

City of Kelowna: Paving the Way for an Equity Strategy



Wayfinding Report

Prepared for
City of Kelowna

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Land Acknowledgment

The City of Kelowna is located in the Okanagan Valley, which is the traditional, ancestral and unceded territory of the Syilx/Okanagan people. In the southern interior of British Columbia, the Syilx/Okanagan Nation comprises seven member communities: Okanagan Indian Band, Osoyoos Indian Band, Penticton Indian Band, Upper Nicola Band, Upper Similkameen Indian Band, Lower Similkameen Indian Band and Westbank First Nation. They have lived on and tended to these lands since time immemorial.

The SCARP team working on this project are doing so in Vancouver, which is situated on the traditional, ancestral and unceded territories of the x̣ṃəθḳẉəỵəm (Musqueam), Sḳwx̣ẉú7mesh (Squamish), and səliwətał (Tsleil-Waututh) Nations. These peoples have stewarded this place since time immemorial.

Any effort that seeks to improve equity outcomes in Canada needs to acknowledge the history of the land on which the participants live and work, the pre-existing relationships and traditions that have been suppressed and erased by colonial and settler actions and structures, and the continued struggles that Indigenous peoples face to maintain their ways of life. In addition, the profession of planning has a history of contributions to the displacement and dispossession of Indigenous peoples. As outsider students of this profession, we keep these realities in mind and hope that our work helps to undo some of these harms and improve conditions for Indigenous peoples and other equity-seeking groups.



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Executive Summary

Project objective

The Paving the Way project seeks to support the City of Kelowna's work to translate the equity direction set out in the Kelowna 2040 Official Community Plan (OCP) into implementable policies. Using the working lens of pragmatic idealism, the SCARP team reviewed various innovative case studies and conducted engagement activities with City staff and community stakeholders. This Wayfinding Report provides recommendations toward the City's efforts to create a full-scale Citywide Equity Strategy.

Approach

Our approach comprised three key moves:

- ◆ **Understanding the context** by outlining key demographic data and current policy landscape considerations from interviews with City of Kelowna staff;
- ◆ **Researching real-world references** by scanning equity strategies and plans for innovative and applicable case study comparators; and
- ◆ **Touching base with grassroots community organizations** through interviews, to build relationships and ensure our recommendations meet the equity needs of Kelowna.

Key findings

Staff interviews

Through six thirty-minute interviews with current City of Kelowna planners, the SCARP team gained a better understanding of where Kelowna is at on its equity journey. While foundational moves have been made, the City should consider the following key areas as it moves towards stronger equity planning:

- ◆ **Provide clearer guidance for implementation:** Staff highlighted two main areas of concern: better engaging seldom-heard voices in planning, and minimizing the displacing impacts of continued growth in Kelowna on equity-seeking groups.
- ◆ **Address current structural gaps and obstacles:** Staff described an existing lack of diversity among their ranks; uneven levels of equity competency among City staff, a development-oriented City culture

Equity, as defined in the Kelowna 2040 OCP, is the "fair distribution of opportunities, power, and resources to meet the needs of all citizens." Specific equity goals include "providing opportunities for people of all ages, abilities and identities, and building a community where everyone has the same opportunity to succeed and thrive and no one is excluded."

Pragmatic Idealism balances idealistic interests and values (in this case, the importance of equity in planning) with a pragmatic, i.e. "flexible, adaptable, and workable" sensibility.

Social justice refers to the idea that "everyone—from the poorest, most marginalized in society to the wealthiest—is afforded equal rights and opportunities" (Global Affairs Canada, 2017). In planning, this is often linked to **spatial justice**, defined by Edward Soja in 2010 as "the fair and equitable distribution in space of socially valued resources and opportunities to use them". This now also commonly includes recognizing the rights of marginalized groups to these resources and opportunities (The Spatial Justice Network, 2020).

Equity-seeking groups are defined in federal legislation as communities that experience collective barriers in participating in society, based on factors that include race, origin, religion, age, sexual orientation, gender identity or expression, and disability (Public Service Commission of Canada, 2021). For Kelowna, this can also specifically include individuals experiencing homelessness, Indigenous communities, new immigrants and women at risk.

Grassroots organizations are community groups that “[advocate] a cause to spur change at local, national, or international levels” (Bettencourt, 2019). They typically organize to “improve the social, cultural and economic well-being of their families, communities and societies” (Inter-American Foundation, n.d.). Working with grassroots community organizations allows for the development of solutions that are tailored to the local context.

that does not readily incorporate equity, and a lack of disaggregated datasets that would help equity analyses.

- ◆ **Lead in progressing equity:** Staff suggested that the City could be an equity leader by better involving equity-seeking groups in decision-making and incorporating equity-related actions into City bylaws.
- ◆ **Comprehensively and sensitively measure equity:** Staff indicated that the implementation of equity should be measured through the use of indicators to demonstrate its impact, but this has to be done comprehensively and sensitively so that it does not detract from the relationship-building needed, or overstate its impact.

Equity strategy scan

To set a foundation for Kelowna’s equity work, the SCARP team researched a range of equity strategies from Canada, the United States and Australia for common elements. Five key recommendations emerged that provide guiding principles for the City of Kelowna in structuring its equity efforts. A robust and effective strategy should address all parts of the planning process, featuring the following key actions:

- ◆ Build a clear foundational vision for equity
- ◆ Incorporate EDI principles into internal employment practices
- ◆ Review and update municipal procedures through an equity lens
- ◆ Reassess community engagement to focus on equity
- ◆ Build trust with equity-seeking groups

Equity policy scan

The SCARP team scanned a range of equity and equity-informed plans from Canada, the United States and Australia to identify applicable and innovative downstream policies that can help translate the OCP policy visions into implementable actions. The team compiled the policies found, along with recommended policy goals for Kelowna, in an Equity Policy Reference Table (Appendix B). From the policies reviewed, the team found that the strongest policies:

- ◆ **Explicitly mention equity concepts** in their policy language;
- ◆ **Identified the target equity-seeking groups** for that policy,
- ◆ **Identified the desired outcomes** from the policy; and

- ◆ **Leveraged existing programs, platforms, and legislation** to support implementation.

The team grouped our recommended policy goals into short- and long-term implementation goals based on assumed available resources, existing risk appetites and extent of political support required for each policy domain.

Short-term goals focus on actions such as developing disaggregated datasets, reviewing existing plans through an equity lens, and improving engagement processes. Longer-term goals focus on actions such as amending bylaws and associated legislation, implementing policies for more equitable approaches in development, committing resources for equity and community programs, and establishing standing committees to give equity-seeking communities a clearly-defined role within the planning process.

Community stakeholder engagement

Over the course of six 45-60 minute virtual interviews with non-profit organizations, public health, and social service providers, participants were asked a number of conversation starter questions in an effort to dig deeper into the equity landscape in Kelowna. In the SCARP team's synthesis, three key categories of recommendations and reflections arose throughout the interviews regarding possible roles the City of Kelowna could employ to better serve equity-seeking groups:

- ◆ **Act as convener:** Bring people and service providers together by providing robust community liaison support. Leverage this facilitation to develop appropriate engagement opportunities with equity-seeking groups.
- ◆ **Act as advocate:** Use the City of Kelowna's power and privilege to advocate for equity-seeking groups and help organizations access support from other levels of government.
- ◆ **Provide practical support:** Administer targeted support and staff resources to organizations working with equity-seeking groups.

Participants emphasized the complex and nuanced nature of equity in city planning, often stressing that there is no one size fits all approach. As equity is an ever-changing aspect of city planning, it is the responsibility of the City of Kelowna to maintain continuous and ongoing relationships with grassroots service providers and equity-seeking groups to ensure City work fits the needs of all its residents, especially those who have been historically marginalized.

Next steps

In light of the work completed for the Paving the Way project, the SCARP team recommends that the City of Kelowna undertake the following next steps to work towards an equity strategy:

- ◆ Address internal concerns regarding representation and equity competency, and provide staff with more guidance on equity implementation;
- ◆ Translate the equity-related policies in the 2040 OCP into implementation policies; using the Equity Policy Reference Table as a guide, and adopting an equity lens
- ◆ Continue to track policies through implementation, considering the suggested indicators, and ensuring that the work dovetails with other planning exercises undertaken by the city (such as the ongoing Housing Needs Assessment);
- ◆ Continue to keep abreast of equity plans and initiatives from other communities, to be aware of new knowledge on state-of-the-practice methods and policies, as equity planning is a nuanced and evolving field;
- ◆ Engage the First Nations and urban Indigenous communities in Kelowna to better understand their concerns and to establish appropriate engagement approaches with their communities; and
- ◆ Continue to strengthen community relationships, including with the grassroots organizations that the SCARP team has initiated links with.

Summary poster for the Paving the Way project.



Kelowna's equity context

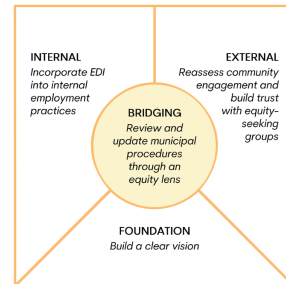
Given Kelowna's current nascent equity context, an equity strategy should:

- **Provide clearer guidance for implementation**, especially for engaging seldom-heard voices and minimizing displacement effects of development
- **Address obstacles** such as lack of diversity and uneven equity competency among staff, a development-oriented culture, and lack of disaggregated datasets
- **Better involve equity-seeking groups** in decision-making, and incorporate equity into bylaws
- **Comprehensively measure** equity implementation

Guiding principles



Key principles for a robust and effective equity strategy:



Adapted from GDEIB Equity Benchmarks Model

Objectives

In its 2040 Official Community Plan (OCP), the City of Kelowna included equity as a core pillar. To support the City's equity work, the team:

- Researched **innovative and applicable practices**
- Interviewed community organizations for **directional insight**
- **Made recommendations** to inform a future equity strategy

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Project lens

Pragmatic idealism helps us adapt our work to the Kelowna context, and adopt an approach geared towards effective action.



Engaging the community

Community organizations are a key stakeholder and a vital resource for any effort to improve equity in Kelowna. The City can:

- **Act as convener** and provide liaison support for community organizations
- **Act as advocate** for equity-seeking groups using City power and privilege
- **Provide practical support** to organizations working with equity-seeking groups

There is **no one-size-fits-all approach** for all communities. The City must **maintain ongoing relationships** with grassroots service providers and equity-seeking groups.

Implementing equity policies



The Equity Policy Reference Table compiles innovative implementation-level equity policies. The strongest policies:

- Explicitly mention equity
- Identify target groups
- Identify desired outcomes
- Leverage existing tools

Using these, the team recommended short- and long-term implementation goals for the City's OCP equity policies.

Short-term:

- **Build disaggregated datasets** for equity analyses
- **Review existing plans** to identify gaps
- **Make engagement processes more inclusive**

Long-term:

- **Amend bylaws**
- **Implement development-oriented policies**
- **Commit resources**
- **Give planning power to equity-seeking groups**

Water St 1400



Project Background

Background

As one of the fastest-growing cities in Canada, Kelowna is constantly evolving, and the City continues to develop new ways to provide services that uphold the values of its citizens. Recently, the City of Kelowna adopted the [2040 Official Community Plan \(OCP\)](#), a guiding document that provides direction around land use, mapping and policies based on the Imagine Kelowna community vision.

[Community Trends Reports](#) published by the City of Kelowna note social challenges like rising inequality, an ageing community, and housing unavailability due to a rising affordability gap; these challenges have influenced a need for a conversation about how the City approaches the community's goals. As the City of Kelowna's population continues to diversify socially and economically, there is a demand for equitable strategies that drive city building and development.

Correspondingly, "*Incorporating equity*" has been identified as one of the OCP's core pillars, the first time this has been done in the City. For the City to realize this intended approach as implementable equity actions in policy areas like housing, accessibility and engagement, there is a need to understand better how an overall strategy can be used to guide planning policies and processes, alongside broader City work.

The City of Kelowna has successfully collaborated with the School of Community and Regional Planning (SCARP) at the University of British Columbia on several projects, including *Mapping Equity In Kelowna's Built Environment* in 2021 and *A Resilient Future for All: City of Kelowna Climate Equity Analysis* in 2022. These previous SCARP projects have been helpful for the City in expanding on equity for city-building, testing analytical approaches for highlighting at-risk communities, and suggesting improvements to address gaps in process and policy.

The *Paving the Way* project builds on these earlier efforts to support the City of Kelowna's work in translating the broad understanding already gathered, and the overarching equity direction set out in the OCP, into pragmatic, implementable policies. In particular, this project will draw from a review of various innovative case studies and interviews with practitioners and community organizations to develop a Wayfinding Report. This Report is intended to provide recommendations and references for the City's efforts to create a full-scale Citywide Equity Strategy, which will in turn function as a north star for the City's planning policies. The team will also reflect on constraints and suggest far-reaching and all-inclusive indicators (both qualitative and quantitative) for the City's consideration in monitoring equity progress.

Project Goals and Objectives

Based on the review of the provided request for proposals and consultation with members of the City of Kelowna team, the SCARP project team set out to undertake the following:

- ◆ **Research innovative and applicable practices;** case studies that provide examples of equity strategies in communities, organizations and municipalities;
 - Obtain a deeper understanding of planning context in City of Kelowna, through analysis of census data and interviews with City staff, to inform recommendations
- ◆ **Engage, through interviews,** with community and equity-based organizations that represent groups in Kelowna that have historically been underrepresented, to share their experiences with and strategies for community engagement, and priorities for the future;
- ◆ **Provide recommendations** to embed equitable practices within the city building process, each with a series of actions to help address the strategy;
 - Create a vision and goals for the equity strategy;
 - Propose recommended actions for equity implementation;
 - Identify measurable (qualitative and quantitative) equity indicators for tracking implementation and impact of policies over time. ◆

Lens and Approach

Equity advocacy

The SCARP project team’s approach is based on our comprehensive review and understanding of the RFP, our own experiences and our strong belief in the importance of equity in planning. Equity and social justice are “an inescapable fact of planning” (Loh and Kim, 2020: p182) and a core priority for planners, to be addressed in tandem with economic development as well as environmental protection (Campbell, 2016). This is reflected in the professional standards set out by planning bodies — the American Institute of Certified Planners commits planners to “incorporate equity principles and strategies as the foundation for preparing plans and implementation programs” (APA, 2021), while the Canadian Institute of Planners identified social equity as a “policy priority” going forward (CIP, 2020).

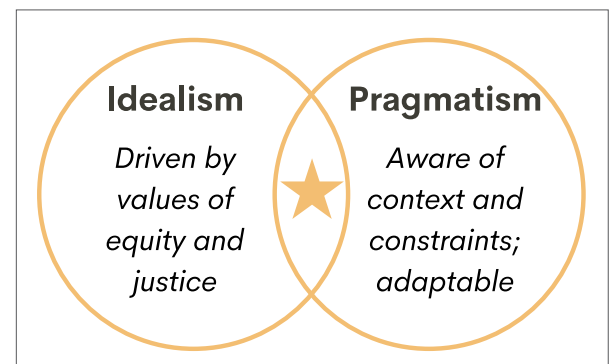
This focus ties in well with the City of Kelowna’s approach. For the first time, the City has included “Incorporat[ing] equity into city building” in the 2040 OCP as a core pillar for strategic direction. This is an exciting development, and we are keen to work with the City to imbue its plans, processes and policies with equity principles. In line with Paul Davidoff’s advocacy planning approach, this work should look to explicitly consider equity as a value informing the City’s plans, and adopt a pluralist and inclusive approach (including representing specific interest groups) to “bring planning practice closer to the issues of real concern to the citizens” (Davidoff, 1965: p337).

Working lens: *Pragmatic Idealism*

At the same time, we must recognize the context we operate within. As the above suggests, the City is in its early stages of implementing this equity vision into a context where, historically, policies that marginalized and displaced communities (Lewis and Berg, 2021; Tedesco, 2021). Attitudes and structures inevitably take longer to shift, and equity implementation will require a tender introduction. To meet this challenge and ensure that our proposals have traction, we are adopting the working lens of pragmatic idealism (fig. 1).

The phrase pragmatic idealism expresses the SCARP team’s aim to balance idealistic interests and values (in this case, the importance of equity in planning) with a pragmatic, i.e. “flexible, adaptable, and workable” sensibility (Melakopides, 1998: p5). Political philosopher Pierre-Étienne Vandamme describes pragmatic idealism as a strategic lens that combines “high [...] ideals with a willingness to guide action” (Vandamme, 2020: p263). While the concept of pragmatic idealism has its

Figure 1. Key principles of the pragmatic idealism lens.



Pragmatic Idealism in NGO Activism

An example of pragmatic idealism in action is how the international non-governmental organization (NGO) Oxfam works towards its objective to fight inequality to end poverty and injustice. While Oxfam is driven by its values and vision as it seeks lasting solutions to inequality, Oxfam also recognizes the potentially key role that the private sector, while a complex sector with corporations pursuing their own interests, can play in generating solutions.

As such, Oxfam adopts a pragmatic idealist approach in working with corporations, “testing and trying new ways of engagement... to move them to greater positive impact”. Lies Craeynest, the Head of Private Sector Engagement, describes how Oxfam combines hard-hitting publicity campaigns to leverage public pressure on large corporations, with collaborating with smaller, frontrunner companies who want to fix systemic problems but need support to do so.

Craeynest writes, “As Oxfam, we haven’t quite found the ultimate recipe to make a company move on our concerns, and we regularly re-examine our multifaceted approach. Yet, we have no doubt that we do need to develop a diverse set of tailored and agile strategies towards the corporate sector if we want to make progress towards the [Sustainable Development Goals].”

theoretical basis in philosophy and political theory, we find that these central tenets are highly applicable to planning and policy work that tries to bridge a value-driven perspective with the need to effect real outcomes.

The pragmatic aspect understands the city as a complex system with wicked problems, and considers that stakeholders are “not a homogeneous group, and are not static entities either” (Craeynest, 2019). Policy solutions should thus recognize constraints and consider opportunities to realise tangible results. The idealist side, on the other hand, allows us to retain equity and social justice as an aspirational “hedge” against any conservative bias towards maintaining the status quo that may come with a realist approach (Vandamme, 2020: p263), and use it as a principle to guide policy action.

Blanusa, Chen and Huttner (2018) of Redstone Strategy, a consultancy serving philanthropic institutions as well as corporations, suggest that taking an approach that combines pragmatism with idealism can help funders and advocates work better with grassroots communities to more effectively support and sustain advocacy movements. We therefore see this approach as consistent with early conversations with City of Kelowna staff, who highlighted the importance of and need for a pragmatic and realistic approach, even while working towards the ideal of equity. Thus, while retaining a commitment to equitable planning, we focused on drawing insights from practitioners and community actors with experience in Kelowna, and finding real world implementation examples for inspiration, to ensure applicability to this context and the best chance of real implementation and impact.

Focus areas

Effective plans and policies are needed to translate equity into equitable outcomes on the ground. Policies “set out purposive courses of action and determine the wider framework within which actions of inclusion or exclusion occur” (Huss and MacLachlan, 2016: p4). For policies to address the needs of equity-seeking groups, “deliberate action [...] to include the interests of vulnerable and marginalized groups in policy processes” is needed (Ebuenyi *et al*, 2021: p2). These considerations “must shape the entire policy process — from formulation, through to implementation, monitoring and evaluation”

(Huss and MacLachlan, 2016: p6). Hence, in addition to substantive planning policies in domains like housing and accessibility, we also look into structural and process recommendations (e.g. staff capacity, engagement processes).

As a team, we recognize that the incorporation of equity in city building demands more than representing the values of community members, but also a yearning for justice that identifies and takes meaningful action to provide full access to social, economic and environmental structures for all. The SCARP team acknowledges that past decision-making processes and engagement efforts may not have been underpinned by a conscious and concerted application of equity, and we aim to address it through our recommendations.

With the support of City of Kelowna staff, we will seek out ways to provide far-reaching actions to ensure community access to the planning process. This includes envisioning the project process as engagement-focused, based on suggestions of practice from other equity-focused practitioners and community organizations. This approach draws from Sherry Arnstein's Ladder of Citizen Participation theory, which proposes that "have-not" citizens be deliberately included in political and economic processes (Arnstein, 1969), and Loh and Kim's work, which holds that "an equitable comprehensive plan would be created through an inclusive public participation process" that explicitly recognizes and considers the needs of disadvantaged and vulnerable groups in the community (Loh and Kim, 2021: p183).

Key moves

Guided by the above, our approach included the following broad pieces:

- ◆ **Understanding the Context:** Through reviewing existing policies and data, as well as interviews with City of Kelowna planners, the team sought to form a grounded, nuanced understanding of Kelowna's planning context and experiences thus far with equity planning as a sound basis for the rest of the project.
- ◆ **Real-world References:** The team also explored a range of strategies from external municipalities and organizations to identify innovative and applicable case studies to Kelowna's context for the City's reference and inspiration.
- ◆ **Engagement for Relationship Building:** We then worked to engage key community stakeholders in Kelowna to deepen our understanding of equity issues there, and to obtain input on how the City can practice engagement and deliver services through an equity lens. ◆

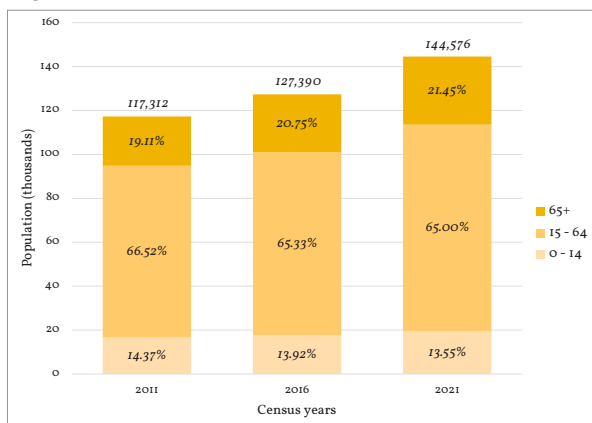
Understanding the Kelowna Context

Key Takeaways

The City of Kelowna is growing rapidly, and facing new challenges in managing both absolute growth and increasing diversity. While the City is fairly early on in its equity journey, it has made foundational moves like including equity as an OCP pillar. There are important areas to consider as the City moves towards stronger equity planning:

- ◆ Need for clearer guidance at implementation level, with two main areas of concern:
 - Improving engagement process to include seldom-heard voices
 - Minimizing displacing impacts of continued development
- ◆ Efforts up to now have faced several key gaps and obstacles:
 - Lack of diversity and uneven equity competency among staff
 - Development-oriented culture
 - Need better, disaggregated datasets to inform analyses
- ◆ Planners suggested areas for the municipality to lead in progressing equity:
 - Better involve equity-seeking groups in decision making
 - Incorporate equity-related actions into bylaws
- ◆ Measuring equity implementation must be done sensitively

Figure 2. Population by age groups, 2011-2021.



Community profile

The City of Kelowna is a fast-growing place. Its overall population increased by 13.5% to 144,576 from the last Census in 2016 (fig. 2) — comparable to Vancouver's pace (15.4%) and almost double the provincial rate of 7.6%. The fastest growing segments of the population are the 25-44 years and 65-84 years age brackets, suggesting there are more Kelownites of family-starting age, but also a steadily-ageing community. Indeed, over a fifth of current Kelowna residents have looked for a new home in the city over the past five years, and over a quarter have moved to Kelowna in the same time period (fig. 3).

With this growth, Kelowna is also changing. Almost 5% of the city’s population migrated here from overseas in the past 5 years (fig. 3). While the city is still predominantly white, the profile is gradually becoming more diverse, with 14% of the population belonging to a visible minority (fig. 4), up from 7.6% in 2011 and 9.5% in 2016. More Indigenous-identifying people are also living in Kelowna, comprising 5.6% of the total population (fig. 5).

The population growth has also been accompanied by economic growth. The median total household income has been steadily increasing from 2010 to 2020, and the median total individual income of \$57,600 is above the national median of \$57,200. Fewer individuals are now assessed as low-income (against national standards), though this is still around 10% of the city’s population (fig. 6), and Kelowna still has the 8th (out of 41) highest poverty rate (9.2%) among large urban areas across Canada (Statistics Canada, 2022).

Figure 3. Migration status from 5 years ago, 2021.

