



Agenda No: 7.3

Mtg. Date: Nov 12/15

Governance & Services Committee

TO: Governance & Services Committee
FROM: Marilyn Rilkoff
Director of Financial Services
DATE: October 13, 2014
SUBJECT: Okanagan Regional Library (ORL) Services for Electoral Areas Service Review

Purpose: The attached service review is part of the Service Establishment Bylaw Review Schedule approved January 16, 2014. Every five years, these services will be reviewed.

Executive Summary:

This service provides the RDCO Electoral Areas with access to the ORL's services via tax requisition (refer to Exhibit 1 for services provided by ORL). An RDCO electoral area director sits on the ORL Board.

One of the objectives of the review was to follow up with ORL to find a more reasonable determination of the population estimates used to calculate the RDCO's share of the tax requisition. On October 9th, the ORL Policy Committee met. They will be recommending an alternative solution at the ORL Board's October 21st meeting. Voting will likely take place mid-November. Staff agree that the recommended method would be a more reasonable approach and that the service continues to provide valuable access to the electoral area residents.

Staff would also take this opportunity to ask if there are any other concerns or matters that the Board would like followed up in this review.

RECOMMENDATION:

THAT the Board support continued electoral area participation in the service.

AND THAT staff continue with the appeal process relating to population numbers in 2016 to obtain a population increase closer to the average for all participants.

AND THAT staff report back to the Board during the budget process.

AND FURTHER THAT staff continue to review the fairness of the proration annually.

Respectfully Submitted:


Marilyn Rilkoff, Director of Financial Services

Approved for Board's Consideration


Brian Reardon, CAO

Attachment(s):

- **Service Review Report**
- **Exhibit 1** – Electoral Area Library Services – Three Ways to Use the Library
- **Exhibit 2** – March 12, 2015 G&S Report – Population Numbers Used by ORL for Electoral Area Levy
- **Exhibit 3** – ORL Staff Powerpoint presentation from March 12, 2015 G&S Meeting
- **Exhibit 4** – Population Estimate for 2016 vs 2011 Census Numbers
- **Exhibit 5A & 4B** – 2015 Budget and 2015 – 2019 Five Year Financial Plan for Cost Centre 171 – Okanagan Regional Library
- **Exhibit 6** - RDCO Okanagan Regional Library Participation Establishment Bylaw No. 610, 1994

REGIONAL DISTRICT OF CENTRAL OKANAGAN SERVICE REVIEW

Service Under Review: **171 – Okanagan Regional Library Services for Electoral Areas.**

Service Review Requested by: Regional Board (Service Establishment Bylaw Review Schedule Approved-Jan 16, 2014)

Year of Review: **2015**

Mandate:

To provide the RDCO's Electoral Areas with access to the services of the Okanagan Regional Library.

The ORL is a large external service established under the Library Act, which, by regulation, may require any regional district within its area to participate by bylaw. ORL tax requisitions its participants (which include the electoral areas and municipalities within four regional districts and two First Nations: RDCO, CSRD, RDNO, RDOS, WFN, PIB.) Direction for ORL happens primarily at the ORL Board.

Program Management Goals:

From the RDCO perspective:

- Provide a representative on the ORL Board. That representative brings any service related issues forward to the RDCO Board for discussion.
- Review the requisition requests that are made.

Program Activities:

A requisition is received from the Okanagan Regional Library for Electoral Area Central Okanagan East and Central Okanagan West, and that forms the budget for the service. This is incorporated into the RDCO's budget/financial plan and presented.

On rare occasions, minor capital requests are made.

One of the EA Directors is appointed to sit as an RDCO representative on the ORL Board.

RDCO Participating Members:

Funding: EA Central Okanagan West and EA Central Okanagan East tax requisitions.
The ORL's total requisition is prorated amongst all the partners/participants. The participants receive their requisition requests directly. The proration is based on a formula of assessed values and estimated population for each participant.

Boards/Committees: Okanagan Regional Library Board – One EA director represents the RDCO on the Board.

Contracts / Agreements: N/A

Objective of Service Review

- Achieve greater fairness in the proration of costs relating to the population numbers. This will result in cost savings to Electoral Areas:
- Opportunity to address any other items the Board may wish to raise with regard to Board Representation on ORL Board.

