

# Local Conservation Funds in British Columbia

A Guide for Local Governments and Community Organizations



Second Edition

# ACKNOWLEDGEMENTS

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# Executive Summary

**A conservation fund is a local government service that is funded through a dedicated tax or fee and used to support environmental conservation and community sustainability projects.**

The regional district or municipality that holds the conservation fund decides which projects to support according to criteria in the fund's terms of reference.

Conservation funds support projects that reflect local priorities, such as:

- Protecting clean water sources.
- Conserving natural areas for people to enjoy.
- Restoring fish and wildlife habitat.
- Strengthening community vitality by taking care of ecosystems and the benefits they provide.

## Three Good Reasons to Support Conservation Funds

1. **Ecosystem services** – A healthy environment provides us with clean water, pure air, and many other natural resources. It can be very expensive to try to make things right after we have damaged our environment. It's smart to take care of what we've got.
2. **A healthy environment supports a healthy economy** – Robust property values; attractive, investable, safe communities; tourism, agriculture, and other renewable resource sectors all rely on a functioning environment.
3. **Local control** – Funds are generated locally and directly benefit the community.

## A Group Effort

Establishing a conservation fund is a big job that requires cooperation for success. Conservation groups usually initiate the process; however, local government staff and elected officials play an essential role. Cultivating community connection and collaboration is also necessary to create a conservation fund that meets residents' needs and addresses local environmental priorities.

## Community Vision

Conservation funds are forward looking. They show that communities can work together to protect local environments and steward the natural resources that support their lives and livelihoods. Conservation funds empower communities to improve on past decisions and give future generations a leg-up.

## Existing Conservation Funds

### Columbia Valley Local Conservation Fund

- Subregional fund established by Regional District of East Kootenay in 2008.
- Established by assent vote (referendum) in the participating areas.
- Property owners in the service area pay a parcel tax of 5¢ per \$1,000 of taxable assessed value, up to a maximum of \$230,000 annually (this works out to about \$20 per parcel).
- Fund themes: Conservation of water, wildlife, habitat, and open space.
- Funded 69 projects totalling \$1.7 million (2010-2017).



Columbia Wetlands Stewardship Partners work to re-establish the northern leopard frog in the Columbia marshes.

### Kootenay Lake Local Conservation Fund

- Subregional fund established by Regional District of Central Kootenay in 2014.
- Established by assent vote (referendum) in the participating areas.
- Property owners in the service area pay an annual parcel tax of \$15 per parcel of land. All parcels are taxed at the same rate, regardless of assessed value.
- Fund themes: Conservation of water and aquatic systems, wildlife, and habitat.
- Funded 10 projects totalling just over \$108,000 (2016-2017).



BC Wildlife Federation provides education and on-the-ground support to improve grizzly bear/human coexistence.

### South Okanagan Conservation Fund

- Subregional fund established by Regional District of Okanagan-Similkameen in 2016.
- Established by alternative approval process.
- Property owners in the service area pay a property value tax of 3.72¢ per \$1,000 of net taxable value of land and improvements, to a maximum of \$450,000 annually.
- Fund themes: Conservation, protection, enhancement, and restoration of valuable natural areas, including water and land based ecosystems, wildlife, and habitat.
- The first round of applications to the fund opened in September 2017.



Working to protect the yellow-breasted chat, an endangered species in B.C.

See the Case Studies section of the guide for more information about each of these conservation funds.

Find this guide, terms of reference for the existing B.C. conservation funds, and other resources online: [sosp.org/conservationfundguidebc/](https://sosp.org/conservationfundguidebc/)



# Introduction

British Columbia is an exceptional place, known for its spectacular landscapes and quality of life. Accelerating development and resource use demands have put a great deal of pressure on land, water, and wildlife in many areas of the province.

Natural areas benefit our communities in various ways. Investing in clean water, air, and functioning ecosystems is not only good for our physical and mental well-being, but also for the well-being of our communities.

This guide is for local government staff, elected officials, community groups, conservation organizations, and conservation minded individuals that are interested in setting up a local, dedicated source of funding to support conservation efforts.

The guide outlines the steps involved in establishing conservation funds in B.C., and includes examples of successful campaigns and experiences.

Establishing a conservation fund is a collaborative initiative. This document can help ensure that everyone who may be involved in the process is on the same page.