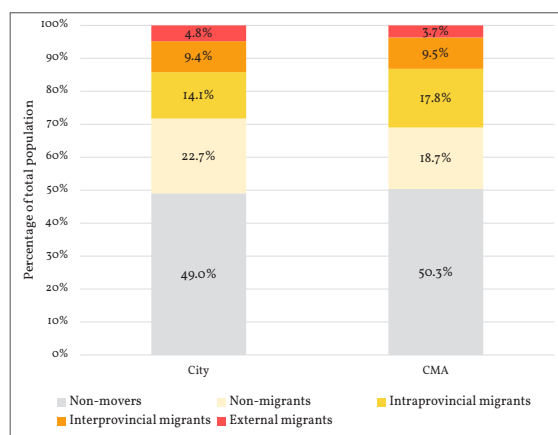


Figure 4. Population by declared visible minority membership, 2021.

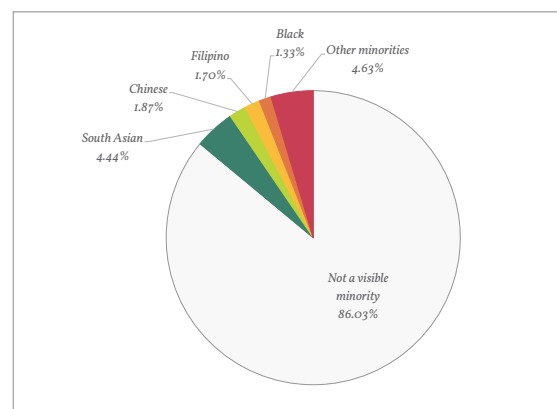


Figure 5. Persons with Indigenous identity, 2011-2021.

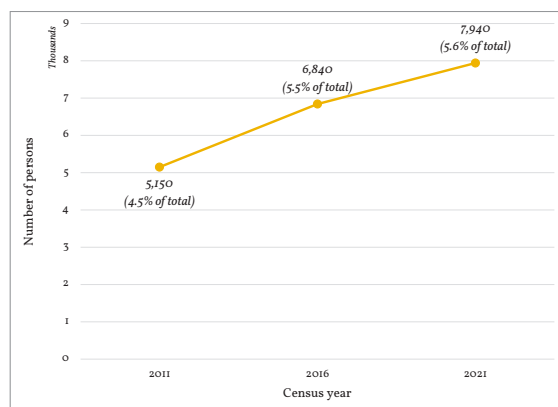


Figure 6. Population assessed as low-income (LIM-AT) by age group, 2011-2021.

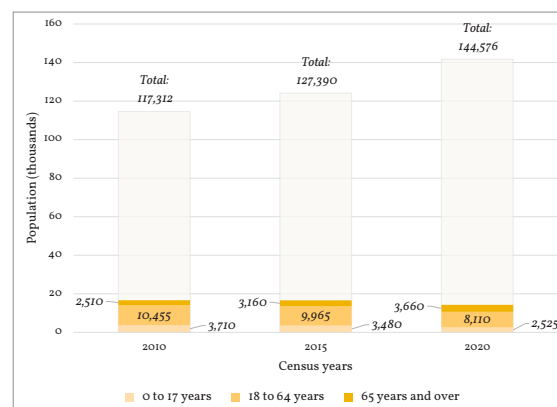


Figure 7. Median rent by dwelling size, 1990-2022.

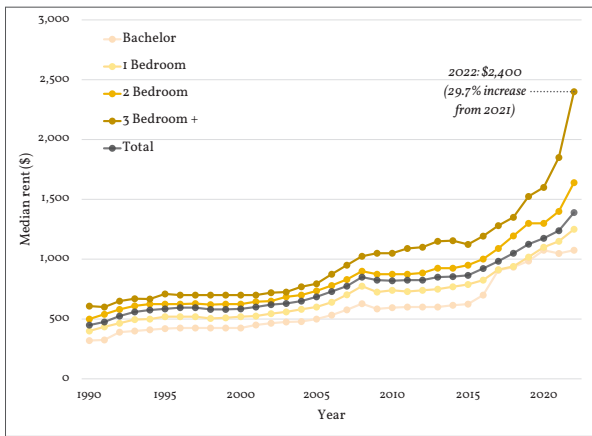


Figure 8. Households by percentage of income spent on shelter costs, 2011-2021.

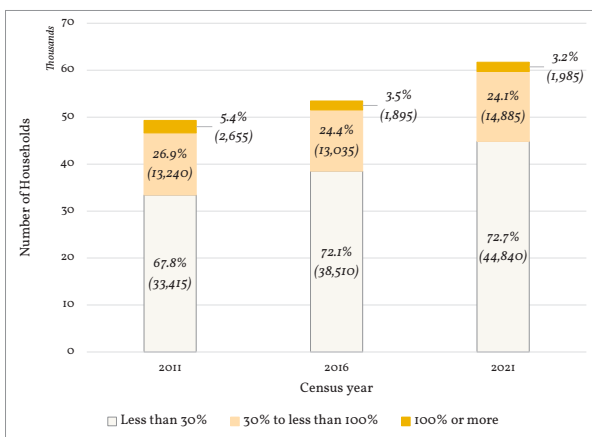
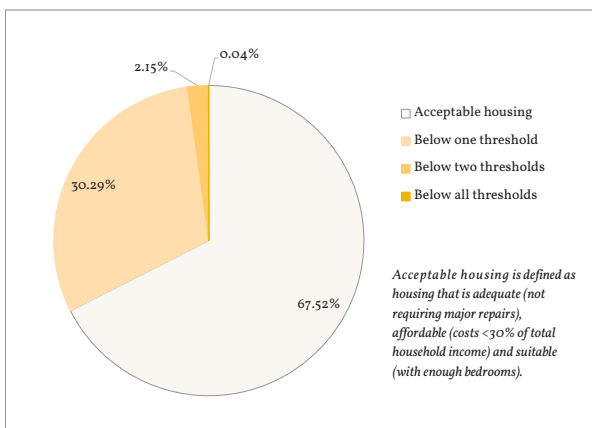


Figure 9. Households by standard of housing, 2021.



Against this backdrop of growth, housing costs have become an increasing concern, with both housing prices and rents (fig. 7) rising more quickly over the past two years. A growing number of households are spending over 30% of income on shelter costs (fig. 8), and nearly a third of households are not living in acceptable housing (fig. 9). While the percentage of Kelowna households in unaffordable housing has fallen slightly from 2016 to 2021, we do not yet know what the full effects of COVID-19 financial supports like the Canada Emergency Response Benefit (CERB) were on housing affordability. As the benefits were temporary, there will likely be a resumption of previous housing affordability trends (i.e. growing unaffordability) in future years.

Historical backdrop

The city has also had a complicated history with minority groups: it was founded on unceded Syilx/Okanagan First Nation territory as a site for French Canadian fur traders and grew as a community of British upper-middle-class families and young men (Tedesco, 2021); and Japanese-and Chinese-Canadians have both been excluded from Kelowna society in the past (Lewis and Berg, 2021).

The pace at which Kelowna is transitioning from a broadly homogeneous community to an increasingly diverse one facing structural changes (such as an ageing population) will need to be managed carefully so as not to exacerbate any issues extant in Kelowna’s society.

Against this backdrop, the City of Kelowna’s new commitments to advance Truth and Reconciliation (Hemens, 2021), along with the inclusion of equity as a key strategic pillar in the 2040 OCP, represent an important step to ensure that benefits of the growth that Kelowna is seeing can accrue to everyone in the city and improve the circumstances of groups that have hitherto been left behind.

Interviews with City staff

To further our understanding of the equity situation in Kelowna, we interviewed a range of City of Kelowna staff responsible for preparing, implementing and monitoring policies and regulations. While the staff we interviewed had differing levels of experience with planning work and equity issues, they all had indicated interest in issues relating to equity in planning. These interactions thus provided us with practitioner insight into previous and current efforts in implementing an equity lens in Kelowna planning work.

Our discussions focused on the gaps in the planning process, the role of the municipality in improving equity, and the measurement and acceptance of equity efforts. Each interview lasted approximately 30 minutes and allowed interviewees to describe their roles, focus, personal experiences, and approaches to a more equity-inclusive strategy. We conducted six interviews throughout November and early December 2022 via a video conference platform.

In collaboration with our City of Kelowna partners, interviewees were from the following city divisions: Partnerships and Investments, Active Living and Culture, and Planning and Development Services. Their selections were based on their work alongside the Policy and Planning team on various subject matters. Key themes from the interviews, along with selected quotes, are summarized in the rest of this section:

Key equity focus areas

While the inclusion of equity as a 2040 OCP strategic pillar sets the direction for future planning policy, interviewees acknowledged that it remains a broad and aspirational approach. Staff reflected a need for clearer guidance at the policy and implementation level on how to incorporate equity into their work:

- ◆ *“What can we put into these neighbourhood plans to make them more equitable, particularly as we see development in areas that does have the potential for displacement, not just on the results, but also the processes?”*
- ◆ *“How are we going to include DEI within the City of Kelowna?”*
- ◆ *“There's a recognition that there's a lot of work to do, and there's on the whole, at least with the people I've spoken to, quite an interest in doing differently and better, but not a clear sense of how to go about it, and not a clear sense of who to talk to to learn about it.”*

Absent clear direction, the broad perceived range of possible actions was reflected in the range of key policy areas that the interviewees thought required active equity work. The range broadly reflected the interviewees' work focus areas, though two main recurring areas raised were the need to improve engagement processes to better involve seldom-heard voices and improve relationships with communities, and concerns about the possible gentrifying and displacing impacts of continued development in Kelowna, as planners pursued a sustainable growth approach to prioritize new developments within existing neighbourhoods.

- ◆ *“One of the challenges we have is we need to grow in a more compact way; we need to see growth happening in these existing neighbourhoods. But we need to find ways to ensure that as these properties redevelop, that we're not pushing people into situations where they're homeless, or they're moving now into inadequate housing, or they're struggling to find housing that they can afford.”*
- ◆ *“That view of equity is how we actually look at the built form on a site-by-site basis [...] and even the placement [...] we don't have a great mechanism for looking at where is the closest daycare, where is the closest medical clinic, where is the closest community centre? We just kind of go, okay, it's got transit and it's an urban centre.”*

Gaps in process / Key obstacles

The City of Kelowna has historically been dominated politically and economically by a white majority. As such, rapid population growth leading to increased diversity within the community will require policy changes and paradigm shifts that almost certainly will lead to equity-based challenges. Interviewed staff were cognisant of this context, and they were clear that as the City of Kelowna — staff as a whole included — is early on in its equity journey, education on what equity means and how it can be practiced would benefit staff at all levels, especially those in policy-making and implementation positions.

Interviewees commented that there is also a gap in diversity among the staff, and that this contributes to lower levels of intercultural competence across the planning spectrum, from project management to processing development applications and planning engagement activities. These gaps in competency posed obstacles in ensuring that the City's plans, and their implementation through day-to-day development and processing choices, benefit all members of the community.

- ◆ *“Our internal staff is [...] fairly lacking in diversity, at least insofar as that can be sort of visibly - and of course, not all forms of diversity are visibly apparent, but*

if you look around sort of our internal composition, there's not a huge amount of diversity. And I think, you know, Kelowna as a whole is not known for being very diverse, particularly in relation to its speed of growth."

- ◆ *"There's not a lot of diversity in terms of like, level of leadership. [...] The City has done a lot of work to make sure that there's learning opportunities for us to be able to do our work better, but it's not required training. [...] If it's all choice-oriented, I think people who maybe have experienced some barriers might be more understanding of the reasons why it's important to learn about that stuff and to show up for it. Others who just haven't thought about it might not realize how important it is to go."*

Interviewees also highlighted a further challenge when they commented on how a "development-oriented" city culture posed a possible obstacle to equitable community engagement and planning:

- ◆ *"Nobody was expecting Kelowna to grow so fast. Now the challenge is meeting the OCP targets, which it's already doing very quickly, so there are changes which need to be done in terms of growth. People are thinking about how to control the city. And I think equity is kind of sidelined in those discussions."*
- ◆ *"Our projects are often like, you have to have this done within this many months, within this budget, etc. And often that's where that authentic engagement ends up being so constrained that it has to be on our timelines instead of what others are."*
- ◆ *"I think without [a] careful process you end up with documents that repeat the problem [...] particularly working in an environment with outcomes and deadlines and timelines and all those things that can be really counter to developing the properly inclusive processes which are probably going to be different in every place."*

Besides process issues, interviewees also highlighted the current lack of disaggregated or equity-specific datasets that can be used to run specific analyses and identify equity gaps.

- ◆ *"We're getting to a point where we're using more information to guide our problem solving [...] maybe we're not there yet, or maybe it's a blind spot. I think there's also conversations about who's more impacted, who are we more likely to see experiencing homelessness or [...] involved in the justice system, which then often leads to homelessness. But it's not been collected for sure in a really coordinated fashion."*
- ◆ *"If I have more data, I can expand and explore more options and see how it's looking [...] data is something which is very crucial for equity, I guess, especially in the city's context."*

The role of the municipality

Municipalities have a significant role in the development of equity strategies and the implementation of equity-informed actions. For instance, governments can help equity-seeking groups better address the gaps in social, economic and physical structures by making more resources and key services available to them.

In our interviews, planners shared that there is a need for coordination between the municipality and the public to ensure that policies reflect the equitable needs of community members. Interviewees emphasized the need to include equity-seeking groups in decision-making, so that their perspectives and needs are better accounted for in plans and policies:

- ◆ *“Because this is going to be sitting in our policy and planning group, thinking through how to really implement the OCP policies that we already have approval for and we have buy-in from Council, how do we make those into a reality? How do we thoughtfully engage with seldom heard voices? We do have a lived experience circle that we can talk to.”*
- ◆ *“We've got a number of collaborative teams that meet regularly between people with lived experience, people who are working on the front lines and people who are in more senior roles, to talk about what's happening and to see what's missing and to be able to include voices of people with lived experience. I think that in many ways has been one of the successes of this situation that we're in right now.”*

Interviewees also discussed how the municipality could work to put equity strategies into practice. An approach highlighted by planners more involved with development planning was to incorporate equity-required actions into bylaws and guidelines.

- ◆ *“Our zoning bylaw is the strongest tool we've got. It would take a lot of public engagement and council buy-in and everything. We do have the option of putting stuff into our zoning bylaw that we can require X number of accessible units per development if that's the direction the community wants to go. But I think as a municipality, we really owe it to the community to try and be more transparent and overall raise awareness.”*
- ◆ *“What I would like to do with a more detailed equity strategy is take that and build it more into something like OCP policy, and if possible, some of our more regulatory bylaws, potentially the Zoning Bylaw. We rely on our OCP policy a lot. We use it when we take reports forward to Council with the intent of demonstrating that staff have reviewed these policies and, and use them to inform their work.”*

Measuring equity implementation

As equity is a recently-established pillar in Kelowna's planning strategy, and given the early stages of equity in Kelowna's city planning, some interviewees pointed out a need to develop measurements to determine how effective the equitable actions are for the members of the City of Kelowna. There is a requirement for both qualitative and quantitative measurements as a way to measure accountability with policy actions. These measurements are intended to help ensure that the City meets its targets and implements actions.

Equitable actions tend to be frequently represented through qualitative measures, which are harder to translate to a numerical value. Interviewees highlighted the tension between using quantitative measures of planning outcomes to demonstrate the case for equity in planning, and the necessary (but harder to quantitatively measure) qualitative interventions required (i.e. relationship building). Ultimately, there needs to be consideration for the extra time it takes to implement equity measures and to witness their corresponding benefits.

- ◆ *“In a place like Kelowna, where demographically the community is so predominantly white still, there's a real risk that quantitative measures just kind of reinforce a certain pattern of decision making where - ‘But look, it's overwhelmingly positive, right? 85% of people feel like they were really heard and engaged on this. That's great, right?’ Okay. But if that maps pretty closely onto certain dominant segments of the community, then that raises some pretty significant questions.”*
- ◆ *“Sometimes it's a challenge to explain what are the tangible benefits of taking the additional time and effort and changing the way you're doing some of your work and even changing some of the outcomes because of equity. I think we all know them. Some of it is this intrinsic, because it's the right thing to do and inherently we want to build a more equitable community. But it can be challenging to articulate that in a very tangible way. [...] Sometimes getting it to that extra step is something that [is] just a bit more quantifiable and a bit more tangible.”*
- ◆ *“I do wonder what we're not measuring when it comes to successes, because I know that there's a lot of communication and collaboration between organizations, a lot of shared problem solving and things like that, that don't happen easily. It's been through years of organizations committing to working together to solve the problem jointly. I imagine if you could look at the more qualitative side of things like trust and collaboration, you would see that there's lots of things trending in the right direction. But when you look at the numbers of people sheltering outdoors, the number of available shelter beds, those aren't looking good.”◆*

Innovative Equity Strategy Practices

Key Takeaways

From the equity strategies scanned, five key recommendations emerged that provide guiding principles for the City of Kelowna in structuring its equity efforts. A robust and effective strategy should address all parts of the planning process, featuring the following key actions:

- ◆ Build a clear foundational vision for equity
- ◆ Incorporate EDI principles into internal employment practices
- ◆ Review and update municipal procedures through an equity lens
- ◆ Reassess community engagement to focus on equity
- ◆ Build trust with equity-seeking groups

To set a foundation of relevant policy recommendations related to Kelowna's 2040 OCP, part of the SCARP team's process was to research innovative equity policies and plans. This information is meant to provide additional context to the project's approach and to help identify policies from other jurisdictions that could have an impact in the City of Kelowna.

In identifying possible relevant equity strategies, the SCARP team reviewed a variety of equity strategies from regions and municipalities across Canada and internationally. Key findings and common elements are catalogued here.

Guiding principles

In our research, we adopted four guiding principles from the Centre for Global Inclusion's Global Diversity, Equity and Inclusion Benchmarks (GDEIB):

- ◆ Foundation: Drive the Strategy
- ◆ Internal: Attract and Retain People
- ◆ Bridging: Align and Connect
- ◆ External: Listen to and Serve Society

These four principles were chosen by the SCARP team as an analytical tool due to their alignment with the overall project approach of pragmatic idealism and their use in other municipalities (i.e. Vancouver). As a group, the principles are

The Centre for Global Inclusion

The Centre for Global Inclusion is an American-based non-profit organization focusing on equity, diversity and inclusion (EDI) practices around the world. The Centre develops the Global Diversity, Equity and Inclusion Benchmarks framework, which sets out EDI standards and best practices for organizations, with input from a panel of over 100 expert panelists with backgrounds in organizational development and EDI practice and consulting.

a useful tool for categorizing and understanding specific Equity, Diversity, and Inclusion (EDI) approaches, and allow for a nuanced equity review of Kelowna's planning processes that is both values-based, and workable within the complex organizational framework of the City.

Key thematic elements

The SCARP team found several recurring themes across the equity strategies reviewed. In a preliminary analysis, each theme was paired with a corresponding Guiding Principle to ensure applicability to the project focus:

- ◆ Build a clear vision (Foundation)
- ◆ Incorporate EDI into internal employment practices (Internal)
- ◆ Review and update municipal procedures through an equity lens (Bridging)
- ◆ Reassess community engagement (External)
- ◆ Build trust with equity-seeking groups (External)

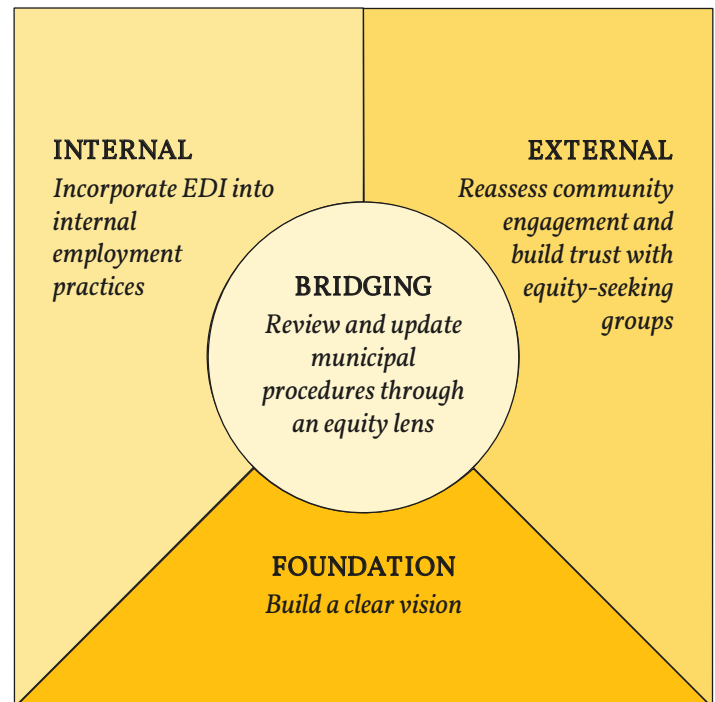
These recommendations are summarized in Figure 10, adapted from the GDEIB model, which shows how each of these pieces are an interlocking part of a whole strategy.

Each theme was further analyzed to determine common elements and explore any variance. An annotated list of reviewed equity strategies and other relevant documents is attached in Appendix A.

Build a clear vision (Foundation)

As an initial, internal step, building a clear vision was central to many of the strategies reviewed, especially for the development and grounding of objectives, goals, and actions. With the recent adoption of Kelowna's 2040 Official Community Plan and the inclusion of Equity as a core pillar, the planning department has planted the seeds for more specific visioning in the future.

Figure 10. Summary of key thematic elements found in scanned equity strategies.



In anticipation of a Citywide Equity Strategy, a clear vision will necessitate a strong rationale, clear alignment with OCP bylaws, and will help ensure that the City of Kelowna staff have the ownership and accountability necessary for long-term sustainability and success.

Common recommendations regarding vision development included:

- ◆ Establish connection to other City Plan visioning statements.
 - Create interdependence and overlapping scopes.
- ◆ Create a clear problem statement and workshop the draft vision against the problem.
- ◆ Develop the vision in partnership with other municipal departments.
 - Ensure that the diversity of departments and staff engaged reflects the purpose of the Strategy.
- ◆ Revisit the vision regularly and operate under the assumption that it is a living statement.
 - Allow for flexibility and adaptability rather than a “snapshot in time” approach that will invariably become out of date.

Incorporate EDI into internal employment practices (Internal)

Though the strategies reviewed were often in relation to external individuals and communities, internally facing equity objectives were extremely common. In identifying the vision, many local governments included a recognition of their own internal shortcomings, and the need to show leadership. Most commonly, this related to employment practices within the city or municipality.

Common recommendations regarding internal EDI approaches to employment included:

- ◆ Identify internal systemic barriers faced by Indigenous, Black, and People of Colour (IBPOC), LGBTQ2IA+ individuals, and those differently-abled.
 - Daylight these barriers and document their existence.
- ◆ Educate staff on the external barriers faced by minority groups and investigate and challenge “colour-blind” policies that don’t acknowledge these barriers.

- Review merit-based hiring and employment policies through an equity lens.
- Review compensation policies regularly for potential inequities.
- ◆ Tackle bias in hiring practices by ensuring human resource and hiring personnel are highly aware of both internal and external barriers for minority and equity-seeking applicants.
- ◆ Recruit employees from representative communities
- ◆ Include EDI as an asset within skills matrices and other assessment criteria.

Review and update municipal procedures through an equity lens (Bridging)

Often listed within the key objectives of the strategy in question, reviewing municipal procedures through an equity lens and aligning them with the strategies' vision were present in the vast majority of reviewed documents. The specific procedures being targeted depended on the type of strategy being reviewed (i.e. gender equity, engagement equity, zoning/land-use equity, city-wide equity strategy, etc.), though the principle remained the same: bridge internal vision by connecting external-facing procedures.

A recurring challenge identified in many of the strategies was related to measurement, monitoring, and evaluation. After the general framing of the vision, the procedural reviews and policy changes often resorted to simply a “yearly review”.

Common recommendations were to:

- ◆ Routinely collect and analyze disaggregated data with the greatest possible detail (i.e. avoid racially-monolithic classifications).
 - Review and update relevant mapping to reflect new data.
- ◆ Make Bylaw content flexible and responsive, as changes are often rigid and reactionary.
- ◆ Track and report spending and public service delivery measures by neighbourhood and community.
 - Reallocate resources to target large disparities.
- ◆ Municipal plans and strategic documents should acknowledge the divergent views that may exist within the city on an issue.

