - Individual change only cubicles
  - Limited change and shower cubicles
- **Universal with Gender Specific**
  - Individual change only cubicles
  - Separate gender specific change added as well.
  - More easily accommodates teams, larger groups & events



Accessibility and Inclusivity Trends

Recreational facilities are increasingly inclusive and accessible to accommodate people of all ages and abilities. In addition to meeting accessibility requirements, accommodation of personal comfort and gender identity is evolving. Accessibility trends and best practices include:

- Welcoming environment - easy to access and navigate for a range of demographics, cultures and capabilities
- Recognize the many different ways people arrive at the facility
- Create a clear sense of entry with a clear path to a welcoming point
- Intuitive wayfinding supported by clear signage and floor patterns
- Transparency to programs enables everyone to understand the facility
- Barrier free accessible route throughout all public areas of the building



- Personal touch points begin at the control/welcome counter. Must be accessible to a range of physical and visual capabilities.
- A ramp and/or beach entry for each tank.

2.6.2 Comparing Community & Regional Aquatic Facilities

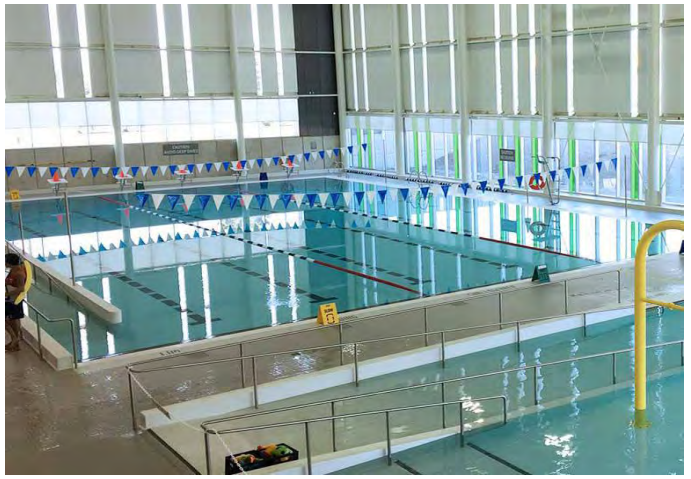
The types of pools include local community pools, a minor competitive pool, and a regional level competitive pool. Examples below demonstrate features of local community pools and regional level competitive pools.

Local Level Aquatics Facilities

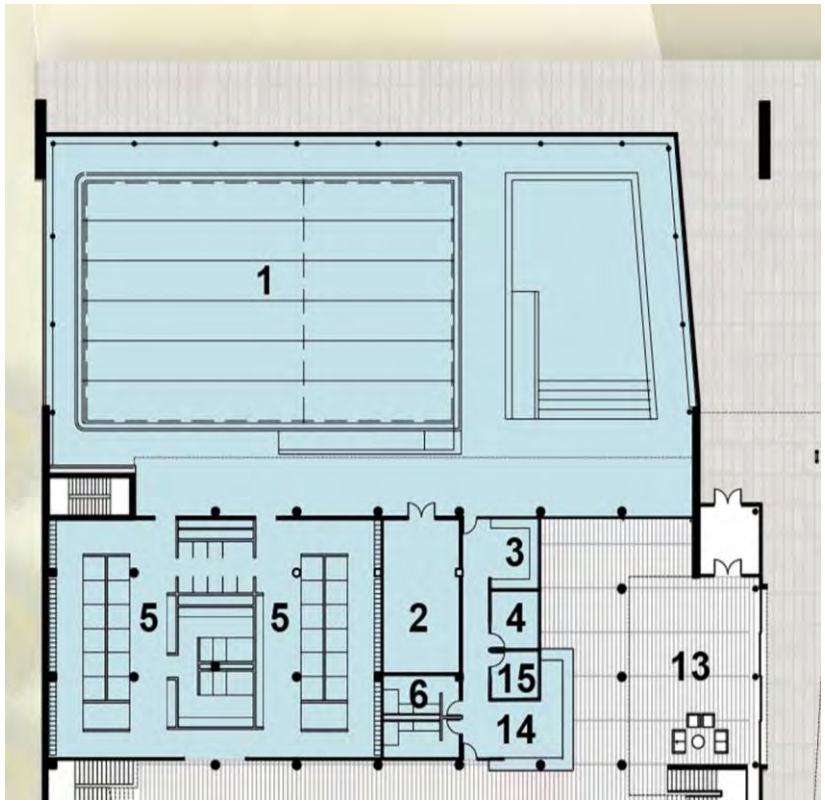
Community pools are generally 4-6 lanes and suitable for community use. The purpose of such aquatics facilities includes teaching, relaxation, and recreation. Aquatics programs includes:

- 4-6 Lane Pool
- Leisure Pool
- Upper bleacher seating
- Gender neutral universal Change
- Ramp entries and spray features

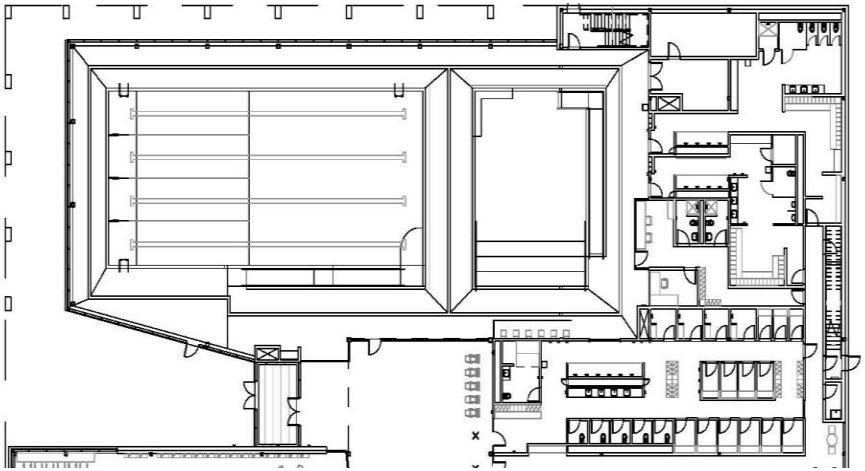




A 25m 6-lane community pool example



A 25m 4-lane community pool example



Regional Level Aquatics Facilities

Regional facilities are often designed as a part of a larger recreation centre program. Regional facilities typically offer aquatics programs (training, competition, recreational swimming), non-aquatic programs (e.g. gymnasium, fitness, ice arenas) and a variety of community uses.

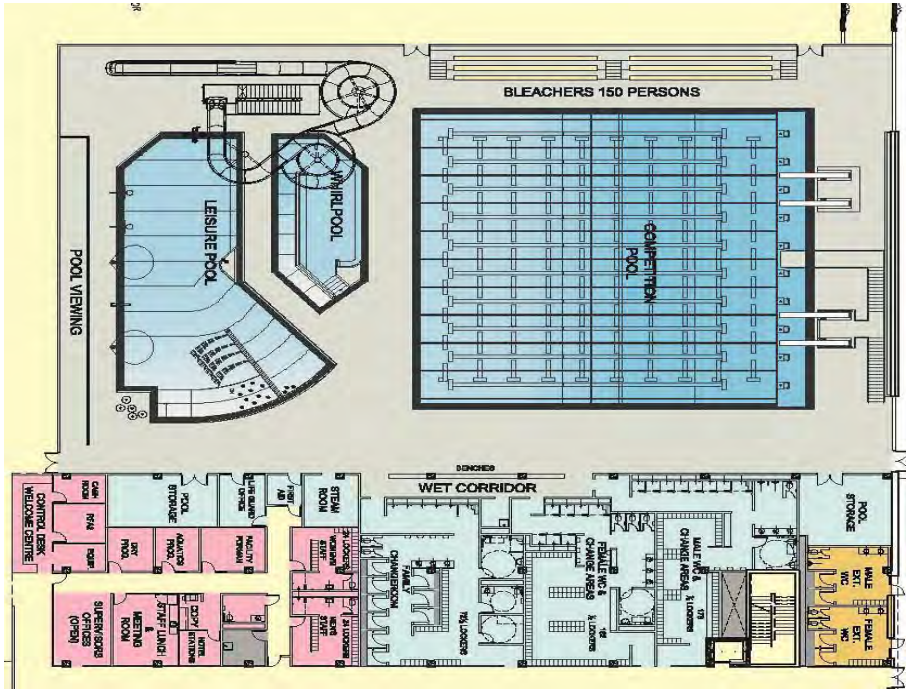
This allows community members engaging in aquatics activities the opportunity to augment their pool visit with access to the gym, fitness centres, multipurpose programs, group exercise rooms. Such a facility can be combined with other uses such as a library and community meeting rooms.

Regional level aquatics facilities combine community and competitive programs. Competitive programs support training and competition. Community aquatics programs include family swimming and leisure, parent and tots, recreational swimming, lane swimming, teaching, therapy, recreation, and swim lessons. A regional pool has the following features:

- 10 Lane Pool
- 3m 5m 10m Diving
- 1m diving
- Whirlpool
- Leisure Pool
- On deck bleacher seating
- Family and M/F change
- Slide







2.6.3. Western Canadian Examples of Current Practice

Best Practice: H2O Kelowna, B.C.

Program Components

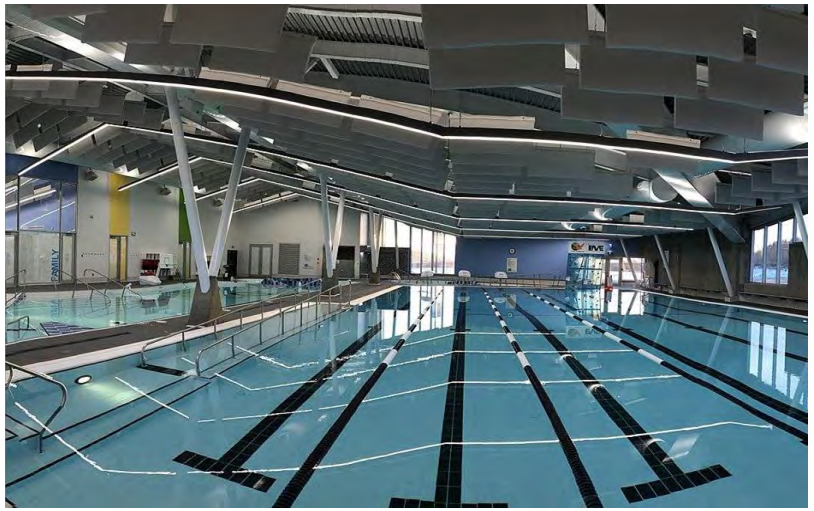
- Main pool 50m, 8 lanes with movable floor and bulkheads, and 1m + 3m diving boards
- Leisure pool with wave feature, large lazy river, shallow tot pool
- Multiple large hot tubs and a steam room
- WaveRider
- 3 waterslides
- Double gym, fitness center, walking track,
- Opened 2009 and cost $41.2 million



Best Practice: Vanderhoof Aquatic Center, B.C.

Program Components

- 25m Lap pool with 6 lanes and aquatic climbing wall
- Leisure pool with lazy river
- Hot tub and sauna
- Plus programming located at other facilities in the city.
- Opened 2019 and cost $12 million



Best Practice: Northern Rockies, Fort Nelson

Program Components

- 25m Lap pool with 6 lanes, aquatic climbing wall, and 1m + 3m diving boards
- Leisure pool with lazy river, and 2-lane therapy pool/ warm laps, and many water-spray features
- Large hot tub, steam room and dry sauna
- 3-storey waterslide
- Fitness room, multipurpose rooms, 2 ice rinks, curling rink, rock climbing wall, squash court, walking track
- Opened 2015 and cost $95 million



Best Practice: Creston Aquatic Center, Creston, B.C.

Program Components

- 25m Lap pool with 5 lanes, aquatic climbing wall and 1m diving board
- Leisure pool with bubble pit, lazy river, spray features, and 3-lane therapy pool/ warm laps
- Large hot tub
- Fitness room, fitness studio, Ice arena, curling rink, multiple multipurpose rooms, and full kitchen
- Opened 2011 and cost $18.25 million



Best Practice: Western Financial Place, Cranbrook, B.C.

Program Components

- 25m Lap pool with 8 lanes and 1m diving board
- Leisure pool with wave feature, and spray park for tots
- Large hot tub, steam room and dry sauna
- 180ft Waterslide
- Arena, multipurpose rooms, restaurant, and squash courts.
- Opened 2000 for $22 million, and expanded in 2019 for an additional $32.5 million



Best Practice: Terrace Aquatic Center, City of Terrace, B.C.

Program Components

- 25m Lap pool with 6 lanes
- Leisure pool with lazy river, and spray features
- Large hot tub, steam room and dry sauna
- Fitness room
- Opened 2018 and cost $8.8 million



2.7 Anticipated Recreational Needs

2.7.1 Municipal Recreation Plans

Regional District of Okanagan-Similkameen

The Regional District of Okanagan-Similkameen (RDOS) is currently developing its new Parks, Trails and Recreation Master Plan that will provide direction for decision-making over the next 10 years. This plan aims to provide the right mix of outdoor and indoor recreation facilities and services, while also helping to ensure that the RDOS continues to protect environmentally significant areas.

Town of Osoyoos

The Town of Osoyoos Community Services Master Plan was completed in 2014. In 2015, a Parks and Trails Master Plan was developed and, in 2020, The Town of Osoyoos approved a new Parks Plan. Recreation, parks and green spaces were identified as important topics during the Town of Osoyoos' official community plan review in 2019-2020. During public consultations in 2019, Osoyoos residents were asked about their recreation needs. Community members suggested upgrading existing facilities - upkeep of the Sun Bowl Arena - and identified additional opportunities/facilities including: a pool, leisure centre (waterslides, etc.), curling rink, and skate park, beach volleyball, tennis courts, and a gymnasium.

Town of Oliver

The Oliver Parks and Recreation Master plan was originally developed in 1991 and updated in 2001. In addition, the Oliver Parks Improvement Plan was published in 2015.

A more recent document addressing recreational needs is the *Oliver Age-friendly Assessment and Action Plan* (2021). The document speaks to opportunities for older adults and seniors and emphasizes opportunities that will benefit them by attracting all generations and accommodating age-specific needs.

Among other critical issues in the document, the community identified the need for social participation in leisure, social, cultural, and spiritual activities.

In the Town of Oliver, social involvement and recreation are supported through

- many social activities, service clubs, arts and culture programs and diverse, age-friendly events as well as a strong arts community.
- age-friendly recreation programs (e.g., Oliver Parks and Recreation offers a variety of classes and activities for older adults, including those led by older adults) and groups (e.g., Tennis and Pickleball clubs).
- good recreation facilities and infrastructure, including the many walking and biking trails, an outdoor fitness park that was designed specifically to be age-friendly and accessible, parks, and more.

- Spaces for gathering include the Senior Centre, Oliver Community Centre, places of worship, art and recreation centres, the Kiwanis Flea Market, the OIB Community Centre, local cafes, and more.

Recreational goals considered include active recreation, events, activities, and venues suitable for older adults and seniors in Oliver. Important to focus on are opportunities that are targeted to older adults and seniors as well as community-wide settings that may attract all generations yet accommodate age-specific needs and preferences.

The Oliver Age-friendly Strategy emphasizes the importance of accessibility and affordability of existing and future recreational opportunities.

Osoyoos Indian Band

The Osoyoos Indian Band has been successfully creating a self-sustaining economy, generating employment, tourism and leisure opportunities. The OIB's strategy has a goal of maintaining a strong and healthy community. OIB has significant commercial and agricultural land that is available for lease. Making use of the abundant resources of the Okanagan Valley, OIB manages and operates a broad range of tourism and recreation activities in its traditional territory, the Okanagan "Little Falls" park. Some of these activities include the Indian Grove Riding Stables for rodeos and equestrian tourism; the Play Nk'Mip Canyon Desert Golf Course suitable for golfers of all levels, as well as other activities, the Nk'Mip Campground and RV Park at Osoyoos Lake, hiking in the vicinity of a sacred Indigenous site: Spotted Lake, and other recreation opportunities.

2.7.2 Aquatic Needs and Opportunity

There are currently four (4) municipal aquatics facilities within the RDOS. Two municipal indoor pools in Summerland and Penticton and two outdoor pools in the Town of Oliver and the Village of Keremeos. Non-municipal facilities provide only limited access for the public and some rental space for swimming classes. There are four (4) private indoor pools and eight (8) outdoor pools in the Service Area. These facilities include hotels and motels, and pools in condominiums and townhouses for year-round swimming. An important part of the regional supply in the warmer months is the Osoyoos Lake. Residents and tourists use Osoyoos as a recreational swimming lake; the Town of Osoyoos organizes swimming lessons.

Three (3) other municipal pools serve the residents of the region but are located outside of the Region limits although within reasonable driving distance – 60- to 90-minute drive time from the Service Area location. These facilities include the recently built H2O Aquatics Centre in Kelowna (North of Penticton), an indoor aquatic centre in Grand Forks and an outdoor pool in Greenwood (both in the East).

Standards of Provision

Regional supply, or level of service, is calculated as a ratio of facilities to population these facilities serve. Regional supply of indoor aquatic pools includes two indoor pools - Penticton Community Centre Pool and Summerland Aquatic Centre and two outdoor pools – the Town of Oliver and Village of Keremeos Community centres.

Because outdoor municipal facilities are open during the summer months, or approximately 1/3 of the year, they are counted as a 0.3 indoor pool equivalent when considering the supply for public use. Therefore, the total supply of pools within RDOS and within the Service Area is 2.6 pools.

Standard for an indoor pool regional level of service is one per 20,000 - 35,000 population.

The current and future standard of provision is generally in line with the upper end of the range. However, the scale of the region in terms of driving distances between communities suggests that the appropriate standard should be closer to the lower end of the population range – a more dispersed population base necessitates a more decentralized model of service delivery. Accordingly, the estimated population in this broader region by 2031 is sufficient to warrant an additional indoor pool developed as a Class A Municipal Pool Venue.

Exhibit 22: Standard for Regional Indoor Pool

Regional Supply		**RDOS Population:** **2021 – 90,178** **2031 – 99,000-110,000 (projections)**
Indoor Aquatics Facilities	**Municipal supply**	**Aquatics Amenities**
Penticton Community Centre	1	25meter 10-lane lap pool, leisure pool with whirlpool hot tub, sauna and steam room, waterslide, accessible features, change rooms
Summerland Aquatic Centre	1	25meter 6-lane lap pool, whirlpool hot tub, sauna, change rooms
Outdoor pools: Oliver Keremeos	 0.3 0.3	25 metre 6-lane pool and a hot tub 25 metre 4-lane lane pool Facilities operate from May to August.
TOTAL Municipal supply	**2.6**	**Regional Municipal Supply:** **2021: 1 pool per 34,684** **2031: 1 pool per 38,076 – 42,307**

3 Overview of Public Engagement

The purpose of the public engagement is to firstly engage with the aquatic users to understand their needs, and secondly, engage with the broader community at large.

3.1 Methods of Engagement

In this study, engagement focused on the needs and details of components typically found in a facility of this nature and was not intended to cover the broad spectrum of community recreation needs – as previously noted, this would be a separate exercise. The process ensured that residents and municipal representatives from the Town of Oliver, Town of Osoyoos and the OIB as well as Electoral Areas A and C were involved.

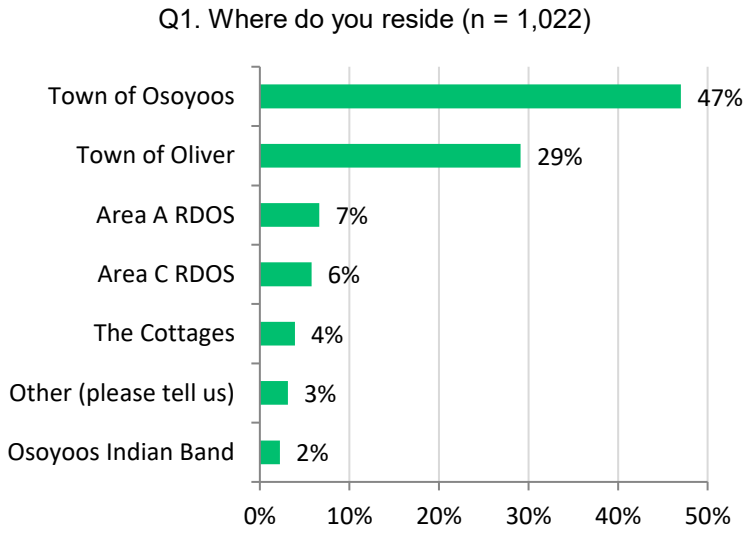
A public engagement plan was developed collaboratively with the Advisory Committee to ensure that members of all participating communities had an opportunity to provide input and share their opinions. A public survey was conducted, providing an opportunity for feedback from the stakeholder communities on their needs and aspirations for the future aquatics facility.

An important method of engagement is the holding of regular meetings with the Project Advisory Committee comprised of regional, municipal and OIB stakeholders and community representatives.

3.2 Summary of Public Survey Results

Survey Participants and Engagement in Aquatic Activities

The public survey conducted in September-October 2021, received 1,022 responses. Survey participants were from across the RDOS. A plurality were from the Town of Osoyoos (47%) followed by the Town of Oliver (29%). The portion of responses from the rest of the Region and the OIB were proportionate to the population distribution in RDOS.

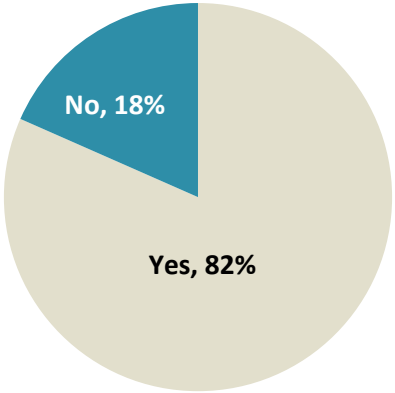


Based on their household composition, the first group of respondents is adults with no dependent children (54%), including couples (43%) and adults living alone (11%). The second group of respondents is families with children (34%), including parents (30%) and single parents (4%). Other categories included extended family, more than one adult sharing a residence, and other.

Age distribution of respondents corresponded with the age profiles in the Town of Oliver, Town of Osoyoos and OIB (as demonstrated in the more detailed presentation in the Appendix X).

Most respondents (82%) swim or engage in aquatics activities.

Do you or a member of your family swim or engage in aquatic activities? (n=1,022)



Types of facilities used in a typical year

Indoor facilities

Respondents indicated using both indoor and outdoor aquatic facilities in the Region. The majority of respondents (60%) indicated that they and/or members of their family used indoor pools in the region at least once a month; 30% used an indoor pool weekly. (The question referred to a typical year before COVID).

Outdoor facilities

Similarly, the majority of respondents (62%) of respondents indicated that they and/or members of their family used outdoor pools in the region or swam in the lake at least once a month; 40% swam in an outdoor pool or a lake at least once a week. (The question referred to a typical year before COVID).

Time to get to an aquatic facility

Most respondents (85%) spend under 30 minutes to get to an outdoor aquatic facility and 84% under 60 minutes to get to an indoor aquatic facility, including 48% who spend 30-60 minutes.

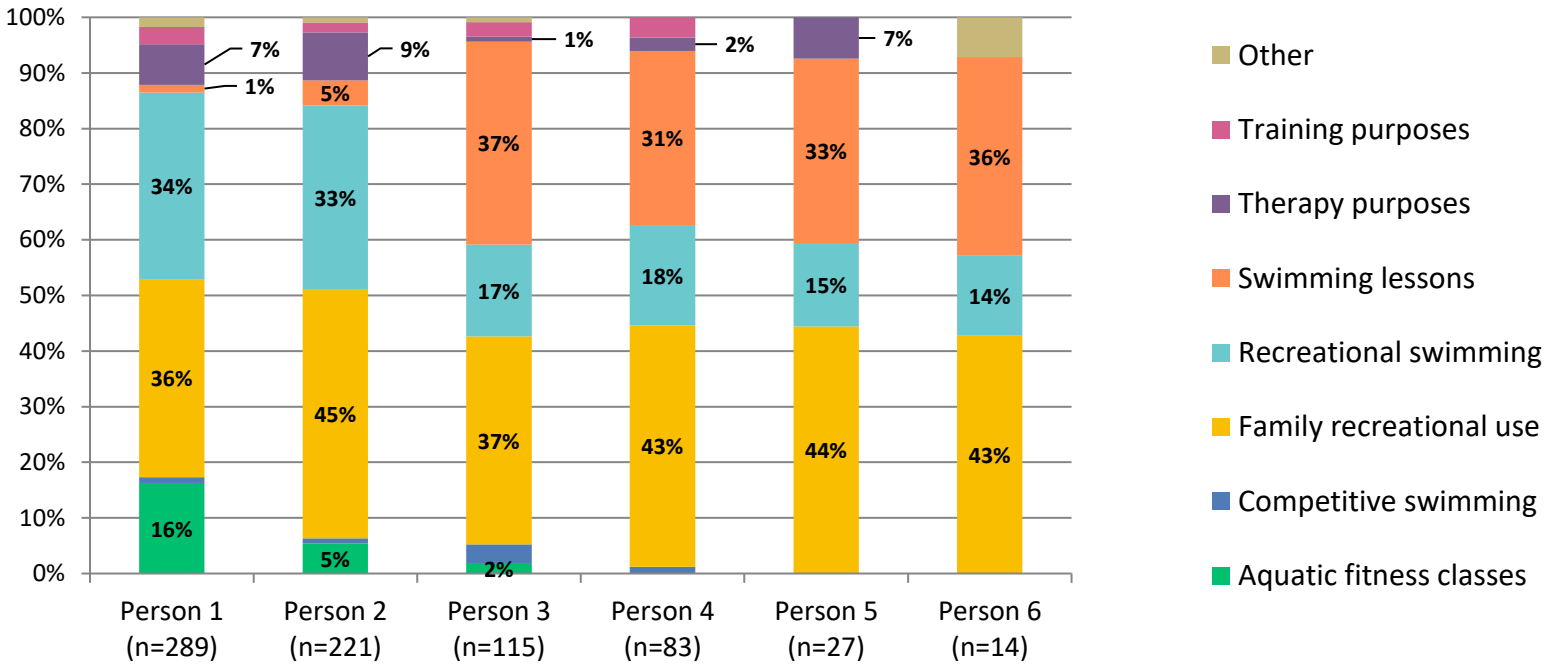
The main type of use was family recreation, recreation swimming, swimming lessons, aquatic fitness classes and therapy.