Concerns Regarding Current Provision of Service

Tax Requisition Calculation (a combination of population and assessment value): The area of major concern is the Province's estimated increase to population numbers used for the RDCO's Electoral Areas' tax requisition calculations. The requisition has fluctuated over the years due to changes in population estimates. The numbers used for RDCO seem disproportionately higher than other areas. This matter was brought to the Board's attention in March 2015 (see Board Report – Exhibit 2), and Management Staff from ORL made a presentation to the Board (copies attached – Exhibit 3.) Actions as a result of that meeting:

- Staff sent a letter of Appeal to the ORL staff
 - *Result:* No change can be made for 2015, however, the information was reviewed with respect to preparations for 2016 allocations. The preliminary population numbers were received October 8th and have been reduced from 7,307 for 2015 to 6,785 for 2016.
 - While the numbers have been adjusted downward, RDCO staff still feel the proposed 2016 increase over the 2011 census numbers is disproportionately higher than the extrapolations for increases used in other areas. This is still an 18.16% increase over 2011 Census numbers, when the average for the entire area is 4.02%. (see attached Exhibit 4).
 - Staff advised ORL on October 8th that this number is being appealed.
 - ORL has acted quickly. The Policy Committee met October 9th. They will be recommending an alternative solution at the ORL Board's October 21st meeting. Voting would likely not take place until mid-November:
 - To use a 6.4% increase over the 2011 census numbers for RDCO and WFN (who had a similar percentage increase as RDCO). This is the BC Stats average for the Central Okanagan as a whole (189,289 vs. 177,922 in 2011). The

revision to the population numbers would then be 6,108 for RDCO EA's and 7,519 for WFN.

- To continue using this method until the next census. If this appears to work, it will continue afterward, or be reviewed at that time.
- Staff agree this would be much more reasonable.
- A letter dated April 20, 2015 was sent by the CAO to the Acting Director of the Libraries Branch, Ministry of Education asking for an explanation of the calculation of the population numbers.
 - *Result:* No response has been received, perhaps because of discussions ORL was having with the Province.

It appears that we are very close to achieving a mutually agreeable method of estimating population growth now and in the future, and the issue should be resolved within weeks.

Authority Under Which The Service Is Approved

- RDCO Bylaw Establishment Bylaw 610, Local Government Act (Exhibit 6)
- Library Act, & Regulation 285/94

Participants

By Requisition – The Participants in the RDCO Service are EA Central Okanagan East and EA Central Okanagan West.

By Contract – N/A

Historical Cost of Service By Participant – as attached (Exhibits 5A & B)

- 5 Year Actual Requisitions

	2011	2012	2013	2014 **	2015
COE	164,555	177,703	155,515	134,917	157,526
COW	226,191	231,192	191,206	162,345	175,222
Total	390,746	408,895	346,721	297,262	332,748

**Note – in 2014 Population portion of proration was done using 2011 Census population numbers.

- 2015 Program Budget (Exhibit 5A)
- 2015 – 2019 Projected Budgets (Exhibit 5B)

Other Financial Implications To Consider

- Reserve Balance Yes (x) No ()
 - Projected \$ 3063 2015
- Capital Investment Yes () No (x)

Options For Consideration

1. Continue with Appeal of population portion of requisition proration again, and staff to review annually.
2. Any other direction that the Board wishes the Board's ORL Board representative to convey on their behalf.
3. As with all service reviews, where the option is available, the question is always asked: Does the Board wish to consider withdrawal from the service. If so, the Library Act legislation would need to be followed:

Library Act - "Withdrawal from regional library district

29 (1) A municipality or regional district may withdraw from a regional library district only by bylaw adopted with the assent of the electors.

(2) No vote to obtain assent may be taken after October 1 in any year.

(3) If a bylaw under subsection (1) is adopted, the municipality or regional district must send a copy of the bylaw to the minister for presentation to the Lieutenant Governor in Council.

(4) If the Lieutenant Governor in Council approves of the municipality or regional district withdrawing from the regional library district, the area within the municipality or the electoral participating areas within the regional district ceases to form part of the regional library district on January 1 after the date of approval.

(5) If the Lieutenant Governor in Council approves of the municipality or regional district withdrawing from the regional library district, the library board may enter into an agreement with the municipality or regional district to transfer to it a reasonable share of library assets, including library materials.

(6) If the share of library assets is not agreed on by January 1 after the date of approval, the library board must submit the matter for determination by one arbitrator appointed under the Arbitration Act and that Act applies to the dispute."

Future Service Review Considerations

- Continue to review requisition proration for fairness.
- Board representation on ORL Board.
- Participation in Service.

Next Proposed Service Review Period

- Major review – 5 years
- Annual review of proration will continue.

Recommendation(s) to the Regional Board

- THAT the Board support continued electoral area participation in the service.
- AND THAT staff continue with the appeal process relating to population numbers in 2016 to obtain a population increase closer to the average for all participants.
- AND THAT staff report back to the Board during the budget process.
- AND FURTHER THAT staff continue to review the fairness of the proration annually.

THREE WAYS TO USE THE LIBRARY

COME INTO A BRANCH

The ORL has 29 branches, where you'll find:

- ✓ friendly staff!
- ✓ programs and classes
- ✓ kids' activities and comfortable space
- ✓ books
- ✓ audiobooks
- ✓ music and movies
- ✓ magazines and newspapers
- ✓ services for print-disabled
- ✓ bookable meeting rooms (varies by branch)
- ✓ free Wi-Fi and computer access



The ORL also provides support to the North Westside Book Deposit – check it out if you're in Killiney Beach!