- Analyze differing views with an equity lens and give weight to feedback accordingly.
- ◆ Municipal plans and bylaws should be presented to the public in an accessible manner in clear language and with translation available.
- Published plans should integrate equity strategy performance indicators.

Reassess community engagement (External)

Within the strategies, there is widespread acknowledgement that current, common municipal community engagement structures are ill-suited to address equity disparities. A reassessment of these structures was present in each of the strategies reviewed, with some strategies focusing solely on equitable engagement. Engagement was pervasive throughout each strategy, often underpinning different objectives to differing degrees, especially in the Bridging and External policies.

Common recommendations were to:

- ◆ Address and atone for any past behaviours and policies with regard to the mistreatment, marginalization, and disenfranchisement of people and communities.
- ◆ Consider who is missing from engagement. Seek out and elevate traditionally excluded voices.
 - Address barriers to participation and allow for flexible engagement methods.
- ◆ Involve equity-seeking communities early in engagement processes.
- ◆ Use tools such as the International Association of Public Participation (IAP2) Spectrum of Public Participation to evaluate participation and strive for engagement practices that place final decision-making power in the hands of the public.
- ◆ Redefine success to include nuanced and weighted information beyond the touchpoint totals.

Build trust with equity-seeking groups (External)

Engagement within municipal systems is often related to specific projects, plans, or policies. Many of the strategies identified a need to build ongoing relationships with equity-seeking communities to avoid a purely extractive, or start-stop, engagement process. Rather than focusing solely on how

specific instances of engagement are done (above), relationship building recommendations were more often related to the long-term sustainability of equitable engagement.

Common recommendations were to:

- ◆ Build reciprocity and trust by dedicating time and resources to community capacity building with equity-seeking groups and allow for truly collaborative relationships.
- ◆ Build relationships on a basis of honesty by acknowledging past harms and injustices.
- ◆ Develop trust through reporting and accountability.
- ◆ For strategies in Canada: focus particularly on local Indigenous nations, and work to establish culturally appropriate relationships of mutual respect.

The above recommendations suggest that, to be effective and robust, an equity strategy should address all parts of the planning process from up- to downstream. There should be a clear foundational equity vision; there should be internal work undertaken to incorporate EDI principles into employment practices, and to improve equity awareness and competency among staff; there should be an acknowledgement of the gaps in historical and existing external engagement efforts as well as effort to build trust with equity-seeking groups; and there should be a plan to bridge internal efforts to external groups by reviewing external-facing procedures.

Equity Policies for Implementation

Key Takeaways

The Equity Policy Reference Table compiles implementation policies for equity-related policies in the 2040 OCP. This includes an initial set of equity-related policies suggested by City of Kelowna staff, as well as others in the OCP that the SCARP team identified as having the potential for supporting equity improvement. This table can be used both for reference in drafting the City of Kelowna's policies, as well as for planning and implementation to ensure continuity throughout the process.

The SCARP team found that the strongest reference policies had key features which provided clarity and focus, such as:

- ◆ Explicitly mentioning equity and highlighting equity concerns in the policy language
- ◆ Clearly identifying equity-seeking groups
- ◆ Identifying clear desired outcomes
- ◆ Leveraging existing programs, platforms and legislation for implementation

Using the pragmatic idealism lens, the SCARP team also identified short- and long-term implementation goals for the planning team to consider for each policy, based on existing progress, available resources, risk appetites and political context. Finally, the SCARP team also recommended prioritization for implementation as well as measurement indicators for the different policies.

Translating OCP policies into actions

In addition to insights into key guiding principles for equity strategies as a whole, the SCARP team also reviewed equity plans from other communities for examples of downstream policies that help translate equity visions into implementable actions. Working off an initial list of equity-related policies from the 2040 OCP as identified by City staff, the SCARP team first expanded the list to include other OCP policies that had potentially substantial equity implications, and then grouped these policies into categories and sub-categories by policy area. The team then re-reviewed a number of equity frameworks from communities in Canada, the United States and Australia to identify policies and measures for each sub-category that were geared towards implementation actions.

The findings are compiled in an Equity Policy Reference Table, which is intended to function both as a reference tool and as a tracking document for City staff. Drawing from policy language identified from case studies, the SCARP team recommended example policies for each sub-category, focusing on potentially implementable actions that are likely to improve equity outcomes for underserved communities.

The Equity Policy Reference Table also includes additional columns for the lead department for implementation, required/allocated budget, and implementation status. This enables the Reference Table to also be used for tracking, providing a clear through-line from policy areas as set out in the 2040 OCP to implementation actions, and ensuring continuity of purpose and ease of reference.

Common policy features from case studies

In compiling policy language for reference for each of the identified OCP policies, the SCARP team focused on language that was positioned more towards implementation action than direction-setting. This follows from the sentiment expressed by interviewed City of Kelowna planning staff that there needed to be clearer guidance at the policy and implementation levels to help staff better incorporate equity considerations into their planning work. In their research on assessing plan quality, Berke and Godschalk found that “if issues are clearly articulated early in the plan document, then subsequent plan elements are more apt to squarely address issues deemed important by the community. In contrast, poorly defined issues are likely to create policy solutions that do not fit community needs and capabilities” (Berke and Godschalk, 2009: p232).

The strongest policies as identified by the SCARP team had the following features which gave the policies focus and a clear possible path of action:

- ◆ Using terms that explicitly reference equity and distributive concerns, beyond generic policies that could otherwise be deemed as good planning approaches;
- ◆ Clearly identifying equity-seeking groups that the policy is targeting;
- ◆ Leveraging existing programs, platforms and legislation for implementation; and
- ◆ Identifying clear desired outcomes within the policy.

The team found that, among the equity and equity-informed strategies scanned, implementation-oriented language was found more commonly in more-detailed, policy-area-specific plans which took high-level guidance from overarching, city-wide equity strategies and translated these directions into their respective domain areas. Health and housing policies represented policy domains that had the clearest-developed implementation-oriented policy language.

Recommended implementation goals

Per the pragmatic idealism lens adopted for the project, the team recognized that because resources, risk appetites and popular/political support likely varies widely between different policy areas and between different communities, it would be neither viable nor advisable to push for high-impact and high-effort implementation policies across all the policy areas. Hence, the SCARP team further grouped proposed example policies into short- and long-term implementation goals.

The short-term goals are intended to be more immediately achievable and less potentially controversial, for policy areas where there is a need to be pragmatic. Following many implementation-level policies from other equity and equity-informed plans the team found, these short-term goals often focus on foundational steps, such as:

- ◆ Developing disaggregated datasets that allow better understanding of how different demographics and equity-seeking groups are variously affected by existing distributions of key amenities and facilities;
- ◆ Reviewing existing specialized plans to identify equity gaps; and
- ◆ Improving engagement processes to be more inclusive, for instance through partnering with community groups and representatives.

While the short-term goals are a good start and would represent concrete steps towards improving equity conditions in the community, further actions are required to ensure systemic change and to embed equity-informed lenses and action within the planning process. The long-term goals are intended as both next-stage implementation steps to build on the foundational work that the short-term goals would implement, and opportunities for the City of Kelowna to make substantial equity advancements in policy areas where there is more room for working towards an equitable ideal. Following the example policy language found in other equity and equity-informed plans, these long-term goals emphasize measures that would formalize equity processes, through actions such as:

- ◆ Amending bylaws and associated legislation to implement equitable planning actions;
- ◆ Implementing policies to require or incentivize more equitable approaches in development, such as partnering with non-profit and community groups for amenity provision, or accessible design through formal design guidelines;

- ◆ Committing resources and funding for equity and community programs; and
- ◆ Establishing standing committees or panels that would give Indigenous and other equity-seeking communities a clearly-defined and substantial role within the planning process.

Preparing for implementation

For each policy, the SCARP team also made recommendations for subsequent steps in the process. The policies are assigned a priority for implementation, bearing in mind limitations on resources as well as potential limitations on change or risk appetite. Policies that the team assessed would have a key impact on basic necessities, such as housing, health and safety, were given higher priority for implementation, so that immediate policies put in place to address such issues can be planned for and carried out equitably. Policies that involved collecting disaggregated equity data or making community partnerships were given medium priority, as these are likely to yield outsized benefits that can inform further equity efforts later on. While the rest of the policies are given lower priority, these should still be implemented where possible, as they would still likely provide improvements to access and quality of life for specific communities.

Tables 1-4 summarize the equity-related policies in the 2040 OCP, together with consolidated recommended short- and long-term goals, as well as suggested priority for implementation.

Table 1. Housing policies.

Legend: ● Lower | ●● Medium | ●●● Higher

Subcategory	Short-term Implementation Goals	Long-term Implementation Goals	Implement ² Priority
Housing distribution	Facilitate housing partnerships that address equitable needs within Kelowna (e.g. supportive housing, Indigenous housing, deep-subsidy housing, affordable rental housing, seniors housing).	Commission a land acquisition and disposal strategy that identifies land for affordable housing development. Implement strategy in partnership with housing organizations that work with underserved, equity-seeking communities.	●●
	Develop custom data sets that show disaggregated demographic information for residents near industrial zones throughout Kelowna and explore mitigation strategies for where equity-seeking groups are located.	Amend zoning bylaws to formalize buffering and screening requirements for industrial zones adjacent to residential lands.	●

Subcategory	Short-term Implementation Goals	Long-term Implementation Goals	Implement ² Priority
Typologies/ tenures	Commission new strategies to address the unique housing and service needs of specific vulnerable populations to improve housing access and security for each group through direct engagement. Studies should address the needs of families and equity-seeking groups.	<p>Implement DCC and municipal development fee waivers for non-profit affordable housing projects that increase density beyond single family homes.</p> <p>Implement Density Bonuses for development projects that include affordable housing for tenures that target equity-seeking groups.</p> <p>Amend Zoning Bylaw to reduce the list of discretionary uses specifically related to affordable, supportive, and transitional housing, instead turning them into permitted uses, along with clear, precise, and quantifiable conditions.</p>	●●●
	Review 2021 Census data (order custom data if needed) to identify housing tenure types and associated income, ethnicity, race, spoken language, immigration status, core housing need, and other relevant disaggregated data.	Amend zoning bylaws and design guidelines to allow as a permitted use alternative forms of tenure, including but not limited to co-housing, fee-simple row housing, co-ops, and rent-to-own.	●●
	Review all Neighbourhood Plans through a lens of social isolation that includes housing, transit, access to green space, and accessibility issues.	Renew all Suburban Neighbourhood Plans and specifically engage with residents who include seniors, people with diverse abilities, Indigenous communities and newcomers regarding social isolation.	●
Rental stock/ renters	Review location of social services and non-market affordable housing units throughout the City, and ensure that they are not hyper-focused in the downtown core of Kelowna.	<p>Amend Bylaw to enable supportive, subsidized, and multi-family affordable housing as permitted uses in all zones with a targeted approach to providing affordable housing for equity-seeking groups and low-income residents.</p> <p>Enact, at minimum, 1-1 replacement legislation for existing affordable units with density bonusing for any additional affordable units provided by a developer.</p>	●●●
	Prioritize Development and Building Permit applications that include strong tenant assistance plans as a soft-launch to mandatory requirements.	Implement a strong tenant protection policy that mandates tenant assistance plans by property owners and developers. Ensure that the policy reviews the needs of equity-seeking groups and includes at minimum: market-rate relocation payouts to removed tenants, a right of first refusal for returning tenants, and 1:1 replacement clauses for affordable rental units.	●●●

Subcategory	Short-term Implementation Goals	Long-term Implementation Goals	Implement ^a Priority
Rental stock/ renters	Create and maintain a database of known rental units/buildings by neighbourhood in Kelowna and further categorize them according to disaggregated 2021 Census data.	Implement requirements (e.g. through creating a Rental Only Zoning or Rental Replacement Obligations) and/or incentives (e.g. density bonusing, community amenity contributions, DCC reductions) for developers to retain or replace existing rental units, especially in predominantly low SES neighbourhoods. Institute a Bylaw that prohibits the conversion of existing residential rental buildings to condominium status when the rental vacancy rate falls below five per cent in Kelowna, unless the conversion is for the purpose of creating affordable rental housing with a Section 219 covenant registered on each strata title.	●●●
	Create a mandatory registry for all short-term rental housing throughout the City of Kelowna to build a comprehensive database.	Monitor data on short-term rentals to track supply and market impact, and pilot restrictions on short-term rental housing in secondary residences as necessary.	●

Table 2. Community services and supports policies.

Legend: ● Lower | ●● Medium | ●●● Higher

Subcategory	Short-term Implementation Goals	Long-term Implementation Goals	Implement ^a Priority
Supports	In consultation with local homelessness support organizations, develop and execute an educational campaign targeted to residents of neighbourhoods in the Core Area that are slated for supportive housing development.	Zoning changes: Pilot "supportive housing" as a permitted use in residential, commercial, and urban service zones. In collaboration with the land acquisition strategy, prioritize lots for development or redevelopment to include supportive housing, and reduce approval barriers by pre-zoning the land ahead of any design or development.	●●●
	Map existing child care spaces in Kelowna. Create a child-care expansion plan that addresses inequities both in cost and location, and takes into consideration the needs of equity-seeking groups.	Allocate City-owned land to non-profit entities that wish to build childcare space. Establish a multi-year fund to provide subsidies towards the development and operation of childcares run by non-profit entities.	●●

Subcategory	Short-term Implementation Goals	Long-term Implementation Goals	Implement ² Priority
Supports	Develop a resident survey targeted to residents of a variety of housing typologies that details individual perceptions of social connection. Prioritize demographics or tenures that may be at increased risk of social isolation (e.g. seniors, recent immigrants, temporary foreign workers, etc).	Alter Design Guidelines based on resident survey feedback to prioritize certain form factors or housing typologies, and include a required minimum amount of indoor and outdoor communal space for social interaction.	●●
Homelessness	Coordinate homelessness outreach with local organizations to reduce overlapping scopes by instituting a service provider roundtable.	Fund a City position (or 1 FTE) to act as a service coordinator who liaises with Kelowna grassroots homeless support services. Remove approval barriers for shelter sites that are City-funded but not City-owned or City-leased.	●●

Table 3. Access and accessibility policies.

Legend: ● Lower | ●● Medium | ●●● Higher

Subcategory	Short-term Implementation Goals	Long-term Implementation Goals	Implement ² Priority
Urban infrastructure/safety	Identify priority areas for street accessibility design changes based on disaggregated data for equity-seeking groups and required connections to key destinations.	Create a universal street design handbook and review with accessibility, differently-abled, and child-safety advocacy groups in Kelowna. Formalize and implement universal street design handbook Citywide for all new development or redevelopment.	●●●
	Map available green, blue, and other public community space throughout Kelowna, and combine with disaggregated demographic data to identify gaps in green space and overlaps with equity-seeking groups. Identify priority areas and establish a park expansion plan in line with mapping and engagement of equity-seeking groups. Vancouver's VanPlay plan is a model for equity in park planning.	Create and publish findings in an Equitable Park Strategy. Implement Equitable Park Strategy.	●●●
	Partner with the Central Okanagan School District to explore utilization of existing school facilities for community uses, prioritizing schools in areas with a high percentage of families from equity-seeking demographics, and subsidizing their rental fees.	Pilot design guideline changes for new school developments to facilitate multi-use purposes including recreational community programs for youth, families, continuing education, and other community uses.	●●●

Subcategory	Short-term Implementation Goals	Long-term Implementation Goals	Implement ^a Priority
Urban infrastructure/ safety	<p>Encourage uses in the ground floor of buildings that support housing, neighbourhood activity, cultural community building, or provide important community services.</p> <p>Support the location of important community amenities and services along transit corridors so that they are accessible to users of all ages, incomes and abilities, including seniors, people with diverse abilities, Indigenous people and newcomers.</p>	<p>Pilot a "First Right of Refusal" clause for culturally significant businesses, small local businesses, and social support services for any new development or renovation (i.e. cultural grocers, corner stores, small cafés and neighbourhood grocers).</p> <p>Create special area design guidelines for areas where the design of public space and architecture could help reinforce cultural identities, in compliance with City requirements.</p>	● ●
	<p>Review and record accessibility needs with accessibility and seniors advocacy groups in Kelowna.</p>	<p>Create a universal design handbook in partnership with accessibility and seniors advocacy groups in Kelowna. Incorporate design handbook requirements in development design guidelines.</p>	● ●
Food	<p>Map currently available food assets, including the distribution of small and mid-size grocery stores and stores selling cultural foods, and combine with disaggregated demographic data to identify gaps in food access and overlaps with equity-seeking groups.</p>	<p>Prioritize development applications that include partnerships with small-medium local or cultural grocers for Core Area Neighbourhoods with identified grocery needs.</p> <p>Explore provision of seasonal farmers markets for local and cultural vendors in Core Area Neighbourhoods with equitable food needs.</p>	● ● ●
	<p>In partnership with local advocacy and grassroots farm worker organizations, provide outreach services to key local areas where farm workers congregate.</p>	<p>Create mandatory guidelines for location and quality of temporary farm worker housing through ongoing engagement with local organizations, and in line with recommendations from the Migrant Workers Alliance (created in partnership with Kelowna's RAMA).</p>	● ● ●
	<p>Map empty public lots throughout the City and provide community garden spaces based on demographic data focused on equity-seeking groups/areas in food deserts.</p>	<p>Provide property tax incentives or density bonuses to private owners seeking to include shared or rooftop gardens, prioritizing communities with identified grocery needs.</p>	●

Table 4. Social equity policies.

Legend: ● Lower | ●● Medium | ●●● Higher

Subcategory	Short-term Implementation Goals	Long-term Implementation Goals	Implement ² Priority
Racism	Build internal cultural competency of inter-generational harm to Indigenous people in Kelowna by instituting a mandatory staff training program such as San'yas . In good faith, establish protocols for respectful and meaningful relationship building between the City and Syilx/Okanagan. Using these protocols, collaborate with Syilx/Okanagan to create culturally safe engagement strategies for engaging with Indigenous residents in Kelowna.	Develop and fund an interdepartmental Aboriginal Committee that includes members from the City of Kelowna (both Council and planning) and Syilx/Okanagan to review policies relevant to the wellbeing of Indigenous residents in Kelowna, and to appropriately share Indigenous celebrations, language, and tradition in parks and public spaces. Financially compensate Syilx/Okanagan for their time in accordance with contract and procurement policies within the City.	●●●
	Develop a Community Action Committee made up of local equity-seeking grassroots community leaders that provide feedback on ongoing long-term public safety planning. Ensure members are fairly compensated for their time.	With the help of the Community Action Committee, create and implement a Public Safety Strategy that addresses the unique safety concerns experienced by local equity-seeking groups.	●●●
	Build internal anti-racist competency by instituting a mandatory training program for staff, such as UBC's Anti-Racism Awareness Course . Develop a Community Action Committee made up of local Indigenous and racialized community leaders that reviews City of Kelowna social policies and provides feedback on ongoing long-term planning. Ensure members are fairly compensated for their time.	With the help of the Community Action Committee, create an Anti-Racist Engagement Policy that informs all future engagement between the City and racialized equity-seeking groups.	●●●
	Engage with local cultural groups to identify City spaces and events of cultural importance, and opportunities to support preservation and management.	Engage with local cultural groups for the creation of new cultural spaces, and incorporate guidance on culturally relevant design elements, such as signage, public art, historical interpretation and educational opportunities, within street and urban design guidelines.	●●
	Through engagement with Syilx/Okanagan communities, identify City-owned land that is available and culturally relevant for creation of Indigenous Forest Gardens.	Provide funding and management resources to Syilx/Okanagan partners to create and maintain Indigenous Forest Gardens in a culturally appropriate manner.	●●

Subcategory	Short-term Implementation Goals	Long-term Implementation Goals	Implement ^a Priority
Racism	<p>Facilitate and commission the creation of a Public Art Strategy that includes all forms of artistry, and prioritizes engagement with equity seeking groups for respectful inclusion of cultural expression.</p> <p>Map both formal and informal public art installations across the City, including alternative forms of expression (e.g. graffiti, street performers, etc.).</p>	<p>Implement a Public Art Strategy. Maintain engagement with artist and cultural partners to ensure consideration of underrepresented cultural forms of expression throughout its implementation.</p>	●
Engagement	<p>Conduct a comprehensive equity assessment to identify existing disparities through developed and maintained partnerships with equity-seeking groups.</p> <p>Implement long-lasting committee groups and round tables populated by community service providers.</p>	<p>Develop equity-focused metrics targeting funding and resource distribution, and track progress on reducing disparities.</p> <p>Develop programs that prioritize resource allocation with guidelines that address equity-seeking groups concerns.</p>	●●●
	<p>Spend time and City resources to build connection, trust and relationship with Indigenous communities. Collaborate with Syilx/Okanagan community service providers to better understand the gaps in the social services provisions.</p>	<p>Accommodate [mandate] the inclusion of multiple Syilx/Okanagan people members in committees, round table and decision-making processes.</p> <p>Incorporate Indigenous partnership and consultation under guidance and consideration for the Calls to Action from the Truth and Reconciliation Commission.</p>	●●●
	<p>Partner with community service providers to offer training resources on the different equity-seeking groups served.</p>	<p>Establish and support the existence of standing committees and community engagement councils/groups with seldom-heard voices.</p> <p>Ensure members with lived experiences contribute/participate in decision panels and service support design.</p>	●●●

Subcategory	Short-term Implementation Goals	Long-term Implementation Goals	Implement ^a Priority
Engagement	<p>Create and implement standard park and event planning processes that incorporate engagement with local residents, especially in communities with equity-seeking groups, at different points in the planning process to ensure an equity lens and that the actions proposed are helpful.</p> <p>Engage Indigenous community representatives to understand better current perceptions of park spaces, including any perceived barriers to use or participation, and work to implement solutions in partnership.</p> <p>Provide resources and administrative/process support for park and public space planning or event initiatives drawn up in partnership with other agencies and community groups as opportunities arise.</p>	<p>Establish and provide resources to community engagement groups, including members of equity-seeking communities and Indigenous committees.</p> <p>Work alongside local residents to develop and implement required solutions and organize community events in parks.</p>	●●●
	<p>Partner and build relationships with community service groups through recurring service provider roundtable meetings. Through the roundtable meetings, identify gaps in knowledge on social planning issues.</p>	<p>Establish funding opportunities to provide additional services for equity-seeking groups in collaboration with community service providers, stakeholders, and government service providers.</p>	●●
Heritage	<p>Include representation from community groups, including Indigenous and equity-seeking communities, in the heritage planning process and on technical assessment panels/committees.</p> <p>Consider heritage expansion opportunities in balance with other equity goals, such as the provision of affordable housing or cultural amenities, and incorporate this into the heritage planning process.</p> <p>The First Peoples' Cultural Council 2019 policy paper on Recognizing and Including Indigenous Cultural Heritage in B.C. includes useful process recommendations for reference.</p>	<p>Establish an Indigenous-led committee to assess the proposed expansion of the Kelowna Heritage Register to include additional archaeological sites, landscapes, properties, structures and cemeteries, and support with funding and staff.</p> <p>Engage with Indigenous communities to actively work towards decolonizing public spaces, and incorporate a formal process to assess the potential impact on Indigenous communities for new proposals for built heritage designations.</p>	●●

The SCARP team has also suggested indicators that would help to track progress for each policy. These indicators, together with the example policy language that the team drew from in recommending implementation goals, are included in the full Equity Policy Reference Table, appended for reference in Appendix B. ◆

Community Stakeholder Interviews

Key Takeaways

Three key categories of recommendations and reflections arose throughout the interviews regarding possible roles the City of Kelowna could employ to better serve equity-seeking groups:

- ◆ **Act as convener:** Bring people and service providers together by providing robust community liaison support. Leverage this facilitation to develop appropriate engagement opportunities with equity-seeking groups.
- ◆ **Act as advocate:** Use the City of Kelowna's power and privilege to advocate for equity-seeking groups and help organizations access support from other levels of government.
- ◆ **Provide practical support:** Administer targeted support and staff resources to organizations working with equity-seeking groups.