Main Type of Aquatic Activities – Existing

Survey responses indicate a larger share of *recreation aquatic activities*, compared to *competitive swimming* or *training.* Recreation aquatic activities include family recreation and recreation swimming as more prevalent aquatic activities among survey respondents and others in their households.

Family and recreation aquatic activities are followed by leisure swimming, aquatic fitness and therapy. Members of respondents' households participate in swimming lessons.

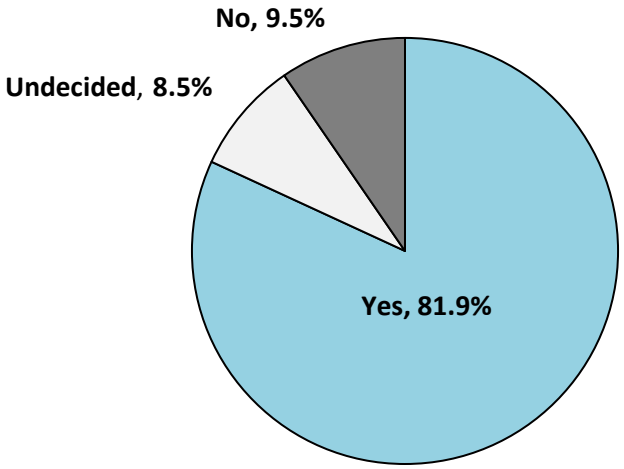
Main type of use of existing facilities?



Note: Person 1 - survey respondents, Persons 2-6 - other persons in respondents' households

The survey asked whether the new aquatics centre is warranted.

Out of 949 participants, who answered this question, **82%** of survey participants support the idea, **8.5%** are undecided and 9.5% - disagree.



Recognizing that a substantial majority of respondents are in support of a proposed aquatic centre, those that did voice concerns included the following:

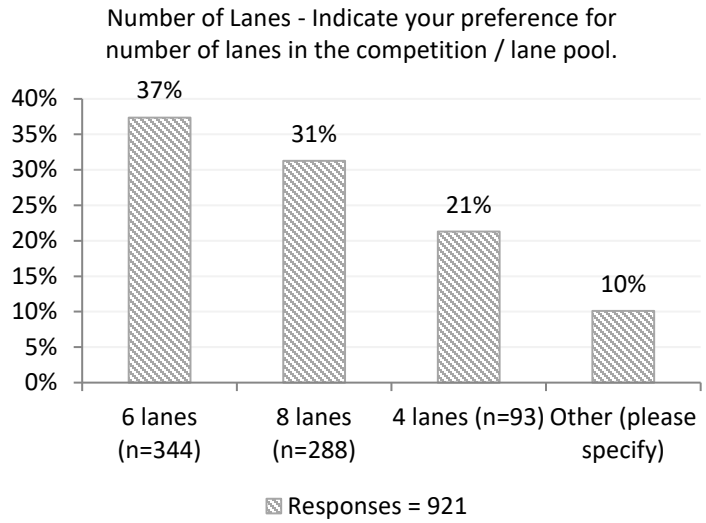
- High costs of building, maintaining, staffing, and operating a new facility;
- An expensive facility will increase property taxes;
- Other options are available within a reasonable distance;
- Investing in building a new facility may result less funding for maintenance and upgrades of existing facilities.

The purpose of a feasibility study is to give an opportunity for commentary from the public but also to provide detailed analysis of questions such as the extent of annual deficits, and how these relate to the scale of the facility proposed. This report provides answers to those questions.

In terms of desired elements of a new centre, the survey responses in the following section are noteworthy.

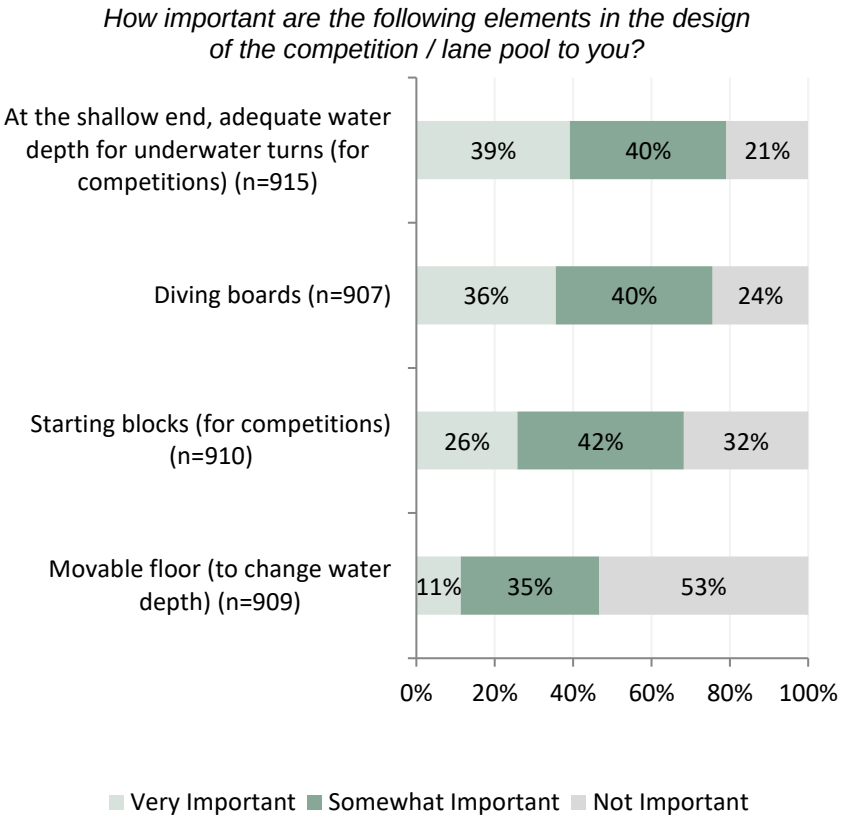
3.3 Emerging Needs for an Aquatics Facility

Survey participants were asked about their preferences for a potential aquatic facility in terms of activities and types of spaces (aquatics and dry uses such as fitness or community rooms).



Answering the question about the number of lanes in a competition / lane pool the majority (89%) indicated at least 4 lanes, of them 37% prefer 6 lanes and 31% prefer 8 lanes.

The following elements of competition / lane pools were ranked as important.



Aquatics Uses

All uses received a high number of responses; respondents generally agreed that all aquatic uses are important for them.

Over 90 % identified as **generally important** (this includes answers “very important” or “important” on a scale from very important to not important):

- Leisure aquatic activities
- Family recreation use
- Swimming Lessons
- Aquatic fitness classes
- Therapy purposes

Over 80% identified as generally important:

- Training opportunities
- Lane Swimming

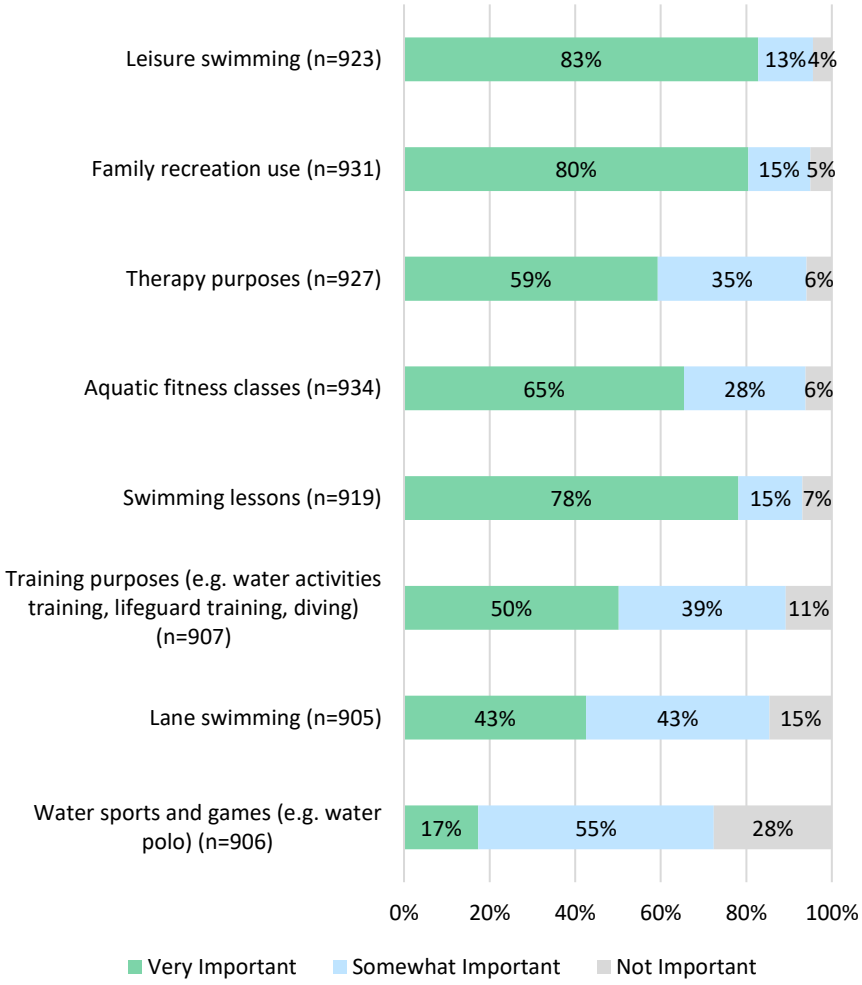
Over 70% identified water sports/games as important.

Other suggestions included:

- Hot tub or sauna, diving board, children's area
- opportunities for competitive swimming
- Making the pool wheelchair accessible
- Lessons or pool rental that provide additional revenue

In your opinion, what should be the top priorities for use of a new indoor aquatic centre?

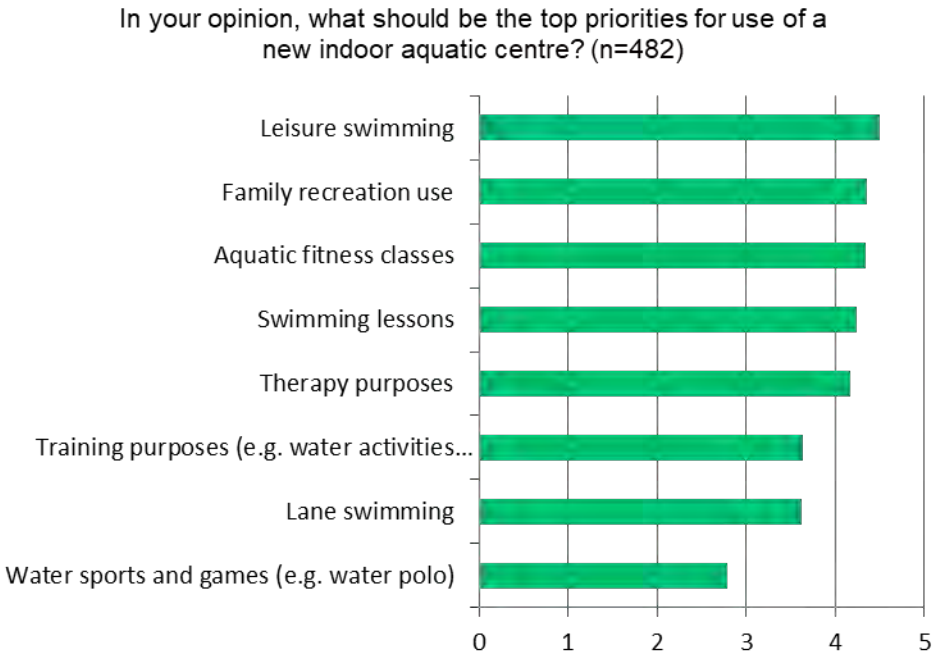
Answers to this question were cross-referenced by the type of household – looking separately at adults without dependent children and at families. Results for both groups demonstrated preferences similar to the overall responses – leisure and family swimming are important. Family use, swimming lessons and training are more important for families with children. Aquatic fitness and therapy somewhat more important for adults. These uses were followed by lane swimming, training, aquatic fitness and therapy.



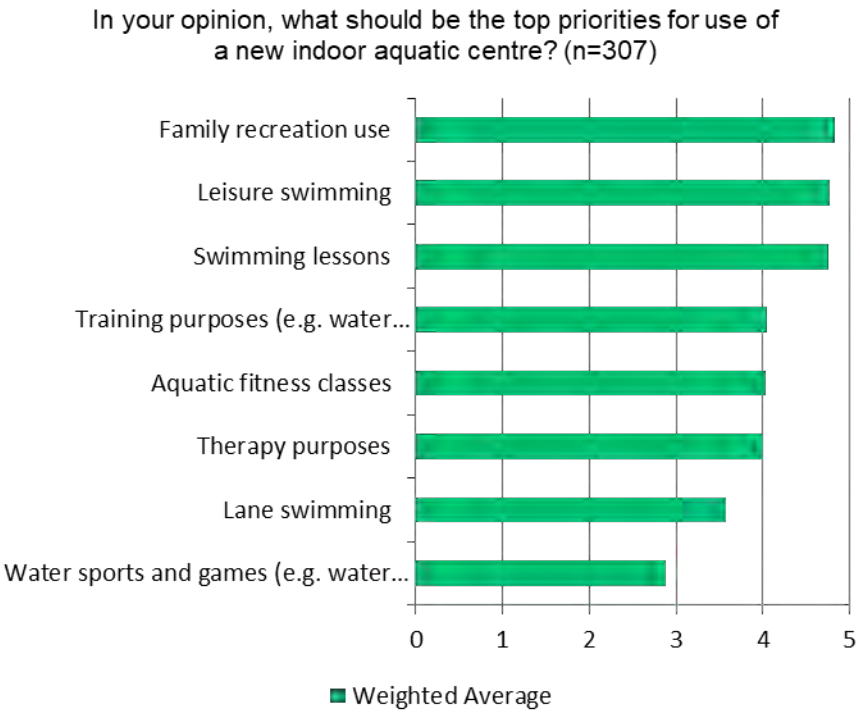
Cross-Tabulation by household type (select responses) –
Two cohorts: Adults (no children), n=487 | Families w children, n= 367

Top Priorities for a new aquatic centre

Couples, no children OR Adult living alone

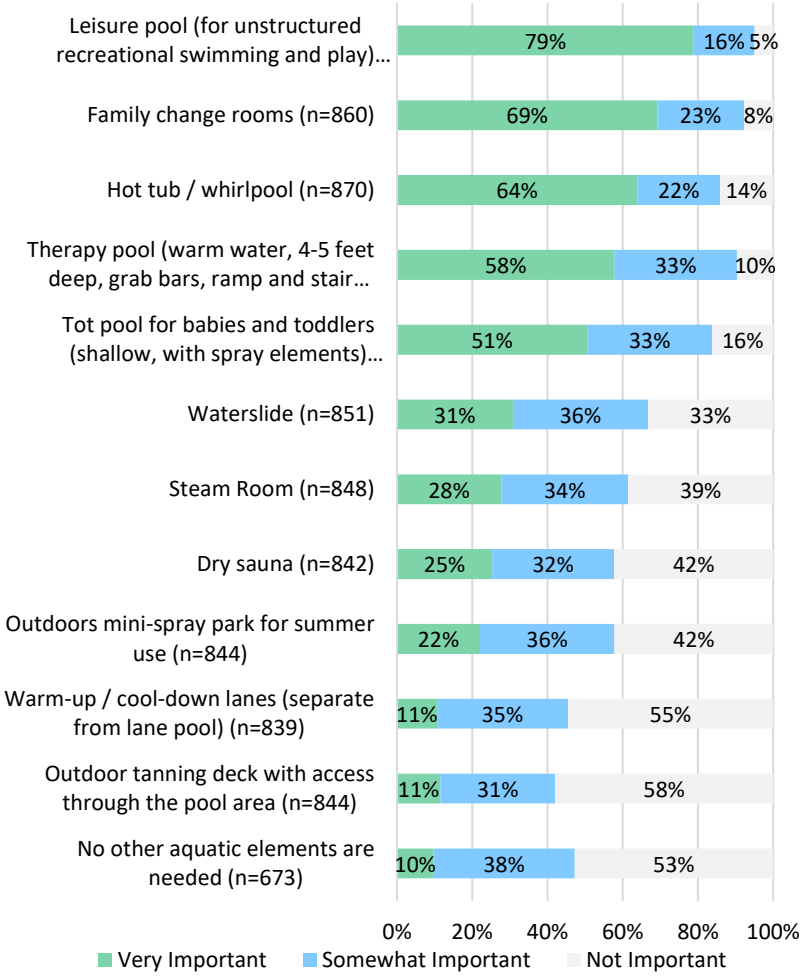


Parents with children OR Single parents



Aquatic Uses Beyond a Lane Pool

Beyond a lane pool, what are your top 3 priorities for other aquatic elements?



The survey received high numbers of responses to the question about aquatic uses beyond the lane pool; respondents generally agree that different aquatic uses beyond a lane pool are important.

Priorities were identified as follows:

Top priorities – generally important (over 80%):

1. leisure pool,
2. family change rooms,
3. hot tub, a therapy pool,
4. tot pool for babies and toddlers

Elements that are generally important (70-50%):

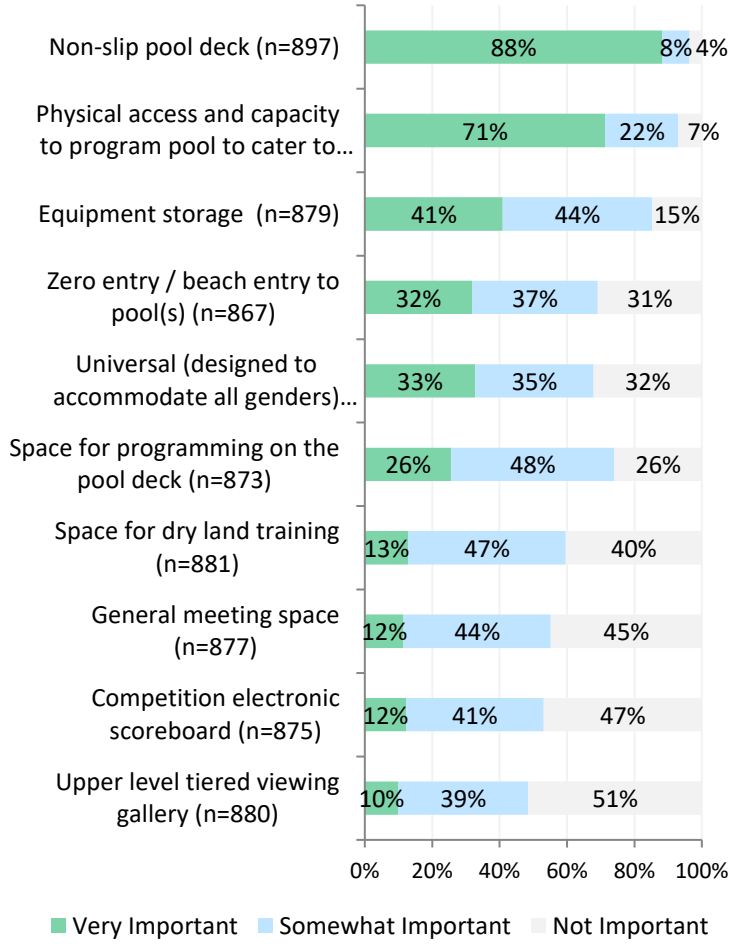
1. waterslide,
2. steam room
3. dry sauna,
4. summer outdoors mini-spray park or

Elements generally important (under 40%):

1. warm up or cool down lanes
2. outdoor tanning deck

Dry (non-aquatic uses)

In your opinion, how important are the following elements to your experience beyond the pool?



Dry uses or non-aquatic uses included a place to have a healthy snack, fitness / exercise spaces, multi-use activity court and weight-rooms, gymnasium and community meeting rooms and cultural uses.

The survey received high numbers of responses to the question about dry (non-aquatic) uses beyond an aquatics facility; respondents generally agree that different elements beyond a lane pool are important.

Top priorities – generally important (over 80%):

1. Non-slip pool deck
2. Physical access and capacity to program pool to cater to needs of persons with physical and/or cognitive disabilities
3. Equipment storage

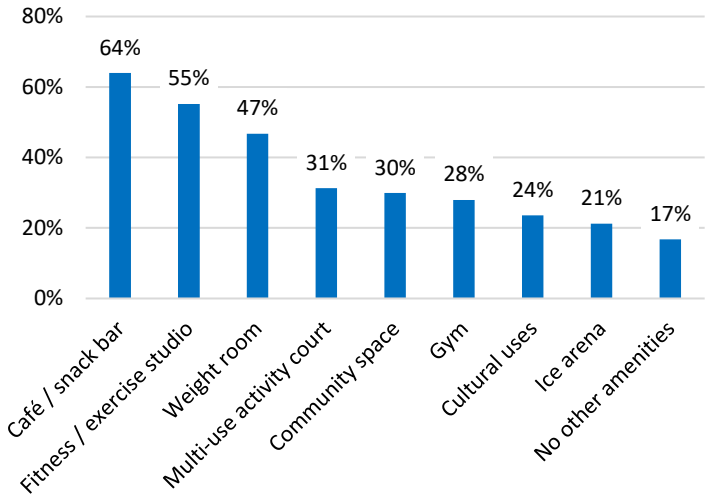
Elements that are generally important (70-60%):

1. Zero entry / beach entry to pool(s)
2. Universal (designed to accommodate all genders) change rooms
3. Space for programming on the pool deck / dry land training
4. General meeting space
5. Upper-level tiered viewing board

Other uses

Survey participants identified other uses that could be included in a potential aquatics facility.

Are there other indoor recreation amenities (dry uses) that you think should be included?



Facilities include: Café or a place to have a healthy snack (64%), a fitness studio (55%), weight room (47%), multi-purpose activity room (31%), and community space (30%).

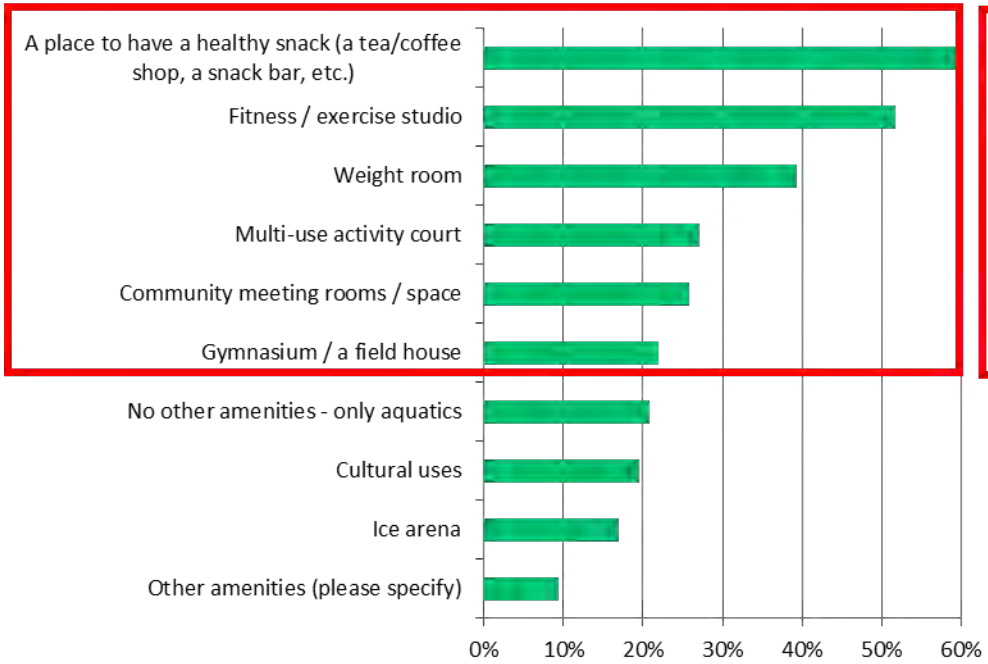
Gymnasium, cultural spaces, and ice arena were under 30% but over 20%.