## Conservation Funds and Parkland Acquisition Funds

In general, there are two kinds of conservation funds.

Several B.C. local governments have set up **parkland acquisition funds**, which are an important way for local governments to achieve amenity and greenspace objectives.

This guide focuses on **conservation funds** that have broader sets of objectives and support a more diverse range of environmental conservation and sustainability activities in a community or region. At the time of writing, there are three areas in B.C. that have established conservation funds focused on broad conservation objectives: Columbia Valley Local Conservation Fund, Kootenay Lake Local Conservation Fund, and South Okanagan Conservation Fund.

See the Case Studies section for more information.

## DEFINITION

A conservation fund is a local government service that is funded through a dedicated tax or fee, held and overseen by local government, and earmarked for the specific purpose of undertaking projects that support environmental conservation and community sustainability.

Conservation funds support local priorities, such as:

- Protecting clean, abundant water resources.
- Preserving natural places for people to enjoy.
- Restoring and maintaining important habitats for fish and wildlife.
- Enhancing the viability of local agriculture, food production, and other renewable resources.
- Maintaining and enhancing ecosystem health to be more resilient to the effects of a changing climate, such as floods, fire, and drought.

## A LOCAL GOVERNMENT SERVICE

Though the inspiration to create a conservation fund often comes from a community or conservation organization, conservation funds must be established and financed through legally-binding local government mechanisms.

Local governments provide a range of services for the taxes they levy. Services may include planning, parks and recreation, libraries, fire protection, recycling and solid waste disposal, water supply and distribution, and environmental conservation. As such, a conservation fund can be financed through local government taxation: property value tax, parcel tax, local area service tax, or fees.

Existing conservation funds in B.C. are established as "environmental conservation services" or "local conservation fund services." For simplicity, the remainder of this guide will refer to such services as either "conservation funds" or "conservation fund services."

It is worth noting that once a conservation fund has been established, some of the operational workload can be shared with other organizations. In every case in B.C., funds are allocated to eligible recipients to deliver environmental conservation projects through an application-based system.



Local governments retain direct control of financial administration and decision-making while partnering with community organizations to support other aspects of fund administration and management.

In addition, money in a conservation fund can be non-lapsing, which means it can be carried over from one fiscal year to the next. Monies can be used immediately or saved for future use—when sufficient funds are available for a larger or more significant project.

Importantly, funds generated locally can be used to leverage and attract significant additional resources from other funding sources outside the community. In the case of the Columbia Valley Local Conservation Fund, every \$1 raised locally has leveraged an additional \$6 from outside funding sources.

## Other Tools for Conservation

A conservation fund is just one tool to support stewardship initiatives and protect ecologically important lands. The *Green Bylaws Toolkit for Conserving Sensitive Ecosystems and Green Infrastructure* provides local governments with information on a range of other conservation tools. The toolkit includes bylaw language that local governments can use to protect ecologically important lands and explains the various legal approaches to protection, including their benefits and drawbacks.

[greenbylaws.ca](http://greenbylaws.ca)





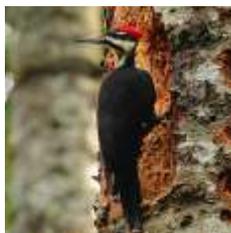
## ENSURING LIVABLE COMMUNITIES

We depend on natural systems. We rely on land, air, water, plants, animals, insects, and other living things to give us what we need. By all accounts, it is in our best interests to support what sustains us.

While nature has intrinsic value, it also benefits us—and our communities—by providing essential services. Rivers and lakes, wetlands, grasslands, forests, and so on perform complex functions that we cannot get any other way. Here are just a few of the ecosystem services that healthy ecosystems provide:

- Flood and erosion control, and recharging groundwater resources
- Air and water purification
- Clean and abundant water for drinking and irrigation
- Pollination of fruits and vegetables
- Attracting tourists and enhancing quality of life for residents
- Providing areas for outdoor recreation
- Supporting Aboriginal cultural activities
- Providing fish and wildlife habitat, including species at risk
- Storing carbon and moderating the effects of climate change

What ecosystems provide to our communities and economies is incredibly valuable. All we have to do is care for the natural systems that allow them to function—nature does the rest.