Though these themes were shared amongst the interviews, participants emphasized the complex and nuanced nature of equity in city planning, often stressing that there is no one size fits all approach. As equity is an ever-changing aspect of city planning, it is the responsibility of the City of Kelowna to maintain continuous and ongoing relationships with grassroots service providers and equity-seeking groups to ensure City work fits the needs of all its residents, especially those who have been historically marginalized.

Engagement Overview

There is no shortage of grassroots energy in the City of Kelowna. Many of the organizations interviewed were overwhelmingly positive and had a clear desire for frequent and ongoing engagement with the City of Kelowna. Notably, many of the organizations interviewed had little to no direct engagement with the City. Participants acknowledged the occasional round table or light touch engagements, but many did not have recent or meaningful long-term engagement with the City of Kelowna. In the SCARP team's view, this brought fresh perspectives to the table and underlined the possibilities for pathways and partnerships outside of the City's longstanding engagement approach.

In the SCARP team's synthesis, three key categories of recommendations and reflections arose throughout the interviews regarding possible roles the City of Kelowna could employ to better serve equity-seeking groups:

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- ◆ **Act as advocate:** Use the City of Kelowna’s power and privilege to advocate for equity-seeking groups and help organizations access support from other levels of government.
- ◆ **Provide practical support:** Administer targeted support and staff resources to organizations working with equity-seeking groups.

Though these themes were shared amongst the interviews, participants emphasized the complex and nuanced nature of equity in city planning, often stressing that there is no one size fits all approach. As equity is an ever-changing aspect of city planning, it is the responsibility of the City of Kelowna to maintain continuous and ongoing relationships with grass-roots service providers and equity-seeking groups to ensure City work fits the needs of all its residents, especially those who have been historically marginalized.

Engagement objectives

The community stakeholder interviews were purposefully designed to be conducted at the service provider level. In the SCARP team’s view, this would help ensure that those engaged would have the capacity (temporal and financial) to provide information on how to engage with their service communities effectively, respectfully, and empathetically. These findings are detailed below.

Recent City of Kelowna engagement efforts

Current engagement efforts by the City of Kelowna are broadly guided by a set of Public Engagement Guiding Principles and official Engage Policy drawn up in 2013 and 2014 respectively. This set of documents adapts the International Association of Public Participation (IAP2) Framework and Standards of Practice, and sets out a framework for incorporating public engagement into the City decision-making process, and guides staff to assess the community impact of the potential project or policy, identify the level and goal of public engagement as appropriate for the project/policy, and develop a public engagement plan.

While the guiding principles suggest actions like following up with under-engaged groups to assess the engagement process, principles like “inclusiveness” and “transparency” are framed at a very broad level with no explicit mention of equity, equitable planning or equity-seeking/underserved communities.

Two major engagement exercises were undertaken using these guidelines — for the Journey Home exercise (January - April 2018) and as the engagement process for the 2040 OCP (2018-2021). In particular, the Journey Home strategy, the City of Kelowna’s five-year plan to address homelessness in the community, built on the Engage Policy by using varied engagement practices with a stated “strong commitment to honouring, listening, and learning from the voices of those that have, or currently are, experiencing homelessness in our community” throughout the project.

Both these exercises demonstrate a clearer consideration for equity in their approach to engage groups that have been underserved, including the homeless and First Nation communities, though the released statistics for the 2040 OCP engagement exercises did not provide detailed demographic breakdowns for the people engaged.

Priority groups for engagement

Based on the community profile compiled on Kelowna, the team identified a list of priority groups for engagement.

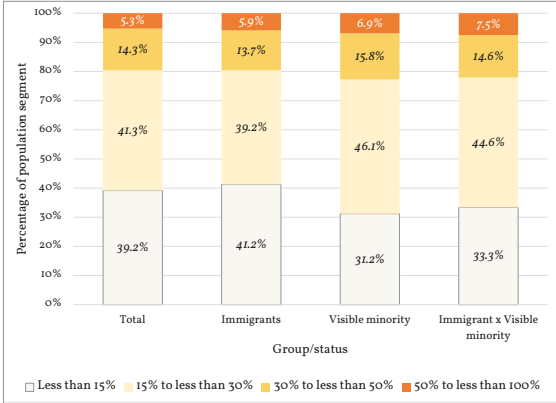
According to the 2021 Census data for Kelowna, the fastest-growing segments of the City’s populations are the 25-44 years and 65-84 years age brackets, suggesting a growing proportion of seniors and Kelownites of family-starting age. The data also reflects a growing community, both in count and proportion, of Indigenous-identifying persons living in Kelowna.

The team also found that certain communities are more affected than others by rising housing costs. In particular, the visible minority community in the Kelowna area is proportionately more likely to be spending over 30% of their income on shelter costs (fig. 11).

This is in combination with Journey Home’s Point in Time (PiT) count from 2020 (the most recent year completed) which showed those experiencing homelessness at a 4% increase over the 2018 PiT count (which in turn showed a 23% increase over the 2016 PiT count). While detailed data on the proportion of visible minorities experiencing homelessness was not included in the report, Journey Home does state that 1 in 5 individuals surveyed identified as Indigenous, hinting at larger intersectional trends.

Beyond those identified by the data, the City’s complicated history with First Nations and minority groups suggests that

Figure 11. Shelter-cost-to-income ratio by visible minority and immigrant status, Kelowna CMA (2021 Census).



these groups are more likely to have been systematically disadvantaged by historical decisions and practices (e.g. see Tedesco, 2021).

There is nearly unanimous consensus that planning equitably for a diverse community requires engagement approaches that are tailored to their specific planning context. Loh and Kim (2020) found in their research on local comprehensive plans in Michigan cities that “increasing the types of public participation approaches is strongly correlated with a more equity-focused plan” (p192). Taking into consideration resource and time limitations that many local governments and planning staff face, leveraging existing links that community organizations have with the groups they serve is a potentially useful way for planners to tailor their engagement approaches to the equity-seeking groups that they want to reach.

For instance, in Minneapolis-St. Paul, MN, Allen and Slotterback (2021) found that planners were better able to reach out to the local Somali refugee population by collaborating with staff at migrant civil society organizations and leveraging their understanding of the community and their “reservoir of trust with Somalis because of their common ethnicity and history of providing useful services to the community” (p750).

Based on the above, the SCARP team contacted relevant community organizations in Kelowna as a first step in establishing better links with the key equity-seeking groups identified in the above scan. Through this step, the team can better understand circumstances faced by these groups, while paving the way for more sustained engagements later on that can incorporate insights about preferred engagement approaches and methods.

Engagement methodology

Stakeholder overview

Through an iterative process, City staff provided guidance and feedback on a potential list of organizations for engagement by the SCARP team. This took into consideration existing relationships and other ongoing engagement processes to ensure stakeholder engagement was respecting the capacity of the listed organizations and avoiding unnecessary duplication.

Of particular note, engagement with identified urban Indigenous groups was already in process for the City’s Housing Needs Assessment. As a result, and because of the limited timeframe of the Paving the Way project, the SCARP team did not specifically engage with urban Indigenous groups despite identifying them as a priority for equitable engagement. Ahead of a potential Citywide Equity Strategy, the SCARP team recommends that the City allocate

additional time and resources to Indigenous and urban Indigenous engagement to address this gap.

By design, many of our identified stakeholders fit into multiple of our identified priority groups. We understand that equity is inherently intersectional, and that embracing the complexity of equitable needs requires an intrinsic flexibility; equity-seeking groups are not monoliths, and many have a variety of intersecting needs that require creative solutions. The final list can be seen in Table 5, it includes: non-profit organizations, the public health authority responsible for Kelowna, and various grassroots social service providers.

Table 5. List of community organizations interviewed.

Organization	Group/Community Served
ARC Programs	Youth and Family Services
Columbian Centennial Housing Society	Low-income households
H.O.P.E. Okanagan	Unhoused/at-risk women
Interior Health, Healthy Communities Initiative	All
Partners In Resources Inc (PIERS)	Immigrant workers
Radical Action with Migrants in Agriculture (RAMA)	Immigrant workers
The Bridge	Youth and Family Services

Stakeholder Interviews

To determine an appropriate and relevant direction for the Wayfinding Report, the SCARP team engaged a small number of local community stakeholders. Over the course of 6 45-60 minute virtual interviews with non-profit organizations, public health, and social service providers, participants were asked a number of conversation starter questions in an effort to dig deeper into the equity landscape in Kelowna. Questions focused on three main categories: organization history, equity-seeking groups served, and alternative engagement methods to reach those groups with respect and dignity. Collected learnings were used to inform priorities and recommended actions.

In particular, the engagement sessions with leaders within Kelowna’s community organizations provided the team with a clearer sense of the needs and challenges faced by equity-seeking groups in Kelowna. In addition, these interviews highlighted important considerations for engaging with equity-seeking groups to inform future participatory approaches by the City of Kelowna. The team hopes that these findings can support the City’s efforts

to strengthen existing relationships, initiate new ones, and lay groundwork for further, more substantial engagements in preparation for a potential Citywide Equity Strategy.

Engagement Findings

As mentioned, interviews were analyzed and summarized into three recommendations for the City's role as a partner in Citywide equity.

Act as Convener

Many of the participants work for organizations that are already financially stretched to their limits. Individuals discussed piecing together funding for programs while struggling to provide competitive staff salaries, and underscored the importance of collaboration with similar organizations to avoid providing overlapping services.

- ◆ *"It's working together and collaborating. That makes us successful... some of us have funding for one thing and some of us have funding for others, right. We need to be able to coordinate and collaborate to support the individuals that we serve."*
- ◆ *"Certainly before COVID the city had several lunch meetings from other societies and other groups within Kelowna in the area. And they were interesting, and it was basically financing or funding or things like that. That helped."*
- ◆ *"And it's a lot of times not knowing who to call or how to approach something and that's where I developed [relationships] with other administrators of other housing societies. I'd have a question I didn't have a clue about and it was fairly easy to deal with after I had spoken to someone about what they did and how they did it and who to phone."*

As facilitation and meeting coordination can take a significant amount of time and resources, there was an overarching sentiment that the City could step into this role and promote on-going networking and knowledge sharing between local organizations. That way, when organizational turnover inevitably occurs, there are additional layers of support beyond the often limited on-the-job training.

Additionally, this supports City networking by providing an ongoing space for the City to collaborate with knowledgeable grassroots partners on sensitive in-person engagement plans, and map out any important power dynamics between individuals and groups. It is here where the City can work to determine what engagement level could be most appropriate, especially since organizations may not have management that is part of the equity-seeking group they serve.

- ◆ *“I’ve been encountering a few other societies that have had new administrators and again, from totally different walks of life, hotel and hospitality and, again, it’s that brick wall of bureaucracy that in time you get to kind of understand.”*
- ◆ *“So if you could find a peer to direct those focus groups, that would be good. To even know what questions to ask. I think because sometimes, folks don’t know what questions are appropriate to ask or they ask something and everybody in the focus group looks at them like they’re from the moon because it’s totally irrelevant to their experience.”*
- ◆ *“I kind of think the city needs to expose themselves to the communities that they say they want to serve, so that they can directly hear that voice, rather than me putting my 30 years of administrative leadership spin on it and putting the nice phrases together so that they can interpret it and maybe minimize the message. I think that direct link between the communities could be more impactful.”*
- ◆ *“100%, the city gathering community organizations together would be helpful. I would also include the Regional District. I think they can work in partnership with all these, perhaps will be good.”*

Act as Advocate

Many of the organizations we interviewed were small-to-medium in size. Besides Interior Health, the participants represented groups that have a handful of staff with some being completely volunteer run. In addition to building inter-organizational relationships, it was keenly important that the City use its position and power as a municipality to advocate for the needs of Kelowna’s equity-seeking groups both within the City itself, and to higher levels of government.

- ◆ *“The city of Kelowna, in terms of its citizens, is just not ready for some of these things in a formalized, kind of city-driven way. I think a bit of a way to say, how do we begin to do some small tests of change or proof-of-concept approaches to some of these more paradigmatic kinds of shifts away from traditional health services, I think that the city has a role to play in that as it thinks about how it builds up neighbourhoods and some of its functions it’s responsible for.”*
- ◆ *“I think underpinning that [engagement] is creating trust between government structures and citizens that have been marginalized, or that don’t have the same health equity as others. How do you start creating trust when you have somebody in between speaking on behalf of a group, just kind of feels like it actually doesn’t do anything to change the bigger issue?”*
- ◆ *“There’s different associations and groups where people have deeper resilience and have good awareness and can speak on those things [respectful engagement*

methods]. I would think in that situation there should be more of a direct connection [with equity-seeking people].”

- ◆ *“We’ve talked to the city before about issues with housing for migrant workers, and they kind of steer away from that, because that seems to be a hot potato in the sense that these different government levels that are supposed to be accountable for the issue are throwing this responsibility around.”*

It was readily mentioned that the City, Council, and Kelowna residents are still in the early stages of equity literacy. This means that City staff will likely bear the responsibility for educating other staff, Council, and residents on why issues relating to a minority of individuals (e.g. unhoused people, sex workers, migrant workers) are important to elevate and spend taxpayer resources on. This is a tall order, and one that could produce any number of tensions.

One respondent mentioned that they strategically consider each of the following angles when presenting on issues of social equity to match their audience with an argument that will hit home: representation, social justice, economic development, efficiency, legality, and community well-being. In the words of another participant:

- ◆ *“I think the city would need to really adopt a stance that’s quite different than its traditional one around how it seeks feedback and engages with people around these populations, and would also have to probably change its expectation on what kind of return on investment it’s going to get in those conversations. Timelines, milestones, and charters, and all those things that we kind of use to keep ourselves organized, probably need to be moved a little bit to the side. It also has to just be around putting that time in. I appreciate that there’s a desire for it. I’m just not sure that there actually at the end of the day will be the investment, knowing that it does take a lot longer to do it.”*

Provide Practical Support

The Equity Pillar in the 2040 Official Community Plan is an important first step to building institutional support for, and acknowledgement of, the issues that equity-seeking groups face. However, when asked about ways the City can be a better partner to local grassroots organizations, the response often trended towards practical supports directly related to participants’ own line of work. Suggestions ranged from development cost charge (DCC) waivers to honoraria and red-light district zoning.

- ◆ *“I did municipal work. I know what DCCs are for but charging a nonprofit over half a million dollars...I mean, we're not selling these units. We're creating affordable renting stock and we were hit with as if we were a for-profit developer”*
- ◆ *“The city actually gave us \$19,000. As for the rental units that we created...we got a 10 year tax exemption for property taxes...that's really helped.”*
- ◆ *“We have an Elder sit on that committee and then the rest are staff...we paid an honorarium for that elder to participate and that's an ongoing expectation that that's [our organizations] responsibility, not the whole committee's responsibility. So I think it is around honouring people's time, especially for unpaid individuals.”*
- ◆ *“If we could get zoning for brothels, I feel like it would solve quite a few of...the problems... it's pretty well known that it's safer for [sex] workers, it's safer for patrons and it keeps a lot of folks that are the tourists who don't want to see a particular area [away], like our encampments are in an industrial area because folks don't like seeing it.”*

While highlighting that equitable solutions are not a one-size fits all, the conversations all pointed to actions that are deeper than language and intention. The City has a reputation of being the practical problem solver. Essentially, the City is perceived to have the deepest pockets, the staff, the data, and the resources to tackle the practical issues at hand.

Overall, participants were encouraging the forward motion of a future citywide equity strategy, but they were also very clear about the ways they need support now. Due to the limited nature of the SCARP team's conversations, it is recommended that the City reach out to organizations and establish specific, useful, and practical ways to support their work. ◆

Gaps and Limitations

As with most studies on social equity, there are limitations to various aspects of how we approach our understanding of equity. As outside researchers, we recognize that we are subject to biases in our understanding of the needs of equity-seeking communities and individuals within Kelowna.

For this report, we are basing our recommendations on a comparative and observational review of case studies and interviews with a few City of Kelowna staff and service providers. Still, we acknowledge potential gaps and limitations that may impact understanding the equity need in the City of Kelowna. Some of those limitations and gaps include 1) First Nations representation, 2) Limited interviews, and 3) Evidence of proven equity practice.

First Nations representation

First, the SCARP team recognizes that as non-Indigenous researchers conducting work on equity, there are limitations to our understanding of the lived experiences needed in addressing solutions and meaningful action. To advance equity within the City of Kelowna, there needs to be more meaningful engagement with the Syilx/Okanagan Indigenous communities.

At the step of identifying service providers to engage, the SCARP team compiled a list of fourteen (14) preliminary stakeholders to consult and interview. The SCARP team ultimately interviewed six (6) service providers serving various equity-seeking groups, and did not include an urban Indigenous organization after discussion with City staff. This gap arose due to concerns about the potential of engagement fatigue since the same urban Indigenous organizations the SCARP team identified were already part of a different engagement process with City staff.

We strongly encourage the City to apply the recommendations from this project to ongoing and future engagements with First Nations and Indigenous communities in Kelowna, so that they can be considered upfront within city-wide and cross-policy domain equity efforts.

Limited interviews

Given the limited study duration of eight months, we recognize the small sample size of interviews conducted with staff members of the City of Kelowna and a few service providers in Kelowna. Since the SCARP team was in a different city, online communication was the only strategy for data collection. The researchers' capacity to interview City of Kelowna staff and service providers was strictly based on both parties' availability during relatively limited periods, which could sometimes be more challenging to accommodate.

As mentioned, the initial list of identified preliminary stakeholders was reduced to address a potential overlap in engagement practices and data collection, thus reducing the sample size and the representation of identified equity-seeking groups in the report. Ultimately, the interviews serve as a starting point to understanding the experiences of equity-seeking groups.

As we were able to gain useful insights and make connections through the interviews we were able to conduct, we suggest that this approach can be used going forward to further the City's understanding of its communities, including ones not engaged by this project.

Evidence of proven equity practice

Given the infancy of the study and implementation of equity strategies, many that this project drew from for insights are relatively early in the implementation process. With the comparison nature of this project, the SCARP team found several case studies that highlighted action items and long-range policy changes that incorporated equity in various aspects of city building. However, because of the long-range nature of the plans, some of the actions are yet to have evidence of success.

As such, while this report has highlighted recommendations and implementable actions, it is still difficult to identify proven strategies and actions, especially ones that could immediately and directly translate to the Kelowna context. Also, the team had a challenge finding implementation-level policy language informed by an equity lens for some of the Kelowna 2040 OCP policies, which makes the team believe the City of Kelowna is a first mover in those aspects.

For these policies, the team encourages City staff to work with the community to develop, pilot and refine implementation policies, and add to the overall body of equity planning case studies. ♦

Next Steps

The City of Kelowna is a growing and diversifying community with much to offer its residents. While equity may not have historically been a key consideration in its growth and planning, the SCARP team finds much potential and encouragement in the initial steps that the City has taken through its 2040 OCP, but also in the enthusiasm and perspective seen in our interactions with City staff and community organizations alike. The SCARP team believes that an equity lens is important in planning so that City policies can benefit all groups in the community, especially those who have historically been disadvantaged. We feel that our City partners share this belief.

In line with the Paving the Way report research and recommendations, the SCARP team recommends that the City of Kelowna undertake the following next steps to work towards an equity strategy:

- ◆ Address internal concerns regarding representation and equity competency, and provide staff with more guidance on equity implementation;
- ◆ Translate the equity-related policies in the 2040 OCP into implementation policies; using the Equity Policy Reference Table as a guide, and adopting an equity lens
- ◆ Continue to track policies through implementation, considering the suggested indicators, and ensuring that the work dovetails with other planning exercises undertaken by the city (such as the ongoing Housing Needs Assessment);
- ◆ Continue to keep abreast of equity plans and initiatives from other communities, to be aware of new knowledge on state-of-the-practice methods and policies, as equity planning is a nuanced and evolving field;
- ◆ Engage the First Nations and urban Indigenous communities in Kelowna to better understand their concerns and to establish appropriate engagement approaches with their communities; and
- ◆ Continue to strengthen community relationships, including with the grassroots organizations that the SCARP team has initiated links with.

The SCARP team hopes that this research project, and the insights and recommendations garnered, helps to pave the way for the City to continue on its equity journey. Translating the stated equity goal in the 2040 OCP into actions on the ground is an enormous undertaking, and requires the planning team to navigate a shifting and complicated operating environment while keeping the principle of equity clearly in view, so that the community

can advance on that journey together. In a climate (not necessarily exclusive to Kelowna) where some communities may not share the same understanding of the importance and benefits of equitable planning, this is an especially important concern.

Taking our City partners' considerations as a guiding principle, we adopted a lens of pragmatic idealism that sought to marry our beliefs with an actionable and deliberate approach. We hope that the learning points and proposed policies that build on the experience of other communities provides the City with inspiration for its own work, and that the budding connections with community organizations made through this project provides City staff with a support network to co-create a functional and far-reaching equity strategy.



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Appendix A **Reviewed Equity Strategies**

City of Blue Mountains, NSW, AUS - Gender Equity Strategy (2021-2026)

Located just North East of Sydney, Australia, the City of Blue Mountains is a municipal district encompassing several smaller towns and villages. The purpose of the Strategy is for all members of the Blue Mountains community to “contribute equally at home, the workplace, in decision-making and wider”. The Strategy highlights the importance of leadership by analyzing its own internal practices and promoting gender equity internally in tandem with established external goals.

◆ Goals

■ Leadership

- ◆ To provide leadership to the community and partners on gender equity. To affect community change, ensure the Council culture, policy, planning and programs demonstrate gender respect and equity.

■ Advocacy

- ◆ To advocate for gender equity and the prevention of violence against women, people of non-binary gender and transgender people at a local, regional, state and national level.

■ Capacity building (staff partners, and community)

- ◆ To support Council, other partners/stakeholders and the Blue Mountains community to understand how to promote gender equity in everyday work and lives.

■ Partnerships

- ◆ Employer: To ensure Council as a workplace provides equitable opportunities for all employees and maintains an organisational culture which supports gender equity.
- ◆ Arm of government: To ensure decision making, resource allocation, planning, policy and service delivery addresses gender inequalities and is evidence based.

◆ Challenges

- Resistance may arise from the lack of general understanding regarding what gender equality means, and what a Gender Equity Strategy is meant to do.
- People may hold to the notion that commitment to merit negates the need of a Gender Equity Strategy.
- A lack/limitation of data for the City of Blue Mountains could present a challenge.
- Engagement needs to avoid complacency, and work to ensure that all voices are heard.

- The outcomes of the Strategy must be sustainable and resilient for long-term success.
- ◆ Actions
 - Leadership
 - ◇ Support gender equity initiatives within the City of Blue Mountains Council's Vision for the city includes Gender Equity.
 - ◇ Ensure that Blue Mountains City Council workplace culture, practice, policy, planning and programs demonstrate gender equity and respect.
 - Research
 - ◇ Ensure that the Blue Mountains Community is informed of Gender Equity implications of key social, economic and cultural parameters of life in the Blue Mountains.
 - Partnerships
 - ◇ Develop a community wide response and recognition of Gender Equity as a key social and economic challenge for the Blue Mountains.
 - Advocacy
 - ◇ Advocate for gender equity and the prevention of violence against women at a local, regional and state level.
 - ◇ Improve the gender representation of elected Councilors.
 - ◇ Advocate for gender inclusive design principles.
 - Capacity Building
 - ◇ Support Council staff, partners and the Blue Mountains Community to understand how they can promote gender equity in their everyday work and lives. To build capacity through broadening community engagement and debate on gender equity.
 - Evaluation
 - ◇ An annual report will be completed by the Community Development team and submitted to Council for review. This will aim to help determine new directions for Council in line with Strategy goals.

City of Edmonton - The Art of Inclusion: Our Diversity and Inclusion Framework (December 2019)

The City of Edmonton is a fast-growing Canadian municipality, seen by many as a leader for equity-minded planning. The Framework serves as the City's aspirational view of an inclusive workplace, outlining the path required to achieve its objectives. It feeds into the City of Edmonton's Corporate Business Plan and aims to support employees by fostering safety and value in each person's uniqueness.