DOWNLOAD FROM HOME

Don't want to leave home? No problem! Check out our website for 24/7 access to:

- ✓ ebooks (RDCO members are the #1 user of this service)
- ✓ e-audiobooks
- ✓ streaming indie movies
- ✓ downloadable magazines and newspapers
- ✓ interactive books for kids
- ✓ special downloads for people with print disabilities
- ✓ learning tools, like Rosetta Stone for language learning, or repair guides for cars, small engines, and homes
- ✓ ... and you can explore the online catalogue of physical materials and place holds for pick-up when you do make it to a branch!



ASK A QUESTION

Did you know we still answer about 400,000 questions per year? Sometimes they're still information questions, but more and more we're getting questions about technology.

If you have a question, you can call your local library branch, or email us at info@orl.bc.ca



Stephanie Hall - Executive Director
Don Nettleton - Mgr of Finance

EXHIBIT 2

Agenda No: 6.1
Mtg. Date: March 12/15

Governance & Services Committee

TO: Governance & Services Committee
FROM: Marilyn Rilkoff
Director of Financial Services
DATE: February 26, 2015
SUBJECT: Population Numbers Used by Okanagan Regional Library for Electoral Area Levy

Purpose: To provide the Board with background information with regard to the 27.255% increase in Electoral Area population counts used in Okanagan Regional Library's (ORL) levy calculation which resulted in a large increase to the levy. Staff from the ORL will be at the March 12th G&S meeting to answer any questions the Board may have. It is hoped ORL will agree to further review the numbers.

Executive Summary:

The ORL allocates its levy to participants over four regional districts based 50% on population and 50% on assessments.

In 2015, the increase in the population counts used for RDCO's Electoral Areas (EA's) varies disproportionately from all other participants across the four regional districts. The average population increase for all participants was 1.98%, or 7,013 (see Table 2). The RDCO's electoral area population increase was 27.255% - from 5,742 to 7,307, a difference of 1,565 people (and is much higher than Kelowna's increase of 3.633%, which seems unlikely). BCAA growth rates indicate 1.12 - 2.88% in the EA's.

This has resulted in a large levy increase from \$291,262 in 2014 to \$327,748 in 2015. Of the total increase of \$36,486, \$30,431 relates to the apportionment formula which uses population and assessments, and \$6,056 relates to a budget increase.

Population numbers have fluctuated widely over the years, and as a result, it appears the EA's have likely been paying more than their share of the ORL Levy. The RDCO disputed these figures in prior years, and it appeared the issue was resolved in 2014, albeit not retroactively. Surprisingly, in 2015, the population numbers rose again, along with the levy.

RECOMMENDATION:

THAT the Board request that the ORL review the population numbers now, and for future calculations.

Respectfully Submitted:


Marilyn Rilkoff
Director of Financial Services

Approved for Board's Consideration


Brian Reardon, CAO

Implications of Recommendation:

Strategic Plan: Strategic Growth Management

Legal/Statutory Authority:

- RDCO Okanagan Regional Library Participation Establishment Bylaw No. 610,1994
- Library Act

Background:

The Okanagan Regional Library Service for the RDCO has 2 participants – Central Okanagan East and Central Okanagan West. The library determines its cost allocation to the RDCO on the basis of Population (50%) and Converted Assessment Value of Land and Improvements (50%).

Back in 2012 and 2013, the RDCO, West Kelowna and WFN disputed the numbers used for the population portion of the cost allocations. Changes in the population numbers varied greatly and disproportionately in comparison to Stats Canada 2011 Census numbers and all other participants, even if growth factors were applied. See attached Apr. 5, 2013 memo from ORL regarding the review requested.

Under the Library Act, the requirement is to use population numbers provided by the province.

In 2014, staff thought that the issue had been resolved going forward, when the 2011 Federal Stats Canada Census numbers were used. The RDCO's Electoral Area population total used was 5,742. This was felt to be fair and equitable, as the distribution between areas was based on a reliable number. As a result, the RDCO's share of assessments went down to a more reasonable level. (It should be noted that this is also the number the province / UBCM uses for calculating Community Works Gas Tax Funding each year. This number is never adjusted for estimated population increases, but the allocation proportions remain stable.)

Surprisingly, in 2015, the population numbers rose again, and they rose very disproportionately to other areas' population numbers. The revised population went from 5,742 to 7,307, an increase of 1,565, or 27%. Even if one were to assume growth in each year, it would be in the range of 6 to 8% per year, which is not likely in a rural area.

Table 1 below shows the widely fluctuating population numbers used to calculate the funding levy to RDCO for the Electoral Areas in the past. The corresponding tax levies are also shown. This has caused huge annual tax fluctuations to rural home owners from year to year, as the service area is small. For example, the increase in taxes to the average home in Central Okanagan East 2015 is \$11.49, and in Central Okanagan West \$6.67.