## PLANNING AHEAD

Unfortunately, the true value of ecosystems is revealed when they are destroyed or degraded and we have to manage the consequences.

Habitat fragmentation and loss, climate change, invasive species, pollution, and human disruption of natural processes, such as fire and water cycles, are the most significant threats now contributing to the decline of our environment. Many of these threats are historically unprecedented.

In B.C. there is significant need for communities to protect ecologically important lands sooner rather than later. By planning ahead, it is possible to protect and care for the natural assets that are the cornerstone of safe, livable communities.

## TAKING INITIATIVE

While many local governments in B.C. are aligning with other sustainability policies and strategies, or are leading the way themselves, most local governments and community organizations have limited resources to address these objectives.

By taking the initiative to establish conservation funds, local governments are recognizing the importance of biodiversity and a healthy natural world for maintaining human health and community resilience. Conservation funds bring together local governments, conservation organizations, and community members to develop capacity and meet these goals.

### Conservation funds can help communities to:

Build a network of parks, greenspace, and natural corridors for both people and wildlife.



Enhance the viability of local agriculture, food production, and other renewable resources.



Enhance quality of life, tourism and recreation opportunities, and understanding of the natural environment.



Protect the integrity of watersheds and aquifers; ensure clean, abundant water resources.

Restore, enhance, and steward natural areas that provide services important to economies and communities.



Protect ecosystems to sequester carbon and meet community climate action objectives.

Partner with other organizations to pool financial resources and leverage funding from outside the community to achieve local goals.



## Key Steps

There is no “one size fits all” way to establish a fund. Everything—from choosing a legislative approach, to deciding how to finance the fund and engage the public—depends on the nature and needs of each community. Even so, there are several main tasks to be undertaken during the establishment process. The next section of the guide expands upon the following tasks:

1. **Assemble a leadership team and build a network of support.** Setting up a conservation fund requires a champion (or champions) to lead and coordinate efforts, and a core group of supportive and dedicated people. Collaboration is crucial, so be sure to engage key community members, as well as local government staff and elected officials, from the beginning.
2. **Determine community priorities and gauge support for the fund.** Public opinion polls and focus groups are two methods that can be used to learn about people's views and priorities and assess community support.
3. **Make the case for a conservation fund.** To be successful in establishing a conservation fund, support is required from two different sources: the local government that will host the fund and the community members that will pay for it. While participating organizations will have different points of view on various aspects of the initiative, it is important for project partners to consult with one another from the outset as they develop strategies to frame the issues, determine communication tactics, define tasks and responsibilities, lay out a timeline, and establish budgets.
4. **Design the conservation fund.** A conservation vision and terms of reference provide a road map for the design and implementation of the fund. Where conservation funds exist in B.C., monies are allocated for projects through an application-based system to eligible recipients. Each fund has its own terms of reference, which detail such items as goals, governance, administration, timelines, funding, and project eligibility. It is best practice for conservation funds to be designed and administered using objective science-based criteria to guide and select the activities it supports. This ensures that decisions regarding allocation of funds are effective, informed, and defensible.

5. **Decide how to finance the conservation fund.** A dedicated conservation fund can be financed through a property value tax, parcel tax, or a local area service tax or fee. The form of financing chosen should be based on what works best for the community.
6. **Understand the establishment options.** Funds can be established for whole or parts of individual municipalities and regional districts, or with municipalities and regional districts cooperating for a regional or subregional approach; Aboriginal governments may also be part of such an arrangement. A service area needs to be defined for the conservation fund, and the choice of how to proceed depends on the community's unique circumstances. In any case, the conservation fund service must be established according to applicable legislative mechanisms.
7. **Select the appropriate approval process to establish the fund.** There are various legal options available to local governments to seek elector approval and establish a conservation fund, and the particulars partly depend on whether municipalities, regional districts, Aboriginal governments, or a combination are participating to establish the fund.



## 1. Build the Leadership Team and Support Network

### LEADERSHIP

Establishing a conservation fund requires considerable investment of human and financial resources. While conservation groups tend to initiate conservation funds, establishment is a collaborative process that involves key local government staff and elected officials.

Local government staff members play an important role in the establishment of the fund, with expertise related to financial administration, corporate services, legislative process, and public engagement. Staff must be directed by elected officials in order to be involved, and must remain impartial to maintain the integrity and transparency of the process. Working together ensures that roles, responsibilities, and tasks are outlined clearly and delivered appropriately.