◆ Objectives

- Deliver excellent services to the Edmonton community: The Diversity & Inclusion Framework will meet this objective by supporting employees to provide excellent service to all Edmontonians by being respectful, inclusive and equitable in the service they provide.
- The City of Edmonton's staff are safe and supported to achieve their aspirations and deliver excellent services: The Diversity & Inclusion Framework impacts this outcome by promoting inclusive, respectful and equitable connections so that all our employees have what they need to succeed.

◆ Goals and Pillars

■ Diversity

- ◇ Intentionally seek and value diversity.
- ◇ Attract and recruit a talented and diverse workforce.
- ◇ Review and adapt employee lifecycle systems and processes to ensure equity.
- ◇ Collect and analyze diversity data to make evidence-based decisions.

■ Equity

- ◇ Implement systems and practices that advance equity and respect.
- ◇ Prioritize Indigenous reconciliation.
- ◇ Identify needs of equity-seeking groups.
- ◇ Reduce harassment and discrimination and support those impacted.

■ Growth

- ◇ Adopt best practices in diversity and inclusion.
- ◇ Remove systemic barriers and support innovation.
- ◇ Integrate diversity and inclusion across the organization to ensure sustainability.

- ◇ Measure and evaluate diversity and inclusion initiatives for continuous improvement.
- Skill
 - ◇ Develop skills at working inclusively.
 - ◇ Support employees to work inclusively and champion diversity and inclusion.
 - ◇ Support leaders to work inclusively and champion edi.
 - ◇ Raise awareness and communicate effectively about diversity and inclusion.
- Evaluation
 - ◇ The City will assess action towards objects through a pre-determined quantitative measure that embody SMART goal framing.
 - ◇ Quantitative sources and data will be cataloged and shared on an ongoing basis.

City of Edmonton - Edmonton's Zoning Bylaw: Under the Lens of Equity (June 2021)

As a much more procedural addition to Edmonton's equity planning analysis, this report, led by a multidisciplinary research team² at the University of Alberta, aims to inform the City of Edmonton's (CoE) Zoning Bylaw Renewal Initiative (ZBRI) through scholarly and academic research, by identifying inequities generated by the current Zoning Bylaw and exploring equity measures that have been or can be taken. As a compliment to the race, gender, and engagement equity strategies reviewed, this report highlights the nuanced and non-neutral nature of a city's bylaws.

- ◆ Conceptual Framework
 - Distributional Equity
 - ◇ Equitable distribution of goods, services, and opportunities
 - Recognitional Equity
 - ◇ Acknowledgement of and respect for diverse intersecting identities
 - Procedural Equity
 - ◇ Decision-making processes that encapsulate distributional, recognitional and/or regulatory equity
 - Regulatory Equity
 - ◇ Zoning and other regulations crafted in such a way that they do not lead to differential treatment, hardship, or disadvantage to some people
- ◆ Proposed Bylaw Changes
 - Replace the discretionary use system with a conditional use system.
 - ◇ A permitted- conditional use means a building or land use that is generally consistent with other uses in the zone, but may be unique in its characteristics or operation, which could have an impact on adjoining properties.
 - ◇ Conditional uses are proposed to be permitted in a given zone provided an additional set of regulations are met.
 - Make the Bylaw more accessible by simplifying the language and creating a citizens' guide.
 - ◇ Because of years of additions and attrition, the Bylaw has become cumbersome and is filled with legalese. To overcome this, the Bylaw must be drafted in plain language that is certain, predictable, transparent, accountable, and easy to understand, while meeting the legal requirement for clear and precise legislation.

- ◇ An accompanying citizens' guide (a non-operative part of the Bylaw), also written in accessible language and providing graphic illustrations, should explain the purpose of each zone and use, the function they serve, the reasons for creating each zone and use, and the rationale for any conditions attached to the use.
- Reduce the number of zones, overlays, and uses.
 - ◇ The Zoning Bylaw has become unnecessarily complex over the years. Zones and land uses need to be simplified, based on their intensity of impacts. They can be merged into fewer zones that allow for the most permissible forms of housing.
- Apply human rights and equity tests to the Zoning Bylaw.
 - ◇ The renewal of the Zoning Bylaw can be bolstered further by adapting the two tests—human rights and equity—developed by Agrawal, the Principal Author, in his previous writings.
 - ◇ The tests will act as a “quality control” measure, built into the CoE's GBA+ (Gender-Based Analysis Plus) and Equity Toolkit, to review the most contentious portions of the Bylaw.
- Reform the SDAB's appeals process and diversify the community consultation process.
 - ◇ At the moment, discriminatory use of the appeals system, in particular, impedes developments that can further equity goals, such as effective housing choices and affordability. Such usages undermine the CoE's strategic direction to become more equitable and inclusive; thus, appeals at the SDAB on grounds that undermine human rights should be discouraged.
 - ◇ Instead, pre-hearing consultations and mediations should be offered to parties involved, to amicably resolve their concerns. Reaching out to equity groups includes engaging with Indigenous and other minority groups, to enhance both cultural diversity and inclusion.
- Develop an Edmonton Charter to guarantee certain rights.
 - ◇ This can be modelled after the Charter of Ville de Montréal and the Montréal Charter of Rights and Responsibilities, and include the right to initiate public consultation on issues important to Edmontonians.
- Establish two new offices:
 - ◇ (1) an Ombudsman's Office, to find remedies for complaints about inequitable or unjust treatment by the city administration, and
 - ◇ (2) an Office of Public Consultation, mandated to carry out public consultation regarding planning matters and to promote public participation in urban and land use planning matters.

King County, WA, USA – Equity and Social Justice Strategic Plan (2016–2022)

Located on the west side of Washington state and encompassing Seattle, King County is a large local government area that works with many municipalities to accomplish regional policy goals. The Strategic Plan is a blueprint for change, mutually created by King County employees and community partners. From the outset, the planning process was designed to hear from people across sectors, geography and populations before development.

- ◆ Vision: A King County where all people have equitable opportunities to thrive.
- ◆ Key Strategies are to invest:
 - Upstream and where the needs are greatest.
 - In community partnerships
 - In employees
- ◆ Defining Pro-Equity Governance Goals
 - Leadership, operations, and services
 - ◇ Develop effective and accountable leadership for advancing ESJ to drive pro-equity governance at all levels of the organization
 - ◇ Develop an organization where all employees are change agents who actively apply their ESJ knowledge to their work
 - Visibly and publicly display progress on Equity and Social Justice
 - ◇ County operations, programs and services are pro-equity in our service delivery – responsive and adaptive, focused on those whose needs are greatest—and collaborate with other King County and external service providers
 - Plans policies and budgets
 - ◇ Department and agency business plans, including line of business and other planning processes, include analyses of equity impacts from their operations, services and programs, as well as equity targets and measures of progress.
 - ◇ Policy guidance incorporates the ESJ Shared Values from this Strategic Plan, into analysis and decision making for operations and service delivery.
 - ◇ Budget decisions, rates, and allocation, including the base budget, reflect the values and strategies of the ESJ Strategic Plan and are tied to ESJ outcome measures and tracked.
 - Workplace and workforce

- ◇ Require and sustain a daily workplace culture where every employee experiences trust and respect, is treated with dignity, and feels engaged and confident to perform well.
- ◇ Systematically develop and retain a more racially diverse and culturally responsive workforce at all levels: leadership, management, and staff.
- ◇ Establish a shared commitment, resources and support—between leadership, managers, staff and labor—to grow every employee’s talent through training, development, coaching and mentoring.
- ◇ Build an organization of shared decision-making and shared-responsibility between staff, managers, leadership and labor partners that is grounded in consistent and effective communication, accountability and transparency.
- Community partnerships
 - ◇ Systematically provide resource support to community-based organizations to leverage their expertise toward advancing ESJ outcomes.
 - ◇ Expand and promote diversity among applicant pool by creating pro-equity contracting processes that are visible and accessible to contractors of varied sizes and capacities, consistent with state and federal law.
 - ◇ Provide non-monetary support to community-based partners that builds their internal capacities.
- Communication and education
 - ◇ As one in five county residents speaks a language other than English at home or is limited-English speaking (LES), update King County tools for public-facing communication and education to align with current populations, needs, and demographic changes.
 - ◇ Develop tools for better engaging with County services and opportunities for input on County projects and initiatives, regardless of neighborhood, immigration status, disability or primary language used for communication; and improve engagement by increasing capacity-building outreach and marketing buys with smaller, community-based organizations and media outlets.
 - ◇ Given the digital divide and that many communities rely on mobile devices to bridge that gap, improve the collaborative use of mobile-optimized web pages, and social media across County agencies and services as an engagement, outreach, and feedback tool for the public.
 - ◇ Improve collaboration and language-related tools and resources for employees to provide more services to those who are LES and include more of the community’s voice in the policy-making process.

- Facility and system improvements.
 - ◇ Infrastructure system master plans, including line of business and other strategic planning processes, include clear objectives to advance equity and social justice that are informed by and sensitive to priority populations and key affected parties .
 - ◇ Capital development policy, budgets, portfolios and programs are developed in accordance with community equity priorities, informed by a perspective on historic and existing inequities, and include a description of their contribution to improving equity in community conditions.
 - ◇ Activities and responsibilities for proequity progress are clear and defined at the Dept., Division, and Section levels.
- ◆ Shared Values
 - Inclusive and Collaborative
 - Diverse and People Focused
 - Responsive and Adaptive
 - Transparent and Accountable
 - Racially Just
 - Focused Upstream and Where Needs Are Greatest
- ◆ Pro-Equity Policy Agenda
 - Child and youth development
 - Economic development and jobs
 - Environment and climate
 - Health and human services
 - Housing
 - Information and technology
 - Justice system
 - Transportation and mobility

City of Nanaimo - Health and Housing Action Plan (December 2020)

Though not expressly an “equity strategy”, the Action Plan focused on an intersectional and equity-based framework, and identifies significant gaps in the City’s capacity to support the housing, health, and social needs of vulnerable individuals and families. As a guiding vision, the Plan frames health and housing as basic needs that should be affordable and accessible to everyone. The Action Plan serves as a five-year roadmap for collaboration and bold action.

◆ Key Priority Areas

■ System Coordination

- ◇ Create a community-based governance committee for the oversight of this Action Plan and coordination of the Health and Housing System.
- ◇ Support continuous improvement and innovation activities across the ecosystem. o Diverse Housing options
- ◇ Support and bolster existing efforts in the community to increase access to affordable housing.
- ◇ Create appropriate, accessible, and culturally-competent housing options across the housing spectrum for people with diverse needs (esp. supportive housing).
- ◇ Enact engagement strategies and programs to improve Housing & Health Equity in market housing.

■ Leadership and Engagement

- ◇ Promote and support community engagement and feedback to support Plan priorities.
- ◇ Leverage the strengths, experiences, and contributions of diverse groups across the community to champion plan priorities.
- ◇ Support the City to create a provincial and federal advocacy strategy to support plan priorities.

■ Prevention

- ◇ Develop and support a holistic and integrated health and housing spectrum that leverages new and existing services and wrap-around supports across diverse needs.
- ◇ Improve access to supports, through systems navigators, to connect children, young people, and families to supports that promote lifelong health and wellbeing.

■ Complex Needs Capability

- ◇ Leverage a human rights approach by ensuring access to the most basic human needs for all residents, at minimum, while connecting clients to supports they need.

- ◇ Advance a complex needs capability approach across the community that ensures consistent practices across services and improve outcomes for clients with complex needs.
- ◇ Support community health and safety through proactive planning, partnerships, and communitywide prevention.
- Poverty Reduction
 - ◇ Develop a Poverty Reduction Strategy aligned with the strategies set forth in TogetherBC, and based on community needs and priorities
 - ◇ Explore demand for programming and supports that improve the economic equity and health of residents now and in future generations.
 - ◇ Support Community Economic Development through initiatives, advocacy, and social infrastructure development.

City of Ottawa – Women and Gender Equity Strategy (2021–2025)

As the nation's capital, the City of Ottawa is specially situated as a City of regional, national, and international importance. As such, the City has an important role to play in advancing equity. The Women and Gender Equity Strategy (WGES) was developed to ensure that the City of Ottawa's services, strategies, and plans integrate a women and gender lens and promote women and gender equity. The WGES includes a systematic framework that sets organizational and departmental targets and defines commitments on women and gender equity for the first phase of its implementation.

◆ Vision

- Ottawa is a women and gender-inclusive, diverse, and safe city for residents from all gender groups where every person has equitable access to services and equal opportunities to participate in all aspects of life.

◆ Mission

- WGES works on removing the systemic barriers that hinder intersectional groups of women and gender diverse persons. It integrates a women and gender equity lens in City strategies, plans, policies, and services by developing City staff capacity, meaningfully engaging women and gender diverse persons, and ensuring safety and inclusivity in its workspaces.

◆ WGES Guiding Principles

- Women and Gender Equity
 - ◇ Recognition of barriers that face women, gender diverse persons, and intersectional groups of women, and a commitment to remove these barriers.
- Women and Gender Equality
 - ◇ Equal rights, responsibilities, and opportunities for all gender groups and intersectional groups of women.
- Evidence-based Planning
 - ◇ Actions and decisions are based on data, research, and best practice approaches to gender equity.
- Collaboration
 - ◇ Partnership and collaboration at all levels are crucial to social change.
- Intersectionality
 - ◇ Acknowledging the multi-faceted experiences of women and gender diverse groups. Discrimination and gender are interconnected and cannot be examined in isolation.
- Accountability

- ◇ Everyone has a collective responsibility and mechanism to ensure action.
- ◆ WGES Strategic Outcomes
 - Policy Change for Women and Gender Equity
 - ◇ The City’s decisions, programs, plans, and resource allocations are informed by an intersectional gender lens to ensure that residents from all gender groups have equitable access to services and resources.
 - Safety
 - ◇ The City establishes policies and accountability mechanisms to ensure its offices and facilities are free from all forms of gender-based violence.
 - Equitable Representation of Women
 - ◇ The City promotes and increases women and gender diverse representation in its workforce. Also, the City introduces policies that support women and gender-equitable access to career opportunities, including leadership roles, and policies that increase the number of women in occupations where they are under-represented.
 - Gender Inclusivity
 - ◇ The City offices and facilities are welcoming and safe environments for all gender groups.
- ◆ WGES Strategic Priorities
 - Gender-based analysis and gender lens on City’s policies and strategies
 - ◇ To systematically use Gender-based Analysis (GBA) to identify gender gaps and revise existing policies or create new policies towards equitable women and gender access to services and resources.
 - Women-and gender-sensitive data systems
 - ◇ To integrate a women and gender lens in the City’s data systems and use gender-sensitive data to make decisions and inform City strategies, plans and programs.
 - Meaningful public engagement of intersectional groups of women and gender diverse persons
 - ◇ To improve the level of meaningful engagement of community organizations, service providers, stakeholders, and residents from all gender groups.
 - Awareness-raising and training on women and gender equity
 - ◇ To increase awareness and capacity of City Council, management, and staff in integrating a women and gender lens in their work.

- Gender-sensitive resource allocation
 - ◇ To develop processes in City planning, programming, and budgeting that contribute to women and gender equity.

City of Portland, OR, USA - Racial Equity Strategy Guide (2012)

Located slightly inland in the state of Oregon, Portland is separated by the North-South running Willamette River. Portland is focusing on racial equity to address the City's most persistent disparities, and developing a permanent shift towards fairer practice and institutions that benefit all. The work of this Strategy is guided by The Portland Plan, Portland's Title VI Program, and City of Portland's Public Involvement Principles.

◆ Goals

- Establish strong leadership, training and technical assistance for Citywide racial equity initiative
- Develop a bureau specific racial equity strategy with measurable targets
- Implement strategy, develop tools and track progress

◆ Core Practices and Principles for Equity

■ Leadership and City-Wide Approach:

- ◇ Strategic planning
- ◇ Training
- ◇ Technical assistance
- ◇ Sufficient funding and resources

■ Partnerships:

- ◇ Cross agency collaboration
- ◇ Community organizations and other jurisdictions

■ Community Engagement:

- ◇ Partnership
- ◇ Early involvement
- ◇ Building relationships and community capacity
- ◇ Inclusiveness and equity
- ◇ Good quality process design and implementation
- ◇ Transparency
- ◇ Accountability

■ Accountability and Tracking Outcomes:

- ◇ Knowledgeable evaluation teams
- ◇ Define measurable social impacts
- ◇ Identify relevant levels of service and geographies for evaluation
- ◇ Develop relevant evaluation criteria specific to the service
- ◇ Incorporate the results into budget process

- ◇ Ongoing improvement to this process and capacity
- ◇ Integrate into performance evaluations
- ◆ Leadership Roles and Responsibilities in Development and Implementation of an Equity Strategy
 - Mayor and City Council
 - ◇ Develop and Implement a Mayoral and City Council racial equity strategy
 - ◇ Identify and implement a Citywide strategy, including Portland Plan deliverables
 - ◇ Public Reporting of Equity strategy progress
 - ◇ Model commitment through training and communication
 - ◇ Evaluate Directors on implementation performance of equity strategy
 - Bureau Directors
 - ◇ Develop and implement bureau-wide equity strategy and plan (See Applying Equity Strategies in Your Bureau)
 - ◇ Annual reporting to City Council and Mayor on equity strategy progress
 - ◇ Foster and support cross-bureau collaboration
 - Bureau Senior Leadership
 - ◇ Facilitate training and technical assistance for issue portfolios
 - ◇ Foster and support ongoing professional – development
 - Mid-level Management and Staff
 - ◇ Work with bureau leadership to identify places for implementation
 - ◇ Implement equity strategy in program, business operations and services
 - Recommended Areas for Integrating a Racial Equity Framework
 - ◇ Citywide Budgeting Process
 - ◇ Strategic Citywide Planning
 - ◇ Bureau Program Planning
 - ◇ Seeking new Funding Streams
 - ◇ Bureau Project Selection
 - ◇ City Hiring
 - ◇ Contracting and Subcontracting
 - ◇ Evaluation
 - ◇ Service Delivery
 - ◇ Operations
 - ◇ Community-based partnering
- ◆ Progress Tracking

- Racial Equity Lens Questions:
 - ◇ Briefly describe the proposed action (Policy, Program, Planning, Budget, etc. decision) and the desired results?
 - ◇ Who are the racial/ethnic groups affected by this action? How will each group be affected? What are the racial disparities related to this project and how will you track progress towards reducing disparities?
 - ◇ How does the proposed action expand opportunity and access for individuals to City services?
 - ◇ How does the proposed project promote racially inclusive collaboration and civic engagement? Is there community support for or opposition to the proposal? Why?
 - ◇ How does the proposed action affect systemic change (address institutional racism?) and what is your method for tracking progress?
 - ◇ How does the proposed project support work force equity and/or contracting equity?
 - ◇ Are there any unintended consequences for certain populations and/or communities? Are there strategies to mitigate any negative impacts?

City of San Francisco, CA, USA - Citywide Racial Equity Framework: Phase 1: Internal Programs and Policies (March 2020)

The City of San Francisco created the Office of Racial Equity (ORE) in July 2019. This pivotal step in San Francisco's equity journey was the result of successful advocacy and organizing by Black City workers, labor leaders and community members. With the establishment of ORE, San Francisco joins a national movement to address the government's role in resolving the inequitable outcomes it created. Phase I of the Framework aims to support all City agencies in building a culture, space, and workplace that is accessible and welcoming to all current and future employees, and to actively build an environment in which all people, regardless of background, identity, or ability, can be equal participants.

- ◆ Departmental Racial Equity Action Plans
 - Each Department's Racial Equity Action Plan is a declaration of the Department's key role and commitment to ensuring equitable and inclusive outcomes in San Francisco.
- ◆ Phases (This Report only focuses on Phase I)
 - Phase 1: Citywide Racial Equity Framework Phase I will center on internal, overarching strategies regarding our workforce.
 - Phase 2: The Citywide Racial Equity Framework Phase 2 will center on external equity indicators and support for historically marginalized communities.
- ◆ Phase I Sections
 - Hiring and Recruitment
 - ◇ Identify, Attract, Invest in and Retain a Diverse City Workforce.
 - ◇ Develop a hiring and recruitment policy and procedure that aligns with the Citywide Racial Equity Framework and the department's RE Action Plan.
 - ◇ Strengthen recruitment and hiring strategies to attract and cultivate diverse candidates at all levels of the department.
 - ◇ Invest in a diverse and equitable talent pool by formalizing robust internship, fellowship, pre-apprenticeship and apprenticeship programs, and provide equal opportunity towards permanent employment.
 - ◇ Commit to standardized, transparent, and participatory recruiting and onboarding.
 - Retention, Promotion, and Protection
 - ◇ Our Workforce is Our Largest Asset.

- ◇ Ensure stronger protections for workers of color given anticipated COVID-19 related deployment, budget shortfalls, hiring freezes, layoffs, and furloughs.
- ◇ Ensure salaries and benefits meet or exceed industry standards while actively pursuing income equity, centering the experiences of women and people of color.
- ◇ Create paths to promotion that are transparent and work to advance equity.
- Discipline and Separation
 - ◇ The Path to Termination is Filled with Bias.
 - ◇ Create a clear, equitable, and accountable protocol for disciplinary actions.
- Diverse and Equitable Leadership
 - ◇ An Equitable Workplace Starts with Diverse Leadership.
 - ◇ Commit to developing a diverse and equitable leadership that will foster a culture of inclusion and belonging.
- Mobility and Professional Development
 - ◇ When an Employee's Needs are Met, so are the Department's Needs.
 - ◇ Offer professional and skill development opportunities that center individual goals first, then organizational needs.
 - ◇ Encourage collaboration between staff and supervisors that are consistent and thoughtful.
 - ◇ Ensure staff needs are centered and timely met in order to perform and excel at their jobs.
- Organizational Culture of Inclusion and Belonging
 - ◇ Growing a Diverse Workforce is Just the First Step.
 - ◇ Foster an intentional organizational culture that is committed to inclusion and belonging.
 - ◇ Develop internal communication processes and procedures that promote equity.
 - ◇ Improve both physical and digital spaces to meet or exceed accessibility standards.
 - ◇ Expand the internal culture of belonging by fostering relationships with the external communities the department serves.
- Boards and Commissions
 - ◇ An Equitable Workforce Starts with Equitable Decision Making.
 - ◇ Ensure a diverse and equitable board and commission members that match the community being served.
 - ◇ Safeguard members so they naturally feel welcomed and valued, not tokenized.

City of Vancouver – Equity Framework: Getting our House in Order (July 2021)

The City of Vancouver is a City of Reconciliation. The original vision is to “form sustained relationships of mutual respect, incorporate perspectives, and provide services that benefit local First Nations and the Urban Indigenous community”. Under this context, Vancouver is working to expand their work with equity to establish a unified vision of equity across the City’s departments. As the title suggests, this plan is focused on “internal” and “bridging” City policies.

- ◆ Equity Commitments
 - Commit to doing equity work long term.
 - Commit to creating spaces for accountable learning.
 - Commit to reflecting equity in City leadership.
 - Commit to fostering strong relationships.
 - Commit to adequately resourcing equity work.
 - Commit to shared accountability.
- ◆ Three Imperatives for Doing Equity Work
 - The Justice Imperative
 - ◇ It is important to understand the history of racialization and atone for the harms of racial marginalization under white supremacist policies and actions by
 - The Compliance Imperative
 - ◇ It is key to track the strength, accessibility, and follow through of internal City policies.
 - The Effectiveness Imperative
 - ◇ Effectiveness can be assessed through participation and trust in government reported by marginalized groups.
- ◆ Equity Lenses
 - Indigenous Rights
 - ◇ Partnership with local Nations
 - ◇ Allocation of secure, long-term spaces for gathering and healing
 - ◇ Understanding MMIWG Calls for Justice and identifying roles for the City.
 - Racial Justice
 - ◇ Designations of geographic areas in the City that are of significance to racialized or ethno cultural communities.