Other amenities and uses in a potential aquatic centre were cross-referenced by the type of household – looking separately at adults without dependent children and at families. This comparison yielded similar results to the preferences described above. The preference in both groups is given to a place to have a healthy snack and fitness spaces, followed by community meeting spaces and gymnasium.

Dry-uses (indoor recreation amenities) in the Aquatic Centre

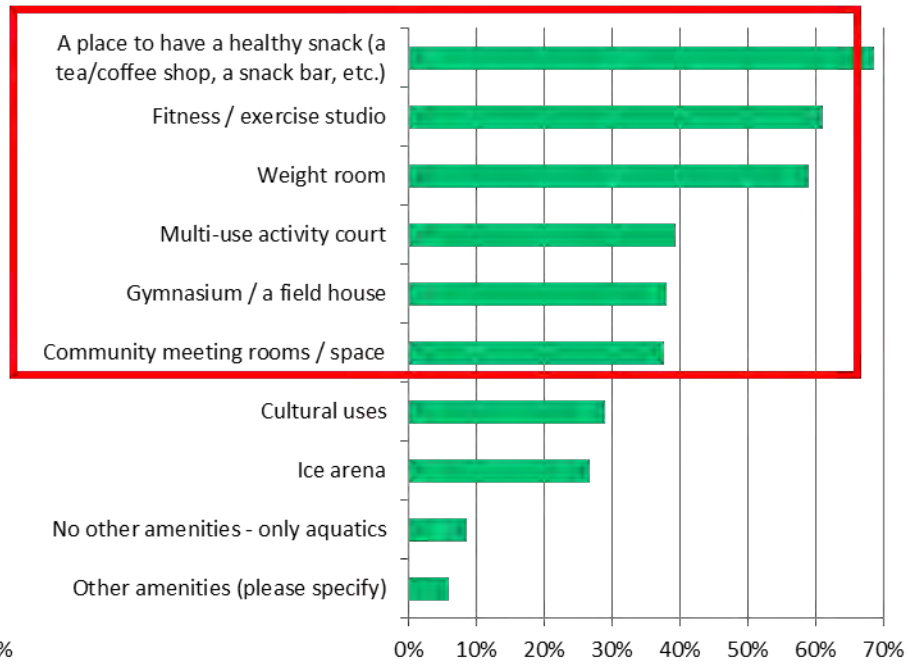
Couples, no children OR Adult living alone

Are there other indoor recreation amenities (dry uses) that you think should be included in the design of a new aquatics centre? (n=470)



Parents with children OR Single parents

Are there other indoor recreation amenities (dry uses) that you think should be included in the design of a new aquatics centre? (n=300)



Other suggestions

Answers to an open question about other suggestions of elements and uses in a potential aquatics facility include:

- **Additional facilities that were not included in the question**: Walking track, tennis and pickleball courts, physiotherapy and massage businesses, childminding services, climbing gym, kids birthday party / multipurpose room / lifeguard staff area.

- **Ensuring accessibility and equity** (both physical accessibility and access for low-income people and those who do not drive).

    - Barrier free access: "If it's not 100% wheelchair accessible, don't build it"
    - Bench for change room especially for people with disabilities

- Paying attention to the **needs of different age groups** (for example, lessons and programs, warmer water temperature for older adults, shallow pools for kids).

    - Childminding services / daycare
    - Swimming lessons for kids
    - Programs for youth
    - Physiotherapy, therapy services for all ages
    - Programs for seniors, Cardiac rehab (reflecting the population profile)

- Cozy meeting/seating/eating areas to meet up and enjoy a coffee/tea and snacks with the kids after swimming
- Activities: Yoga, Zumba, etc. guided workouts / swimming lessons
- Some respondents were concerned about the cost of construction, running and maintenance of a potential new Aquatic Centre.
- Some respondents suggested making space available for rent or competition to recover costs.
- "Walking and biking distance would be an asset. We totally need a pool in the south okanagan! There could be some amazing opportunities for youth! And all ages really!"
- "This facility should open as aquatics only but have space to develop further services as our existing facilities and service areas age-out. Perhaps further development after 3-5 years."

Frequency of use

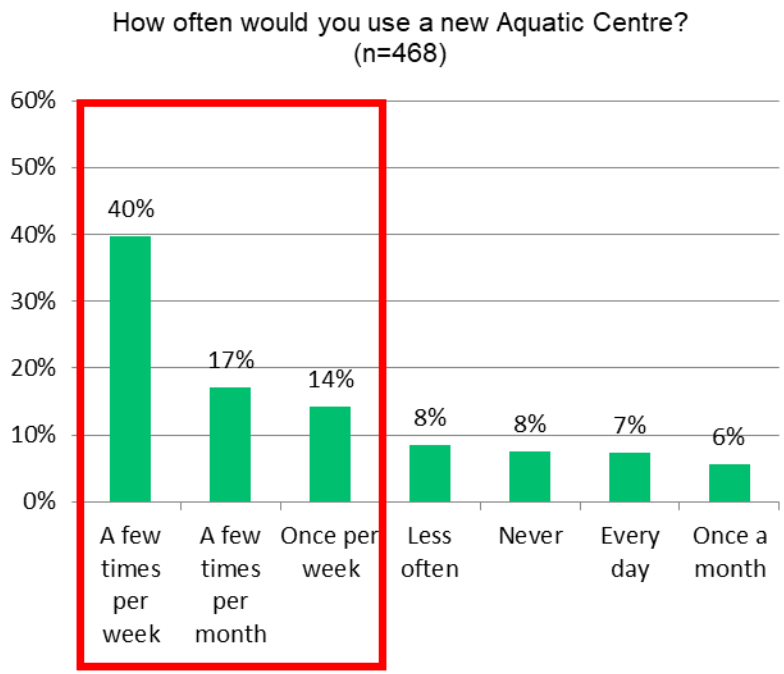
How often would respondents use a potential new aquatic facility showed that 87% of respondents with dependent children (n=306) would use such a facility at least several times a month and 50% - several times a week. Respondents who would not use the pool – 3%.

Among respondents without dependent children (n=468) 61% would use the pool at least once a month, 40% - several times a week. Respondents who would not use the pool - 8%.

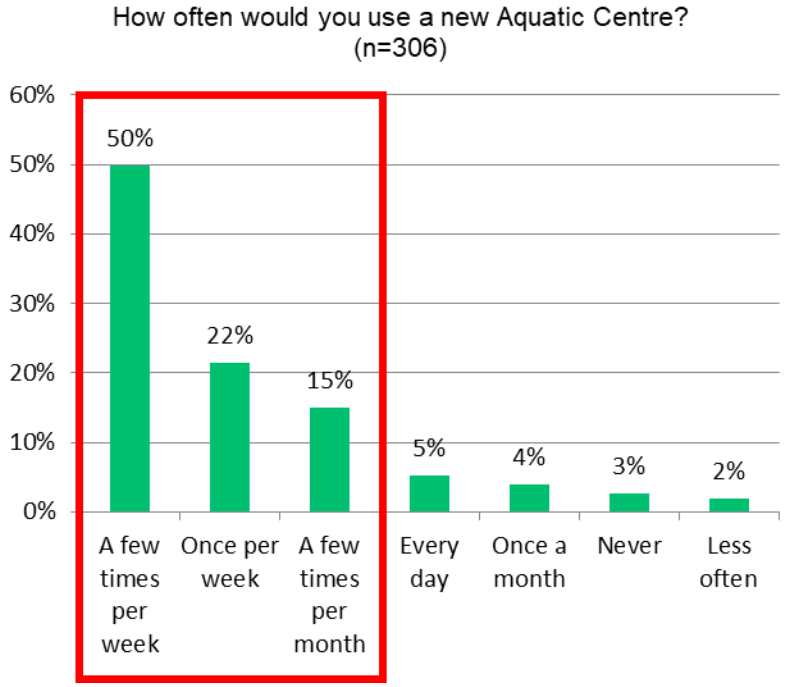
Cross-Tabulation by household type (select responses) –
Similar potential usage frequency

Potential Frequency of AC use

Couples, no children OR Adult living alone



Parents with children OR Single parents

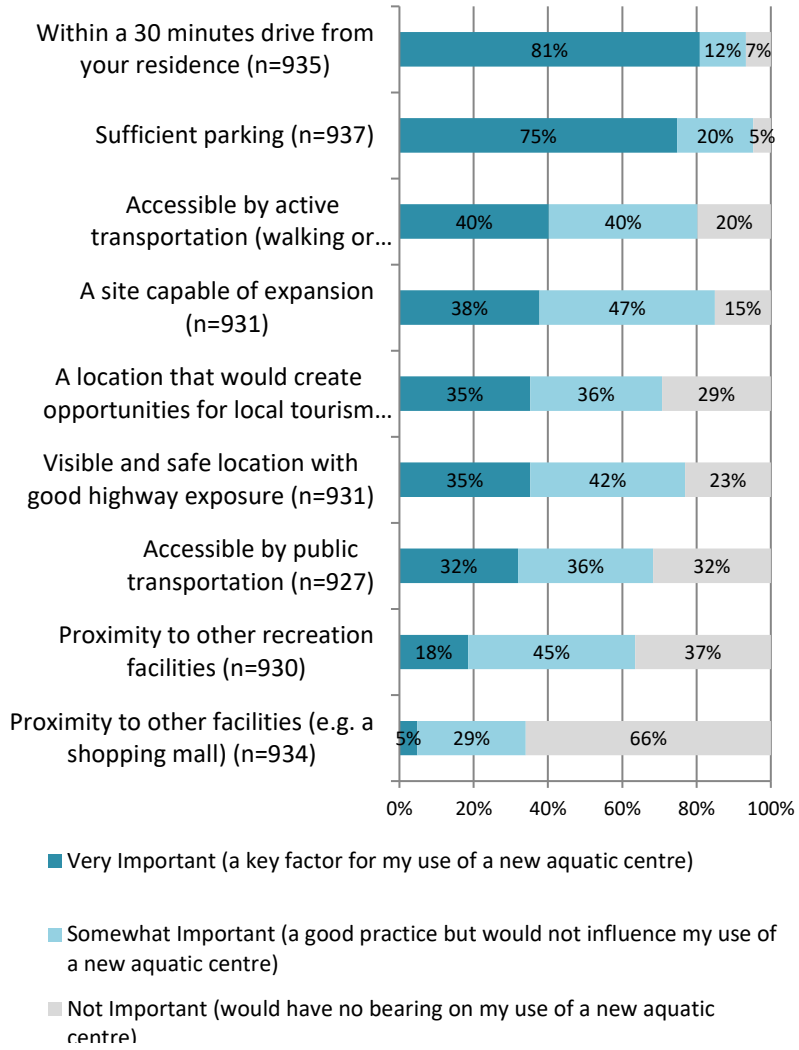


Criteria for a potential aquatics centre location

The Survey asked for opinions on what are the important qualities of a good location for a new aquatic centre in South Okanagan?

Criteria mentioned by most participants include “Location within 30 minute drive from one’s residence” and “sufficient parking” and a site that would be accessible by active transportation and public transport. Other important factors include “a potential site that would be capable of expansion” and a site that would create opportunities for local tourism and exposure to local culture and history, and proximity to other recreational facilities. These factors speak to the trend of co-location in the design and planning of recreation facilities.

In your opinion, what are the important qualities of a good location for a new aquatic centre in South Okanagan?



Comments and suggestions

Generally, survey participants expressed their support for the new aquatic facility as a positive change for communities:

- New recreation, fitness and sport opportunities for people in different age groups*;*
- New recreation space that is closer to where some respondents reside.

Main concerns included the cost of building and running a potentially expensive facility.

Summary of What We Have Heard

As it pertains to this assignment, the consulting team sought to drill down on the specifics of the functional space program for a new aquatics facility through the following:

1. Public input on the variety and nature, scale and configuration of space required within a new aquatic centre, resulting in a wish-list of community needs and wants.

2. A critical assessment of the feasibility of achieving community needs and wants weighed against the capacity and constraints of the identified locations, functional efficiencies achievable through investment in spaces including opportunities for multi-use, and potential development costs and challenges.

Based on the various engagement activities undertaken, there was a clearly expressed demand for:

- A multi-use, multi-generational facility where seniors, adults, youth and children are able to participate in aquatic and non-aquatic activities.
- A facility to accommodate recreational needs, family swimming programs and swimming lessons, as well as aquatic fitness, with some demand for lane and competitive swimming.

One of the key drivers for the development of the building program was to ensure that there is adequate pool tank configuration to satisfy learning, teaching, aquatic fitness and therapy and training programs.

The major building components that emerged from the engagement activities include the following:

- 6-8 lanes;
- Leisure pool / therapeutic pool;
- Different depths and temperatures for different types of programs;
- Hot tub;
- Tot pool for babies and toddlers;
- Physical access and capacity to program pool to cater to needs of persons with physical and/or cognitive disabilities;
- Non-slip pool deck / Zero entry / beach entry to pool(s);
- Adequate pool deck space to accommodate groups and multiple programs at one time;
- Accessible facility to accommodate families with children, seniors, different abilities. Quote: “If it’s not 100% wheelchair accessible, don’t build it”;
- Family changerooms;
- Universal (designed to accommodate all genders) change rooms;
- Provision of possible compatible programs such as multi-purpose rooms, fitness studios, flexible community spaces;
- Space for programming on the pool deck / dry land training;
- Important dry (non-aquatic) uses include a place to have a snack and a fitness studio;
- Potentially a gymnasium;
- Building an aquatic facility on a site with potential for expansion.

Meeting the greatest need: Modern, state of the art facilities are based on multi-tank designs. Typically, but not exclusively this includes leisure pools, along with a lane pool, and either therapeutic tanks or zero-entry learn to swim pools. Single tank facilities are built often when expansions to existing facilities are contemplated. Sometimes, a single tank is comprised of both a lane and leisure component for cost savings with an agreed expectation of compromise in the nature of use between lane and leisure use.

The reason for these configurations is to meet the greatest need – expressed in terms of the widest range of uses of the pool complex, the highest volume of visitation on a daily, weekly and seasonal basis, and thereby the greatest value for municipal operational funding support (the deficits). Unless both capital funding support and operational deficit support is provided from sources beyond the municipal tax base, maximizing the use of tax-payer dollars is one of the principal determinants of facility design and operation.

4 Location Analysis

4.1 Site Options

While a complete locational search and review was not part of the current assignment, a qualitative assessment of various sites was undertaken which outlines the need for an effective location, including maximizing access and proximity to population in the Service and Market Areas and the Region.

As part of this study, 11 sites were originally identified as potential sites for the SOAC complex. The sites were mostly located on public lands but private lands were also reviewed. A process was then initiated to analyze, review and rank the desirability of these potential sites using various criteria.

The process of identifying potential sites for an Aquatics Facility has included multiple steps including:

- Demographic and situation analysis
- Developing site criteria
- Analysis of the range of sites (See Appendix C)

As a result of this process, three sites were short listed:

1. Parks & Recreation Centre site - Oliver
2. Desert Park site - Osoyoos
3. Fruitvale Way site - Highway 97

Site 1 – Parks & Recreation Centre site, Oliver:

This site is currently the centre of parks and recreation facilities in Oliver and, as it is adjacent to the downtown, is very centrally located within the town. The site contains structured indoor sports facilities for hockey and curling as well as the Oliver Parks & Recreation Centre. It is also the home of outdoor baseball fields and an outdoor swimming pool. The study explored two potential locations of the new SOAC; one to the west of the arena and the other to the west of the curling rink. Both options had an impact on existing parking lots and sports fields but do reinforce the centralization of sports and recreation in the community. Because of the central location, site servicing requirements can likely be provided with minimal upgrading of existing services. This site is very convenient for Oliver residents but clearly less so for residents of Osoyoos.

Site 2 – Desert Park site, Osoyoos:

This site is located on vacant property south of the downtown area and west of Highway 97 and at the south end of the (currently vacant) Desert Park horseracing facility. There are public parks and recreation facilities south of the site such as outdoor racquet sports (tennis and pickleball) and a dog park and public facilities with outdoor and indoor sports facilities such as Osoyoos Secondary School. The Osoyoos Golf & Country Club is located just west of the site as well, so the proposed site is in an area focused on sports and recreation. However, by virtue of its location, it is less accessible for residents of Oliver, and members of the Osoyoos Indian Band relative to Osoyoos residents. Proximity to Highway 97 ameliorates this impact somewhat.

Site 3 – Fruitvale Way site, Highway 97:

This site is located on Fruitvale Way, a little used road on the west side of – and parallel to – Highway 97. It is located on a publicly-owned piece of crown land that has been confirmed to be surplus to the Ministry of Transportation and Infrastructure needs. Fruitvale Way can be accessed from the north and the south; there are two lanes of traffic in each direction with a centre, left turn lane and there is a major (uncontrolled) intersection at the south point of access for ease of access for users arriving from Osoyoos or the OIB. The site is adjacent to the highway and except for an existing berm between the highway and Fruitvale Way, the site is directly visible from the highway for drivers travelling in either direction at the south intersection. The site is almost perfectly centred between Oliver and Osoyoos; it is 14.5km (or a 13-minute drive) from the Oliver site and 9.5 km (or an 11-minute drive) from the Desert Park site.

It is important to note that other sites in the area that are not part of this assessment may be appropriate locations when measured on the basis of the criteria discussed above. However, for the purposes of developing a feasibility study for an implementable project – and one that can be developed in the short-term - it is important to anchor this work on a chosen site. A chosen site enables the site to be tested for what it can accommodate (scale of program), whether it is expandable, what the costs are and how it might operate. If other sites are identified, this would require a new conceptual site planning exercise, and review of costs and operations.

4.2 Establishing Site Evaluation Criteria

A range of information was collected to help determine the opportunities and challenges associated with the three short listed site options. This information was used to evaluate the sites based on the following criteria: site characteristics, regionality, planning objectives, and economic impacts.

A: Site Characteristics

The identified sites were evaluated based on a series of locational characteristics, including:

- Whether the land is in public ownership, or it could be easily acquired from the existing landowner.
- Any known development constraints of the site that would limit development or require resolution prior to developing the site.
- Because this is a regional facility, site visibility and prominence are important considerations for evaluation. The level of visibility in terms of sightlines from main arterials and within the Regional / municipal / OIB land use context are critical.
- The potential for colocation of services on site to reduce capital and operating costs, as well as to enhance customer access and amenity, and proximity to other municipal or public services, adjacent to, within walking distance or short drive of the site.

B: Regionality

The focus of this new aquatics facility will be regional - to serve the communities of Oliver, Osoyoos and the Osoyoos Indian Band, as well as the residents of the RDOS within a reasonable distance (primarily Electoral Districts A and C). Metrics related to regionality, transportation and access include:

- Facility located within an appropriate drive time relative to population centres.
- Convenient regional access by automobile with little or no impacts on local streets due to increased traffic.
- Ease of access for transport modes other than the car, including regional and local public transit and potentially for active transportation.
- Proximity to existing or planned community sport facilities and other compatible / complementary uses.
- Parking capacity on site with the ability to increase as required to accommodate future expansion. RDOS Zoning By-law would require approximately 1 parking space per 10 m2 of assembly area (Zoning Bylaw No. 2451, 2008 – Regional District of Okanagan-Similkameen, Electoral Area A – Consolidated 2021, Table 9.2, p.53) and locational convenience.

C: Planning Objectives

The new aquatics facility should be developed in a manner that fulfills the current planning objectives related to recreation for the municipalities, the OIB and the region. The key documents that have planning objectives related to recreation and growth include *The B.C. Sports and Active Living Strategy and Action Plan* (2015), *The Regional Growth Strategy* (2018) and the Region's Recreation Master Plan (currently being developed); guidance on creating opportunities for indigenous communities to engage in sports, active living, wellness, healing, and recreation; the Municipal Plans. For a more detailed discussion refer to the Policy Section above.

D: Economic Impacts

Other synergistic impacts of development were evaluated. Specifically, as it relates to supporting the local policy objectives, locations were evaluated on the potential benefits of a new facility on-site to positively contribute to local economic activity through likely retail/commercial and accommodations spin-offs.

4.3 Preferred Site Analysis

The leading site is at the south end of Fruitvale Way just off Highway 97 at the northern end of Osoyoos Lake. The site is a section of highway right of way that was created by the province during the construction of adjacent highway upgrades and appears to be no longer required. Most importantly, it is essentially equidistant from both Oliver and Osoyoos and highly accessible to both communities.

The other sites shortlisted were located in the two communities which would have reduced servicing costs and made them more accessible to users hoping to access the site on foot or by bicycle. However, this local accessibility would only be applicable to the host community and conceptually, was not consistent with the idea of a regional facility equally accessible to South Okanagan and OIB residents

Exhibit 23: Site Location - Fruitvale Way site, Highway 97

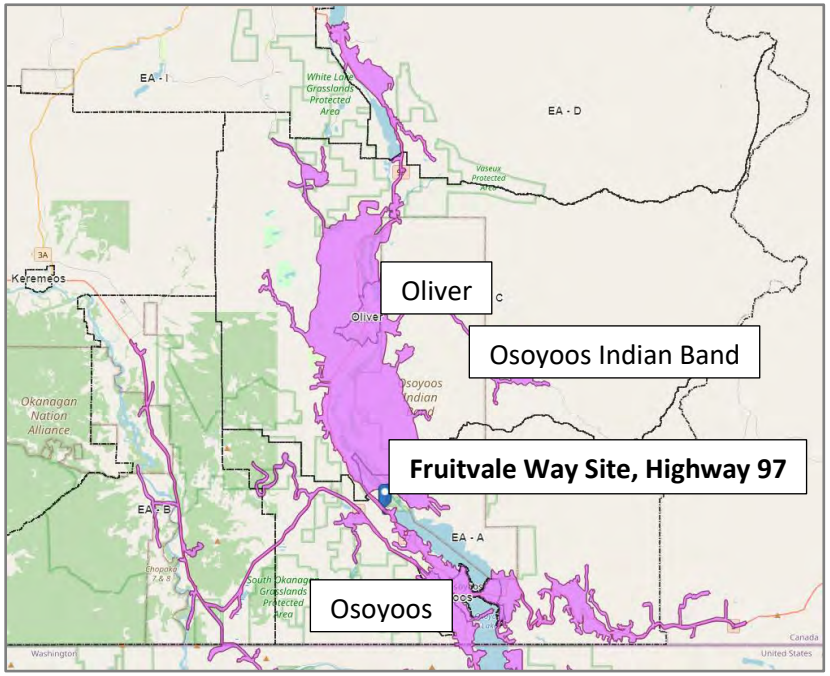




Photo Credit: MAD Studio

4.3.1 Current Status of the Land Holdings

Known as the Graveyard site, this former wayside aggregate pit is now surplus to requirements of the B.C. Ministry of Transportation and Infrastructure (MOTI).

Current Status of the Land Holdings

- As it relates to the needs of this project, there are two parcels – the gravel pit parcel and the relevant part of the linear right of way (ROW) for the main highway. The latter includes a service road and lay-by within the ROW; and
- The wayside pit has been used and depleted, and since reclaimed. At this time, the MOTI has no further interest in the property. Accordingly, the Ministry is able to commence the process of removing the Section 16 Gravel Reserve designation over the property.

Disposition Process:

- The wayside pit site is Crown-owned and an application for change of tenure is required to enable the site and its ownership to pass from the Crown to a new landowner in fee simple or ultimately, in the case of the OIB, transferred to the Reserve;
- In order to achieve this, MOTI itself would need to request cancellation of the existing tenure of the parcel by notification of such to the Ministry of Forests, Lands, Natural Resource Operations and Rural Development (FLNRORD);
- The approval of a land tenure change, and the removal of the Section 16 reserve designation is contingent on the proof of site reclamation. The reclamation plan was provided to the Ministry in 2011, and subsequently implemented; and
- With respect to the MOTI highway Right of Way (ROW), a road closure application is required to start the process toward obtaining a portion of highway ROW for development.