Note:
CWF is based
on census,
not provincially
adjusted popn *

Year	Population	ORL Levy
2010	9,804	\$345,045
2011	11,284	\$384,245
2012	11,899	\$404,395
2013	8,458	\$340,721
2014	5,742 ←	\$291,262
2015	7,307	\$327,748

Table 2 below (based on the attached Member Assessment Levy Spreadsheet from ORL for the 2015 Levy) shows the relative population increases for only the Central Okanagan Areas from 2014 to 2015. The 2011 Census numbers were used as the base in 2014. The average increase for the region and economically strong municipalities over the same period of time is under 4%, however the rural electoral areas have a population increase of 27.255%:

Area	2014 Pop'n - ORL used 2011 Canada Census #'s	2015 Pop'n - per ORL	Increase / Decrease	%
Kelowna	117,312	121,574	4,262	3.633%
Lake Country	11,708	12,149	441	3.767%
Peachland	5,200	5,153	(-47)	(-0.904)%
West Kelowna	30,892	31,212	320	1.036%
RDCO-COE/COW	5,742	7,307	1,565	27.255%
WFN	7,068	7,200	132	1.868%
Total	177,922	184,595	6,673	3.750%

The total population increases for the entire area covered by the ORL (RDCO, CSRD, RDNO, & RDOS) for the same period of time:

Total	353,966	360,979	7,013	1.981%
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The increase to RDCO's electoral areas 1,565, is 22% (1,565 / 7,013) of the entire increase in population over all four regional districts. This does not make sense, and does not seem reasonable.

Looking at it another way:

Table 3 - BC Assessment Authority information showed the following assessment growth rates, which are more in line with the municipal population growth rates above. And as one would expect, a rural area would likely have lower growth/population rates than municipalities in the area:

Year	C. O. East	C.O. West
2013	1.61%	1.15%
2014	2.67%	1.92%
2015	2.88%	1.12%

Financial Considerations:

Supporting facts show that the population counts simply cannot be changing that much. It would appear that the RDCO Electoral Areas have overpaid their share of ORL levies over several years in relation to corresponding increases in other areas. It was thought this was rectified in 2014, however 2015 again shows disproportionate increases in comparison to all the other participants within the four regional districts. With such huge fluctuations in the population estimates, this causes large fluctuations in the tax requisitions from year to year.

Alternatives:
For discussion.

Organizational Issues:
n/a

External Implications:
The results of any review and changes in population splits would affect the levies of all other participants in the ORL service.

Attachment(s):

- *Okanagan Regional Library Member Assessment Levy - Year 2015 Approved Levy*
- *Memo from ORL dated April 5, 2013*

INTEROFFICE MEMORANDUM

TO: TREASURERS OF ORL MEMBER COMMUNITIES
FROM: STEPHANIE HALL, EXECUTIVE DIRECTOR, DON NETTLETON, FINANCIAL MANAGER
ORL
SUBJECT: PROVINCIAL SUPPLIED POPULATION FIGURES USED TO DISTRIBUTE COSTS OF
LIBRARY ASSESSMENT LEVY
DATE: APRIL 5, 2013
CC: LIBRARY BOARD MEMBERS

We have had some inquiries from some of the treasurers who have had heard rumors regarding population figures being in question or have had their ORL Library Board members or other council members reporting to their councils that population figures differ from other population sources such as the federal census or the annual published BC Provincial Statistics. We are sending this memo out to all of you so that you are aware, if you are asked questions, where our initial inquiries indicate population figures have come from and what steps and the timing of those steps that we are taking on behalf of the members and Library Board to further clarify these figures for the future.

Regional Library Districts operate under the provincial Library Act. Under this act, the Library budget is distributed 50% based upon population and 50% upon converted value of property assessments. Under the act, the province provides the Library Districts with the latest updated figures of both population and converted assessments every summer which are used to allocate the library assessment for the following year. The population figures are specially done midway through the summer by BC stats for the provincial Library Ministry staff and so will differ, because of their timing, from the annual published BC population statistics. All BC population statistics have always differed from the Federal population figures (which are released every 5 years) as you all know.

The population figures which were provided to us in summer 2012 and were used for 2013 have raised some questions – primarily within Westbank First Nations, District of West Kelowna, and Central Okanagan Regional District. The Library Board, at their last meeting, have directed staff to do further follow-up with Provincial Ministry Staff to ensure that the source of population figures is understood and members can feel comfortable with these independent figures each year going forward, as they have in the past (and as we rely upon the BC Assessment figures driving the other half of the formula). In particular, the focus of the BC Stats figures in question seems to be revolving around the initial creation of the figures for the District of West Kelowna, and the rural split of the remaining population figures for the Central Okanagan Regional District Rural areas and the Westbank First Nations.