For community organizations, successful examples from around the province show that the process requires champions and leaders who can carry the vision, advocate for the fund, and work closely with local government to manage overall design and coordination.

Having a core team to facilitate the process is key. Leadership team members should be people with the time, energy, and skills to lead and manage a major undertaking that includes strategy development, fundraising, volunteer coordination, communications, and public relations. A conservation fund establishment process could take up to two years or longer.

Aboriginal governments and local governments sometimes partner to deliver shared services, and establishing a conservation fund may be an opportunity for such collaboration. As with any conservation fund process, it is important to initiate preliminary discussions with the relevant people and departments long before one expects to seek elector approval.

Partnerships developed during the establishment process can be valuable in delivering the fund after a successful campaign too. In some areas of B.C., umbrella organizations or partnerships bring together many non-profit and government agencies to share knowledge and work toward common goals. Assembling a group or partnership like this, even ad hoc, can inform and support the local government in its legislated roles and help meet the community's conservation fund goals. If there is already a conservation group that is working on big ideas and issues, start there and ask for appointees or volunteers to join the team.

## Conservation Programs and Partnerships

**Coastal Douglas-Fir and Associated Ecosystems Conservation Partnership** was launched in 2012 to pursue a collaborative approach, based on sound science, to conserving Coastal Douglas-fir ecosystems. Forty-plus partners are working to implement a strategy to secure more protected areas, support active ecosystem management, and raise awareness of both issues and solutions.

[cdfcp.ca](http://cdfcp.ca)

**Comox Valley Conservation Strategy Community Partnership**, formed in 2008, is a partnership of over 20 organizations in Vancouver Island's Comox Valley that support the Comox Valley Conservation Strategy. The strategy plans to reverse the trend of ecosystem losses by identifying, maintaining, protecting, and restoring treasured natural areas.

[cvconservationstrategy.org](http://cvconservationstrategy.org)

**Kootenay Conservation Program** (formerly East Kootenay Conservation Program) was established in 2002 as a partnership of conservation, industry, and government organizations focused on conserving natural areas for Kootenay communities. Today the partnership includes over 80 organizations that pool expertise to develop, facilitate, and coordinate conservation efforts on private land through securement, stewardship, and capacity building.

[kootenayconservation.ca](http://kootenayconservation.ca)

**Garry Oak Ecosystems Recovery Team** is a non-profit organization dedicated to the recovery of Garry oak and associated ecosystems in Canada and the species at risk that inhabit them. The team was formed in 1999 as a comprehensive partnership of experts affiliated with all levels of government, non-government organizations, academic institutions, First Nations, volunteers, and consultants.

[goert.ca](http://goert.ca)

**Okanagan Collaborative Conservation Program** was created in 2006 as a partnership of organizations and businesses with shared goals, which include maintaining regional biodiversity, protecting species at risk, maintaining ecological connectivity throughout the Okanagan Basin, and balancing regional growth with conservation.

[okcp.ca](http://okcp.ca)

**South Okanagan-Similkameen Conservation Program** was founded in 2000 by various groups concerned with the special environment and habitat of the South Okanagan-Similkameen area. SOSCP is a partnership of 50 non-government, government, and First Nations organizations working together to conserve biodiversity. SOSCP coordinates and facilitates the partners to help improve the effectiveness of their conservation efforts.

[soscp.org](http://soscp.org)

**South Coast Conservation Program** was established in 2005 as a multi-partner, landscape-level conservation program that coordinates and facilitates the implementation of conservation actions to maintain and restore species and ecosystems at risk for the South Coast (or Lower Mainland) of B.C.

[sccp.ca](http://sccp.ca)

## COMMUNITY SUPPORT

There is likely to be a broad base of support as interest in protecting the community's natural assets and creating a conservation fund will come from all sides of the political spectrum.

For this reason, it is helpful to reach out to groups and individuals that represent the community's many social, economic, and environmental interests. They may be invaluable in sharing information with their contacts, hosting information sessions, or providing expertise to support the fund campaign.

When making a list of whom to include, consider local business and industry; youth and seniors; recreation, environmental, health, and education groups; and other levels of government, including First Nations.