Discussions with MOTI Regarding Portions of the Site within the ROW

- MOTI administers the ROW and would determine the merit of disposing of that portion of the ROW to enable the proposed development to proceed;
- Based on preliminary discussions, MOTI is open to further consideration of disposition of part of the ROW as well as design solutions to ensure that the aquatic centre access and egress is effectively planned viz-a-vis the existing intersections with Highway 97 in the vicinity of the site;
- The existing service road (frontage road) provides access to land holdings and connects to the highway at two intersections – one just south of the site, the other to the north. We understand that MOTI may be willing to consider plans for the closure of one intersection (to the south) to enable use of the service road for development, with access provided to the site from the north;

- We understand that road closure and realignment of ROW is not a simple matter and involves a number of steps including not only a traffic impact assessment, but also a market value assessment and legal surveys for land parcel adjustment. While a number of the steps necessary for the disposition of the wayside pit parcel have been completed, we assume that a market value assessment for that parcel is also required; and
- Barring other circumstances, any decommissioning of the service road and redesign of intersections, as well as other impacts, would be at the cost of the development, not the Ministry.

Reclamation Plan

The reclamation plan, dated April 2011, includes provisions for soils replacement, vegetation establishment, and effective drainage and erosion control. The plan covers both the pit lands and the area that later formed part of the Highway ROW. There is no reference to the presence of environmental contamination of the site.

As regards geotechnical conditions of the site, it is reasonable to assume these are adequate. Whether any extraordinary costs related to building foundations or site development are likely, will be determined by future due diligence as part of the design process. Geotechnical analysis should be undertaken and environmental site assessment (as required) to determine the likelihood of any contamination.

Land Use Approvals

The site is zoned AG (AGRICULTURAL) AND PR (Parks and Recreation) on the slope side of the property.

The site is not serviced at present and services to do so extend to the site boundaries. At this time, the extension of services would necessitate a lift station or other infrastructure. It is understood that community development to the east also requires a servicing solution and that this may be an opportunity for services to be extended as far as the Fruitvale Way site.

Opportunities and Challenges

Additional important considerations were identified in the process of analysis and exploration.

Site Geometry:

The preferred site is essentially long and narrow. The "principal" entry to the site is at the south end of the site between Highway 97 and Fruitvale Way and therefore, the logical location for the building to maximize its visibility from the passing traffic. At this end of the site, there is also a large, flat, paved area which is on the road right of way and it is assumed that this flat area would be available for site parking. It is recommended that during the property acquisition phase (i.e. the transfer of Crown Land for the purposes of this

project), the possibility of moving the eastern property line to incorporate this paved area within the site boundary be explored.

Site Excavation:

The majority of the site is located at a higher elevation than the adjacent road. This elevation change is highest on the south end of the property where the proposed facility would be located – on average, approximately 3m. At this stage, it is assumed that the subsurface conditions are likely made of mainly clay and/or sandy soils as the site is well away from the bedrock of the adjacent mountain and, if correct, it is likely that these soils could be removed and the site leveled, excavated and prepared for construction relatively easily. If not, it would be possible to "shift" the proposed building footprint to the north as the grade change is approximately 50% less than the preferred building location. Nonetheless, a geotechnical investigation should confirm this assumption prior to proceeding with the next phase of the project.



Site Services:

The site is also across the highway from a recently proposed development and this preferred site would benefit from any of the site servicing work that may have been completed for this project. However, site servicing – along with the Site Excavation – are likely the two largest challenges related to the preferred site and both will need to be confirmed and quantified at the next phase of the project.



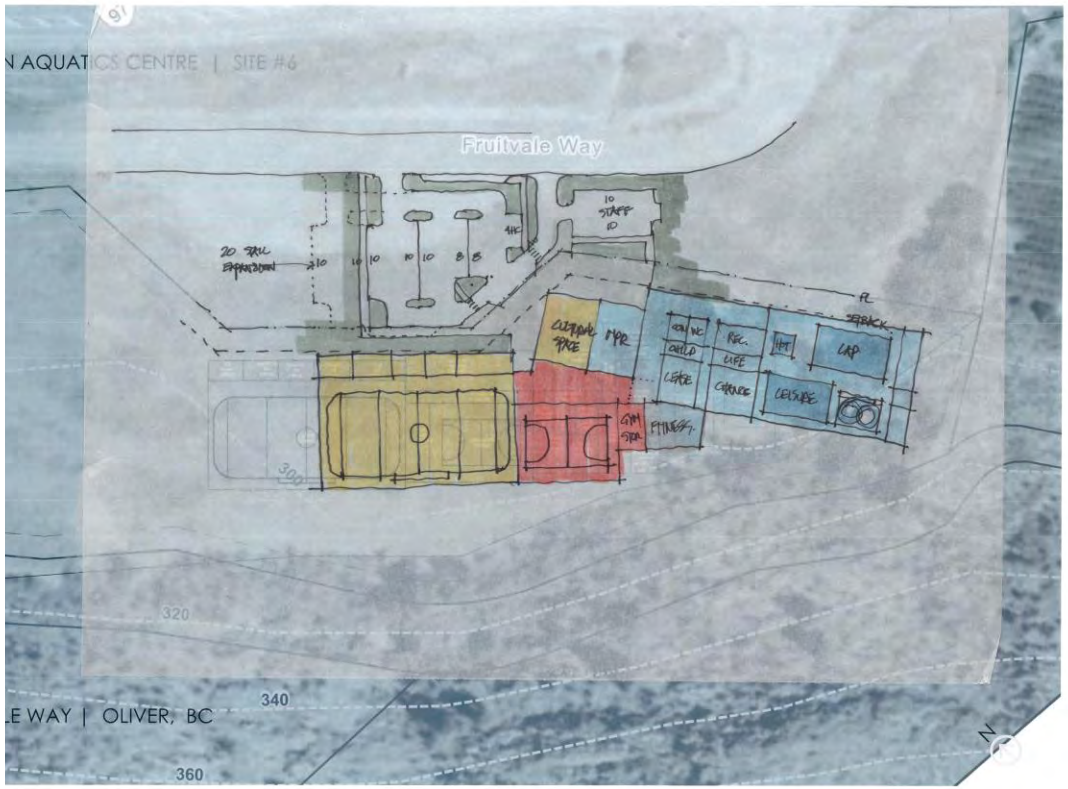
Building Layout:

The conceptual building layout is relatively long and narrow given the site constraints. This building orientation has some inherent inefficiencies compared to a more square and compact building footprint. However, this also allows the building to have a very public (and likely highly glazed) façade facing the street which is towards the northeast which will allow morning light into the public spaces and the pool basin. The building layout on the preferred site shows the core program as well as potential phasing of the project and shows how additional phases could easily be added on the north end of the core program at a later date.

A potential site for the facility would need to be able to accommodate additional programs through future expansion. The proposed approach is to locate the aquatics facility with the ability to expand to include proposed CORE uses in the short term and offer a potential to accommodate CORE Plus uses in the future. This involved strategic siting that has the least impact on operations of the arena and minimizes the disruption to the existing parking and traffic circulation. (As shown on the Exhibit below.)

The Concept Plans indicating the size and relationship between the program elements and their areas are discussed in the following section.

Exhibit 24: The CORE, Plus and Future programs on a potential site



5 Core Program

5.1 Design Principles

The core program was developed from key design principles which were based on input from the committee, the public and from the consultant team's analysis of current practices and future trends. Some of the key principles are noted below:

- Provide a range of core aquatics programs that provide opportunities for all potential users;
- Create a destination, multi-use facility with a focus on health and wellness for all ages and abilities;
- Provide an inclusive facility to promote use by all members of the three participating communities to reflect diversity of background and levels of participation;
- Locate the facility for maximum exposure of public spaces and opportunity to see activities within.
- Arrange the sequence of aquatic spaces to allow for the inclusion of a future gym.
- Indicate how parking areas can expand to accommodate increased parking needs.

5.2 Conceptual Design Summary

As noted in previous sections of this report, the facility design considered best practices of similar facilities from both within and outside the region. It also considered input from the committee as well as the general public. As is typically the case, the "wish list" of all of the potential design elements was long. However, the process used to identify what could possibly be included in the facility clearly indicated a ranking of the most important and desirable components. This enabled the team to consider a phased development plan and three potential phases were identified: Phase 1 - Core Program, Phase 2 - Plus Program, and Phase 3 - Future Program. In order to understand the distinctions between each option, the following sections provide summaries of their relative design principles, detail functional space programs in an area comparison matrix.

5.3 Programs Options - Phasing Approach

The CORE functional space program is based on the facility being both local and regional in nature, representing an appropriately sized aquatics facility with adequate change facilities and generous deck space for the pools, well-suited for a variety of community uses as well as training and potentially competition uses.

The three options are presented as a Core option and two phases – Phase 2 Plus Programming and Phase 3 Future Programming. These options were generated from the ideal program of spaces, but the end results are different as they

respond to unique site influences and opportunities. Therefore, the construction cost results also differ but not by a significant amount. Depending upon which option is selected, future design explorations may be able to find further planning efficiencies.

The matrix below identifies the functional space program for the aquatics facility and provides a detailed side-by-side comparison of the proposed net building program that is applicable for each of the two options. The refined planning for each option, while still conceptual, responds to the general requirements of an aquatics facility and ancillary spaces. The option for the addition of a gymnasium is also provided separately. The matrix enables a detailed comparison for each of the discreet items proposed within each of the facilities relating to size, number, and specifications, as relevant. The functional program and allocation of space will continue to be refined as the design process progresses.

Phase 1 - Core Program:

The core program focuses on the aquatics facility and related spaces. The pools in the natatorium include: 1) a lap pool for competitive and recreational lane swimming as well as diving platforms; 2) a leisure pool for family and general users that would likely include elements such as a slow moving "lazy river" as well as spray and bubbling water features and beach access; 3) a hot tub for relaxation and therapeutic treatment; 4) an indoor waterslide; and 5) a spectator viewing area. The spaces directly related to the natatorium include service spaces such as mechanical rooms and storage and staff spaces (reception and administration area, lifeguarding, and staff support areas). There are also spaces for the users of the aquatic centre such as entry vestibule, reception counter and change rooms that would likely include male, female, family and universal change areas. There were also other functions that were identified as core program elements and that needed to be accommodated in the plan. These include spaces such as a concession area (as the facility is located outside of the town centres and far from any related amenities) as well as a child-minding space, a fitness room (accessible only through the interior corridor that links the reception area to the change rooms) and a multipurpose space for general community use. There was also the desire to provide a leasable area that could be an attractive business opportunity to help offset capital and/or operational costs. The space would be of interest to retailers and/or professionals who see a concentration of potential customers and clients interested in health and wellness.

Phase 2 - Plus Program

Because of the proposed location and based on the regional nature of the facility, a "plus program" was considered and developed. It included a gymnasium that could be used for many types of team sports requiring an indoor court such as basketball, volleyball, badminton, pickle ball as well as general recreation programs. Support space for this facility includes a large storage area to accommodate related equipment for the various user groups. It also includes a

cultural space given that one of the three key participants in the projects is the Osoyoos Indian Band.

Phase 3 - Future Program

This phase is identified separately from all other phases for several reasons. Firstly, it has a high capital cost and, as noted in the costing section of the report, the core program alone is a relatively ambitious project for the region. Secondly, it is understood that other potential sites and projects that include ice arena facilities are currently under consideration. Thirdly, there is a substantial opportunity for energy efficiency if a facility such as this with high refrigeration loads is combined with a facility with high heating loads such as an aquatic centre with a potential for a "net zero" building. Lastly, as a "regional sports and recreational facility", an arena is a natural fit.

Exhibit 25: Floor Plan Phase 1

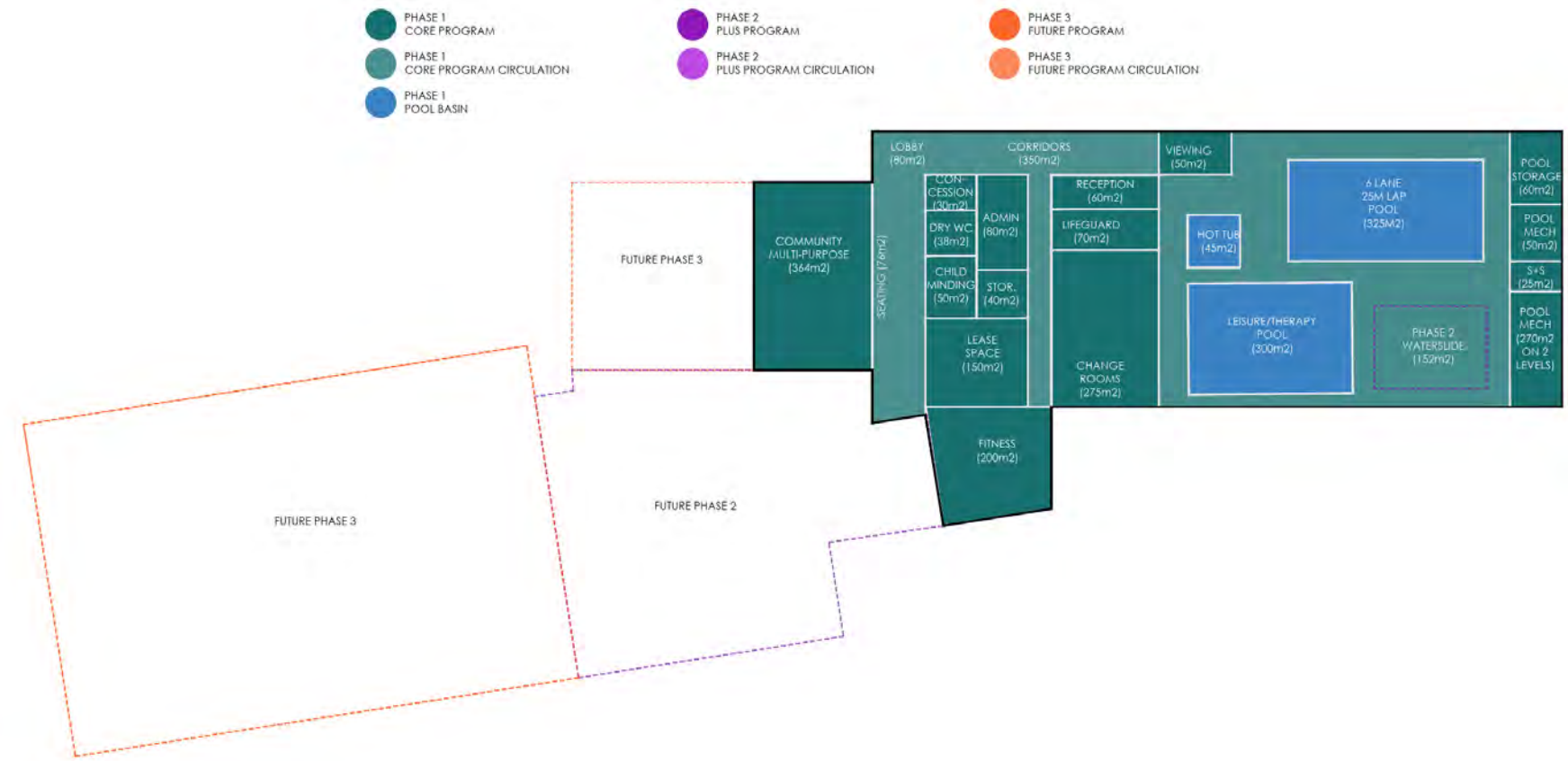


Exhibit 26: Floor Plan Phase 2

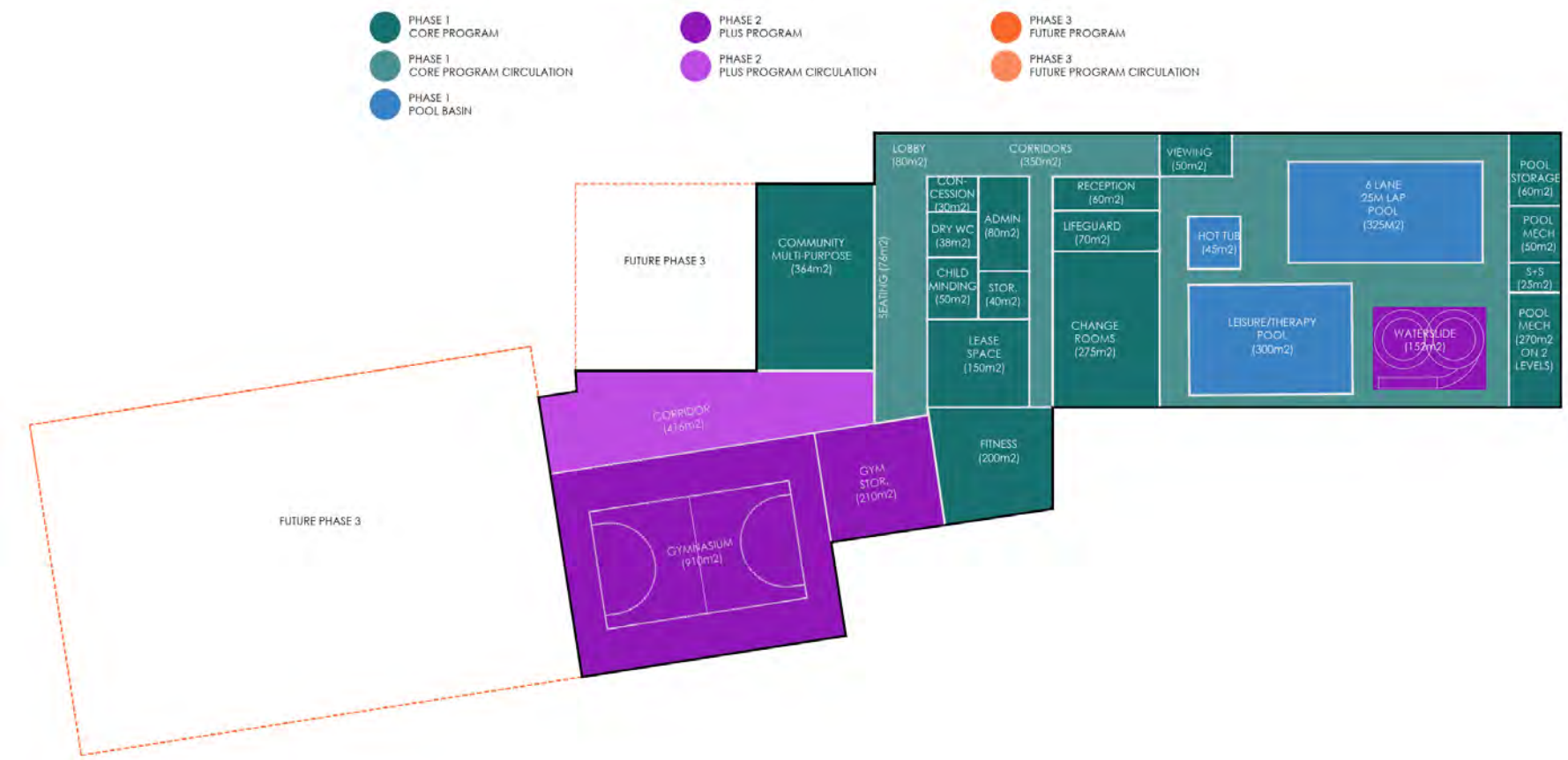


Exhibit 27: Floor Plan Phase 3



Exhibit 28: Site Plan Option A



Exhibit 29: Site Plan Option B



Exhibit 30: Detailed Functional Space Program Area Comparison Matrix

		Phase 1 - Core Program	Phase 2 - Plus Programming	Phase 3 - Future Programming	Notes:
Program Multipurpose Rooms (m²)	Leisure Pool	300			Includes. 3 lane therapy pool, tot area, beach entry
	Lap Pool	325			Typical 6-lane pool
	Hot Pool	45			
	Waterslide		0 (On Exst. Deck)		
	Pool Deck	863			
	Change and Washrooms (Wet)	275			Includes Family, Male, and Female
	Sauna	12.5			
	Steam	12.5			
	Guard and Staff	70			
	Pool Storage	60			
	Pool Mech	330			
Public (m²)	Lobby	80			
	Pool Viewing @ deck level	50			
	Concession	30			
	Seating	76			
Admin. (m²)	Reception	60			
	Admin	80			
	Garbage/ other storage	25			

		Phase 1 - Core Program	Phase 2 - Plus Programming	Phase 3 - Future Programming	Notes:
Multipurpose (m²)	Fitness Centre	200			Weight room
	Community Multi-purpose	364			
	Lease space	150			
	Child-minding	50			
	Storage	40			
	Washrooms (Dry)	38			
	Gymnasium w/ multi-use Activity court		910		
	Gym Storage		210		
	Cultural Facilities			560	
	Ice Arena			2375	
	Arena Changerooms			156	
	Arena viewing/seating (second floor)			156	Above arena changerooms
	Arena Ice plant			78	
	Arena Zamboni			78	
	Arena Storage			122	
	Circulation	350	416	0	
	walls (5%)	194	77	176	
	Total Gross Floor Area (m²)	**4080**	**1613**	**3701**	
	Total Facility area after Phase 3			9394	
Features	Waterslide		Yes		
	Diving Boards	Yes			
	Starting blocks	Yes			
	Tot Pool	Yes			
	Barrier Free/ Disabled access	Yes			

5.4 Summary of Proposed Phasing Options

Three options, presented above as a Core option and two phases – Phase 2 Plus Programming and Phase 3 Future Programming, were generated from the ideal program of spaces, but the end results are different as they respond to unique site influences and opportunities.

In the phasing approach, the Phase 1 or CORE functional space program is an appropriately-sized aquatics facility both local and regional in nature. The facility features adequate change facilities and generous deck space for the pools, well-suited for a variety of community uses as well as training and potentially competition uses. Phase 2 or a "plus program" adds a multi-use gymnasium and support space. Phase 3 “Future Program” adds an ice arena.

The matrix and floor plans above identify and demonstrate the functional space program for the aquatic facility and the two additional phases. An exhibit below summarizes the above matrix providing an at-a-glance view of the three phases.

Assessing the options should involve comparing the design merits in conjunction with an understanding of the comparative areas and costs. The functional program and allocation of space will continue to be refined as the design process progresses. The construction cost will differ depending upon which option is selected.

Exhibit 31: Program Comparison Overview

Components	**Core Program**	**Phase 2 Plus Programming**	**Phase 3 Future Programming**
Program Aquatics (m^2)	2,293		
Public Space	236		
Administration	165		
Multi Purpose	842		
Non-Aquatic Components			
Gym Addition		1,120	
Ice Arena Addition			3,525
Circulation / Walls	544	493	176
Total Gross Floor Area (m2)	4,080	1,613	3,701
Total Area – Facility in Phase 3 (m2)			**9,394**

5.5 Capital Cost Estimates

Capital cost estimates represent an order of magnitude estimate (OME) of probable capital costs based on the scale and composition of uses in the building. As such, it represents a Class D estimate of capital costs which is the first and most preliminary of cost estimates that accompany concept development. This type of cost estimate is also referred to as a pre-design estimate of costs. As such, it is appropriate to add a contingency factor to the resulting cost estimates. In this case, a reasonable contingency provision is in the order of an additional 25%[2]. The anticipation is that, as the project is subject to more design refinement, and more details regarding site related costs are known, this overall cost contingency can be reduced.

Subsequent costing of the project can occur if and when the project moves beyond the design concept stage. A Class C estimate of costs equates to approximately a 33% level of design development; a Class B costing at the 66% level of design development, and a Class A costing at the time of completed tender documents. By that time, the expected accuracy of costs is within 5 to 10% of the eventual bid prices.

As it pertains to site development, these are necessarily based on reasonable allocations of cost taking into account both the type and scale of the building, and any relevant information regarding the site.

5.5.1 No Estimation of Escalation Beyond 2022

The cost estimates are based on current prices and are not escalated to a predetermined point in the future when development may occur. It is apparent, and has been for some time, that construction cost escalation in Canada in all regions has outpaced general measures of inflation.

The reality of cost escalation is therefore a primary consideration in any decision to move a project forward that still has a number of hurdles to be overcome before detailed design is commissioned. In this case, these additional steps involve the strategic considerations of potential cost sharing (both capital and any resulting annual deficit), governance of the facility and the potential for developing the project in concert with other required recreational infrastructure.

[2] Note that Class D contingencies are often referred to in terms of **+/-** 25%. For initial planning purposes, a more reasonable method involves establishing a total project cost per sq. ft., **plus** a contingency (25%) that may be reduced or confirmed as the design process is refined. Note that some government grant applications require higher contingency estimates in order to fully mitigate potential cost risks and/or ensure that the necessary one-time funding envelope is not exceeded. In our opinion, 25% is a reasonable estimate in order to provide a meaningful assessment of cost.

5.5.2 Capital Cost Inclusions

Capital costs are inclusive of:

- Construction hard costs;
- Soft costs – these include all associated fees for surveying, site testing, design, engineering, overhead, administration and bonding, permitting, legal and project management, and construction contingency, etc.;
- Furniture Fixtures and Equipment (FF+E);
- Additional (Class D) design and construction contingencies; and
- Allocations for site development inclusive of site grading, earthworks, services emplacement, storm water management, landscaping, internal roadways, lighting, etc.