We have been asking questions of ministry staff, trying get initial information, and having some preliminary discussions with a couple of the affected treasurers. Provincial staff are indicating that they do not have a lot of opportunity to work with us on this for a couple of months due to workloads and the upcoming election. Our intent is to have further discussions with them during June and early July. We also hope to involve some of the treasurers of the significantly affected Central Okanagan areas and bring back a summary with recommendations for the future to the ORL Board by the September ORL Board meeting. Our intent is to clarify how all the population figures are determined, with a special focus on Central Okanagan areas in particular. This report and recommendations to the Board will be in time for the 2014 ORL budget.

Member Assessment Levy Spreadsheet
 OKANAGAN REGIONAL LIBRARY
 Year 2015 Approved Levy

Municipalities	POPULATION 2014	CONVERTED VALUE OF LAND AND IMPROVEMENTS 2014	APPORTIONMENT PER \$100 OF SHARED COSTS		Approved LEVY 2015	LEVY 2014	Total Difference In Levy	change due to 2015 budget increase	PER CAPITA LEVY		2015	2014	Difference
			2015	2014					2015	2014			
Armstrong	5,034	\$66,453,498	1.421	1.100	\$17,038.00	\$170,564	\$ 6,226	\$3,254	\$35.92	\$35.92	\$ 0.00	\$4,272.47	
Coldstream	10,314	\$196,100,398	2.611	2.634	\$412,452	\$418,253	4,059	(\$3,521)	\$39.60	\$39.60	\$ 0.00	103,115.51	
Endicott	2,932	\$98,175,276	0.833	0.845	\$101,720	\$93,958	782	(\$1,000)	\$31.03	\$31.03	\$ 0.00	25,180.39	
Goldon + E.A. A	6,025	\$163,897,416	1.891	1.868	\$348,213	\$303,571	4,842	(\$1,959)	\$45.15	\$44.87	\$ 0.28	77,063.22	
Kelowna	121,574	\$3,024,146,372	35.400	34.874	\$1,533,383	\$6,422,206	182,435	\$68,119	\$45.99	\$46.22	\$ -0.23	1,397,810.51	
Keremeos	1,331	\$28,638,272	0.311	0.320	\$49,128	\$49,636	508	(\$1,416)	\$37.92	\$37.92	\$ 0.00	12,232.07	
Lake Country	12,148	\$273,983,475	3.354	3.334	\$612,918	\$516,874	14,544	\$4,724	\$43.74	\$44.15	\$ -0.41	132,854.40	
Lumby	1,723	\$27,433,757	0.407	0.415	\$142,570	\$84,330	57	(\$1,245)	\$37.39	\$37.16	\$ 0.23	10,083.51	
Oliver	4,516	\$91,806,427	1.128	1.192	\$178,200	\$184,788	6,581	(\$8,873)	\$39.48	\$38.21	\$ 11.27	44,582.08	
DeWoods	4,834	\$42,707,146	1.382	1.616	\$249,570	\$39,478	556	(\$3,171)	\$51.70	\$51.70	\$ 0.00	82,481.48	
Peachland	5,183	\$119,757,681	1.449	1.488	\$226,350	\$230,818	4,418	(\$6,187)	\$44.41	\$44.39	\$ 0.02	57,212.43	
Princeton	2,749	\$42,413,864	0.641	0.650	\$103,332	\$103,844	512	(\$1,453)	\$36.84	\$37.02	\$ -0.18	25,315.58	
Revelstoke	7,241	\$497,853,281	1.916	1.971	\$364,764	\$305,513	3,752	(\$8,328)	\$41.67	\$42.79	\$ -11.12	75,440.16	
Salmon Arm	17,133	\$397,144,544	4.230	4.203	\$1,032,000	\$697,189	6,417	(\$7,011)	\$59.26	\$59.26	\$ 0.00	188,151.46	
Stamiceus	2,410	\$78,708,727	0.817	0.834	\$168,000	\$129,965	383	(\$2,777)	\$53.54	\$53.54	\$ 0.00	32,257.38	
Spallumcheen	5,065	\$92,821,038	1.270	1.279	\$300,000	\$199,836	2,248	(\$1,458)	\$39.99	\$39.24	\$ 7.75	50,181.00	
Summerside	11,229	\$219,333,843	2.803	2.833	\$439,538	\$464,746	3,782	(\$4,631)	\$40.80	\$40.31	\$ 4.49	114,831.39	
Vernon	26,156	\$825,691,687	10.348	10.474	\$1,234,714	\$1,623,796	10,916	(\$19,289)	\$42.87	\$42.86	\$ 0.01	408,878.49	
West Kelowna	31,212	\$881,044,370	3.203	3.058	\$1,340,916	\$1,228,334	14,782	(\$10,036)	\$43.02	\$43.00	\$ 0.02	386,778.11	
Municipal Totals	291,416	\$6,558,101,470	80.615	80.689	\$2,735,844	\$2,503,725	233,019	(\$11,459)	\$43.70	\$43.63	\$ 0.07	3,164,388.82	
Regional Districts													
CDRD	7,307	\$174,470,850	2.075	1.379	\$329,325	\$379,325	50,000	\$6,000	\$44.83	\$50.72	\$ -5.89	61,957.08	
CDRD B.C.D.E.F	16,446	\$478,609,203	5.215	5.203	\$327,900	\$319,104	4,352	(\$10,522)	\$30.09	\$30.55	\$ -0.46	205,949.41	
RAND B.C.D.E.F	18,337	\$316,922,892	4.836	4.621	\$78,658	\$70,802	7,853	(\$5,439)	\$31.64	\$35.43	\$ -3.79	177,138.68	
OSRD A.B.C.D.E.F.G	16,551	\$408,560,240	5.064	5.111	\$80,719	\$72,333	10,786	(\$4,059)	\$43.27	\$42.88	\$ 0.39	200,779.82	
OSRD Totals	68,701	\$1,377,233,385	16.881	16.794	\$2,586,212	\$2,503,801	89,618	\$10,441	\$43.87	\$44.48	\$ -0.61	666,804.70	
Penelshon Band	1,082	\$20,577,839	0.357	0.375	\$39,311	\$39,119	1,600	(\$2,844)	\$33.88	\$35.12	\$ -1.24	14,077.83	
Wesbank Band	7,290	\$8,850,216	2.167	2.142	\$42,369	\$32,137	10,221	\$3,686	\$46.59	\$46.59	\$ 0.00	85,589.90	
Abn Totals	286,978	\$8,145,585,854	100.000	100.000	\$1,617,844	\$15,503,382	281,851	\$0	\$43.18	\$43.60	\$ -0.42	3,943,680.76	