## 2. Determine Community Priorities

Establishing a conservation fund requires an understanding of community members' various interests and priorities, as well as which sustainability objectives the majority of residents share. People have different reasons for supporting conservation, and it is the leadership team's job to find out what those reasons are and make the case for a fund from various perspectives.

Opinion polls and focus groups are two ways to discover people's views and gauge support. To be sure of valid results, it is important to have a professional assist with both the design and implementation of any public opinion research.

Note that the local government may have developed conservation priorities through official community planning or sustainability planning. It makes sense to be aware of existing work, as it could provide useful context when designing the conservation fund.

Also keep in mind that understanding residents' willingness to pay for a conservation fund service is an important factor in the establishment process. Even if there is widespread public support for a conservation fund, there will be an amount, above which many people would say no. It is important to know what that threshold is; focus groups or polling may provide that information.

## PUBLIC OPINION POLLS

The team can use a public opinion poll to collect answers to questions such as:

1. What do people in the community care about?
  - Leaving a legacy for future generations?
  - More parks and natural areas?
  - Recreational opportunities?
  - Clean water and air?
  - Protection of watersheds, wildlife corridors, and greenways?
  - Farmland and food security?
  - Protection of scenic beauty, landmarks, and local identity?
  - Natural areas as outdoor classrooms?
  - Ecotourism opportunities?
  - Slowing sprawl?
  - Reducing the loss of habitat and wildlife species?
  - Keeping important lands as a public asset and resource?
2. Do people support the concept of a conservation fund, and how much are they prepared to pay in taxes for it?
3. What do people think is the best approach for collecting the money (e.g., property value tax or parcel tax)?
4. Do people feel like the natural environment is improving or worsening?
5. What areas do people feel need the most protection and why?



Some local governments regularly conduct public opinion polls or surveys to seek residents' opinions on a wide range of topics, including parks, ecosystem protection, and natural areas. Existing local government polls or surveys should be considered as a first step in assessing the community's readiness for a conservation fund and their conservation priorities.

The leadership team may find it worthwhile to invest in additional, in-depth public opinion research to more fully understand residents' perspectives, motivations, levels of support, and willingness to pay for a conservation fund service. While people may readily support the idea of a conservation fund, when it comes to the official process to gain the community's approval, it is crucial to be able to provide the information residents need to feel confident turning their in-principle support into actual endorsement.

## FOCUS GROUPS

Focus groups provide the opportunity to gather input from people with different backgrounds, roles, and perspectives.

Communications or marketing professionals can provide advice around the number and composition of focus groups, and assist with their design. When skillfully devised, focus groups can be both enlightening and useful, informing both communications and outreach, and the proposed service area boundary.



### 3. Make the Case for a Conservation Fund

#### COMMUNICATION AND OUTREACH STRATEGY

Clear and effective communication is essential to inform and educate the public and decision makers about what the proposed conservation fund is, what it will do, and why it matters.

A communication and outreach strategy can help the leadership team frame issues, outline tactics, and define tasks and responsibilities to be undertaken within certain time and budget constraints. The strategy should underlie all of the team's communications—from advertising to correspondence, and educational activities to social events.

It is important to keep in mind the following points when developing and implementing a conservation fund communication strategy:

- **Key messages** – Use the results of polls and focus groups to help decide what the messaging needs to address. Emphasize the fund's benefits to people, rather than "the environment."  
Include ideas on how the leadership team will deal with opposition to the proposed conservation fund, as well as answers to questions that you expect will be asked frequently. As local government staff and elected officials may receive questions from the community, it is important that they have the information they need to be able to respond accurately.
- **Target audiences** – Target your communication to different audiences, and ensure that appropriate members of the leadership team make personal contact with local government representatives, and other community leaders and organizations, to explain the proposal and gain support.
- **Roles and responsibilities** – Every member of the leadership team should have a clear role in the communication and outreach efforts, including staying on-message when talking about the conservation fund in the community. It is helpful to identify specialized roles, such as authorized spokesperson(s).
- **Budget** – Consider what might be the most effective and efficient vehicles for sharing information and engaging with the audiences in your community, and partner with others to extend the reach of your message without greatly increasing costs.
- **Monitoring** – Make note of how your efforts are measuring up to your objectives. Keeping track of positive and negative public response to the conservation fund campaign can help the team to hone its communication and outreach strategy.