- ◇ Targets for representation of persons of colour in leadership roles, and succession planning that gives explicit consideration to race.
- ◇ Funding awarded to projects that bring together multiple racialized and multi-racial communities.
- Intersectionality
 - ◇ Data collection forms that don't default to "male and female" identify boxes, but instead ask about gender outside the binary.
 - ◇ A model for Employee Resource Groups that allows for the creation of groups along intersections of identity.
 - ◇ Accessible, below-market housing that is built specifically to the needs of Indigenous woman-led families
 - ◇ Focused consultations with the most vulnerable of working people, including owners of small ethnic corner stores, older migrant workers, and trans sex workers.
- Systems Orientation
 - ◇ Conducting a colonial audi to diagnose the colonial processes, systems, mechanisms, policies, ideology, and discourse that is institutionalizaed within City operations.
 - ◇ Integrate an equity lens into the City's budget process to identify strategic opportunities for shifting for shifting investment in the direction of equity.
 - ◇ Introducing onboarding processes that ask all new employees, as a matter of course, about their accessibility needs.
 - ◇ Rethinking the concept of "professional conduct" in a work context to be more inclusive of different cultural norms of expression.
- ◇ Priority areas adapted from GDEIB
 - Foundation: vision, leadership, structure.
 - Internal: human resources functions.
 - Bridging: learning, communications, finance.
 - External: community-facing functions.

City of Victoria, BC – All Our Voices: Engagement Framework (September 2022)

In 2011, the City of Victoria adopted the International Association for Public Participation's (IAP2) core values and started to develop engagement best practices. Victoria was recognized for its leadership in engaging community in 2015 with the IAP2 Organization of the Year Award. This Framework outlines how the City is redefining its approach to public engagement to center equity-related concerns and needs. It sets out a vision for how the City speaks with the community, and how it can welcome all voices and honor diverse ways of knowing, learning, and sharing.

- ◆ City Commitments
 - Pay particular attention to the voices of those who are most impacted by a decision.
 - Clearly communicate what opportunities for participation exist.
 - Listen actively and report back to you on what we heard.
 - Update you on how community input was used in decision-making.
 - The Framework is intended as a living document – it will evolve as the conversation on equity and our own learning evolves – and will be reviewed and updated on a regular basis.
- ◆ How Victoria Centres Equity in Public Engagement
 - Building reciprocal relationships
 - Building capacity
 - Building trust
 - Considering who is missing
 - Addressing barriers to participation using evidence-based decision making
 - Redefining success
- ◆ Guiding Principles adapted from IAP2:
 - Equity
 - ◇ We will work with communities to identify and address barriers to your participation in engagement
 - ◇ We will consider which voices are missing
 - ◇ We will provide you with the information and resources you need to participate meaningfully alongside us in our engagements
 - ◇ Where possible, we will provide various channels for providing input
 - Inclusion

- ◇ We will strive to inform and engage all communities who are impacted by changes or decisions being considered
- ◇ Where possible (when a specific community is highly impacted by a potential decision) the City will involve the community in the design of the engagement through outreach and working groups
- Accessibility
 - ◇ We will take guidance from the Accessible Events Toolkit and work with community members to make our engagements more accessible
 - ◇ Welcoming/belonging
 - ◇ We will work to create engagement spaces where everyone feels that they belong
 - ◇ We will create safe(r), welcoming and respectful engagement spaces and processes where everyone feels comfortable sharing feedback
 - ◇ We will establish clear guidelines for respectful conduct
- Transparency
 - ◇ We will set and manage expectations by telling you what level of involvement you can expect, what decisions have already been made and what's on/off the table for discussion
 - ◇ We will share clear and concise summaries of what we heard from communities and check that all feedback was accurately captured
 - ◇ We will inform you of how your inputs were used to inform decisions
- Timely and clear information
 - ◇ We will aim to provide you with notice of engagement processes as early as possible so that you have time to learn about the issue and actively participate
 - ◇ We will provide materials for review in advance where relevant
 - ◇ We will strive to use plain and accessible language in our communications and present you with balanced and relevant information
 - ◇ In many cases, we will provide two levels of information – a brief summary as well as more technical information for those who want more detail
- Continuous learning and improvement
 - ◇ We will incorporate the lessons we learned into future engagement processes
 - ◇ We will seek your feedback on how we are doing
 - ◇ We will engage with you to update or refresh this Engagement Framework so that we integrate new learnings and practices

- ◆ Engagement Steps
 - Assess if Engagement is Needed
 - Does this require a collaborative engagement approach
 - Design a tailored engagement
 - Tell the story
 - Connect and listen
 - Report back to community
 - Evaluate and improve

Appendix B
**Equity Policy
Reference Table**

Legend for implementation priority: ● Lower | ●● Medium | ●●● Higher

[1] Category	[2] Sub-category	[3] Relevant OCP policies (bold policies: highlighted by CK)	[4] OCP Policy language	[5] Example policy language from case studies	[6] Short-term Implementation Goals	[7] Long-term Implementation Goals	[8] Priority for Implementation	[9] Indicator	[10] Implementation Lead	[11] Budget	[12] Status
Housing	Housing distribution	4.12.4, 5.11.5: City Land Acquisition	Focus land acquisition and housing partnerships in the Urban Centres, in addition to the Core Area, to support affordable rental housing near transit, services and amenities.	[SF] 1.2.8 Prioritize support to neighborhood-based affordable housing developers, particularly those managed by American Indian, Black, and other communities of color. Partner with affordable housing developers to purchase privately owned entitled sites where construction may be stalling.	Facilitate housing partnerships that address equitable needs within Kelowna (e.g. supportive housing, Indigenous housing, deep-subsidy housing, affordable rental housing, seniors housing).	Commission a land acquisition and disposal strategy that identifies land for affordable housing development. Implement strategy in partnership with housing organizations that work with underserved, equity-seeking communities.	●●	Net new affordable housing units as a factor of requirements and findings in Kelowna's Housing Needs Assessment			
		6.4.4: Industrial / Residential Interface	Require low impact industrial uses where industrial lands are adjacent to residential lands. Such uses should be primarily indoors, have limited outdoor storage and include extensive buffering and screening to reduce impacts on residential neighbourhoods.	[BCCDC] Local governments can support access to affordable healthy housing through tools such as provision of diverse housing forms and tenure types; ensuring good housing quality that includes proper housing structure, heating, insulation, and ventilation in all new homes; policies and programs that prioritize the housing needs of the homeless, older adults, low-income groups, and people living with disabilities; and siting and zoning that minimizes exposure to environmental hazards. [BCCDC] There is some evidence that interventions to improve infrastructure and amenities (e.g., affordable child care, well-maintained green spaces, public transportation, access to healthy foods) in low-income neighbourhoods may be more cost-effective and inclusive and have similar impacts as moving individuals to lower poverty areas. Mechanisms include bylaw protection for renters when neighbourhoods are undergoing renewal or redevelopment.	Develop custom data sets that show disaggregated demographic information for residents near industrial zones throughout Kelowna and explore mitigation strategies for where equity-seeking groups are located.	Amend zoning bylaws to formalize buffering and screening requirements for industrial zones adjacent to residential lands.	●	Reduction in amount of noise and air pollution experienced by residents near industrialized zones, particular residents from equity-seeking groups.			

Legend for implementation priority: ● Lower | ●● Medium | ●●● Higher

[1] Category	[2] Sub-category	[3] Relevant OCP policies (bold policies: highlighted by CK)	[4] OCP Policy language	[5] Example policy language from case studies	[6] Short-term Implementation Goals	[7] Long-term Implementation Goals	[8] Priority for Implementation	[9] Indicator	[10] Implementation Lead	[11] Budget	[12] Status
Housing	Typologies/ tenures	4.12.1, 5.11.1: Diverse Housing Forms	Ensure a diverse mix of medium-density and high-density housing forms that support a variety of households, income levels and life stages.	<p>[SF] 1.7.7 Identify new strategies to address the unique housing and service needs of specific vulnerable populations to improve housing access and security for each group, using the findings from the City’s housing Consolidated Plans and through direct engagement of these populations. Studies should address the needs of veterans, seniors, people with disabilities, transitional-aged youth, transgender and LGBTQ+ populations.</p> <p>[SF] 4.1.1 Develop and align citywide metrics that measure progress towards positive outcomes for American Indian, Black, and other people of color, and other disadvantaged communities resulting from housing policies using methods consistent with the San Francisco Equity Index prepared by the Office of Racial Equity. These metrics will be part of the Monitoring Program in Action 8.1.9 and will include affordable housing placement, displacement mitigation measures, and homeownership rates.</p> <p>[SF] 7.2.8 Create a co-housing informational program that provides ideas and recommendations on types, financing structures, precedents, and technical guidance to support their creation in Cultural Districts and Priority Equity Geographies to meet community needs.</p> <p>[Edm Zoning Equity] Reduce the list of discretionary uses, instead turning them into permitted-conditional use, along with clear, precise, and quantifiable conditions.</p> <p>[Edm Zoning Equity] The Bylaw needs redrafting in plain, transparent language that lay readers can easily understand, while providing clear and precise legislation. A citizens’ guide could further support the Bylaw by explaining its purpose, function, and rationale for each zone and use. Pre-application consultation on all types of permit applications could also make the development process more accessible for new or inexperienced applicants.</p>	Commission new strategies to address the unique housing and service needs of specific vulnerable populations to improve housing access and security for each group through direct engagement. Studies should address the needs of families and equity-seeking groups.	<p>Implement DCC and municipal development fee waivers for non-profit affordable housing projects that increase density beyond single family homes.</p> <p>Implement Density Bonuses for development projects that include affordable housing for tenures that target equity-seeking groups.</p> <p>Amend Zoning Bylaw to reduce the list of discretionary uses specifically related to affordable, supportive, and transitional housing, instead turning them into permitted uses, along with clear, precise, and quantifiable conditions."</p>	●●●	Statistical reduction in the amount of equity-seeking individuals who are unhoused or precariously housed.			
		5.12.4: Protection of Mobile Home Parks	Prioritize retention of mobile home parks as an important source of affordable housing in our community. Only consider redevelopment of mobile home parks if 1:1 replacement of affordable units is included in the redevelopment.	<i>no implementation-level policies found in strategies/ plans scanned</i>				In areas currently zoned for, or rezoned from, mobile home park usage, affordable units (in suitability and cost) remain the same.			

Legend for implementation priority: ● Lower | ●● Medium | ●●● Higher

[1] Category	[2] Sub-category	[3] Relevant OCP policies (bold policies: highlighted by CK)	[4] OCP Policy language	[5] Example policy language from case studies	[6] Short-term Implementation Goals	[7] Long-term Implementation Goals	[8] Priority for Implementation	[9] Indicator	[10] Implementation Lead	[11] Budget	[12] Status
Housing	Typologies/tenures	5.12.5: Redevelopment of Mobile Home Parks	During redevelopment, ensure owners of mobile home parks create and implement a viable relocation plan for current tenants and provide them with a first refusal to purchase, as per Council Policy #229.	<i>no implementation-level policies found in strategies/plans scanned</i>				In areas being redeveloped from Mobile Home Parks, residents are given relocation plans that include a first refusal to purchase.			
		4.12.3, 5.11.2, 6.9.2, 6.10.1: Range of Housing Tenure/Diverse Housing Tenures/Housing Tenure Diversity	Encourage a range of rental and ownership tenures that support a variety of households, income levels and life stages. Promote underrepresented forms of tenure, including but not limited to co-housing, fee-simple row housing, co-ops, and rent-to-own.	<p>[SF] 1.3.6 Prioritize achieving the maximum number of permanently affordable housing units at lower- and moderate-incomes that are financially feasible, as an essential benefit of new mixed-use development agreements alongside other benefits such as community facilities and transit investments.</p> <p>[SF] 7.2.7 Support process and code changes in Priority Equity Geographies that seek to define specific needs or limits around co-housing types, as informed by Policy 18. Conduct an affordability analysis to determine financial feasibility.</p> <p>[SF] 7.2.8 Create a co-housing informational program that provides ideas and recommendations on types, financing structures, precedents, and technical guidance to support their creation in Cultural Districts and Priority Equity Geographies to meet community needs.</p> <p>[Edm Infill Strat] The current Zoning Bylaw contains a number of restrictions and special requirements for the development of collective housing options (such as group homes and lodging houses). The City intends to review the intent and impact of the existing restrictions and take informed action based on that review.</p> <p>[Edm Infill Strat] Adapt regulations in the Zoning Bylaw to enable small apartment buildings on small lots that cannot meet the requirements of the current medium scale zone.</p>	Review 2021 Census data (order custom data if needed) to identify housing tenure types and associated income, ethnicity, race, spoken language, immigration status, core housing need, and other relevant disaggregated data.	Amend zoning bylaws and design guidelines to allow as a permitted use alternative forms of tenure, including but not limited to co-housing, fee-simple row housing, co-ops, and rent-to-own.	●●	New and approved housing units reflect tenure diversity requirements set by the City through Housing Action Plans.			

Legend for implementation priority: ● Lower | ●● Medium | ●●● Higher

[1] Category	[2] Sub-category	[3] Relevant OCP policies (bold policies: highlighted by CK)	[4] OCP Policy language	[5] Example policy language from case studies	[6] Short-term Implementation Goals	[7] Long-term Implementation Goals	[8] Priority for Implementation	[9] Indicator	[10] Implementation Lead	[11] Budget	[12] Status
Housing	Typologies/ tenures	7.3.2: Reduce Social Isolation	Design Suburban Neighbourhoods to include groups who may face higher levels of social isolation including seniors, people with diverse abilities, Indigenous communities and newcomers.	<p>[Nanaimo] Create Health & Housing Lived Experience (LivEx) Circles that involve people with lived experiences in the health and housing support system in the design and ongoing consultation about services and housing.</p> <p>[SF] 4.2.2 Increase resources and funding to partner with community-based organizations primarily serving and representing American Indian, Black, and other people of color, and other disadvantaged communities, to ensure inclusive outreach and engagement and meaningful participation in housing and planning processes through focus groups, surveys, and other outreach events.</p> <p>[Victoria CRD RGS] Prioritize transit and active modes in community planning and in the design and implementation of infrastructure, facilities and programs.</p>	Review all Neighbourhood Plans through a lens of social isolation that includes housing, transit, access to green space, and accessibility issues.	Renew all Suburban Neighbourhood Plans and specifically engage with residents who include seniors, people with diverse abilities, Indigenous communities and newcomers regarding social isolation.	●	Renewal or review of suburban Neighbourhood Plans are completed to include substantial equitable engagement with seniors, people with diverse abilities, Indigenous communities and newcomers. Progress to be tracked as each plan is renewed or reviewed.			
	Rental stock/ renters	4.13.2, 5.12.2: Displacement Effects of Gentrification	Ensure Urban Centre planning initiatives and significant redevelopment opportunities include affordable housing and access to services to ensure low to moderate income renters are protected from displacement effects of gentrification.	<p>[SF] 1.2.1 Build between 25% and 50% of the City's new permanently affordable housing within Well-resourced Neighborhoods over the next two RHNA cycles, implementing the zoning strategies of Policy 20.</p> <p>[SF] 1.5.3 Increase housing that is affordable to extremely low and very low-income households in Well-resourced Neighborhoods, as well as in Priority Equity Geographies and Cultural Districts, through City-funded permanently affordable housing projects.</p>	Review location of social services and non-market affordable housing units throughout the City, and ensure that they are not hyper-focused in the downtown core of Kelowna.	Amend Bylaw to enable supportive, subsidized, and multi-family affordable housing as permitted uses in all zones with a targeted approach to providing affordable housing for equity-seeking groups and low-income residents. Enact, at minimum, 1-1 replacement legislation for existing affordable units with density bonusing for any additional affordable units provided by a developer.	●●●	Percentage of non-market affordable housing units as a factor of all new residential development. Turnover rates per neighbourhood do not increase substantially as a factor of new development.			
		4.13.3, 5.12.3, 6.10.4: Tenant Assistance	Work towards the creation of a Council policy to protect tenants displaced by redevelopment through fair relocation assistance from the developer. Such relocation assistance should ensure that tenants retain their access to services and amenities, such as employment, transportation and schools.	<p>[SF] 1.4.2 Continue to implement temporary relocation plans that ensure affordable housing tenants do not pay more than they are currently paying during rehabilitation or redevelopment of existing affordable housing, including identifying units in permanently affordable housing developments that can be used as relocation housing, and ensure tenants are relocated within San Francisco.</p> <p>[SF] 1.5.5 Engage with target communities to determine needs and advocate for expanded tenant and building-based rental assistance programs at the federal and state and local levels to meet the needs of extremely and very low-income households and households with fixed incomes, such as seniors and people with disabilities, as also referenced in Actions 2.1.2, 3.2.1, 1.5.4.</p> <p>[Burnaby] The City of Burnaby is a national leader in tenant protection. Review entire policy for language and practices.</p>	Prioritize Development and Building Permit applications that include strong tenant assistance plans as a soft-launch to mandatory requirements.	Implement a strong tenant protection policy that mandates tenant assistance plans by property owners and developers. Ensure that the policy reviews the needs of equity-seeking groups and includes at minimum: market-rate relocation payouts to removed tenants, a right of first refusal for returning tenants, and 1:1 replacement clauses for affordable rental units.	●●●	A Tenant Protection Policy is drafted and brought before Council.			

Legend for implementation priority: ● Lower | ●● Medium | ●●● Higher

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Housing	Rental stock/renters	4.14.1, 5.13.1, 6.10.2, 7.7.1: Protection of Existing Rental Stock	Ensure retention or replacement of existing rental units as redevelopment occurs in the Urban Centres through planning tools that may include, but are not limited to, Rental Only Zoning and Rental Replacement Obligations.	<p>[SF] 2.4.2 Explore regulatory paths, including a tax or other regulatory structures, to discourage short term speculative resale of residential units, particularly those which seek to extract value out of evicting tenants, or rapid reselling to more lucrative markets.</p> <p>[SF] 2.4.3 Continue to improve compliance, enforcement, and restrictions on intermediate-length occupancy dwelling units. Explore tracking and publishing data on short-term rentals on the Rental Housing Inventory.</p> <p>[SF] 2.4.9 Adopt requirements for replacement of units affordable to the same or lower income level as a condition of any development on a nonvacant site consistent with those requirements in state Density Bonus Law (Government Code section 65915(c)(3).) Replacement requirements shall be required for sites identified in the Sites Inventory that currently have residential uses, or within the past five years have had residential uses that have been vacated or demolished, and:</p> <ul style="list-style-type: none"> ◆ Were subject to a recorded covenant, ordinance, or law that restricts rents to levels affordable to persons and families of low or very low-income, or ◆ Subject to any other form of rent or price control through a public entity's valid exercise of its police power, or ◆ Occupied by low or very low-income households <p>For the purpose of this action, "previous five years" is based on the date the application for development was submitted.</p>	Create and maintain a database of known rental units/buildings by neighbourhood in Kelowna and further categorize them according to disaggregated 2021 Census data.	Implement requirements (e.g. through creating a Rental Only Zoning or Rental Replacement Obligations) and/or incentives (e.g. density bonusing, community amenity contributions, DCC reductions) for developers to retain or replace existing rental units, especially in predominantly low SES neighbourhoods.	●●●	Using CMHC Rental Portal for Kelowna and local data built through a rental unit database, track total rental units as net-positive.			
		4.14.2, 5.13.2, 6.10.3: Rental Conversion	Prohibit the conversion of existing residential rental buildings to condominium status when the rental vacancy rate falls below five per cent in Kelowna, unless the conversion is for the purpose of creating affordable rental housing with a Section 219 covenant registered on each strata title.	<i>no implementation-level policies found in strategies/plans scanned.</i>		Institute a Bylaw that prohibits the conversion of existing residential rental buildings to condominium status when the rental vacancy rate falls below five per cent in Kelowna, unless the conversion is for the purpose of creating affordable rental housing with a Section 219 covenant registered on each strata title.	●●	Bylaw is brought before Council that prohibits the conversion of existing residential rental buildings to strata when the rental vacancy rate falls below five per cent in Kelowna, unless the conversion is for the purpose of creating affordable rental housing with a Section 219 covenant registered on each strata title.			

Legend for implementation priority: ● Lower | ●● Medium | ●●● Higher

[1] Category	[2] Sub-category	[3] Relevant OCP policies (bold policies: highlighted by CK)	[4] OCP Policy language	[5] Example policy language from case studies	[6] Short-term Implementation Goals	[7] Long-term Implementation Goals	[8] Priority for Implementation	[9] Indicator	[10] Implementation Lead	[11] Budget	[12] Status
Housing	Rental stock/renters	4.14.3, 5.13.3, 6.10.5: Short-Term Rentals	Ensure short-term rental accommodations limits impact on the long-term rental housing supply.	[SF] 2.4.3 Continue to improve compliance, enforcement, and restrictions on intermediate-length occupancy dwelling units. Explore tracking and publishing data on short-term rentals on the Rental Housing Inventory.	Create a mandatory registry for all short-term rental housing throughout the City of Kelowna to build a comprehensive database.	Monitor data on short-term rentals to track supply and market impact, and pilot restrictions on short-term rental housing in secondary residences as necessary.	●	Track registered short-term rentals for sharp increases. In the case of a sharp increase, track against median housing costs and housing vacancy.			
Community Services and Supports	Supports	5.4.7. Child Care Spaces.	Facilitate the development of childcare spaces throughout the Core Area including accessible, affordable, and inclusive spaces that meet the needs of the community.	[Squamish CCAP] 1.3 Set targets for child care spaces in neighbourhoods/nodes and work with developers in the design and build of in-kind child care spaces. Develop a policy framework for ensuring spaces are dedicated for child care and rented to not-for-profit child care providers in perpetuity, and explore partnerships to operationalize these policies. ◆ Action 2.1: Increase child care spaces across all age groups and child care types (i.e., infant-toddler, children with extra support needs, before- and after-school, summer options). ◆ Action 2.2: Prioritize new child care facilities in neighbourhoods with high child populations, as well as around existing and future planned family service hubs, schools, senior's centres, parks and Brennan Park Recreation Centre to create and strengthen child care hubs across Squamish.	Map existing child care spaces in Kelowna. Create a child-care expansion plan that addresses inequities both in cost and location, and takes into consideration the needs of equity-seeking groups.	Allocate City-owned land to non-profit entities that wish to build childcare space. Establish a multi-year fund to provide subsidies towards the development and operation of childcares run by non-profit entities.	●●	Net new childcare spaces in Kelowna increases, especially those targeting families from equity-seeking groups.			
		4.12.5, 5.11.6, 6.9.3, 7.6.2: Social Connections Through Design	Encourage housing design that incorporates private open space, rooftops, gardens, green-space and children's play areas to foster social connections, inclusion and intergenerational relationships.	[SF] 8.3.8 Create, complete, adopt, and apply the Ground Floor Residential Objective Design Standards to housing projects to require porches, stoops, and open space under specific conditions without compromising accessibility to invite social engagement and belonging. [MetroVan] Advocate for new streams of funding for retrofits that support social sustainability and social connectedness in buildings and on their grounds.	Develop a resident survey targeted to residents of a variety of housing typologies that details individual perceptions of social connection. Prioritize demographics or tenures that may be at increased risk of social isolation (e.g. seniors, recent immigrants, temporary foreign workers, etc).	Alter Design Guidelines based on resident survey feedback to prioritize certain form factors or housing typologies, and include a required minimum amount of indoor and outdoor communal space for social interaction.	●	Issue subsequent resident surveys in new or renewed housing tenures that adopt recommended guidelines and track against original resident surveys.			
		4.13.1, 5.12.1: Housing with Supports	Prioritize the development of subsidized housing and housing with supports in the Urban Centres in addition to the Core Area, particularly near employment, public transit, services and amenities. Promote acceptance by the community for these supports, services and the citizens that are using them.	[SF] 3.4.1 Identify a numerical target in the 2023 HSH Strategic Plan for building or acquiring permanent supportive housing, in proportion to the expansion of shelter and homelessness prevention services, to continue the trend in reduction in homelessness seen in the Point-in-Time Count from 2019 to 2022 over the Housing Element cycle. [Edm Zoning Equity] More importantly, "limited supportive housing" is now a permitted use in not just all residential zones, but also in commercial and urban service zones, which shields it from NIMBYism and appeals.	In consultation with local homelessness support organizations, develop and execute an educational campaign targeted to residents of neighbourhoods in the Core Area that are slated for supportive housing development.	Zoning changes: Pilot "supportive housing" as a permitted use in residential, commercial, and urban service zones. In collaboration with the land acquisition strategy, prioritize lots for development or redevelopment to include supportive housing, and reduce approval barriers by pre-zoning the land ahead of any design or development.	●●●	Net new supportive housing units as a factor of demographic need through Statistics Canada and the Housing Needs Report.			