Query on ORL Levy population numbers

Response to RDCO query

Stephanie Hall and Don Nettleton, Okanagan Regional Library

March 12, 2015

Topics

- RDCO population #s and levies
- Options – not great
 - Appeal to ORL board
 - Source of statistics
 - Quality of statistics

RDCO population #s and levies

RDCO population #s and levies 2010-15

<i>year</i>	<i>population</i>	<i>% change</i>	<i>levy</i>	<i>% change</i>
2010	9804		345045	
2011	11284	15.1%	384245	11.4%
2012	11899	5.5%	404395	5.2%
2013	8458	-28.9%	340721	-15.7%
2014	5742	-32.1%	291262	-14.5%
2015	7307	27.3%	327748	12.5%

appeal to board

Adjustments to levies and the discretion of the board

- Levy amounts do come under challenge from time to time, especially if there is a sizable fluctuation
- Each jurisdiction has unique interests
- The regional board must try to find the fairest solution for the majority of situations
- As you know, achieving this is not easy

ORL Board policy, Section IX - Finance

B. REALLOCATION OF FUNDS

...

Once the Board has approved the Budget, the tax levy apportionment will not be changed within the Board's fiscal year. *Adopted November 23, 1995*

The Board will not entertain any application to revise a constituent unit's tax levy unless that revision amounts to more than 25% of the constituent unit's library tax levy for that particular year. *Amended May 21, 1997*

source of stats

LIBRARY ACT

[RSBC 1996] CHAPTER 264

• How population is determined

22 (1) For the purposes of sections 23 and 24, the minister is to determine the population of an area by compiling the population figures for the most recent year for which figures are available for that area.

(2) In determining population the minister may take into account any changes in the boundaries of an area and may use

- (a) information or estimates provided by the Minister of Finance,
- (b) information in the most recently available Census of Canada, and
- (c) other information the minister considers relevant.

BC Stats population numbers vs Census

- BC Stats numbers are updated annually, Census numbers every five years
- Any time there is a large fluctuation, it causes problems for local government
- The Okanagan has some of the fastest growing jurisdictions in the country
- The ORL Board could request that federal census numbers be used – it would then be up to the minister to decide
- Federal stats would create large swings in levies for many jurisdictions
- Next census would likely be released in 2017

Census population comparisons, 2006-11

<i>area</i>	<i>2006</i>	<i>2011</i>	<i>%change</i>
Kelowna	107,035	117,312	9.6%
Lake Country	9,606	11,708	21.9%
West Kelowna	27,214	30,892	13.5%
Peachland	4,883	5,200	6.5%
Tsinstikeptum 9	5,171	5,882	13.7%
Tsinstikeptum 10	1,036	1,186	14.5%
Central Okanagan, RDA	3,650	3,795	4.0%
Central Okanagan J, RDA	1,758	1,947	10.8%

quality of stats

Appeal to statistic gathering bodies

- People criticize both the federal census and BC stats
- In 2014, we appealed to the province, as the BC stats numbers were still relying on 2006 census data!
- The minister elected to use federal census data for a single year
- We are now back to BC stats data, which has been updated with 2011 census data and appears realistic in most cases

- BC stats does not break down rural areas, which forces ministry of education staff to create estimates
- Appeal to? BC stats? Ministry? We have tried the latter.