Accordingly, the costs presented represent an estimate (including any relevant allocations for site works) of total project cost including contingency.

5.5.3 Capital Cost Exclusions

Capital costs exclude any site-specific extra-ordinary development costs (e.g. presence of contamination, unknown geotechnical constraints or other environmental conditions), as well as any costs associated with extension of necessary services to the site.

5.5.4 Aquatics Facility: Order of Magnitude Capital Costs

The breakdown of the costs associated with a core functional program of some 44,000 sq. ft. is shown in the following exhibit. The resulting estimate is in the order of $33.5 million and is then subject to a cumulative contingency of roughly 25% for design and pricing risks and additional construction-related risks. The resulting total project cost before GST is estimated, with contingency, at just over $42 million.

5.5.5 Future Potential: Order of Magnitude Capital Costs Associated with a Double Gymnasium

Similar costs are presented for a second phase of the building at some point in the future. This includes a range of additional program items (17,000 sq. ft.), the largest element of which is a double gymnasium.

The combined costs for the Core aquatics centre as well as a second phase modular addition are also presented.

The costs associated with a potential third phase that could include one or more indoor arenas are not provided. This third phase is speculative in terms of both the specifics of what it includes as well as the timing of such development. We include this phase in the concept diagrams and site-fit assessments to better define the capacity of the preferred site to enable future expansion-in-situ.

Exhibit 32: Order of Magnitude Capital Cost Estimate – Core Program

Building Costs - AQUATICS (CORE PROGRAM)

Item Q4 2021 COSTS - NO ESCALATION	Elemental Quantity (Sq. M)	Elemental Quantity (Sq. Ft)	Elemental Unit Measure (Hard Costs per Sq. Ft.))	Hard Costs ($)
A BUILDING HARD COSTS	4,080	43,920	$550	$24,155,968
Total Core Program Building Costs				$24,155,968

Site Development - Allocation

Item ALLOCATION	Hard Costs ($)
TOTAL SITE WORKS	$2,000,000.00
TOTAL CORE PROGRAM HARD CONSTRUCTION COSTS	$26,155,968
TOTAL SOFT COSTS (Including FF+E)	$7,323,671
TOTAL Core Program	*$33,479,639*

Contingency for Class D Order of Magnitude Estimate			
1. Design and Pricing	15.0%		*$5,021,946*
2. Construction	10.0%		*$3,850,158*
Total contingency	26.5%		*$8,872,104*

Grand Total for CORE PROGRAM		*$42,351,742.81*
	PSF	$964

Exhibit 33: Order of Magnitude Capital Cost Estimate – Plus Programming

Building Costs - PHASE 2 PLUS PROGRAMMING

Item	Elemental Quantity (Sq. M)	Elemental Quantity (Sq. Ft)	Elemental Unit Measure (Hard Costs per Sq. Ft.))	Hard Costs ($)
A BUILDING HARD COSTS	1,613	17,360	$400	$6,944,007
Total Phase 2 Plus Programming			$400	$6,944,007

Site Development - Allocation

Item				Hard Costs ($)
ALLOCATION				
TOTAL SITE WORKS			$30.00	$520,801
TOTAL PHASE 2 HARD CONSTRUCTION COSTS			$430	$7,464,808
TOTAL SOFT COSTS (Including FF+E)			*28%*	$2,090,146
TOTAL Phase 2 Plus Programming			*$550*	*$9,554,954*

Contingency for Class D Order of Magnitude Estimate				
1. Design and Pricing	15.0%			*$1,433,243*
2. Construction	10.0%			*$1,098,820*
Total contingency	26.5%			*$2,532,063*

Grand Total (Phase 2) → ***$12,087,016.64***

Exhibit 34: Order of Magnitude Capital Cost Estimate – Core Plus Combined

COMBINED PHASE 1 AND PHASE 2	**5,693**	**61,280**	**$549**	**$33,620,775**
TOTAL SOFT COSTS			***28%***	**$9,413,817**
TOTAL Project Costs			***$702***	***$43,034,592***
		PSF		***$702***
Contingency for Class D Order of Magnitude Estimate				
1. Design and Pricing	15.0%			***$6,455,189***
2. Construction	10.0%			***$4,948,978***
Total contingency	26.5%			***$11,404,167***
Grand Total Full Build-Out				***$54,438,759.45***
		PSF		**$888**

6 Assessment of Operating Financials

6.1 Indoor Aquatics as a Value Proposition

Financial projections of operating performance contained within this section, are based on operations at a normalized state; that is, with the facility operating based on a full schedule and operational staff model, as would be expected to be achieved if not in year 1 but certainly by year 2 of operations. The analysis is intended to provide an illustration of the estimated operating costs and revenues, and the surplus/deficit for the proposed new aquatic facility, over a five-year period.

Municipal indoor pools, by themselves, are deficit propositions. They are also extraordinarily valuable assets for promoting community heath and wellbeing, sport and competition and, coupled with other recreational uses in a single complex, are arguably one of the most important investments that growing communities can make.

The value proposition for indoor aquatics is often lost in the face of the deficits created annually. Yet, by a number of measures these facilities create impacts that do justify the annual cost. Typically, a municipal class A pool will, by itself, represent the largest source of annual deficit of any municipal recreational facility (after accounting for gross floor area). However, in terms of utilization as measured by the number of person visits – an indoor aquatics venue will often outperform other assets such as indoor ice arenas, gymnasiums, and a range of outdoor facilities. While deficits are higher than for many other facility types on a gross floor area basis, on a per person use basis, it is quite possible that deficits are lower than for other traditional services such as indoor ice, field houses, and community centres.

Based on our experience of expected utilization for aquatic centres in different geographic markets, and for facilities of varying size, the following estimated utilization is relevant to the financial performance of a new South Okanagan Aquatics Centre (SOAC).

Exhibit 35: Projected Utilization Based on Reasonable Schedule

	Annual Hours	Assumed Persons Per Hour	Person-Visits
Hourly rentals	1,710	12	20,520
Public Swim - Lanes	920	10	9,200
Public Swims/Drop-in	710	20	14,200
Lessons - Lane	630	10	6,300
Lessons - Leisure	840	20	16,800
Program - Aqua Fit	350	12	4,200
Total	5,160		71,220

The analysis conducted herein is based on the current municipal model of pricing for aquatics services elsewhere in the Okanagan region and is not based on a non-municipal membership model and pricing strategy.

As with all such financial projections, there are a number of key assumptions, explained below, which are critical to understanding the future operating risks associated with this investment.

6.2 Framework for Financial Analysis

6.2.1 General assumptions

The proposed facility operations are based on the functional space program developed for this project. The total floor area of the CORE aquatics building which includes multi-purpose space is 4,080 sq. m. (44,000 square feet). Additional space, conceived as a second phase if necessary, is a gymnasium, at 1,613 sq. m. (17, 360 sq. ft.).

A third phase – the potential addition of indoor ice and cultural spaces – is not considered in the financial analysis. It remains relevant in determining the suitability of any of the candidate sites to host a full expansion of uses over time.

For the financial analysis of both capital costs and operating costs and revenues, we are including both the aquatics and gymnasium elements **(i.e. Phase 1 CORE Program and Phase 2 PLUS program)**, combining both phases into a single phase. This is appropriate for the following reasons:

- The development of a dedicated aquatics facility represents the costliest approach to provision of recreation services. A multi-purpose venue, by contrast has the capacity to spread costs over a broader range of services and yield additional sources of revenue;
- A multi-purpose building represents best practice and has greater benefits for the public; and
- If operated effectively, the specific addition of a dry-use floorspace (gymnasium) has the potential to improve the bottom line for the project. Costs to operate this space are low relative to other types of space, and demand for the space is demonstrated. We also expect the recent RDOS Master Plan to confirm the need for additional flexible gathering space in the region.

The operating model for the new centre is premised on an operating program for each of the revenue-generating spaces. **For the purpose of this analysis, the revenue generating spaces are defined as the aquatics facility, the gymnasium, and the multi-purpose rooms.**

The operating program is based on a 16-hour, 7 day-a week operation, with lower utilization during the 3 summer months (June-August) and a pool closure of 2 weeks over the course of the calendar year.

6.2.2 Revenue Assumptions

Revenues for the aquatics centre are represented as normalized as of Year 1. This refers to the facility operating at expected capacity from the outset and is assumed for illustrative purposes. In reality, operational expertise, marketing and service capacity, including staff experience and availability, are all aspects of the business that will develop over time. Should the project be commissioned, efforts should be focused on a detailed and robust pre-opening business plan.

Pricing is anchored against fees charged in the Penticton Aquatic Centre.

Details regarding programming, resulting revenue assumptions and operating expenses are contained in the Appendices to this report.

6.2.3 Expense Assumptions

The single largest cost is that of facility staffing. As a new service, and one that should reasonably be managed by an independent operator, we believe that there is some degree of flexibility in how the staffing model is organized for this building.

In summary, the staffing model includes the following:

- General Manager
- Director of Aquatics
- Administrative Assistant
- Maintenance and operations Staff
- Front Desk/Registration Staff
- Lifeguards and Lesson providers
- Lifeguard Supervisor
- Fitness Instructors (contract)
- Recreation Coordinator

The cost of front desk and maintenance staff is based on an operating schedule of 112 hours per week. Lifeguard expenses assume a minimum of two lifeguards present during all operating hours in addition to the supervisor. Annual expenses also account for a third-party management fee (as a percentage of revenues) payable to the operator. This fee would also exist in practical terms as part of the corporate overhead if the facility were operated by one of the municipalities or OIB.

6.3 Operating Results for Pool and Gym (Phase 1 and 2 Combined) - Indicative

The capital cost for Phases 1 and 2 combined is $43 million before contingencies ($54.4 million with contingencies and excluding any land purchase cost). Based on the operating assumptions stated above, the normalized deficit of the proposed recreation facility is in the range of $600,000, rising based on the assumption of annual escalation of 3% per annum.

These estimates are indicative and designed to inform further debate regarding the value of individual parts of the proposed capital build and approach to individual cost centres. As an example, the CORE Program includes a significant element of multi-use community space which is unlikely to yield significant incremental revenue compared to the fully scaled gymnasium in Phase 2. In due course, the partners may wish to further refine the CORE functional space program in order to reduce capital and operating costs at the outset.

At this preliminary stage in the concept development and business planning process, it is important to have reasonable estimates of cost and revenue which lean to a more conservative estimation of revenues. As the process moves forward, a more nuanced picture of operational possibilities, users, and prices is possible.

Based on the findings of this exercise, a reduction in the overall scale of the facility may be one way to moderate the potential deficit. It is also important to note that the additional space represents an additional capital cost, but comes with a strong operational rationale with revenues able to outpace incremental operating costs (should the project partners have a clear interest in creating incremental gains which together can lessen the impact of a subsidized pool). This, in its essence, is the model adopted by the YMCA – a "net contribution" model, versus the focus on costs that underscores typical municipal approaches.

For simplicity we have excluded any required long term debt financing that the project partners would potentially place against the project. Nor have we included an annual capital reserve contribution. Both of these variables are matters that will be further refined if and when an emerging funding plan is created. As regards an annual capital reserve allocation, this is increasingly a policy adopted by municipalities for new capital assets although the frequency, quantum and other policy specifics of such reserve payments varies considerably.

Details of the indicative operating financials are provided in the exhibit on the following page.

Exhibit 36: South Okanagan Aquatic Centre Including Gymnasium: order of Magnitude Annual P+L

Note: Assumes Normalized Operations as of Year 1

	YR1	YR2	YR3	YR4	YR5
Escalation Rate - 3% p.a.	***100%***	***1.03***	***1.03***	***1.03***	***1.03***
Revenues					
Public swim/drop-in	$ 96,560	$ 99,457	$ 102,441	$ 105,514	$ 108,679
Swim instruction/lessons	$ 129,938	$ 133,836	$ 137,851	$ 141,986	$ 146,246
Memberships	$ 57,387	$ 59,109	$ 60,882	$ 62,708	$ 64,590
Pool rentals	$ 128,250	$ 132,098	$ 136,060	$ 140,142	$ 144,347
Locker revenue	$ 5,000	$ 5,150	$ 5,305	$ 5,464	$ 5,628
Concession net revenue	$ 21,000	$ 21,630	$ 22,279	$ 22,947	$ 23,636
Room Rental	$ 17,280	$ 17,798	$ 18,332	$ 18,882	$ 19,449
Fitness Programming	$ 36,000	$ 37,080	$ 38,192	$ 39,338	$ 40,518
Gym rentals	$ 72,000	$ 74,160	$ 76,385	$ 78,676	$ 81,037
Gym user groups	$ 48,000	$ 49,440	$ 50,923	$ 52,451	$ 54,024
Lease Space	$ 40,365	$ 41,576	$ 42,823	$ 44,108	$ 45,431
TOTAL REVENUE	**$ 651,779**	**$ 671,332**	**$ 691,472**	**$ 712,217**	**$ 733,583**
Expenses					
Wages	($649,150)	($668,625)	($688,683)	($709,344)	($730,624)
Benefits	($162,288)	($167,156)	($172,171)	($177,336)	($182,656)
Independent Operator Admin	($65,178)	($67,133)	($69,147)	($71,222)	($73,358)
Utilities	($226,821)	($233,625)	($240,634)	($247,853)	($255,289)
Repairs & Maintenance	($20,000)	($20,600)	($21,218)	($21,855)	($22,510)
Insurance	($30,000)	($30,900)	($31,827)	($32,782)	($33,765)
Snow Removal + Waste	($15,000)	($15,450)	($15,914)	($16,391)	($16,883)
Supplies, Materials and Services	($86,000)	($88,580)	($91,237)	($93,975)	($96,794)
Advertising	($10,000)	($10,300)	($10,609)	($10,927)	($11,255)
TOTAL EXPENSES	**($1,264,436)**	**($1,302,369)**	**($1,341,440)**	**($1,381,683)**	**($1,423,134)**
NOI	**($612,657)**	**($631,037)**	**($649,968)**	**($669,467)**	**($689,551)**

6.4 Core Program Only – Financial Results

The capital cost for Phase 1 CORE Program only is $33.5 million before contingencies ($42.4 million with contingencies and excluding any land purchase cost).

By excluding Phase 2, there is a capital cost savings of $9.5 million (or 22%) before contingencies ($12.1 million with contingencies).

The implications for operating costs and revenues are shown below. By excluding the Phase 2 development that comprises both additional meeting room space and a gymnasium, there is a loss of revenue. This amounts in year 1 to approximately $120,000. However, staffing, administration fee (if variable based on revenue) and utilities are all lower such that the loss of Phase 2 results in a very minor net revenue gain. So minor, that Phase 2 in operational terms is essentially a break-even proposition if it were pursued.

This, and the significant potential associated with the gymnasium from a community use perspective, suggests that a broadly programmed gymnasium is a beneficial addition to the project. The question of feasibility then becomes one of supporting the capital costs associated with this second phase. While it is a significant capital cost, it is possible that Phase 1 could be reduced in scale, particularly if Phase 1 and 2 (CORE and PLUS Program were developed as a single phase).

Exhibit 37: South Okanagan Aquatic Centre Excluding the Gymnasium: Order of Magnitude Annual P+L

Note: Assumes Normalized Operations as of Year 1

	YR1	YR2	YR3	YR4	YR5
Escalation Rate - 3% p.a.	***100%***	***1.03***	***1.03***	***1.03***	***1.03***
Revenues					
Public swim/drop-in	$ 96,560	$ 99,457	$ 102,441	$ 105,514	$ 108,679
Swim instruction/lessons	$ 129,938	$ 133,836	$ 137,851	$ 141,986	$ 146,246
Memberships	$ 57,387	$ 59,109	$ 60,882	$ 62,708	$ 64,590
Pool rentals	$ 128,250	$ 132,098	$ 136,060	$ 140,142	$ 144,347
Locker revenue	$ 5,000	$ 5,150	$ 5,305	$ 5,464	$ 5,628
Concession net revenue	$ 21,000	$ 21,630	$ 22,279	$ 22,947	$ 23,636
Room Rental	$ 17,280	$ 17,798	$ 18,332	$ 18,882	$ 19,449
Fitness Programming	$ 36,000	$ 37,080	$ 38,192	$ 39,338	$ 40,518
Gym rentals	$ -	$ -	$ -	$ -	$ -
Gym user groups	$ -	$ -	$ -	$ -	$ -
Lease Space	$ 40,365	$ 41,576	$ 42,823	$ 44,108	$ 45,431
TOTAL REVENUE	**$ 531,779**	**$ 547,732**	**$ 564,164**	**$ 581,089**	**$ 598,522**
Expenses					
Wages	($604,150)	($622,275)	($640,943)	($660,171)	($679,976)
Benefits	($151,038)	($155,569)	($160,236)	($165,043)	($169,994)
Independent Operator Admin	($53,178)	($54,773)	($56,416)	($58,109)	($59,852)
Utilities	($166,061)	($171,042)	($176,174)	($181,459)	($186,903)
Repairs & Maintenance	($20,000)	($20,600)	($21,218)	($21,855)	($22,510)
Insurance	($30,000)	($30,900)	($31,827)	($32,782)	($33,765)
Snow Removal + Waste	($15,000)	($15,450)	($15,914)	($16,391)	($16,883)
Supplies, Materials and Services	($86,000)	($88,580)	($91,237)	($93,975)	($96,794)
Advertising	($10,000)	($10,300)	($10,609)	($10,927)	($11,255)
TOTAL EXPENSES	**($1,135,426)**	**($1,169,489)**	**($1,204,574)**	**($1,240,711)**	**($1,277,932)**
NOI	**($603,647)**	**($621,756)**	**($640,409)**	**($659,621)**	**($679,410)**

6.5 Accounting for Lifecycle Costs

Municipalities vary in their approach to accounting for the future lifecycle replacement costs associated with owned assets. Some municipalities provide for future costs through funding a capital reserve account from operations. The amount often varies year to year as funds become available from operations, while other municipalities follow a stricter policy of accounting for future costs in the annual operations of facilities.

The approach to capital reserve planning has evolved in recent decades as a result of the greater focus given to municipal asset planning and strategies for rehabilitation, reconstruction or replacement.

The Federation of Canadian Municipalities has, in recent years, identified recreation assets as requiring particular attention in terms of lifecycle planning and capital investment. As of 2016, a landmark report on the state of Canadian Municipal Infrastructure identified that the average annual investment rate was 1.3% of replacement value (this included building new facilities). The recommended lower and upper target reinvestment rates were 1.7% and 2.5% of replacement value.

In the current context, it is recommended that a capital reserve fund be established by agreement between the parties. The approach to funding a capital reserve will be influenced by a number of factors including the ownership and operating model for the facility, the degree of cost-sharing of capital and operating costs, and the nature of the building itself. We recommend that further analysis of lifecycle replacement costs be undertaken should the project be approved for next stage planning and design. As a general guide, an allocation of 0.5% of original capital costs would necessitate an annual reserve contribution of between $200,000 and $300,000. It is less likely that this amount would be funded in the early years of operation. However, if this building is operated by third party management, it will be important to identify the expected lifecycle replacement schedule for building systems and factor this into the required annual operating budget.

7 Partnership Options

A collaborative approach to the realization of a new South Okanagan Aquatics Centre commences with the proactive approach to pursuing common interests by the three project partners – the Town of Oliver, Osoyoos Indian Band (OIB) and the Town of Osoyoos. In our experience, projects that originate as joint planning efforts have the greatest opportunity to maintain a collaborative approach to all aspects of the project: from concept to location, and from capital funding to operations and governance. From the lens of funding agencies too, a project that was initiated as a partnership is also more likely to reflect partnership in terms of proposed scope and scale, design, location and financial feasibility.

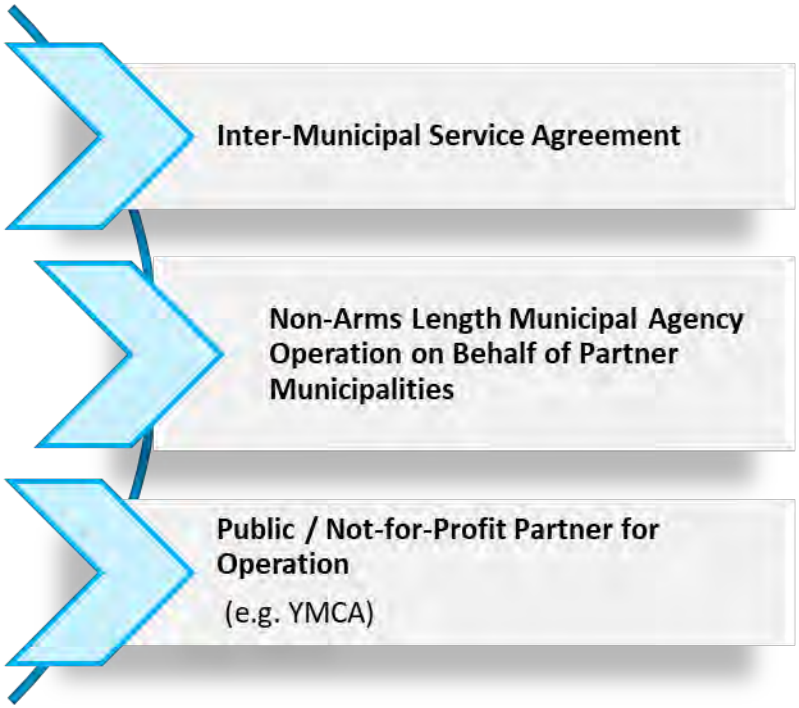
Having addressed a number of these details in earlier sections, the following outlines the range of choices open to the project partners in pursuing a collaborative approach to governance and facility operations. This assumes that each of the three study partners also become cost sharing partners in the project. Further, the opportunity exists for the RDOS to also partner on the implementation of this project and as such all comments below pertain to a partnership that can include all municipal entities and the OIB.

The involvement of all potential partners including the RDOS would enable a simplified approach to establishing a service district which provides full access and equal fee structure for all residents.

7.1 Range of Operating Scenarios

The spectrum of partnerships and collaboration efforts for the development and operation of recreation facilities is broad.

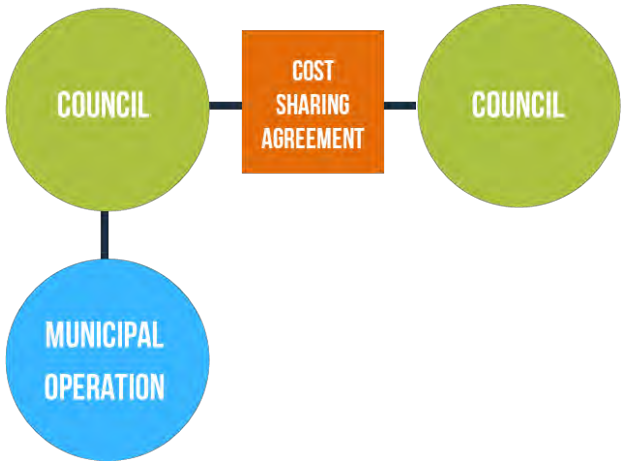
Exhibit 38: Range of Partnership Options Possible for the Operation of an Aquatics Facility



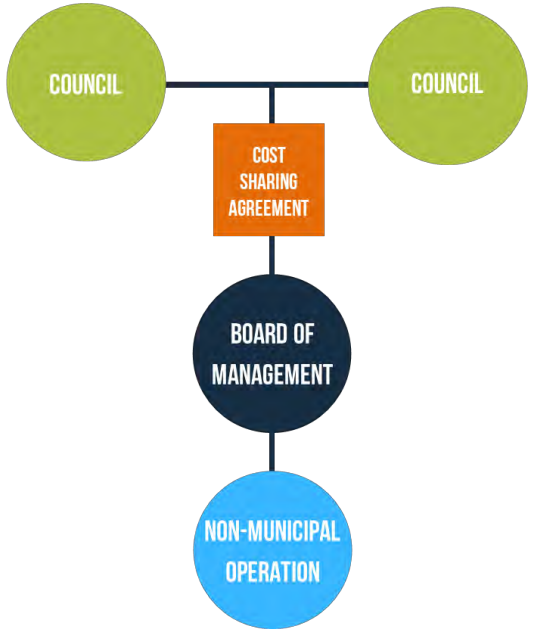
An inter-municipal service agreement is a mechanism to enable operating partnership between municipalities. The precise details of the governance and cost sharing arrangements can differ but the simplest form of agreement is as follows:

- Agreement for one municipality to own and operate the facility
- Agreement between municipalities to cost share
- Agreement on reporting protocols and annual approval of cost share amount
- Agreement on dispute mechanisms, length of agreement and other terms

This model, shown graphically below, would work most effectively in situations where an existing municipal facility is being replaced to meet the needs of surrounding municipalities, or the development of new facility largely benefits one municipality over another.