## COMMUNICATION AND OUTREACH TACTICS

It is helpful to use a range of tactics to reach people from different interest groups and demographics. Consider using a combination of printed outreach materials—such as brochures and news articles—face-to-face contact at meetings and informal gathering places, online methods such as a website and social media, and television and radio announcements.

Design your strategies according to what you know about your audiences and their habits. Be prepared to change course if key audiences are not receiving your message.

Consider the following as part of your outreach campaign:

- **Presentations to municipal councils, regional district boards, and local government staff.** These are vital. Conduct presentations early on to inform and engage key decision makers and staff.
- **One-on-one meetings with local government representatives.** Time allotted for delegations at board or council meetings is limited. It is helpful to have additional opportunities to meet with elected officials and staff to delve more deeply, answer questions, and build support.
- **Presentations to community organizations.** Attending and providing information at others' meetings, gatherings, and trade shows will help to gauge and build support with different groups and sectors (e.g., service clubs, naturalist groups, business associations, rod and gun clubs, etc.)
- **Public information sessions.** These can be hosted by different members of the leadership team and can be formal or informal.
  - Hosting a forum and inviting speakers from areas with existing conservation funds to share their experiences and successes can demonstrate that conservation funds are doable.
  - An open house can provide a relaxed atmosphere where the public is invited to drop by during a set time and date. They can speak with leadership team members, view displays set up around the room, and break into small discussion groups. The team may be able to obtain written feedback on the proposed fund through comment forms.
  - Public meetings are typically more formal events hosted by local governments where attendees are asked to arrive at a specific time to receive information, which is usually in the form of a presentation by staff and/or leadership team members, followed by a question and answer period.
- **Informal gathering places.** Grocery stores, hardware stores, and farmers markets can also be effective locations for outreach efforts. These places provide informal settings for promoting the idea of a fund, addressing questions and concerns, and receiving comments from community members.
- **Mass media: newspaper, television, and radio.** The media are a cost-effective and efficient way to get the message delivered to a large number of people. It is important to develop positive relationships with local media early on—even before submitting anything for coverage. This will help them understand your needs and will pay off in increased reporting, better media relations, and fewer factual distortions. Consider various formats in your outreach strategy, including interviews, stories, letters to the editor, and public service announcements. In some cases, paid media (i.e., advertisements) might be worth the cost.
- **Outreach materials.** Having something to distribute (e.g., frequently asked questions, brochures, rack cards, posters, and flyers) at events or key public locations can be helpful.
- **Graphics and video.** Find someone with the skills to produce high-quality graphic material: photos, social media posters, images with information and messages that can be shared with other organizations and the media. Consider video as part of your strategy.



## FREQUENTLY ASKED QUESTIONS

Frequently asked questions that the leadership team should consider include:

- What benefits will the conservation fund provide to the community and to individuals?
- How will the fund be spent? Who decides? Having an accountability plan in place reassures residents that funds will be spent properly and fairly.
- Isn't there already funding for conservation?
- We already pay taxes. Why should we pay more?

It also may be useful to develop scenarios contrasting what the conservation fund could do compared to what would likely happen without it, and share these with the community to illustrate the importance of the fund.

## NAVIGATING A PUBLIC PROCESS

Depending on the circumstances, the local government likely will have to seek elector approval, such as by assent voting (formerly known as "referendum" or "other voting") or an alternative approval process (see sections 6 and 7 of this guide for details). In order to be successful, an assent vote (referendum) requires that a majority of the qualified electors who show up to vote (50% +1) support the proposal, whereas an alternative approval process requires that less than 10% of qualified electors register formal opposition to the proposal.

It is important to note that under the *Local Elections Campaign Financing Act*,<sup>1</sup> conservation organizations and individuals involved in communicating and campaigning as part of an assent voting process (referendum) need to register as a third party sponsor (if the assent vote is conducted at the same time as a local election) or a non-election assent voting advertising sponsor (if the assent vote is conducted at a time different from a local election). Information on the requirements can be obtained from the Elections BC website.<sup>2</sup>

While the leadership team's communication and outreach efforts will encourage public support for a conservation fund, the team should be aware that it is local government staff's responsibility to remain impartial and unbiased, as their role is to conduct a transparent, sound process. While they might answer questions from the public, it is inappropriate for local government staff members to promote the fund, regardless of how they may feel about it personally.