Discussion

- Other ideas? Ways we can help?

- Questions?

Stephanie Hall, CEO
Okanagan Regional Library
250-860-4033, Ext. 2491
shall@orl.bc.ca

Population Estimate for 2016 vs 2011 Census Numbers

Municipalities	Rec'd Oct 8th - Population (based on 2014 Population Estimates) for 2016 proration	ORL used 2011 Census numbers for 2014 proration	Oct 8th % Increase from 2011 to 2015 Estimate	Proposed Revision
Armstrong	4,879	4,815	1.33%	
Coldstream	10,551	10,314	2.30%	
Enderby	2,887	2,932	-1.53%	
Golden and Electoral Area A	6,966	6,766	2.96%	
Kelowna	123,345	117,312	5.14%	
Keremeos	1,340	1,330	0.75%	
Lake Country	13,015	11,708	11.16%	
Lumby	1,773	1,731	2.43%	
Oliver	4,622	4,824	-4.19%	
Osoyoos	4,879	4,845	0.70%	
Peachland	5,094	5,200	-2.04%	
Penticton Band	1,664	1,655	0.54%	
Princeton	2,770	2,724	1.69%	
Revelstoke	7,280	7,139	1.98%	
Salmon Arm (1)	17,751	17,245	2.93%	
Sicamous	2,439	2,441	-0.08%	
Spallumcheen	5,185	5,055	2.57%	
Summerland	11,126	11,280	-1.37%	
Vernon	38,861	38,150	1.86%	
West Kelowna	32,699	30,892	5.85%	
Westbank First Nation	8,351	7,068	18.15%	7,519 6.40%
MUNICIPAL TOTALS	307,477	295,426	4.08%	
Regional District Electoral Participating Areas				
Central Okanagan I & J (2)		5,742	18.15%	6,108 6.40%
Columbia Shuswap B, C, D, E and F (3)	16,714	16,078	3.96%	
North Okanagan B, C, D, E and F	18,647	18,240	2.23%	
Okanagan-Similkameen A, B, C, D, E, F and G (4)(5)	18,579	18,480	0.54%	
REGIONAL DISTRICT TOTALS	60,725	58,540	3.73%	
REGIONAL LIBRARY DISTRICT TOTALS	368,202	353,966	4.02%	

REGIONAL DISTRICT OF CENTRAL OKANAGAN
2015 PROGRAM BUDGET

Program: 171 -- Okanagan Regional Library

Department: Fiscal Services

General Revenue Fund Budget

	2014 Budget	2014 Actual	Variance 2014 Act. vs. Bud.	2015 Budget	Variance: 2015 vs. 2014 Budget
Revenue:					
Tax Req - EA Cent Ok. West	(162,445)	(162,345)	100	(175,234)	(12,789)
Tax Req - EA Cent Ok East	(134,817)	(134,917)	(100)	(157,514)	(22,697)
Previous Year's Surplus/Deficit	0	(0)	(0)	(0)	(0)
Administration OH	5,000	5,000	0	5,000	0
Total Revenue	(292,262)	(292,262)	(0)	(327,748)	(35,486)
Expenses:					
Transfer to Reserves	1,000	1,000	0	0	(1,000)
Transfer to Library Board	291,262	291,262	(0)	327,748	36,486 a
Total Expenses	292,262	292,262	(0)	327,748	35,486
(Surplus) / Deficit	0	(0)	(0)	(0)	(0)

Tax Levy:

Tax Requisition	(297,262)	(332,748)	(35,486)
Residential Tax Rate (per \$1000 of assessment)	0.1717	0.1927 0.1936	0.0210

Reserve Fund Balance at Y/E (3,033) (3,063)

2015 Budget Notes:

a. Increase due to populations numbers used by the ORL. Reported Population increase in 1 year of 1,565. Staff are disputing, however, it is not likely to change as it would affect all the other apportionments.