This model is less likely to work in the current context of an entirely new service, the requirement for a location that serves the needs of all potential users and the key involvement of the OIB which has self determination in policy and is not subject to the legislation and regulations as exist for municipalities in British Columbia.



The need to form a partnership that is effective for all parties would suggest a different model. An alternative which is commonly deployed is a non-arms length operating entity created by each of the contributing partners, each with share capital. We assume that the OIB could contribute to such an operating entity should there be an interest in this approach. The ownership of the asset would reside with the entity. The governance structure reflects the degree of ownership of each project partner and the degree of ownership is, itself, a reflection of the degree of cost share or equity invested by each.

A third option is a partnership between the project partners (including the OIB) and an arms length operator such as the YMCA. This is really a variation of the second model wherein, the asset is owned and controlled as a Joint Venture and the operating entity is a third-party expert in the operation of these facilities, such as the YMCA.

In the simple case of a partnership between a single municipality and a third-party operator, a board of management is not required. However, in the case of more than one project partner, the third-party operator will need to report to a duly elected board.

Partnerships with external public organizations, such as the YMCA, are common for operation of recreation facilities across the country (usually warm side amenities, not ice). Typically (in smaller communities), the municipality owns the building, while the YMCA operates the facility and associated programming. The approach to risk sharing varies by type and scale of facility.

In consideration of a not-for-profit model of third-party management, we note that the Oliver Recreation Society represents a potential opportunity to extend its role to serve the needs of the partner municipalities and the OIB. We would recommend that the potential for utilizing this established operating model is given further consideration should the project move to the implementation stage.

With regard to the option of seeking a true public-private partnership to design, build, finance and maintain (DBFM) the facility, this is unlikely to represent good value for money unless the partners were to agree to a concession and jointly cost share the annual payments required to cover the amortization of facility construction debt and the annual deficits. This is rarely seen in general community recreation. In part, this is because the cost of capital is lower for municipalities compared to the private sector, but it is also because the management of these facilities for community goals does not readily lend itself to being outsourced to a for-profit provider.

This model, and variations of it, has been used routinely in the provision of community ice which, as a dedicated single use, and based mainly on a rental model has greater potential for private sector management.

7.2 Recommended Approach to Cost Sharing

The ultimate cost sharing arrangement between project partners is intimately part of the approach to governance and operational risk identified above.

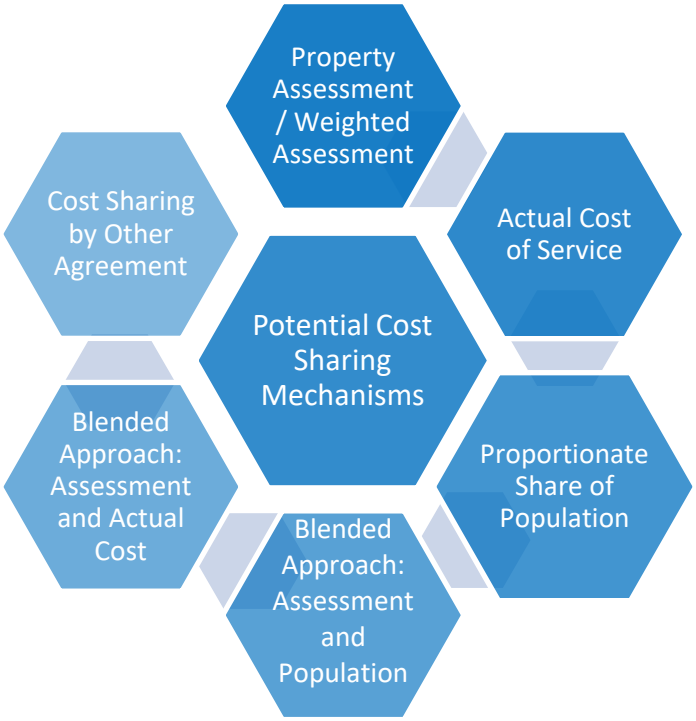
The pre-requisites to efficiently addressing the range of possibilities for cost sharing models include the following:

- **Agree the Building** – what is in it? Is it solely a dedicated aquatic centre with modest ancillary space, a larger recreation centre as conceptualized in this report, or other uses which would be funded only by those parties that deem them warranted? The outcome must be an agreement as to the essential uses that all parties agree are equally beneficial and a categorization of any other uses that may not have universal support. Our report uses the term "Core" and "Plus" for first and second phase development but based on our research and consultation ALL of the uses in both phase 1 and phase 2 are considered as universally beneficial to the project partners.
- **Agree the Scale of the Building** – A related question goes to the matter of value engineering at a later date to ensure that the scale of the building components and their capital costs are discussed through the design process and agreed upon as appropriate.
- **Agree the Site** – We have retained several candidate sites because of the need for a more detailed site investigation that should now occur. Notwithstanding, an agreement to partnership on this project is fundamentally a question of agreeing the location. It is also a question of agreement as to the ownership of the land and the manner in which rights of use of that land are structured to the benefit of the project over the expected life of the building. More on this below.
- **Agree the Number of Partners Willing to Share Risk** – This is most likely to be concluded following the scoping of the matters above. Capital contributions from the tax base or financial reserves represent one-time contributions, however a commitment to joint funding of annual deficits represents a long-term proposition.
- **Length of Cost-Sharing Agreement** – agreements to share the risk associated with a facility and its operations cannot be short-term in nature unless the ownership of the asset resides with one party. Where there is a model of shared ownership, and with a reasonable functional service life of 40 years, agreements much sustain the building over that period. This applies to those partners that are part of the ownership group. A municipality that simply contributes to operating deficits in lieu of higher fees charged to their residents is able to structure shorter term agreements for such.
- **The bottom line is that decisions around ownership of the asset are the foundation** for all aspects of governance, cost sharing, facility utilization and community programming.

This report recommends that there is a commitment on the part of the project partners to jointly own and operate the facility.

7.3 Models and Solutions

Cost sharing models for municipal capital facilities vary significantly as shown below.



The appropriate model certainly should be focused on the particular use in question, but it is also informed by any existing cost sharing models that exist for inter-municipal co-operation and cost share and cost sharing agreements for regional services.

For recreation services, the most direct model is one of usage with costs allocated according to residence. However, the accuracy of that model is open to challenge, administrative burdens can be high in managing and verifying usage by location of user, and limits exist on the capacity to track usage for different programs.

Accordingly, a population-based model is often preferred, with variations in high population centres of population by zone – the further from the location, the lower the cost share. This can work effectively but does require semi-regular update as population patterns change over time.

For these reasons a blended approach can add certainty to the model – with financial certainty for all project contributors being an important outcome of any cost sharing arrangement. An approach which rests on weighted assessment is often the foundation.

The annual cost sharing between the Town and the Regional District shall be based on the ratio of net converted value assessments of land and improvements for school and hospital purposes according to the B.C. Assessment Authority for each of the participating areas.

The existing cost sharing agreements in use between the Regional District and the Town of Osoyoos for Recreation and Leisure Opportunities (signed in 2019and 2021) are:

- A cost sharing of the Sun Bowl Arena operations based on a property assessment formula;
- The Regional District supports various recreation and leisure opportunities in Osoyoos by way of an annual fixed sum grant to the Town of Osoyoos ($70,000);
- Purpose: providing access for the Regional District residents to Town recreational services and facilities on the same terms and conditions as to the residents of the Town.

7.4 Consideration of Issues Specific to the SOAC

With respect to population, the membership of the OIB is considerably smaller than the populations of the areas located within the municipal jurisdictions of Oliver, Osoyoos and the RDOS Electoral Districts A and C. This difference in scale may well reflect relative likelihood of usage of the facility, but it doesn't justify a greater role for the OIB role in facility governance, ownership and cost sharing, should such a role be of interest.

By contrast, if the facility is located on land which is owned by the OIB, such as may occur in the case of the preferred site, the contribution of the OIB is substantially greater. So too are its obligations to cost share the capital and operating deficits.

It should also be noted that the treatment of the land is essential to this question:

- We assume that the ideal circumstance is that the land is acquired (or rights thereto) at zero cost (this includes the preferred site at Fruitvale Way in the potential future ownership of the OIB);
- The project partners may choose a different site that incurs an acquisition cost (or a long-term land lease sufficient to cover the expected life of the building and provide for in-situ expansion); and
- Whether the provision of land at zero or nominal cost represents a contribution to the capital costs of the project is a matter that will need to be resolved at the time of final site acquisition.

There is also the broader question of the opportunity for other recreational facilities to be included in the consideration of a new recreation complex. Difference cost sharing, governance and operational options are all derivative as a result.

As we have outlined above, a specific series of potential cost sharing formulas can only reasonably be achieved through a more fundamental process of agreement as to the foundations of site, scale of development, ownership and risk allocation. There are many successful examples of such partnerships across Canada. The first step in this process is to consider the recommendations of this report on all of these items and make a commitment to following the next steps toward project definition.

8 Risks & Due Diligence

8.1 Inflationary Economic Circumstances

At the outset, a range of risks exist for any major development project. Where possible, the majority of such risks are mitigated through effective management of the business planning, design and delivery process.

Capital costs for facilities of this type are not pre-determined and decision makers have considerable control in establishing the balance between budget and what goes "into" a building for this budget. Decisions-makers, through their advisors, can control scale, quality and business conditions surrounding the allocation of risks in delivery of the project.

Aside from these normal risks described in more detail below, the current inflationary environment within the construction market should be borne in mind. This is a monetary risk, and while the causes of it may be many, the impact is the same – a risk to both cost control and timing of development.

The capital estimates provided here are as of 2021/2022. Given that the project is not certain to proceed within the next 12 to 24 months, a prediction of cost escalation up to and beyond that timeframe is not likely to be helpful in further specifying costs with any degree of accuracy. Rather, capital cost estimates should be updated with the assistance of a professional cost consultant as soon as a decision is taken to move the project forward.

8.2 Required Due Diligence on Land Development Costs

This report contains a considerable assessment of possible locations for the new facility, recognizing, as it should, the importance of finding a location that best serves the residents from across the jurisdictions. In so doing, a detailed assessment of "Site fit" for the prospective program of uses, general suitability of the site, and impacts of the development on adjacent properties have been researched.

For the leading site in contention, further site assessment was undertaken which addressed likely works and approvals necessary to a) acquire the site and b) meet the requirements of the Ministry of Transportation and Infrastructure regarding the access to Highway 97.

The estimate of costs associated with site development assume that services (utilities - gas, water, hydro, as well as wastewater services) are provided to the site. For this site, there are two risks which can be expected to impact costs and for which further assessment is required:

1. Costs associated with bringing services to the site from the nearest extent of urban services. This site is currently beyond such servicing. Accordingly work that is potentially underway to extend services to future development on lands to the east of Highway 97 may represent the best option to service the site. The costs associated with the extension may be an incremental cost to the project but the wider servicing is part of a larger servicing strategy for future development.

2. General site conditions – Geotechnical analysis of ground conditions, drainage and the need for any design mitigation of existing slope will enable a due diligence estimate of likely site-related development costs.

For all other potential sites which remain under consideration as an outcome of this report, the same risks and requirements for due diligence apply.

8.3 Building-Related Capital Costs

The capital cost estimates contained in this report are estimated based on the potential scale of development recommended in this report. Size, quality, and types of use are all yet to be determined in detail through subsequent business planning, such that capital cost estimates at this time are reasonable estimates of possible cost, excluding any extra-ordinary development costs.

The stages required to better inform capital cost estimates are as follows:

1. Confirm building components and develop a final functional space program of the preferred option; and

2. Undertake an elemental capital cost assessment by a professional quantity surveying firm, including the required cost contingency (+/- 25% as a Class D estimate).

8.4 Operating Risks

Facilities, and in particular public sector municipal capital facilities, have a number of operating risks related to revenue generation, operating costs and expense management, effective programming and facility utilization. The following outlines specifically how these combined risks should be (1) anticipated and (2) mitigated.

Some of the principal operating risks for this facility include:

- **Revenue risk:** as in any exercise, the budgeting and estimating process with regard to operating performance should be developed as the design of the facility is further specified, as partners are made known, and as more certainty exists regarding the range of operating costs closer to the time of the commissioning of the building.

- **Operating costs risk:** There is a risk that the operating costs will be higher than projected due to a range of factors, some of which can be estimated and some of which are difficult to estimate in advance. Items such as increased utility costs, unforeseen repairs and maintenance cost, higher management costs and a range of other factors which can affect the financial performance of municipal facilities. However, as a new facility, these costs would not be expected to materialize early in the life of the building, while the estimate of normal operating costs for facilities of this type can be estimated to a high degree of accuracy.

Once a preferred option is chosen and more detailed designs are developed, the estimate of expected operating costs and event-day expenses can be provided with greater certainty.

- **Our process in developing a schedule of illustrative operating costs and revenues is to ensure that risks are mitigated by assuming higher annual deficits. This includes a conservative approach to revenue generation and outlining the full range of potential operating costs associated with the project.**

- **Management performance:** the management performance is a significant risk and can often be the difference between revenue growth and systemic revenue attrition. The approach of the management team to operating the facility and all respects relating to marketing and services provided to both patrons and suppliers, and the overall environment in which the facility is marketed and positioned, is of significance to the success of any facility.

Risk mitigation strategies that can be undertaken to reduce the range and scale of risks include:

- **High quality management of the facility** – a key feature of risk mitigation which is based on utilization of industry expertise to maximize the revenue, ensure efficient operation, and cost reduction in operating expenses.

- **Minimize lifecycle costs through lifecycle cost planning** – this can include the provision of capital reserve budgets to meet certain capital replacement costs in future years.

- **Pre-opening business planning** – it is important that once a detailed design and functional program is established for the facility, and potential programming and revenue opportunities are created for the operations of the facility, that a detailed plan of action is undertaken to create the necessary departmental operating cost budgets, marketing resource requirements, and pre-opening expenses to ensure that the facility operating plans and forecasts are as rigorous as possible and are aligned with the actual facility that has been designed and built. This can be a crucial link to ensure that "normalized operations", that is the facility operating at its designed utilization and capacity, can be achieved as quickly as possible.

- **Facility revenue opportunities -** can be expected to continuously evolve, but the initial "ramp-up" period of the first few years is a risk for facilities.

The above risks can be further mitigated to a lesser or greater extent by the method of delivery and operation of the facility. One such risk reduction strategy is to ensure that the facility is operated as part of a larger multi-use recreation complex. While a larger facility is not immune to business risks, they are mitigated to some degree by the multi-purpose nature of the facility. As regards a standalone aquatic venue, co-location with other municipal recreation services offers potentially considerable opportunity to achieve operational efficiencies, as well as revenue gains as the synergy between recreation activities increases the overall value of the building to the visiting public, generating greater uptake of services. For this reason, a regional approach to the development of an aquatics centre is most appropriate.

9 Immediate Next Steps

Based on the findings of this report, should the Committee support the concept of a regional indoor aquatic centre, including the potential benefits of developing this as part of a multi-use community recreation complex, the following is recommended:

1. **Seek the participation of the Regional District of Okanagan-Similkameen as a potential partner in the next phase of design planning, location confirmation, and business planning**

   The RDOS has recently completed a Recreation Master Plan. Our discussions with the consulting team that produced the plan suggests that a major indoor recreation facility developed in the corridor between Osoyoos and Oliver, and otherwise regionally accessible, would be a considerable benefit to the region as a whole.

   In addition, the ongoing discussions regarding the development of a new ice arena in the region raises questions regarding the potential for co-location with the aquatic centre, as well as the future use of the existing arenas. A partnership approach to planning is an important first step in developing possible pathways to project delivery.

2. **Develop a Funding Plan**

   Notwithstanding the multi-party involvement in funding the project, government grant funding is likely to remain the catalyst for project implementation.

   The project partners should anticipate this and continue therefore to develop the business model, design, governance structure and secure a site. In so doing, the project sponsors can be ready to take full advantage of government grant funding when available and/or tailor the project to maximise its eligibility for funding support.

   Funding the capital costs of development, however, is more than this. It involves a multi-faceted funding strategy, identifying sources of funding that are within the control of the project partners (as opposed to an over-reliance on grant funding which is, by comparison, uncertain). A funding plan should also reconsider the design itself as well as the cost estimates including those for site development.

   Ideally, a funding plan should include a range of sources – grants, existing or future capital reserves, development levies, allocation of gas tax funding, and other measurable contributions as appropriate. The plan should also demonstrate a balanced commitment between project partners based on their expected level of involvement.

Should the site at Fruitvale Way be selected as the ultimate site, the servicing requirements of a major recreation facility on this site should be confirmed and costed – including the costs of extending the services from the existing limits of development to the south. This is a prominent and strategic site, but it is likely not the easiest site to develop, nor are services readily available.

Indoor pools, ice rinks and other major assets have large energy needs, and require significant volumes of water, while generating considerable grey and wastewater. Developing these assets without municipal services is a significant constraint which will limit the development capacity of the site.

3. **Further Site Assessment**

As an immediate next step, the Committee should initiate the process with MOTI to potentially acquire the Graveyard Pit site.

At the same time, we would encourage further site development assessments for the other candidate sites. This will help establish the relative capital costs associated with development at each site and determine the degree to which the preferred site represents a higher cost option.

4. **Develop a Process for Establishing Commitment to Capital and Operating Cost-Sharing amongst Partners**

The complexities involved in this have been outlined in this report. The ongoing commitment to partnership should involve agreement on the design, location, inclusions within the facility and any potential phasing. We recommend that work is undertaken to establish an operating and governance structure. With these items in place, followed by a funding plan, the formalization of cost and risk-sharing arrangements can occur.

Appendix A:
Public Survey Instrument

South Okanagan Aquatics Centre: Public Survey

Introduction

Town of Osoyoos, Town of Oliver and Osoyoos Indian Band are undertaking a community needs analysis, financial feasibility assessment and indicative business plan for a prospective new Aquatic Centre to better serve South Okanagan communities.

Your input is important to ensure the community's needs are reflected in a new aquatic centre. We are interested to hear from all communities about your use of existing aquatic facilities and participation in activities.

This survey should take about 15 minutes of your time. Your responses are CONFIDENTIAL – no individual respondents will be identified publicly through the results. The public survey will be open from September 27 to October 24, 2021.

Should you experience any technical difficulties when participating in the survey, please contact Asya Bidordinova abidordinova@sierraplan.com

South Okanagan Aquatics Centre: Public Survey

Participation in Aquatic Activities

In view of the impacts of the Pandemic on recreation services and facilities since March 2020, as far as possible, please answer the questions in terms of how you use aquatic facilities in a typical year.

1. Where do you live?

Please specify the municipality or rural community in which you reside.

- ◯ Town of Oliver
- ◯ Town of Osoyoos
- ◯ Osoyoos Indian Band
- ◯ Penticton
- ◯ Town of Princeton
- ◯ Village of Keremeos
- ◯ Area A RDOS
- ◯ Area C RDOS
- ◯ The Cottages
- ◯ Other (please tell us)

2. Do you or a member of your family swim or engage in aquatic activities?

- ◯ Yes
- ◯ No

South Okanagan Aquatics Centre: Public Survey

3. You indicated that you or a member of your family engage in aquatic activities. Please indicate all types of activities that apply.

- [ ] Lane swimming
- [ ] Competitive swimming
- [ ] Leisure swimming
- [ ] Family recreation
- [ ] Swimming lessons
- [ ] Training (e.g. life guard training, diving)
- [ ] Water sports or games (e.g. water polo)
- [ ] Therapy purposes
- [ ] Aquatic fitness classes
- [ ] Other (please specify)

South Okanagan Aquatics Centre: Public Survey

Current Usage of Indoor Aquatic Facilities in South Okanagan

In view of the impacts of the Pandemic on recreation services and facilities since March 2020, as far as possible, please answer the questions in terms of how you use aquatic facilities in a typical year.

4. Do you or a member of your family use indoor pools in the region. Please tell us which facility(ies):

- ☐ Penticton Community Centre - Indoor Pool
- ☐ Summerland Aquatic Centre
- ☐ Grand Forks & District Aquatic Centre
- ☐ Other (please specify)
- ☐ A private pool in RDOS (e.g. in a residence, hotel, or private club)
- ☐ I do not use indoor pools

5. How often do you or members of your family use indoor pools in the region in a typical year?

- ○ Every Day
- ○ A few times per week
- ○ Once per week
- ○ A few times per month
- ○ Once a month
- ○ Less often
- ○ Never

6. Do you or members of your family use other indoor pools in the region and/or province? ***These may include private aquatic facilities in hotels.***

- ◯ No
- ◯ Yes (please tell us which other indoor pool(s) you use, and the reason why you use them)

7. How much time does it take to get to the indoor aquatic facility that you use most often?

- ◯ under 30 minutes
- ◯ 30-60 minutes
- ◯ over 60 minutes

South Okanagan Aquatics Centre: Public Survey

Current Usage of Outdoor Aquatic Facilities in South Okanagan

In view of the impacts of the Pandemic on recreation services and facilities since March 2020, as far as possible, please answer the questions in terms of how you use aquatic facilities in a typical year.

8. Do you or a member of your family use outdoor pools in the region? Please tell us which facility(facilities):

- [ ] Oliver Community Centre - outdoor pool
- [ ] Keremeos Community Pool (Outdoor)
- [ ] Centennial Outdoor Pool, Town of Princeton
- [ ] I do not use outdoor pools
- [ ] Other (please specify)

9. How often do you or members of your family use outdoor pools in the region In a typical year?

- ◯ Every Day
- ◯ A few times per week
- ◯ Once per week
- ◯ A few times per month
- ◯ Once a month
- ◯ Less often
- ◯ Never

10. Do you or a member of your family swim, take swimming lessons, or participate in other aquatic activities in a lake(s) in a typical year?

- ◯ Yes, regularly
- ◯ Yes, occasionally
- ◯ No
- ◯ Other (please explain briefly)

11. Whether you swim in a pool or the lake, how much time does it take to get to the outdoor aquatic facility or the lake?

- ◯ under 30 minutes
- ◯ 30-60 minutes
- ◯ over 60 minutes

South Okanagan Aquatics Centre: Public Survey

Potential New Aquatic Centre

12. In your opinion, is a new aquatic centre in South Okanagan warranted?

- ◯ Yes
- ◯ Undecided
- ◯ No (please explain why below)

13. In your opinion, what are the important qualities of a good location for a new aquatic centre in South Okanagan?

	Very Important (a key factor for my use of a new aquatic centre)	**Somewhat Important** (a good practice but would not influence my use of a new aquatic centre)	**Not Important** (would have no bearing on my use of a new aquatic centre)
Within a 30 minutes drive from your residence	◯	◯	◯
A location that would create opportunities for local tourism and exposure to the local history and culture	◯	◯	◯
Visible and safe location with good highway exposure	◯	◯	◯

	Very Important (a key factor for my use of a new aquatic centre)	**Somewhat Important** (a good practice but would not influence my use of a new aquatic centre)	**Not Important** (would have no bearing on my use of a new aquatic centre)
Accessible by public transportation	◯	◯	◯
Accessible by active transportation (walking or cycling)	◯	◯	◯
Proximity to other recreation facilities	◯	◯	◯
Proximity to other facilities (e.g. a shopping mall)	◯	◯	◯
A site capable of expansion	◯	◯	◯
Sufficient parking	◯	◯	◯

Other. Please add any other factors that would be key for your use of a new Aquatic Centre:

14. In your opinion, what should be the top priorities for use of a new indoor aquatic centre?

	Very Important	Somewhat Important	Not Important
Lane swimming	◯	◯	◯
Leisure swimming	◯	◯	◯
Training purposes (e.g. water activities training, lifeguard training, diving)	◯	◯	◯
Swimming lessons	◯	◯	◯
Aquatic fitness classes	◯	◯	◯
Water sports and games (e.g. water polo)	◯	◯	◯
Therapy purposes	◯	◯	◯
Family recreation use	◯	◯	◯

Other (please specify)

15. How often would you use a new Aquatic Centre?

- ◯ Every day
- ◯ A few times per week
- ◯ Once per week
- ◯ A few times per month
- ◯ Once a month
- ◯ Less often
- ◯ Never

South Okanagan Aquatics Centre: Public Survey

Aquatics Facility Design & Amenities

The following questions focus specifically on the design of a competition / lane pool within a new aquatics facility. Municipal competition / lane pools are typically 25 metres in length.

Please indicate your preferences related to the competition / lane pool at a new aquatic facility below.

Example of Municipal competition / lane pool (25m, 8 lanes), Bracebridge Sportsplex, Bracebridge, ON

Photo Credit: Healthyinmuskoka.weebly.com



16. Number of Lanes

Indicate your preference for number of lanes in the competition / lane pool.