Legend for implementation priority: ● Lower | ●● Medium | ●●● Higher

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Community Services and Supports	Homelessness	4.2.2; 5.4.2: Safety Net Supports and Services	Recognize Urban Centres as key locations for safety net supports and services, such as shelters and services that support them, for people experiencing homelessness. Recognize that shelters are used by a diversity of people with different needs such as women fleeing violence, youth and adults. Ensure information is provided to the community to foster positive relationships and promote acceptance for these supports, services and the citizens that are using them.	<p>[SF] 3.1.4 Provide housing navigation services, case management when applicable, and rental assistance as available to people exiting homelessness during the housing search stage. Provide ongoing services to ensure tenant retention.</p> <p>[SF] 3.3.4 Remove approval barriers for shelter sites that are City-funded but not City-owned or -leased under local Ordinance 60-19. The over-the-counter review process for shelter construction authorized under a declared shelter crisis should be allowed regardless of the declaration of a shelter crisis.</p>	Coordinate homelessness outreach with local organizations to reduce overlapping scopes by instituting a service provider roundtable	Fund a City position (or 1 FTE) to act as a service coordinator who liaises with Kelowna grassroots homeless support services. Remove approval barriers for shelter sites that are City-funded but not City-owned or City-leased."	●●	Review and monitoring of PiT counts within Kelowna against previous years, and track trends amongst visible and hidden homelessness.			
Access and Accessibility	Urban Infrastructure and Safety	4.2.1, 5.4.1: Accessible Community Services	<p>Prioritize the following services in Urban Centres to create a more accessible and inclusive community, including, but not limited to:</p> <ul style="list-style-type: none"> Government services; Medical, health and wellness services; Childcare, schools, libraries, and post-secondary institutions; Places of worship, recreation centres, and other community gathering spaces; Food retail, services and programs; Banks and credit unions; and Accessible year round public washrooms. 	<p>[Nanaimo] 1.1 Support the creation of a Navigation Centre [see Prevention: 1.3] bringing together diverse key services for the complex needs group along with basic services (showers, food, etc.). It acts as an entry point into the coordinated system where assessment, intervention can start. Indigenous cultural supports are embedded, trauma-informed, person-centred.</p> <p>[Edm Zoning Equity] Create an Ombudsman Office and Office of Public Consultation, where Edmontonians can raise any issue regarding public consultation and ask for a remedy.</p> <p>[SF] 9.4.2 Remove Conditional Use Authorizations outside of Priority Equity Geographies and areas vulnerable to displacement where required to remove an existing use and construct housing, and instead apply neighborhood notification procedures for proposed demolition of identified community-service uses, such as theaters, grocery stores, and laundromats, by January 31, 2027 and support their economic survival through a replacement provision or participation in a Community Benefit Use program as described in Action 9.4.5.</p>	<p>Encourage uses in the ground floor of buildings that support housing, neighbourhood activity, cultural community building, or provide important community services.</p> <p>Support the location of important community amenities and services along transit corridors so that they are accessible to users of all ages, incomes and abilities, including seniors, people with diverse abilities, Indigenous people and newcomers.</p>	<p>Pilot a "First Right of Refusal" clause for culturally significant businesses, small local businesses, and social support services for any new development or renovation (i.e. cultural grocers, corner stores, small cafés and neighbourhood grocers).</p> <p>Create special area design guidelines for areas where the design of public space and architecture could help reinforce cultural identities, in compliance with City requirements.</p>	●●	Track new and approved developments (including for local, provincial, and federal government services), and record the amenities provided, including if they are cultural or local assets.			

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Access and Accessibility	Urban Infrastructure and Safety	4.16.7. Safe Crossings.	Create accessible crossing opportunities for pedestrians and bicycles across collectors and arterials that serve all ages and abilities.	<p>[Calgary PS] Install more RRFBs Rectangular rapid flashing beacons or RRFBs are a new technology to make crossings more visible using flashing lights at the point where pedestrians enter the roadway. RRFBs have high compliance from drivers and are a cost effective way to improve crossings where pedestrians are not being seen.</p> <ul style="list-style-type: none"> ◆ Action 20 Build new high-value pedestrian under/ over passes and bridges Pedestrian bridges and underpasses connect areas that are otherwise separated by geography (like rivers) or infrastructure (like major roads.) They ensure that people who walk and bike can travel with ease, but they can be expensive. The City will prioritize building these links to make sure they are good investments. <p>[BCCDC] Prioritize safety and enjoyment of public and active transportation in low-SES neighbourhoods. Interventions may include safe street crossings, traffic calming techniques, and enforcement measures such as speed limit reductions; development of linear parks, multi-use trails, greenways and sidewalks, and organization of walking groups.</p>	Identify priority areas for street accessibility design changes based on disaggregated data for equity-seeking groups and required connections to key destinations.	Create a universal street design handbook and review with accessibility, differently abled, and child-safety advocacy groups in Kelowna. Formalize and implement universal street design handbook Citywide for all new development or redevelopment.	●●●	Drafted universal pedestrian and street design guidelines and the development of continuous street networks. Track pedestrian, cyclist, and non-car based injuries and fatalities as a factor of new policies.			
		4.17.5. Accessible Streets.	Streets should be accessible, with wheelchair ramps, accessible pedestrian signals at signalized intersections, tactile walking surface indicators, accessible curb ramps and other features to support all ages and abilities.	[SF] 9.3.2 Prioritize investments in Priority Equity Geographies that overlap with Environmental Justice Communities related to improving transit service, pedestrian safety, schools, child development centers, parks, streetscape, and other neighborhood amenities, in coordination with the investments referenced under Action 9.3.7.							
		5.6.4. Pedestrian Priority in Parking Lots.	Create a safe and pleasant pedestrian experience in Regional Commercial lands with dedicated pathways that clearly delineate pedestrian space. Landscaping should be designed to maximize shade in the summer months.	<p>[Winnipeg BPS] events such as an IceCycle event, Sunday street closures, ciclovias, Bike to Work Day/Week, Walk to Work Day/Week, International Walk to School Day, and other events can encourage uptake in walking and cycling and gain momentum for active transportation.</p> <p>[Winnipeg BPS] city-wide campaigns to deliver positive messaging to promote walking and cycling. Campaigns and city-wide communications through various forums such as radio advertisements, bus shelter advertisements, online/website and others can be important way to reach out to all communities and to increase more awareness about walking and cycling.</p>							

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Access and Accessibility	Urban Infrastructure and Safety	5.14 Provide safe, walkable, Core Area neighbourhoods that are connected to key destinations.	<i>Policies covering walkability, roadway congestion, pedestrian and biking connectivity, base level transit service, frequent transit, active transportation corridors, bicycle-oriented development, urban street network and access management.</i>	[Stratford] Objective 1.1.2: To establish collaborative pathways between programs, services, and supports, so that service providers can work together more effectively and are better equipped to guide individuals and families to the social, health, economic, and education supports they need.	Identify priority areas for street accessibility design changes based on disaggregated data for equity-seeking groups and required connections to key destinations.	Create a universal street design handbook and review with accessibility, differently abled, and child-safety advocacy groups in Kelowna. Formalize and implement universal street design handbook Citywide for all new development or redevelopment.	●●●	Drafted universal pedestrian and street design guidelines and the development of continuous street networks. Track pedestrian, cyclist, and non-car based injuries and fatalities as a factor of new policies.				
		10.1.1 Equitable Distribution of Parks and Amenities	Provide an equitable distribution of neighbourhood and community parks throughout the City through new park acquisition and development in growing and underserved neighbourhoods.	[VanPlay] G.2.2 Create and acquire Equity Analysis Factor data sets on an ongoing basis to support the engagement and co-creation of plans for investment in resources like parks and recreation assets and programming. [VanPlay] R.1.4 Ensure new facilities are located near transit and active transportation nodes where it is possible to encourage green transportation choices. [VanPlay] F.2.1 Advocate for increased maintenance budgets to better meet needs for facilities and amenities to account for increased intensity of use, particularly in Equity Initiative Zones (Strategic Bold Move Tool) and growth areas.	Map available green, blue, and other public community space throughout Kelowna, and combine with disaggregated demographic data to identify gaps in green space and overlap with equity-seeking groups. Identify priority areas and establish a park expansion plan in line with mapping and engagement of equity-seeking groups. Vancouver's VanPlay plan is a model for equity in park planning.	Create and publish findings in an Equitable Park Strategy. Implement Equitable Park Strategy.	●●●	Tracked disaggregated data shows increase of available park space (green, blue, and public space) for equity-seeking groups.				
		10.1.2 Equitable Amounts of Parkland	Strive to provide an equitable amount of parkland for neighbourhood and community parks in urban and suburban areas.	[VanPlay] N.5.2 Increase tree canopy cover in the Equity Initiative Zones, particularly the Downtown Eastside neighbourhood, to improve the quality of the urban living environment by providing more access to nature, supplying increased shade, and reducing the urban heat island effect.								
		10.2.3 Shared Spaces as Gathering Places	Utilize streets for park uses that are underused for vehicle traffic outside of peak hours, particularly those adjacent to parks and other public realm spaces, to provide additional public amenity space. Approaches could include: <ul style="list-style-type: none"> ◆ Temporary closures at weekends and/or evenings; ◆ Different road materials and other traffic calming measures to give priority to pedestrians; and ◆ Programs to facilitate neighbourhood activities and events. 	<i>no implementation-level policies found in strategies/plans scanned.</i> <i>The US-based National Association of City Transportation Officials have published a guide with recommended strategies for various interim street design strategies, including temporary street closures, parklets and interim public plazas. These guides include recommendations of critical, recommended and optional design guidelines for each of these interventions.</i>								

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Access and Accessibility	Urban Infrastructure and Safety	10.3.1 Parks as Community Spaces	Focus on developing spaces that foster health, social connections, and appreciation for the natural environment.	[BCCDC] Expand and improve diverse forms of accessible and connected green spaces in underserved and disadvantaged areas to support physical and mental health. This includes the revitalization of parks, especially those that improve travel links and connectedness through the community.	Map available green, blue, and other public community space throughout Kelowna, and combine with disaggregated demographic data to identify gaps in green space and overlap with equity-seeking groups.	Create and publish findings in an Equitable Park Strategy. Implement Equitable Park Strategy.	●●●	Tracked disaggregated data shows increase of available park space (green, blue, and public space) for equity-seeking groups.			
		10.3.8 Parks for All	Design for a variety of facilities and amenities that function for a diversity of ages and abilities in parks.	[VanPlay] P.1.2 Audit the physical accessibility of all park amenities to inform a feasibility study to consider opportunities for improvement (Universal and Inclusive Design Audit and Feasibility Study). [VanPlay] F.2.13 Promote self-serve admittance while improving accessibility and customer service by installing information and registration kiosks in the lobbies of all major facilities.	Identify priority areas and establish a park expansion plan in line with mapping and engagement of equity-seeking groups. Vancouver's VanPlay plan is a model for equity in park planning.						
		10.5.6 Public Spaces on Private Land	Promote shared public space in private developments for a variety of land uses through partnerships.	<i>no implementation-level policies found in strategies/plans scanned</i>							
		10.5.1 Community Use of Schools	Encourage schools to be designed so as to facilitate, during non-school hours, use for before/after school programs, recreation programs, youth/family activities, adult education or other community uses.	<i>no implementation-level policies found in strategies/plans scanned</i>	Partner with the Central Okanagan School District to explore utilization of existing school facilities for community uses, prioritizing schools in areas with a high percentage of families from equity-seeking demographics, and subsidizing their rental fees.	Pilot design guideline changes for new school developments to facilitate multi-use purposes including recreational community programs for youth, families, continuing education, and other community uses.	●●●		Net increase in open access and usage of school spaces and amenities in neighbourhoods with higher concentrations of equity-seeking groups.		
	Food	5.9.1. Equitable Food Access.	Encourage the inclusion of small and mid-size grocery stores, seasonal farmers markets and emergency food services in Village Centres and Core Area Neighbourhoods.	[VanPlay] R.3.3 Facilitate access to local, secure, healthy food through concessions and restaurant partners (leases), community centre kitchens, farmers markets, community gardens, and field houses (Update the Local Food Action Plan). [Baltimore] 2. Use federal nutrition assistance programs as a framework for increasing healthy food at stores; Support innovative retail models that generate wealth in historically marginalized communities [Baltimore] 3. Develop funding, incentives and tax credits in Grocery Incentive Areas	Map currently available food assets, including the distribution of small and mid-size grocery stores and stores selling cultural foods, and combine with disaggregated demographic data to identify gaps in food access and overlaps with equity-seeking groups.	Prioritize development applications that include partnerships with small-medium local or cultural grocers for Core Area Neighbourhoods with identified grocery needs. Explore provision of seasonal farmers markets for local and cultural vendors in Core Area Neighbourhoods with equitable food needs.	●●●	Food assets in high-need areas (determined by food mapping) increase, and equity-seeking groups have access to cultural food resources.			

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Access and Accessibility	Food	5.9.3. Urban Agriculture.	Encourage urban agriculture, that uses integrated pest management practices, as a way of supplementing the local food system and reducing greenhouse gas emissions associated with food production, processing, and transportation. In the Core Area, support and encourage urban agriculture using approaches that include, but are not limited to: <ul style="list-style-type: none"> ◆ Food production on public and private land including rooftops, beehives, and edible landscaping on residential boulevards, park land, backyards, and rights-of-way; ◆ Multi-residential shared gardens and services (i.e. water and storage) in new developments; and ◆ Private and non-profit sector universally-accessible community gardens, considering the use of City-owned land for use of community gardens where appropriate. 	[Baltimore] 7. Protect and prioritize appropriate parcels of land for agricultural purposes and create a policy environment that encourages food and farm production; Create better-defined and supported pathways to long-term land tenure and/or ownership of agricultural spaces	Map empty public lots throughout the City and provide community garden spaces based on demographic data focused on equity-seeking groups/areas in food deserts.	Provide property tax incentives or density bonuses to private owners seeking to include shared or rooftop gardens, prioritizing communities with identified grocery needs.	●	Track community interaction with public agricultural spaces compared to previous years, include specific tracking for equity-seeking groups. Based on short- and long-range projections of usage, determine the increase or decrease in usage of public spaces and amenities as policies are implemented			

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Access and Accessibility	Food	6.7.8. Farm Help Housing.	<p>As a first option, encourage farm help housing to be located within the Permanent Growth Boundary, providing access to amenities for workers. As a second option, accommodation for farm help on agricultural land on the same farm unit, where approved by the ALC, will be considered only when:</p> <ul style="list-style-type: none"> ◆ Agriculture is the principal use on the parcel; and ◆ The applicant demonstrates that the on-site housing for farm workers is necessary for the overall operation of the farm. The primary consideration is whether the scale of the farm operation is large enough that permanent help is deemed necessary. <p>Temporary farm working housing, such as bunkhouse accommodation on non-permanent foundations, is the preferred solution where farm worker housing is justified.</p>	<i>no implementation-level policies found in strategies/plans scanned.</i>	In partnership with local advocacy and grassroots farm worker organizations, provide outreach services to key local areas where farm workers congregate.	Create mandatory guidelines for location and quality of temporary farm worker housing through ongoing engagement with local organizations, and in line with recommendations from the Migrant Workers Alliance (created in partnership with Kelowna's RAMA).	●●●	<p>Recommendations from Migrant Workers Alliance are implemented.</p> <p>Housing quality for temporary farm workers increases.</p> <p>Access to services for farm workers increases.</p>			
Social Equity	Racism	4.22.2; 5.21.2 Cultural Infrastructure.	Design a multi-functional and adaptable public realm to support and celebrate diversity through cultural programs, public events, performances, and public art installations.	<p>[SF] 5.2.4 Recognize spaces of cultural importance identified by American Indian, Black, Japanese, Filipino, and other communities directly harmed by discriminatory government actions in community planning and regulatory review for development projects, consult them in decisions affecting those spaces, and direct resources towards their preservation and management.</p> <p>[SF] 4.5.9 Revise Urban Design Guidelines to provide guidance on including signage, lighting, public art, historical interpretation, and educational opportunities in housing development projects in a manner that reflects neighborhood history and culture, prioritizing the acknowledgement and representation of American Indian history and culture, in coordination with State requirements.</p>	Engage with local cultural groups to identify City spaces and events of cultural importance, and opportunities to support preservation and management.	Engage with local cultural groups for the creation of new cultural spaces, and incorporate guidance on culturally relevant design elements, such as signage, public art, historical interpretation and educational opportunities, within street and urban design guidelines.	●●	Under regular engagement with equity-seeking groups and grassroots cultural organizations, cultural space needs are met.			

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Social Equity	Racism	4.23.3. Alternative Artistic Expression.	Encourage opportunities to showcase alternative artistic expression through the animation of public spaces, such as busking and pianos in the park, for example. Encourage art that invites people to engage in community building, celebration of diversity, and consideration of social issues.	<p>[Toronto] Public art can take on many forms. It encompasses a broad range of artistic practices rooted in the tradition of visual arts, including but not limited to sculpture, murals, street and graffiti art, video, and digital media. It can also include aspects of performance, theatre, music, culturally-significant ceremony, or other more ephemeral artistic experiences. The artistic medium will depend on the nature and objectives of a particular program or commission.</p> <p>[Toronto] 1.7 Encourage new methods of community-engaged public art works in a variety of media: A community-engaged public art work is a project that is developed in close collaboration with its intended community. Community-engaged public art works often stand as catalysts for community development and revitalization, and are developed through participatory processes engaging local residents and partners. Community-engaged artists devote considerable time to working with a community to develop their project concept, and come away with a project that is deeply connected to and relevant for its local audience.</p>	Facilitate and commission the creation of a Public Art Strategy that includes all forms of artistry, and prioritizes engagement with equity seeking groups for respectful inclusion of cultural expression.	Implement a Public Art Strategy. Maintain engagement with artist and cultural partners to ensure consideration of under-represented cultural forms of expression throughout its implementation.	●	Monitor the net increase of public art over a specific period, comparing artist engagement and art installation processes against previous years. Track public art for alternative forms of expression, including cultural expression. Track implementation of the Public Art Strategy.			
		5.22.1. Public Art Promotion.	Promote public art that celebrates the culture and diversity of Kelowna while reflecting unique character and qualities within the Core Area. Seek opportunities to partner and collaborate with Westbank First Nation and Okanagan Indian Band on public art and place-making initiatives that acknowledge and celebrate their traditional territory and cultural values.	<p>[Toronto] 1.5 Create new skills development and leadership opportunities for Indigenous artists, curators and art consultants in the field of public art: This could include introducing targeted public art mentorship programs — pairing emerging Indigenous artists, curators or art consultants with established professionals to gain the technical experience needed to secure their own future commissions—and dedicated competition calls, providing aspiring Indigenous artists and arts professionals with opportunities to lead temporary or permanent projects.</p>							

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Social Equity	Racism	9.2.2. Syilx/Okanagan Approach to Social Challenges.	Collaborate with Syilx/Okanagan people to support initiatives that address social issues rooted in the impacts of residential school system, such as housing, transportation and food security, in a way that recognizes the traditions, knowledge, wisdom and governance of Syilx people.	<p>[SF] 4.5.1 Improve consultation with local Native Ohlone representatives, including the Association of Ramaytush Ohlone representatives, and American Indian residents in policy development and project review regarding tribal and cultural resource identification, treatment, and management while compensating them for their knowledge and efforts. Improvements should include commissioning the development of community-led, culturally relevant guidelines for identifying and protecting tribal and cultural resources and identifying funding sources for cultural resource identification, treatment and management.</p> <p>[VanReconciliation] In order to facilitate work between the First Nations, Urban Aboriginal groups and City staff, an internal interdepartmental Aboriginal Committee was established. The committee supported activities during the Year of Reconciliation with the goals of promoting understanding of the historical events that have shaped current conditions and experiences for Aboriginal peoples, promoting cultural bonds in building a more inclusive future, and improving city services for the Aboriginal population.</p> <p>[SydneyAUSReconciliation] The City of Sydney Council first appointed the Aboriginal and Torres Strait Islander advisory panel in 2008. Made up of 16 community members and industry professionals, the panel includes Aboriginal and Torres Strait Islander people who live, work or study in the local area. Each member brings a wealth of knowledge and skills to the table.</p> <p>The panel meets six times a year to advise on matters of importance to Aboriginal and Torres Strait Islander communities. It also reviews the City's Aboriginal and Torres Strait Islander protocols and the four pillars of our Eora Journey project.</p>	Build internal cultural competency of intergenerational harm to Indigenous people in Kelowna by instituting a mandatory staff training program such as San'yas . In good faith, establish protocols for respectful and meaningful relationship building between the City and Syilx/Okanagan. Using these protocols, collaborate with Syilx/Okanagan to create culturally safe engagement strategies for engaging with Indigenous residents in Kelowna.	Develop and fund an interdepartmental Aboriginal Committee that includes members from the City of Kelowna (both Council and planning) and Syilx/Okanagan to review policies relevant to the wellbeing of Indigenous residents in Kelowna, and to appropriately share Indigenous celebrations, language, and tradition in parks and public spaces. Financially compensate Syilx/Okanagan for their time in accordance with contract and procurement policies within the City.	●●●	Increased participation in Indigenous cultural training. Indigenous lenses are incorporated in city building strategies through ongoing and meaningful Indigenous consultation, partnership, and delegation of power.			
		10.3.5 Reconciliation and Celebration of Indigenous Culture.	Include spaces in parks that provide opportunities for reconciliation with Indigenous peoples of Canada, and celebrate Indigenous culture, particularly Syilx/Okanagan culture. Work collaboratively with the Syilx/Okanagan people to pursue opportunities for sharing the NSyilxcen traditional language in parks and public spaces.	[VanPlay] G.6.2 Commission and develop an inventory of culturally significant areas throughout the city, as identified by Musqueam, Squamish and Tsleil-Waututh First Nations.							

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Social Equity	Racism	9.4.1. Personal and Collective Safety.	Work with community members and partners to support solutions to matters of public safety. Acknowledge and address unique safety concerns experienced by members of equity-seeking groups.	<p>[BurnabySafety] Develop a communications strategy to guide City communications about community safety initiatives and support communication systems and tools that provide ease of access to information and that encourage reporting and information sharing, especially among diverse community groups.</p> <p>[BurnabySafety] Work with the Burnaby Intercultural Planning Table and Burnaby Together to reduce all forms of discrimination, including those related to race, gender, age, sexual orientation and income level. Develop a suite of actions to reduce racism and discrimination and to enhance cross-cultural community connections.</p> <p>[BurnabySafety] Work with service agencies to assess local community health needs in specific areas and to advance high-quality local health services. Support the Healthier Community Partnership Initiative to improve the social and physical environments of communities and support all priority areas through a range of initiatives.</p>	Develop a Community Action Committee made up of local equity-seeking grassroots community leaders that provide feedback on ongoing long-term public safety planning. Ensure members are fairly compensated for their time.	With the help of the Community Action Committee, create and implement a Public Safety Strategy that addresses the unique safety concerns experienced by local equity-seeking groups.	●●●				
		9.4.2. Systemic Racism.	Seek to understand how systemic racism has and continues to impact our community. Use these learnings to ensure that OCP implementation activities are inclusive and representative of our community,	<p>[SF] 5.2.6 Prioritize businesses and non-profit organizations associated with American Indian, Black, Japanese, Filipino, and other communities directly harmed by discriminatory government actions for grant funding and technical assistance through the Legacy Business Program.</p> <p>[SF] 5.4.2 Establish pilot and permanent programs that offer homeownership opportunities targeted to Black households harmed through redlining or urban renewal or other forms of systemic racism related to housing, including Black individuals and their descendants who hold Certificates of Preference from the urban renewal period, as referenced in Actions 5.4.8 and 5.4.9. Building on the Dream Keeper initiative, such programs should include silent second loans or grants for down payment assistance, as well as other financial assistance to reduce income eligibility as a barrier to access homeownership opportunities.</p> <p>[Stratford] Objective 4.2.1: To develop, promote, and organize innovative community engagement and public strategies/campaigns aimed at reducing stigma and promoting understanding regarding mental health, addiction, racism, and discrimination.</p>	Build internal anti-racist competency by instituting a mandatory training program for staff such as UBC's Anti-Racism Awareness Course . Develop a Community Action Committee made up of local Indigenous and racialized community leaders that reviews City of Kelowna policies and provides feedback on ongoing long-term planning. Ensure members are fairly compensated for their time.	With the help of the Community Action Committee, create an Anti-Racist Engagement Policy that informs all future engagement between the City and racialized equity-seeking groups.	●●●	Staff completes anti-racist training. A report of reviewed and targeted policies is completed and submitted to City staff by the Community Action Committee. A subsequent Anti-Racist Engagement Policy is completed and submitted by the Community Action Committee.			