REGIONAL DISTRICT OF CENTRAL OKANAGAN
2015 - 2019 Five Year Program Budget Projections

Program: 171 -- Okanagan Regional Library

Department: Fiscal Services

General Revenue Fund Budgets

	2015 Budget	2016 Projected Budget	2017 Projected Budget	2018 Projected Budget	2019 Projected Budget
Revenue:					
Tax Req - EA Cent Ok. West	(175,234)	(178,687)	(182,207)	(185,799)	(189,462)
Tax Req - EA Cent Ok East	(157,514)	(160,616)	(163,782)	(167,010)	(170,303)
Previous Year's Surplus/Deficit	(0)	(0)	(0)	(0)	(0)
Administration OH	5,000	5,000	5,000	5,000	5,000
Total Revenue	(327,748)	(334,303)	(340,989)	(347,809)	(354,765)
Expenses:					
Transfer to Library Board	327,748	334,303	340,989	347,809	354,765
Total Expenses	327,748	334,303	340,989	347,809	354,765
(Surplus) / Deficit	(0)	(0)	(0)	(0)	(0)
Tax Levy:					
Tax Requisition	(332,748)	(339,303)	(345,989)	(352,809)	(359,765)
Residential Tax Rate	0.1927	0.1936	0.1945	0.1954	0.1963
(per \$1000 of assessment)	0.1936				
Reserve Fund Balance at Y/E	(3,063)	(3,094)	(3,125)	(3,156)	(3,188)

Notes

a. Increase due to populations numbers used by the ORL. Reported Population increase in 1 year of 1,565. Staff are disputing, however, it is not likely to change as it would affect all the other apportionments.

REGIONAL DISTRICT OF CENTRAL OKANAGAN

BYLAW NO. 610

Being a bylaw to establish a local service within Electoral Areas 'A', 'G', 'H' and 'I' for the purpose of participation in a regional library district under Part 3 of the Library Act.

WHEREAS under Section 58(2) of the Library Act, S.B.C. 1994, c. 31, the Lieutenant Governor in Council may, by regulation, require any regional district within a regional library district to participate, by bylaw, in the regional library district for the purpose of replacing the school districts or parts of school districts within the regional district that form part of the regional library district;

AND WHEREAS B.C. Regulation 285/94, made under Section 58 of the Library Act, requires the Regional District of Central Okanagan, before December 31, 1994, to adopt a bylaw establishing a local service referred to in Section 788(1) (p) of the Municipal Act for the purpose of replacing School District #15 (Penticton) and School District #23 (Central Okanagan) in the Okanagan Regional Library District;

Old EA's:

A = Lake Country
G = Westside (now CWK)
H = Westbank (now CWK)
I = COE

AND WHEREAS, under B.C. Regulation 285/94, the preconditions to the validity of a bylaw establishing a local service set out in Section 795(2) of the Municipal Act do not apply;

AND WHEREAS, under Section 68 of the Library Act, Section 794(2) of the Municipal Act does not apply;

NOW THEREFORE, the Regional Board of the Regional District of Central Okanagan, in open meeting assembled, enacts as follows:

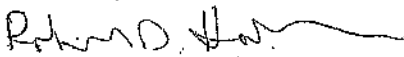
1. The service being established under this bylaw is the local service for the purpose of participation in the Okanagan Regional Library District pursuant to the provisions of Section 788(1) (p) of the Municipal Act.
2. The boundaries of the service shall be the boundaries of Electoral Areas 'A', 'G', 'H' and 'I' of the Regional District of Central Okanagan.
3. The participating areas for the service are Electoral Areas 'A', 'G', 'H' and 'I' of the Regional District of Central Okanagan.
4. As provided for in Section 804(1) of the Municipal Act, the annual cost of providing the service shall be recovered by the requisition of money under Section 809.1 to be collected by a property value tax to be levied and collected under Section 810.1.
5. The costs of providing the service shall be apportioned among the participating areas on the basis of converted values of land and improvements.


This bylaw may be cited as "Regional District of Central Okanagan, Okanagan Regional Library District Participation Establishment Bylaw No. 610, 1994.

READ A FIRST TIME THIS	17th	DAY OF	OCTOBER,	1994.
READ A SECOND TIME THIS	17th	DAY OF	OCTOBER,	1994.
READ A THIRD TIME THIS	17th	DAY OF	OCTOBER,	1994.

Approved by the Inspector of Municipalities this 8th day of
November _____, 1994.

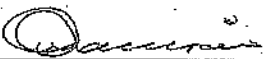
RECONSIDERED AND ADOPTED THIS 12th DAY OF December, 1994.


CHAIRPERSON


SECRETARY

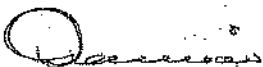
I hereby certify the foregoing to be a true and correct copy of
Bylaw No. 610 cited as the "Regional District of Central
Okanagan, Okanagan Regional Library District Participation
Establishment Bylaw No. 610, 1994", as read a third time by the
Regional Board on the 17th day of October, 1994.

Dated at Kelowna, B.C. this
20th day of October
1994.


Secretary

I hereby certify the foregoing to be a true and correct copy of
Bylaw No. 610 cited as the "Regional District of Central
Okanagan, Okanagan Regional Library District Participation
Establishment Bylaw No. 610, 1994", as adopted by the Regional
Board on the 12th day of December, 1994.

Dated at Kelowna, B.C. this
14th day of December
1994.


Secretary