- ◯ 4 lanes
- ◯ 6 lanes
- ◯ 8 lanes
- ◯ Other (please specify)

17. How important are the following elements in the design of the competition / lane pool to you?

	Very Important	Somewhat Important	Not Important
Diving boards	◯	◯	◯
Starting blocks (for competitions)	◯	◯	◯
At the shallow end, adequate water depth for underwater turns (for competitions)	◯	◯	◯
Movable floor (to change water depth)	◯	◯	◯

Other (please specify)

18. Please let us know if you have additional comments for consideration<u>related to the design of the lane pool</u>?

South Okanagan Aquatics Centre: Public Survey

Aquatics Centre Design and Amenities

The following questions relate to other aquatic elements that could be included as part of a new aquatics centre, including but not limited to leisure, therapy, and/or tot pools. Some examples are provided below for reference.

Example of a Leisure Pool, West Vancouver Aquatic Centre, West Vancouver, BC

Photo Credit: City of West Vancouver



Example of a Therapy Pool (foreground) with leisure and lane pools beyond, Edmonds Community Centre, Burnaby, BC

Photo Credit: Water Technology, Inc.



Example of a Tot Pool (foreground) for babies and toddlers (shallow with spray elements) with a leisure/therapy pool beyond, Côte Saint-Luc Community and Aquatic Centre, City of Côte Saint-Luc, QC

Photo Credit: Figurr Architects Collective



19. Beyond a lane pool, what are your top 3 priorities for other aquatic elements to be included in a new aquatics facility?

	Very Important	Somewhat Important	Not Important
Therapy pool (warm water, 4-5 feet deep, grab bars, ramp and stair entry)	○	○	○
Leisure pool (for unstructured recreational swimming and play)	○	○	○
Tot pool for babies and toddlers (shallow, with spray elements)	○	○	○
Warm-up / cool-down lanes (separate from lane pool)	○	○	○
Waterslide	○	○	○
Dry sauna	○	○	○
Steam Room	○	○	○
Hot tub / whirlpool	○	○	○
Outdoor tanning deck with access through the pool area	○	○	○
Family change rooms	○	○	○
Outdoors mini-spray park for summer use	○	○	○
No other aquatic elements are needed	○	○	○

20. In your opinion, how important are the following elements to your experience beyond the pool?

	Very Important	Somewhat Important	Not Important
Space for programming on the pool deck	○	○	○
Non-slip pool deck	○	○	○
Zero entry / beach entry to pool(s)	○	○	○
Equipment storage	○	○	○
Competition electronic scoreboard	○	○	○
Upper level tiered viewing gallery	○	○	○
Universal (designed to accommodate all genders) change rooms	○	○	○
Physical access and capacity to program pool to cater to needs of persons with physical and/or cognitive disabilities	○	○	○
Space for dry land training	○	○	○
General meeting space	○	○	○

Other (please specify)

21. Please let us know if you have additional comments for consideration related to a new aquatics facility?

South Okanagan Aquatics Centre: Public Survey

Other Aquatic Centre Amenities

22. Are there other indoor recreation amenities (dry uses) that you think should be included in the design of a new aquatics centre?

- [ ] Gymnasium / a field house
- [ ] Multi-use activity court
- [ ] Fitness / exercise studio
- [ ] Weight room
- [ ] Ice arena
- [ ] Community meeting rooms / space
- [ ] Cultural uses
- [ ] A place to have a healthy snack (a tea/coffee shop, a snack bar, etc.)
- [ ] No other amenities - only aquatics
- [ ] Other amenities (please specify)

23. Are there any other new / additional programs and / or activities would you like to see provided to residents at a new aquatics facility?

South Okanagan Aquatics Centre: Public Survey

Please tell us about yourself

24. What description best fits your household?

- ◯ Couple with no dependent children
- ◯ Couple with one or more dependent children
- ◯ Single parent with one or more dependent child
- ◯ Other (please specify)
- ◯ Adult living alone
- ◯ More than 1 adult sharing a residence
- ◯ Extended family

25. Please tell us more about the members of your household and their aquatics-related activities over the last pre-COVID year:

	Used aquatics facilities in the region over the past year?	Main type of use?
Person 1 (self)		
Person 2		
Person 3		
Person 4		
Person 5		
Person 6		

26. Please provide any additional comments you think are relevant to this study:

Appendix B:
Financial Operating Proforma

SOAC: Operating Expense Assumptions

Space	Item	Assumptions			Notes
Aquatics					
	Utilities	*$*	*4.00*	*per sq. ft.*	
			24,681.62	*sq.ft.*	
	Annual Expense	**$**	**98,726.49**		
	Pool Chemicals	**$**	**60,000.00**		
	Wages (Benefits separate)	**$**	**304,050.00**		See detailed calculation
	Uniforms	**$**	**1,000.00**		Allocation
	Housekeeping Materials & Supplies	**$**	**20,000.00**		Allocation
Administration					
	Office Supplies & Materials	**$**	**5,000.00**		Allocation
	Wages (Benefits separate)	**$**	**279,100.00**		See detailed calculation
	Independent Operator Admin Fee	**$**	**65,177.91**	10%	Allocation (% of REV)
General					
	Utilities	*$*	*3.50*	*per sq. ft.*	
			36,598.34	*sq.ft.*	
	Annual Expense	**$**	**128,094.18**		
	Professional Services	**$**	**5,000.00**		Allocation
	Advertising	**$**	**10,000.00**		Allocation
	Repairs & Maintenance	**$**	**20,000.00**		Allocation
	Insurance	**$**	**30,000.00**		Allocation
	Snow & Garbage Removal	**$**	**15,000.00**		Allocation
	Wages (Benefits separate)	**$**	**66,000.00**		See detailed calculation
Gymnasium		Costs included in General			
Concessions					
	Costs -80% of revenue	$	84,000.00		

SOAC: Operating Revenue Assumptions

Space	Assumptions				Notes
Leisure & Lane Pools					
Public swims/drop in	Type:	Admission Rate:		Split:	
	Children under 7	$	1.50	10%	
	Family Swim	*$*	*17.00*	*10%*	
	Youth 7-18	*$*	*5.75*	*20%*	
	Adult 19+	*$*	*6.75*	*35%*	
	Seniors 60+	*$*	*5.75*	*25%*	
	Blended Rate	***$***	***6.80***		
	Annual paid entries		*14,200.00*		
	Annual Revenue:	**$**	**96,560.00**		
Memberships based Public Swim / Drop-in	Youth/seniors		$314.00	33%	
	Adult		$425.00	33%	
	Family		$1,000.00	33%	
	Blended Rate	***$***	***573.87***		
	Members		*100.00*		
	Annual Revenue:	**$**	**57,387.00**		
Swim Instruction/lessons					
	Average program cost per person	$	90.00		
	Program Weeks		50		
	Average cost per class	$	9.00		
	Average class limit		16	students	
	Fill rate		75%		
	Classes per hour (Lane):		1		
	Classes per hour (Leisure):		1		
	Total Annual Classes (Lane)		525.00		
	Total Annual Classes (Leisure)		700.00		
	Total Annual Classes		1,225.00		
	Total Annual Class Spots		19,250.00		
	Annual Revenue:	**$**	**129,937.50**		

SOAC: Operating Revenue Assumptions

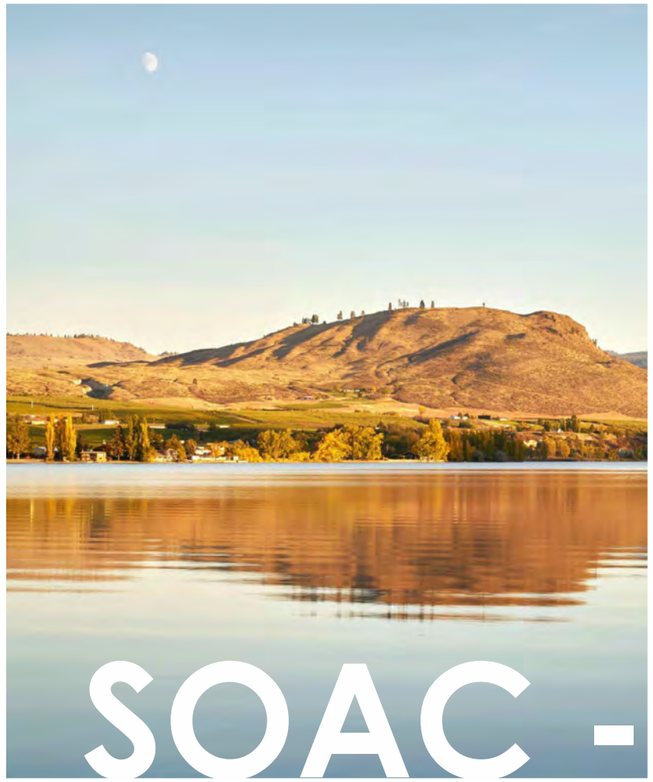
Space	Assumptions				Notes
Aqua Fitness					
	Youth/Senior rate (10 classes)		$60	50%	
	Adult rate (10 classes)		$70	50%	
	Average cost (per class)	$	6.50		
	Average class limit		12		
	Fill rate		80%		
	Total Annual Classes		350		
	Total Annual Class Spots		4,200.00		
	Annual Revenue:	**$**	**21,840.00**		
Pool Rentals					
	Total Annual Rental Hours		1710.00		**NOTE SOME ARE LIKELY FREE - SCHOOL BOARD**
			0.00		
	Rental Rate:	$	75.00		
	Annual Revenue:	**$**	**128,250.00**		
Lockers					
	Annual Revenue:	**$**	**5,000.00**		Annual allocation
Concessions + Vending					
	Annual Revenue:	**$**	**105,000.00**		Annual allocation
	Net of COGS and Labour	**$**	**21,000.00**		
Multi-Purpose Rooms Group Fitness					
	Monday-Friday:		5.00	days	
	# Classes per day		2.00		
	Length of session		9.00	weeks	
	Sessions per year		4.00		**NOTE: THERE IS NO FITNESS FACILITY**
	Average cost of class	$	10.00		
	Maximum enrollment per session		20.00	participants	
	Average fill rate		50%		
	Hours per year:		360		
	Annual Revenue	**$**	**36,000.00**		**360**

SOAC: Operating Revenue Assumptions

Space	Assumptions				Notes	
Multi Purpose Room Rental (Community Room)						
	Rental Rate:	$	120.00	per session (4 hours)		
	Bookings:		4	sessions per week		
	Weeks per year:		36.00		*Allowing for closures for public holidays and limited (zero) use during summer*	
	Annual Revenue	**$**	**17,280.00**			
Gymnasium						
Rentals / Dedicated Use Agreements						
16 hours x 7 days	Rental Rate - Residents	$	100.00	per hour		
	Paid bookings:		30.00	each month	Total annual hours:	720
	Average duration of bookings:		2.00	hours		
	Annual Revenue	**$**	**72,000**			
User Group Usage	Monday to Friday: 7pm-10pm					
	Saturday & Sunday: 8am-10pm					
	Weekday Bookings		10.00	hours	Average of 2 hours each weekday night	
	Weekend Bookings		10.00	hours	Average of 5 hours each weekend day	
					Allowing for closures for public holidays, and expected lack of use during summer months	
	Weeks per year		40.00		(June, July & August)	
	Rental Rate - CSO	$	60.00		Total annual hours:	800
	Annual Revenue	**$**	**48,000**			
					Total gym annual hours:	**1520**
Lease Space						
	Gross Rent		$25	per sq. ft.		
	Occupancy on demised space		100%			
	GLA		1,615	sq. ft.		
	Annual Rent (escalated p.a.)		$40,365			
Child Minding	No Fee					

Appendix C:
Site Location Assessments

SOUTH OKANAGAN AQUATICS CENTRE







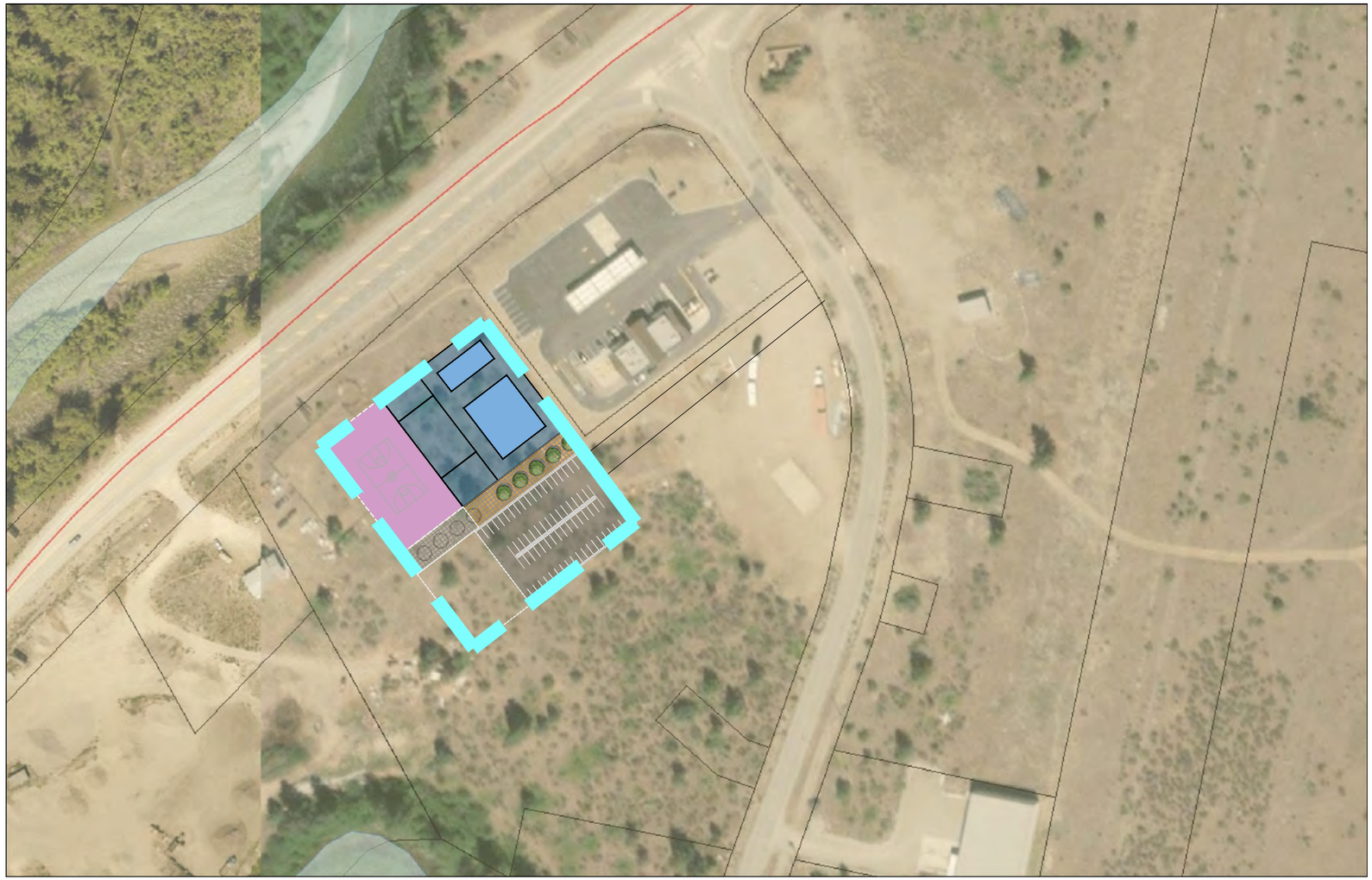
SOAC - SITE ANALYIS





OSOYOOS | OLIVER | OIB

SOUTH OKANAGAN AQUATICS CENTRE | SITE #1



SCALE: 1:2,000

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DISTRICT WINE VILLAGE (OIB) | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #1



SCALE: 1:1,000

DISTRICT WINE VILLAGE (OIB) | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #2



SCALE: 1:2,000

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LION'S PARK | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #2



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DISTRICT WINE VILLAGE (OIB) | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #3a



SCALE: 1:2,000

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OSS/OES (SD 53) | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #3a



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OSS/OES (SD 53) | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #3b



SCALE: 1:2,000

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OSS/OES (SD 53) | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #3b



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OSS/OES (SD 53) | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #4a

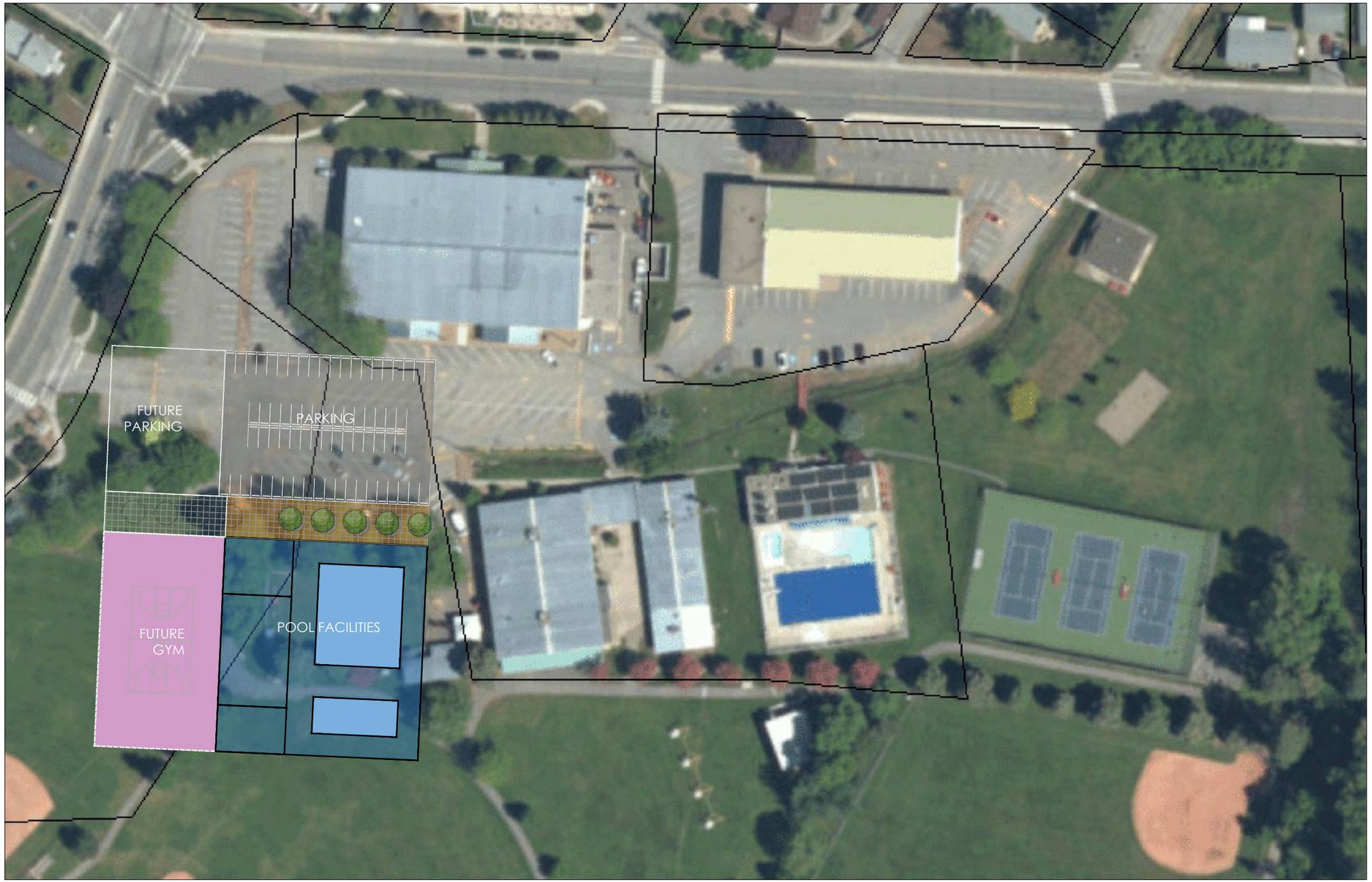


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OLIVER PARKS & REC | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #4a



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OLIVER PARKS & REC | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #4b



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OLIVER PARKS & REC | OLIVER, BC

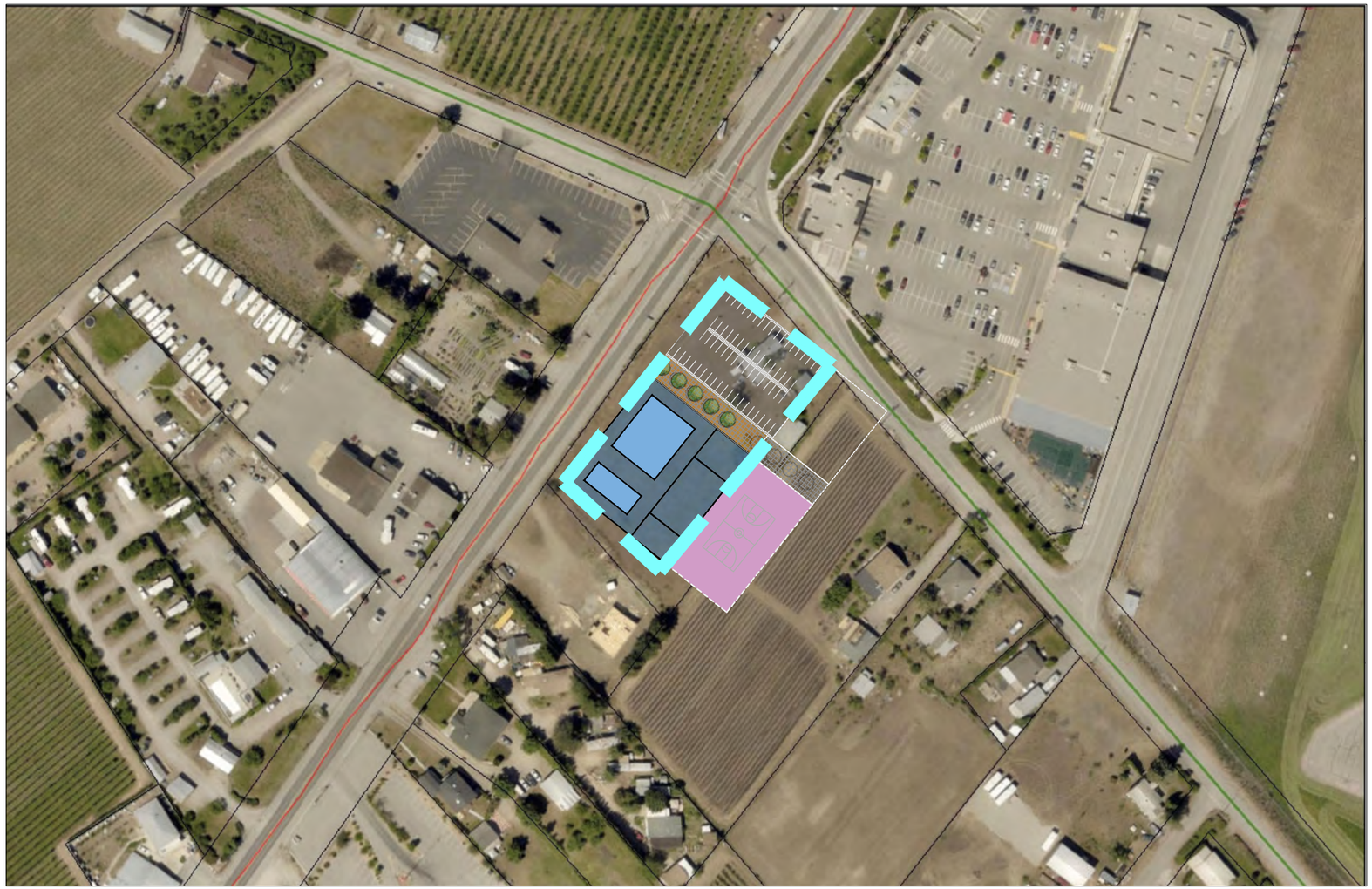
SOUTH OKANAGAN AQUATICS CENTRE | SITE #4b



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OLIVER PARKS & REC | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #5