Legend for implementation priority: ● Lower | ●● Medium | ●●● Higher

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Social Equity	Racism	5.9.4; 6.5.3 Indigenous Forest Gardens.	Partner with Syilx/Okanagan communities to develop, forest gardens that focus on the cultivation of native and culturally important species of plants for food and medicine.	[VanPlay] R.3.2 Work with Musqueam, Squamish, and Tsleil-Waututh First Nations and Urban Aboriginal communities to support Indigenous food systems in parks and recreation.	Through engagement with Syilx/Okanagan communities, identify City-owned land that is available and culturally relevant for creation of Indigenous Forest Gardens.	Provide funding and management resources to Syilx/Okanagan partners to create and maintain Indigenous Forest Gardens in a culturally appropriate manner.	●●	Indigenous Forest Gardens are created in line with Indigenous recommendations and requests.			
	Engagement	9.1; 9.4.3. Incorporate equity into planning decisions and resource allocation in our community.	<p>9.1.1 Equity in Planning Decisions. Incorporate an equity lens into land-use planning decisions and resource allocation in our community.</p> <p>9.1.2 Equity Analysis and Strategy. Undertake a City-wide equity analysis and develop a subsequent strategy to inform decision-making processes related to planning and resource allocation in the community.</p> <p>9.1.3 Equitable Allocation of Resources. Incorporate an equity lens into allocation of City resources to build City-wide equity as well as neighbourhood resiliency and inclusivity.</p>	<p>[Nanaimo] Create mechanisms for regular or continuous community and service user feedback with a focus on reaching service users with diverse experiences. Solutions for exploration: 1.2.1 - Hotline/inbox to report discriminatory and/or racist practices in service provision within the social service sector, within ICA agencies, and those outside of it.</p> <p>[Edm Zoning Equity] More broadly, the creation of the offices for human rights and equity, an ombudsman, and public consultation would systematically promote equity and human rights considerations in regulations and processes across the CoE.</p>	<p>Conduct a comprehensive equity assessment to identify existing disparities through developed and maintained partnerships with equity-seeking groups.</p> <p>Implement long-lasting committee groups and round tables populated by community service providers.</p>	<p>Develop equity-focused metrics targeting funding and resource distribution, and track progress on reducing disparities.</p> <p>Develop programs that prioritize resource allocation with guidelines that address equity-seeking groups concerns.</p>	●●●	Track equity approach and implementation in guidelines, processes and resource management based on the data gathered through community partnerships and the comprehensive equity assessment.			
		9.2. Strengthen the relationship with the Syilx/Okanagan people through initiatives and processes to advance and support reconciliation in Kelowna.	<p>9.2.1 Truth and Reconciliation. Where possible, apply an Indigenous lens when undertaking 2040 OCP implementation actions with knowledge of Syilx/Okanagan history, and with consideration of documents such as the Calls to Action from the Truth and Reconciliation Commission and the United Nations Declaration on the Rights of Indigenous Peoples.</p> <p>9.2.2 Syilx/Okanagan Approach to Social Challenges. Collaborate with Syilx/Okanagan people to support initiatives that address social issues rooted in the impacts of residential school system, such as housing, transportation and food security, in a way that recognizes the traditions, knowledge, wisdom and governance of Syilx people.</p>	<p>[SF] 5.1.1 Commission an American Indian community-led study to document the discriminatory practices and government actions against San Francisco's American Indian communities including the Indian Relocation Act of 1956 and the cumulative impacts of genocide, exploitation, and dispossession of resources in terms of wealth loss, disparate housing and health outcomes, and scale of displacement.</p> <p>[SF] 5.1.7. Incorporate findings from the studies called for in Program 5.1 and Actions 5.1.1 through 5.1.5, including the resulting disparities and inequities, when applying the Planning Department's racial and social equity assessment tool to applicable projects.</p> <p>[Nanaimo] Target 51%+ Indigenous representation on Plan governance and coordination tables. Examples:</p> <ul style="list-style-type: none"> ◆ 2.1.1 Health and Housing Governance Board ◆ 2.1.2 Coalition on Health & Housing ◆ 2.1.3 Funders' Table ◆ 2.1.4 CAA Placement Table ◆ 2.1.5 Complex Needs Action Table 	<p>Spend time and City resources to build connection, trust and relationship with Indigenous communities. Collaborate with Syilx/Okanagan community service providers to better understand the gaps in the social services provisions.</p>	<p>Accommodate [mandate] the inclusion of multiple Syilx/Okanagan people members in committees, round table and decision-making processes.</p> <p>Incorporate Indigenous partnership and consultation under guidance and consideration for the Calls to Action from the Truth and Reconciliation Commission.</p>	●●●	<p>Engagement and consultation with Indigenous governments and urban organizations increases.</p> <p>Recommendations from Indigenous partners are implemented.</p>			

Legend for implementation priority: ● Lower | ●● Medium | ●●● Higher

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Social Equity	Engagement	9.3. Develop diverse partnerships to advance complex social planning issues and increase community wellbeing.	<p>9.3.1 Government Partnerships. Pursue joint use agreements and partnerships with Indigenous communities, other levels of government and educational institutions to advance complex social planning issues, community health, and economic prosperity.</p> <p>9.3.2 Stakeholder Involvement. Involve a broad range of interests identifying solutions for emerging issues, including citizens, businesses, non-profits, major institutions, and utility providers, with a particular effort given to involving those typically not engaged in community decisions.</p> <p>9.3.4 Regional Approach to Social Issues. Collaborate with local governments and key stakeholders to support initiatives that address regional issues such as social, childcare, transportation, housing, and food security.</p> <p>9.3.5 Coordination of Services. Collaborate with all levels of government and community organizations to support integrated planning and coordination of a continuum of health and wellness amenities, recreation programs and facilities, mental health, social and addiction services and care.</p> <p>9.3.6. Poverty Reduction and Community Wellbeing. Form partnerships to engage in and support poverty reduction and community wellbeing efforts to address social issues including homelessness, affordable housing, childcare costs and household food insecurity.</p>	[SF] 5.2.3 Fund the development and implementation of community-led strategies in Cultural Districts to retain and grow culturally associated businesses and services that attract residents back to the area.	Partner and build relationships with community service groups through recurring service provider roundtable meetings. Through the roundtable meetings, identify gaps in knowledge on social planning issues.	Establish funding opportunities to provide additional services for equity-seeking groups in collaboration with community service providers, stakeholders, and government service providers.	●●	Service Provider Roundtable Groups are initiated and recurring meetings are held. Funding opportunities are provided and targeted to equity-seeking groups in collaboration with community service providers, stakeholders and government service providers. Measurements and impacts are measured to track implementation success.			

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Social Equity	Engagement	9.3.3. Seldom Heard Voices.	Engage the community regularly in municipal decision-making, with emphasis on including voices that are seldom heard, members of equity-seeking groups, and those who are going to be impacted by the decision.	[SF] 6.2.3 Adopt Trauma-Informed Systems with robust training resources and increase cultural competency training specific to transgender and LGBTQ+ populations for all service providers and property managers in the City’s affordable housing projects and Homeless Response System. [Blue Mountains] 5.2 Establish and support a Gender Equity Community Engagement Group.	Partner with community service providers to offer training resources on the different equity-seeking groups served.	Establish and support the existence of standing committees and community engagement councils/groups with seldom-heard voices. Ensure members with lived experiences contribute/participate in decision panels and service support design.	●●●	Net increase in seldom-heard members in standing panels and committees contributes to learning and decision-making.				
		10.5.3 Citizen Participation	Foster resident driven solutions and involvement in park use and community involvement.	[VanPlay] G.5.3 Provide opportunities for “equity seeking groups” to be involved in the interpretation of data that is collected and used by the Park Board to ensure that assumptions are correct, stories are respectful and not discriminatory, and that useful actions to solve problems are identified. And reflect this in the Community Engagement Policy (G.5.1). [Blue Mountains] 5.2 Secure local community participation in gender equity events and debate.	Create and implement standard park and event planning processes that incorporate engagement with local residents, especially in communities with equity-seeking groups, at different points in the planning process to ensure an equity lens and that the actions proposed are helpful.	Establish and provide resources to community engagement groups, including members of equity-seeking communities and Indigenous committees. Work alongside local residents to develop and implement required solutions and organize community events in parks.	●●●	Monitor citizen participation through interaction with engagement procedures and resources.				
		10.5.4 Collaboration with Indigenous Communities	Foster partnerships and collaboration with local Indigenous communities to build greater understanding, opportunities for education, and for celebrating culture.	[VanPlay] R.2.9 Conduct a survey by, and of, urban aboriginal youth to measure perceptions of safety and welcome at parks and community centres to develop outcomes and recommendations that result in more opportunities for urban indigenous youth to use Park Board services, and engage with and provide feedback to Park Board recreation.	Engage Indigenous community representatives to understand better current perceptions of park spaces, including any perceived barriers to use or participation, and work to implement solutions in partnership.			●●●	Indigenous community representatives are present in Roundtable Groups and are present in recurring meetings are held. Net increased Indigenous lens and approach used in city planning and program implementation.			
		10.5.5 Community Partnerships	Encourage partnerships with other agencies and community groups to deliver high quality public space and park amenities, as well as maintenance agreements.	[Blue Mountains] 1.1 Leadership: Allocate resources to community driven Gender Equity activities and events when available and/or secure additional resources (such as grants, sponsorships, etc) as opportunities arise. [Blue Mountains] 3.1 Partnerships: Coordinate and support a “Blue Mountains Gender Equity Community Engagement Group” through: <ul style="list-style-type: none"> ◆ Securing the commitment of key partners. ◆ Develop a set of common priorities and activities. ◆ Support and Promote a Program of actions ◆ Secure resources and manage the implementation for 5 year program of activities. [Edm Div & Incl] Establish a community of employers in Edmonton who meet and discuss the Calls to Action, sharing information, best practices and challenges.	Provide resources and administrative/process support for park and public space planning or event initiatives drawn up in partnership with other agencies and community groups as opportunities arise.		●●	Track access to cultural awareness and sensitivity training. Net increase in the number of community partnership programs and activities. Track distribution of support resources annually based on the service provided and social needs trends.				

Legend for implementation priority: ● Lower | ●● Medium | ●●● Higher

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Social Equity	Heritage	11.1.4 Heritage Engagement	Encourage resident and stakeholder input into heritage planning through the advice of the Heritage Advisory Committee and partnerships/communication with the Central Okanagan Heritage Society, the Okanagan Historical Society, the Kelowna Museums Society, Westbank First Nation, Okanagan Indian Band and relevant community or neighbourhood organizations.	[SF] 4.5.12 Consider the effects on housing in balance with the Planning Department's racial and social equity goals for any recommendation of approval, disapproval, or modification of landmark designations or historic district designations, or approval of substantive new review processes or requirements for historic resources.	Include representation from community groups, including Indigenous and equity-seeking communities, in the heritage planning process and on technical assessment panels/committees. Consider heritage expansion opportunities in balance with other equity goals, such as the provision of affordable housing or cultural amenities, and incorporate this into the heritage planning process.	Establish an Indigenous-led committee to assess the proposed expansion of the Kelowna Heritage Register to include additional archaeological sites, landscapes, properties, structures and cemeteries, and support with funding and staff. Engage with Indigenous communities to actively work towards decolonizing public spaces, and incorporate a formal process to assess the potential impact on Indigenous communities for new proposals for built heritage designations.	●●	Ongoing representation of Indigenous and equity-seeking groups in committees and the heritage planning process and decision-making. Track the development and cultural safety measures of public spaces through sporadic surveys from public space users. Review impact assessment on Indigenous communities.			
		11.2.3 Kelowna Heritage Register Expansion	Expand the Kelowna Heritage Register to include additional archaeological sites, landscapes, properties, structures and cemeteries.		The First Peoples' Cultural Council 2019 policy paper on Recognizing and Including Indigenous Cultural Heritage in B.C. includes useful process recommendations for reference.						

Appendix C
**Community Organization
Engagement Strategy**

“Paving the Way” for the City of Kelowna’s Equity Strategy

Draft Engagement Strategy
January 2023



THE UNIVERSITY
OF BRITISH COLUMBIA

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Introduction

This Communication and Engagement Strategy outlines the activities that the SCARP team will implement as part of their Paving the Way Report in an effort to share information about the project and to collect feedback from a range of stakeholders.

The Engagement Strategy will support the development of the Report in the following ways:

- Highlight ***the process by which stakeholders were selected*** by providing contextual statistics within Kelowna,
- Identify ***how information about the Report will be communicated*** to staff and stakeholders, and
- Identify ***how information will be collected from stakeholders*** about their recommendations for future engagement with the communities they serve.

Engagement Objectives

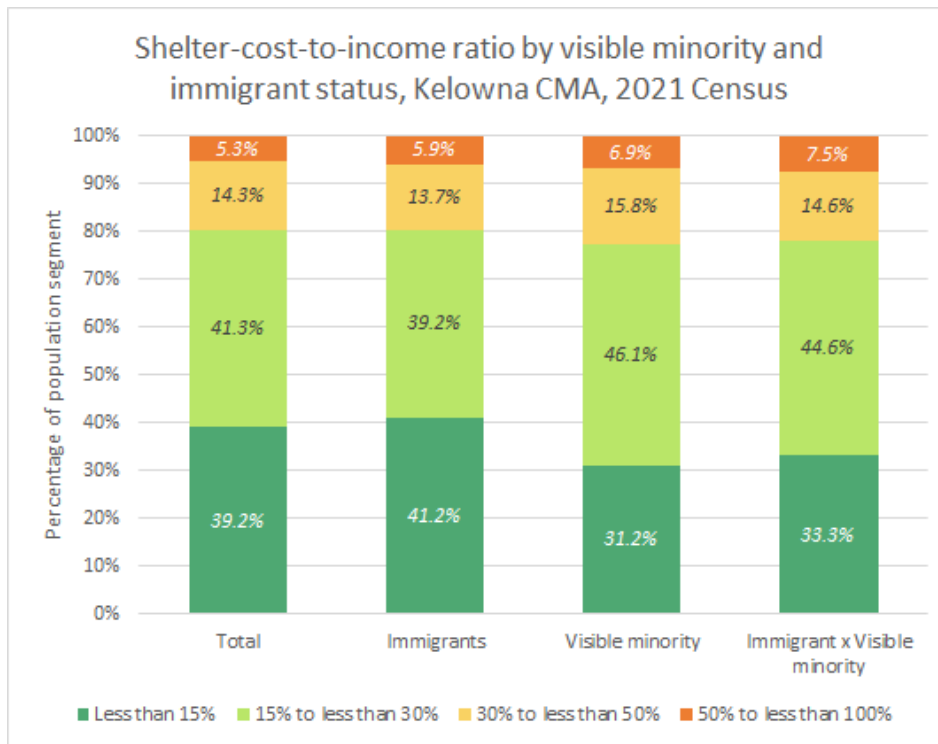
This engagement process will be used to collect information and insights from City staff and key stakeholders through use of context gathering interviews and ground-truthing interviews with non-profit organizations, urban Indigenous organizations, and public health and social service providers. The information will be used to inform priorities and recommended actions for a future Citywide Equity Strategy. In particular, the interviews with City of Kelowna planning staff conducted in Phase 2 helped provide the SCARP team with a deeper understanding of the equity landscape from the planners’ perspective, including both opportunities and gaps within the City’s current equity practices. The upcoming, Phase 4 round of engagement with leaders and representatives of community organisations are intended to provide the team with a clearer sense of the needs and challenges faced by equity-seeking groups in Kelowna. In addition, these interviews will highlight important considerations for engaging with equity-seeking groups to inform future participatory approaches by the City of Kelowna. Engagement findings and information collected will be assembled into a preliminary presentation to project staff and key stakeholders to confirm and validate priorities identified. Engagement findings will also be incorporated into final reports. The team hopes that these findings can support the City’s efforts to strengthen existing relationships, initiate new ones, and lay groundwork for further, more substantial engagements in preparation for a potential Citywide Equity Strategy.

Context

Based on the community profile compiled on Kelowna for the Interim Report, the team has worked to identify an initial list of priority groups for engagement.

Our community profile highlighted some trends facing Kelowna's community from the 2021 Census data. For instance, the fastest-growing segments of the City's populations are the 25-44 years and 65-84 years age brackets, suggesting a growing proportion of seniors and Kelownites of family-starting age. The data also reflected a growing community, both in count and proportion, of Indigenous-identifying persons living in Kelowna.

In addition to the above, the team has also found that certain communities are more affected than others by trends such as rising housing costs. For instance, the visible minority community in the Kelowna area is proportionately more likely to be spending over 30% of their income on shelter costs.



This is in combination with Journey Home's Point in Time (PiT) count from 2020 (the most recent year completed) which showed those experiencing homelessness at a 4% increase over the 2018 PiT count (which in turn showed a 23% increase over the 2016 PiT count). While detailed data on the proportion of visible minorities experiencing homelessness was not included in the report, Journey Home does state that 1 in 5 individuals surveyed identified as Indigenous, hinting at larger intersectional trends.

Beyond those identified by the data, the City's complicated history with First Nations and minority groups suggests that these groups are more likely to have been systematically disadvantaged by

historical decisions and practices (e.g. see [Tedesco, 2021](#)). As such an equitable planning strategy should put these equity-seeking communities at the forefront of efforts.

There is a growing consensus that planning equitably for a diverse community requires engagement approaches that are tailored to context, to better address [historical inequities and particular circumstances]. [Loh and Kim \(2020\)](#) found in their research on local comprehensive plans in American cities that “increasing the types of public participation approaches is strongly correlated with a more equity-focused plan” (p192). Taking into consideration resource and time limitations that many local governments and planning staff face, leveraging existing links that community organisations have with the groups they serve is a potentially useful way for planners to tailor their engagement approaches to the equity-seeking groups that they want to reach. For instance, in Minneapolis-St. Paul, MN, [Allen and Slotterback \(2021\)](#) found that planners were better able to reach out to the local Somali refugee population by collaborating with staff at migrant civil society organisations and leveraging their understanding of the community and their “reservoir of trust with Somalis because of their common ethnicity and history of providing useful services to the community” (p750).

Based on the above, the SCARP team proposes to reach out to community organisations in Kelowna as a first step in establishing better links with the key equity-seeking groups identified in the above scan. Through this step, the team can better understand circumstances faced by these groups, while paving the way for more sustained engagements later on that can incorporate insights about preferred engagement approaches and methods.

Stakeholder Overview

Stakeholders, Roles and Engagement Tools

STAKEHOLDERS	ROLE		ENGAGEMENT	
	Discuss Community Needs/ Initiatives/ Opportunities	Provide Feedback on Interim Report	Initial Context Gathering Interviews	Ground-Truthing Interviews
CoK Staff	X	X	X	
Non-Profit Organizations	X	X		X
Indigenous Organizations	X	X		X
Public Health/Social Services Providers	X	X		X

The above table describes the various stakeholders we plan to engage throughout the project, their role, and the engagement activity planned for each stakeholder. We have separated our community partners outside of the City of Kelowna into three main categories: non-profit organizations, Indigenous organizations, and public health and social service providers. We recognize that some stakeholders may fit into more than one category, however, the purpose is less to delineate between each group and more to ensure that stakeholders from each group are included.

Initial context-gathering interviews were completed in Phase 2. For our Phase 4 engagement, the ground-truthing interviews are meant to be conducted at the service provider level with knowledgeable stakeholders who can provide information on how to engage with their service communities effectively, respectfully, and empathetically. These findings will be included in the final report as guidance to the City of Kelowna as they prepare their Citywide Equity Strategy.

Preliminary Stakeholder List

Organization	Group Served
ARC Programs	Youth and Family Services
Columbian Centennial Housing Society	Low-income households
H.O.P.E. Okanagan	Unhoused/at-risk women
Kelowna Community Health Centre	All
Partners In Resources Inc (PIERS)	Immigrant workers
Radical Action with Migrants in Agriculture (RAMA)	Immigrant workers
The Bridge	Youth and Family Services

Paving the Way for City of Kelowna’s
Citywide Equity Strategy

Stakeholder Contact List

Organization	Name	Role	Contact (Email)	Phone
ARC Programs Ltd	Duane Hughes	Program Coordinator	dhughes@arcprograms.com (following email naming conventions)	
ARC Programs Ltd	Alexander Dodds	Community Inclusion Program Coordinator	adodds@arcprograms.com (same^)	
ARC Programs Ltd	Patrick McIntosh	Director of Services	pmcintosh@arcprograms.com	
Columbian Centennial Housing Society	Keith Beppe	Executive Director	info@cchs-housing.com (generic email)	250-862-3206
HOPE Okanagan	Stephanie Hughes	Community Outreach Coordinator		
HOPE Okanagan	Angie Lohr	Executive Director	Info@hopeokanagan.com (generic email)	250.864.0399 (office phone)
Kelowna Community Health Centre - Interior Health	Tanya Osborne	Community Health Facilitator – Healthy Communities Initiative Central Okanagan	Tanya.Osborne@interiorhealth.ca	
Partners In Resources Inc	Crystal Croteau	Director	crystal@pierspartners.ca	250.762.3494 (office phone)
Radical Action with Migrants in Agriculture	Amy Cohen	Co-founder / Volunteer Organiser	RamaOkanagan@Gmail.com (generic email)	250.309.5698
The Bridge	Kelly Paley	Director of Community Engagement	kelly.paley@thebridgeservices.ca	(250) 763 0456 ext. 2224

Ground-Truthing Engagement Script

Below is a list of potential questions that may come up during the ground-truthing engagement interview process. As stated, interviews will be held with non-profit, urban Indigenous, or public health service providers in an effort to strengthen relationships and lay the groundwork for future, broader engagements. Interviews are semi-structured, so stakeholders are free to elaborate and go into detail with responses. Our objective is to deepen our team’s understanding of the equity landscape in Kelowna’s broader community, specifically from the perspective of equity-seeking groups, and to ascertain effective, respectful, and empathetic engagement methods for community members.

Interviews should last between 30 and 45 minutes. We are able to accommodate virtual or in-person conversations. In-person engagement would be limited to either February 21-24 or February 27-March 3 to account for travel.

Preamble for engagement:

Our intention for this session is to hear from you. As the City of Kelowna is scoping and pre-planning an equity strategy, we feel that this would be a good opportunity to learn about your organisation’s work and your experiences in engaging the communities that you serve. Engagement learning points from this conversation will be shared with the City of Kelowna planning team for consideration as they develop a Citywide Equity Strategy.

Interview Questions:

1. Can you please tell us:
 - a. About [organization]?
 - b. About your position within [organization]?

2. Does [organization] target its services to any particular underserved community?
 - a. Which communities in Kelowna are you most engaged with?
 - b. Are there certain demographics that seek your services more than most?

3. Engagement with underserved communities can often be difficult due to financial, time-based, or mobility-based barriers.
 - a. Are there specific needs within the communities you serve that require tailored approaches to engagement?
 - b. What strategies do you currently use to engage with your community members meaningfully and safely? Could you tell us of an instance where you used this strategy and the outcomes or any learning points from it?
 - i. [if necessary: to guide conversation by asking about specific approaches e.g. town halls, focus groups, interviews]
 - c. Is there a role for your organization to mutually support equity work in partnership with the City? If so, what role do you see your organization taking on?

Paving the Way for City of Kelowna's
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- 4. *For any organisations that have worked with the City before:*
 - a. Have you worked previously with the City of Kelowna?
 - i. If so, what was your experience? Any positive outcomes? Any challenges?
 - b. In what ways can the City be more engaging with your organization when determining equitable policies?

Thank you for your time and sharing your valuable knowledge and experience with us today. All final documents will be shared with the City of Kelowna Planning Department.