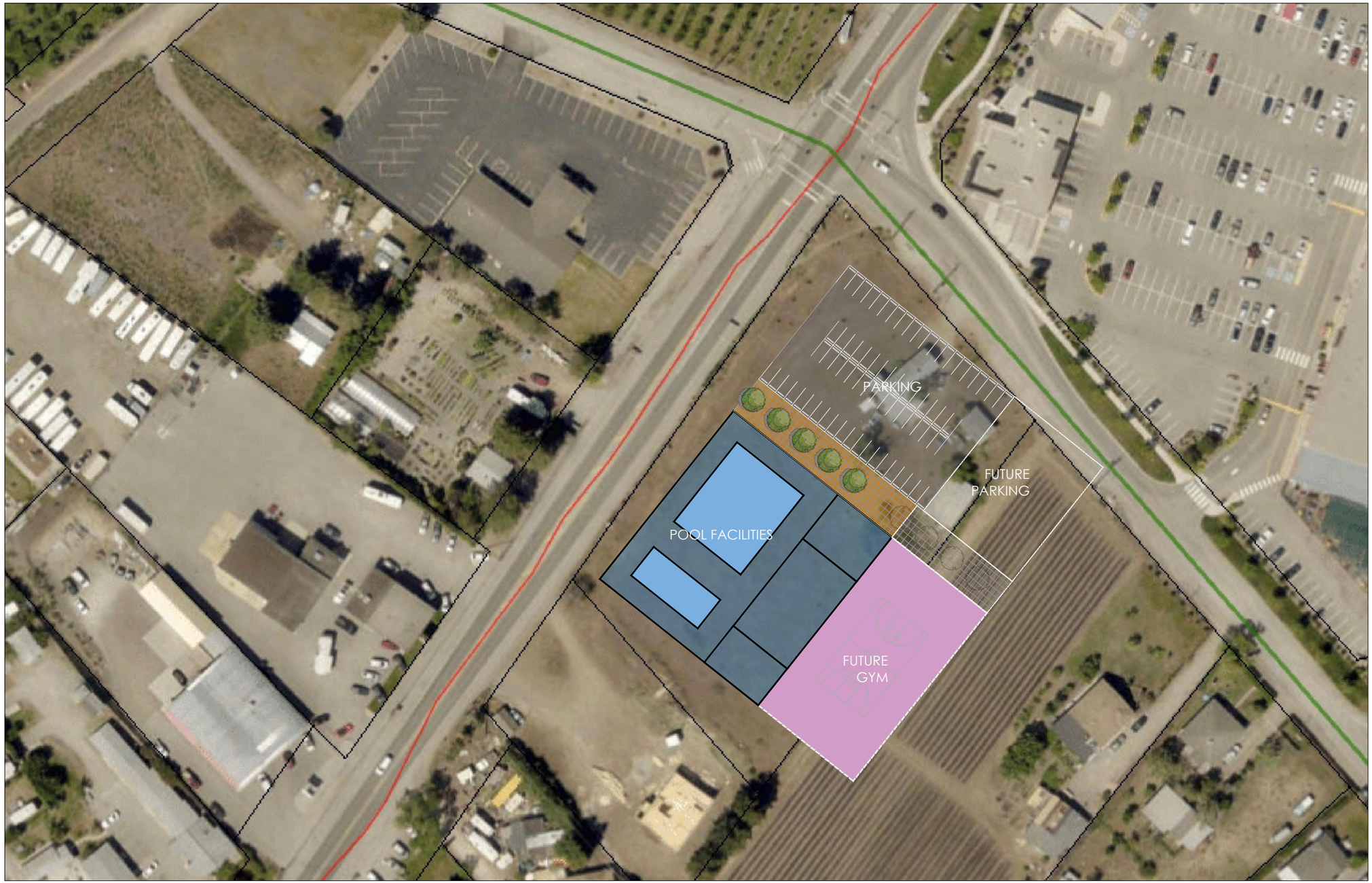


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HWY 97 & ROAD 1 (PRIVATE) | OLIVER, BC

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SOUTH OKANAGAN AQUATICS CENTRE | SITE #5



HWY 97 & ROAD 1 (PRIVATE) | OLIVER, BC

SCALE: 1:1,000

SOUTH OKANAGAN AQUATICS CENTRE | SITE #6



SCALE: 1:2,000

HWY 97 @ FRUITVALE WAY | OLIVER, BC

N

SOUTH OKANAGAN AQUATICS CENTRE | SITE #6



SCALE: 1:1,000

HWY 97 @ FRUITVALE WAY | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #7



SCALE: 1:2,000

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SONORA CENTRE (SD 53) | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #7



SCALE: 1:1,000

SONORA CENTRE (SD 53) | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #8



SCALE: 1:2,000

N

DESERT PARK | OSOYOOS, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #8



SCALE: 1:1,000

DESERT PARK | OLIVER, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #9



SCALE: 1:2,000

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NK'MIP CORNER (OIB) | OSOYOOS, BC

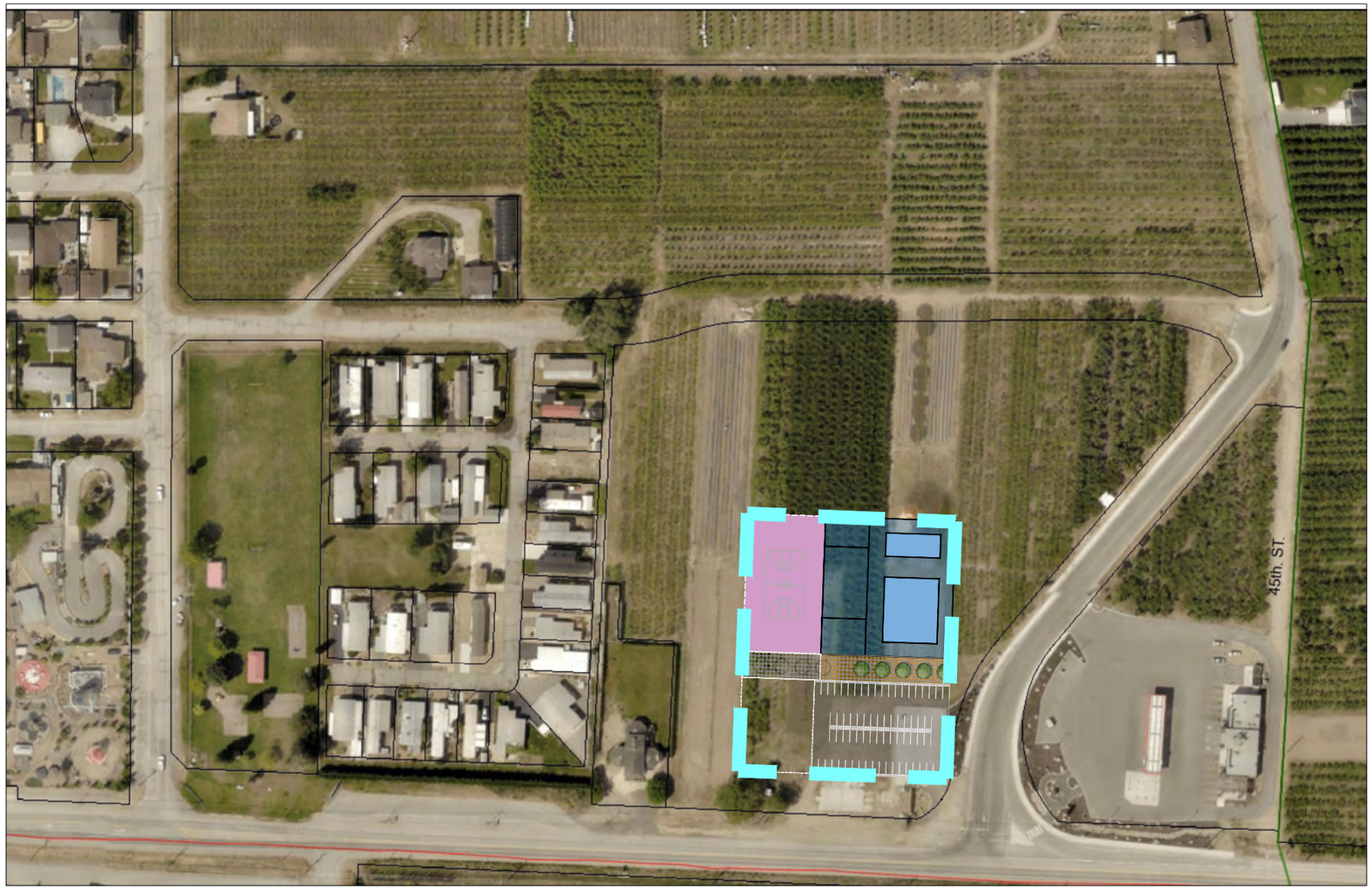
SOUTH OKANAGAN AQUATICS CENTRE | SITE #9



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NK'MIP CORNER (OIB) | OSOYOOS, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #9A



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NK'MIP CORNER (OIB) | OSOYOOS, BC

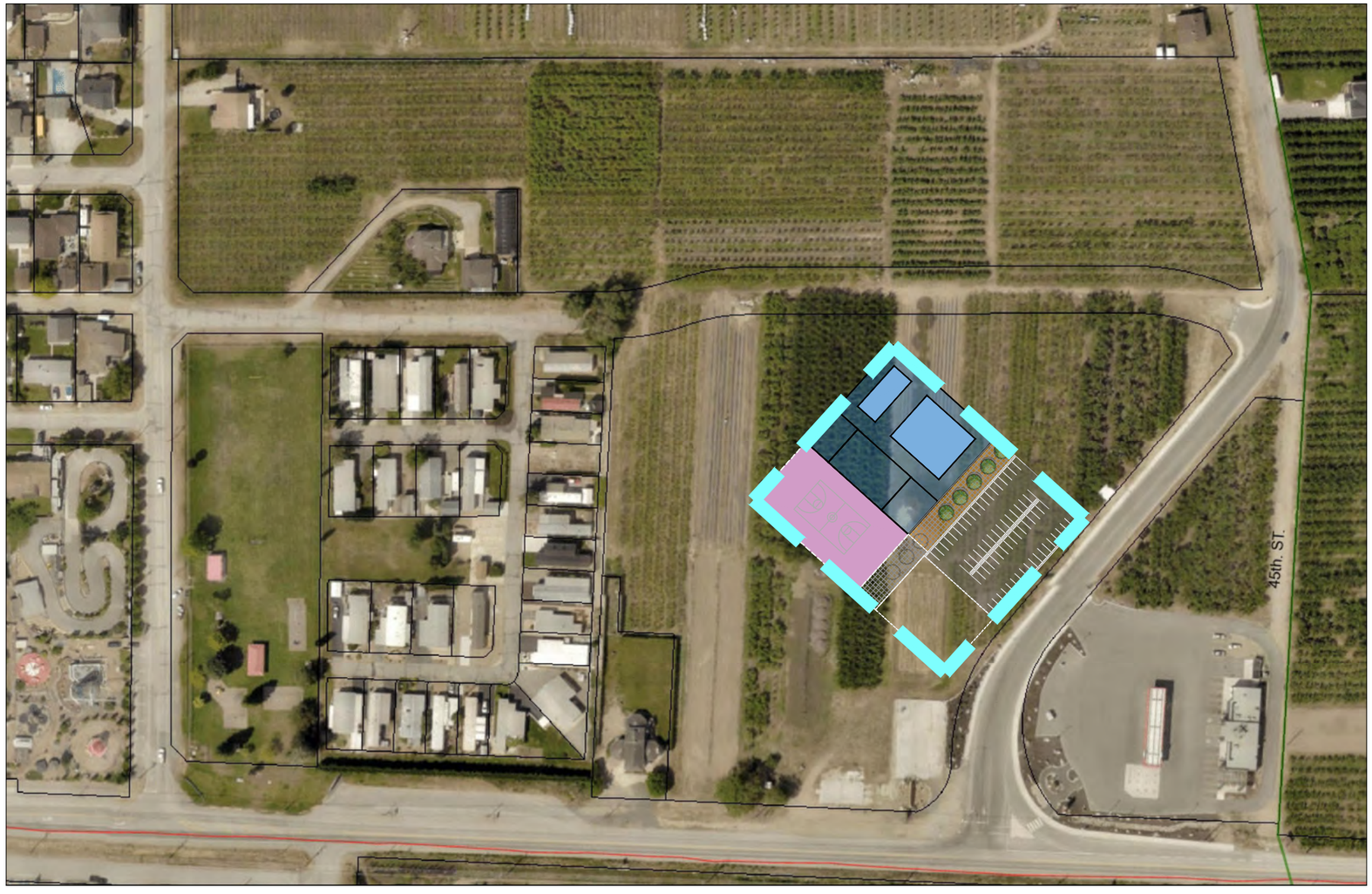
SOUTH OKANAGAN AQUATICS CENTRE | SITE #9A



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NK'MIP CORNER (OIB) | OSOYOOS, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #9B



SCALE: 1:2,000

N

NK'MIP CORNER (OIB) | OSOYOOS, BC

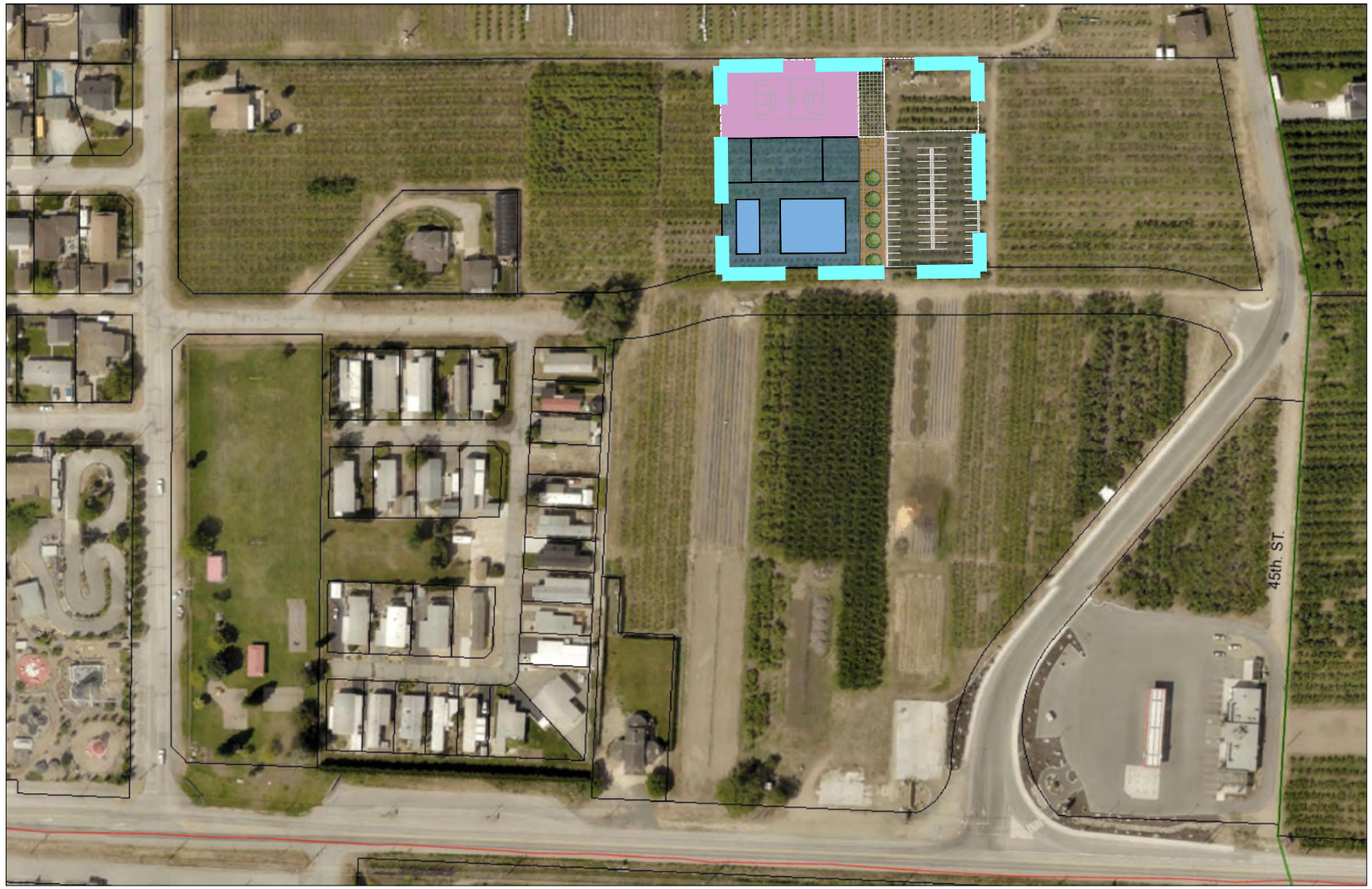
SOUTH OKANAGAN AQUATICS CENTRE | SITE #9A



SCALE: 1:1,000

NK'MIP CORNER (OIB) | OSOYOOS, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #9C



SCALE: 1:2,000

N

NK'MIP CORNER (OIB) | OSOYOOS, BC

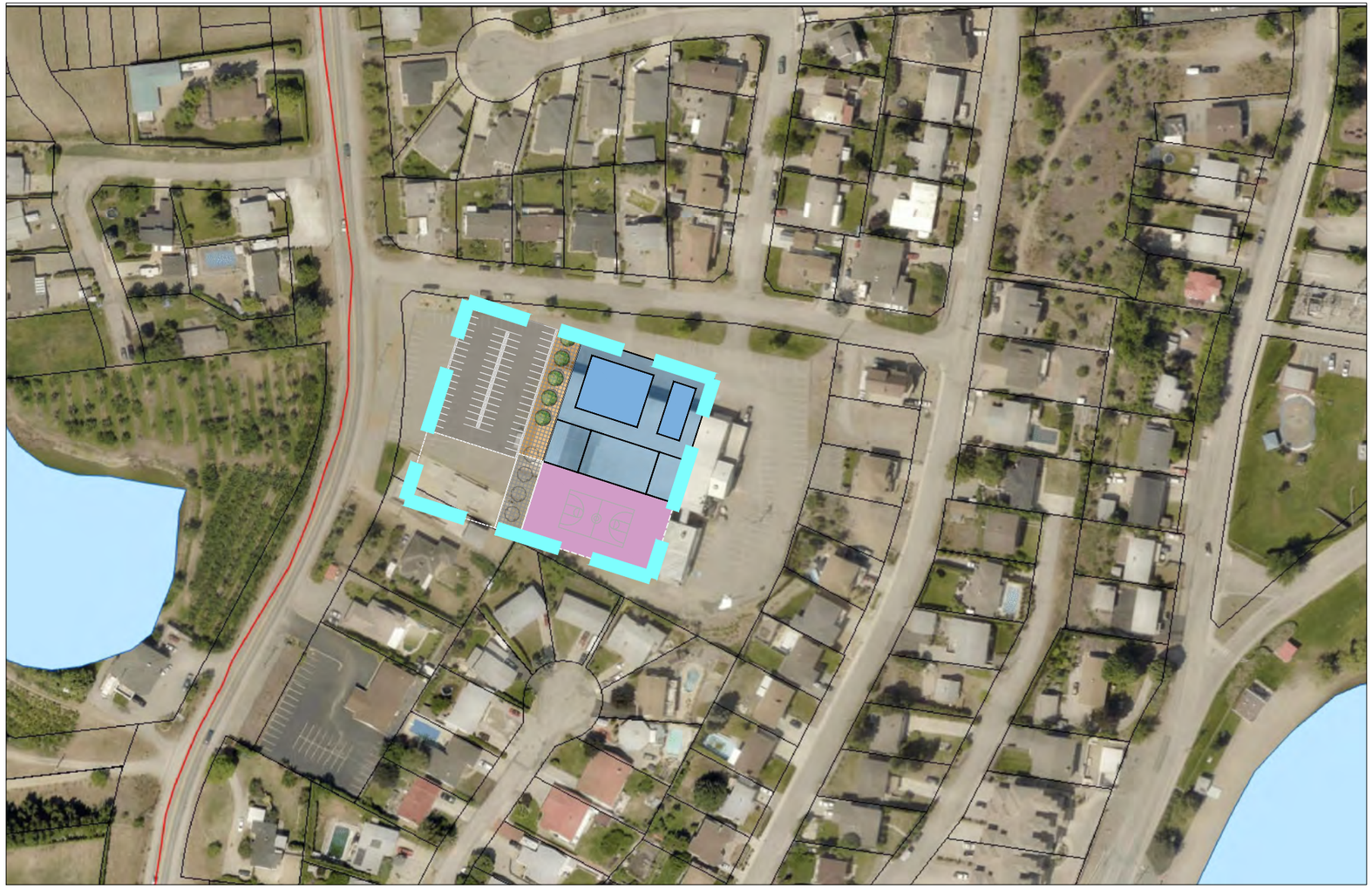
SOUTH OKANAGAN AQUATICS CENTRE | SITE #9C



SCALE: 1:1,000

NK'MIP CORNER (OIB) | OSOYOOS, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #10



SCALE: 1:2,000

N

SUN BOWL ARENA | OSOYOOS, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #10



SCALE: 1:1,000

SUN BOWL ARENA | OSOYOOS, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #11



SCALE: 1:2,000

N

TEST ORCHARD SITE | OSOYOOS, BC

SOUTH OKANAGAN AQUATICS CENTRE | SITE #11



TEST ORCHARD SITE | OSOYOOS, BC

SCALE: 1:1,000

SOUTH OKANAGAN AQUATICS CENTRE | SITE #6 - Option No. 1

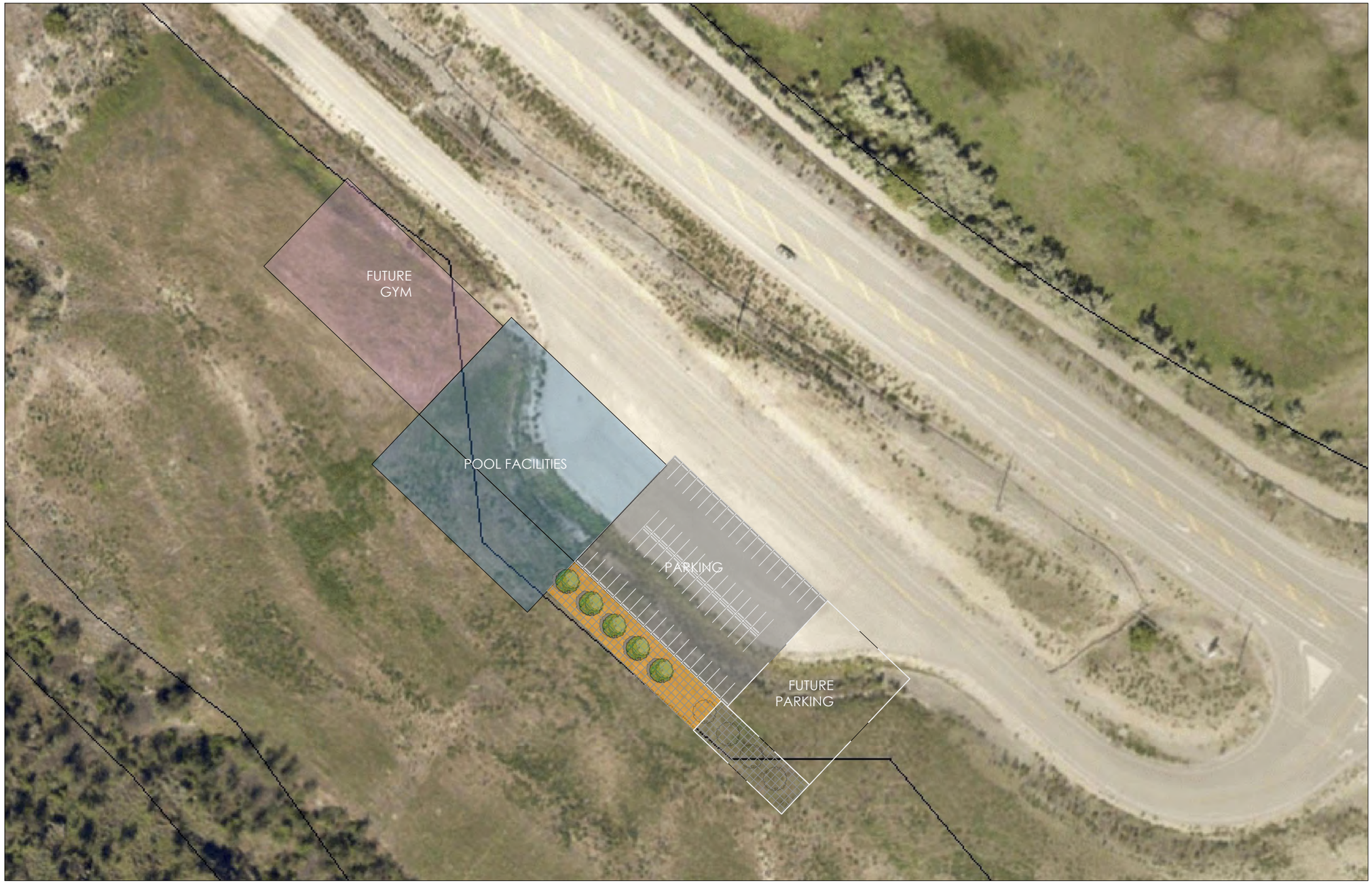


SCALE: 1:2,000

HWY 97 @ FRUITVALE WAY | OLIVER, BC

N

SOUTH OKANAGAN AQUATICS CENTRE | SITE #6 - Option No. 1



HWY 97 @ FRUITVALE WAY | OLIVER, BC

SCALE: 1:1,000


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