The team's broad base of knowledge should be used to identify if any groups are likely to oppose an assent vote or other approval process, and assess whether such groups have the funds, capacity, or a leader who could mount opposition. Being prepared to answer people's concerns and arguments will help the team stay on-message rather than becoming reactive and losing positive momentum.

### The Assent Voting Question

Local governments must comply with strict guidelines for the wording of assent vote questions. It is the leadership team's job to interpret or "translate" the bylaw question in plain language for electors as part of the communication and outreach campaign.

Since the ballot question is the last thing people see as they cast their vote, it is important that they understand what they are voting for in advance of the vote. If they are unclear about what the question means, the vote may be spoiled, or perhaps marked no instead of yes.



## 4. Design the Conservation Fund

### DEVELOPING CONSERVATION PRIORITIES

A conservation vision or statement of conservation priorities outlines the community's conservation goals, provides rationale for the conservation fund, and clarifies how monies will be used.

In some cases, the local government and/or an external organization may already have completed the groundwork for a conservation vision by mapping important natural areas or developing a strategy that details priorities for maintaining and preserving certain ecological values.

Other levels of government (i.e., provincial<sup>3</sup> and/or federal<sup>4</sup> agencies), land trusts, and/or conservancies<sup>5</sup> also may have done studies in the area and be able to provide data and assist with interpretation, assessment, and prioritization.

Check to see if the following information is available for the community:

- **Regional conservation strategy.** Examples include:
  - City of Surrey Biodiversity Conservation Strategy<sup>6</sup>
  - Islands Trust Regional Conservation Plan<sup>7</sup>
  - Keeping Nature in Our Future: A Biodiversity Conservation Strategy for the South Okanagan-Similkameen<sup>8</sup>
  - Keeping Nature in Our Future: A Biodiversity Conservation Strategy for the Okanagan Region<sup>9</sup>
  - Nature Without Borders: Comox Valley Conservation Strategy<sup>10</sup>
  - Strategic Directions for Biodiversity Conservation in the Metro Vancouver Region<sup>11</sup>
- **Official community plan (OCP).** An OCP is an effective way for a local government to express a community's long-term vision for conservation and development. OCPs may contain policies for the “preservation, protection, restoration and enhancement of the natural environment, its ecosystems, and biological diversity.”<sup>12</sup> It is most efficient to make changes to an OCP during the review process when community consultation must occur. Such changes can enshrine visions and goals that pave the way for bylaw provisions that align with conservation fund objectives (e.g., Environmental Development Permit Areas).
- **Ecosystem mapping,** such as Sensitive Ecosystems Inventory (SEI)<sup>13</sup>, which identifies remaining rare or fragile ecosystems in a region, can be very useful in determining priority areas for conservation.
- **List of ecologically important lands** that need to be protected. Governments, land trusts, and conservation partnerships often have up-to-date priority lists.

- **Parks/open space system plan** and/or **natural areas conservation plan** for the area or region.
- **Information about present and future land development pressures.**
- **Land and resource plans** such as:
  - Sustainability studies
  - Growth management studies or plans (e.g., regional growth strategy<sup>14</sup>)
  - Greenhouse gas (GHG) emissions reduction plans
  - Water stewardship plans
  - Watershed management plans
  - Strategic Land and Resource Plans<sup>15</sup>
  - Sensitive ecosystems protection
  - Parks and open space plans
  - Agriculture or food security plans

## DETERMINING THE TYPE AND SCOPE OF FUND

A conservation fund is shaped by a conservation vision and the needs of the community. Parkland funds are typically more narrowly focused on the purchase of land for parks, whereas conservation funds are designed to support a broad array of activities; both can provide immense benefit for the natural environment and the community itself.

For example, in the Capital and Central Okanagan Regional Districts, funds focus solely on parkland acquisition as the main vehicle for achieving conservation and recreation objectives.

In the case of the Columbia Valley, Kootenay Lake, and South Okanagan Conservation Funds, monies can be used to fund land acquisition in addition to a broader range of possible projects, such as conservation of water and aquatic ecosystems, restoration or enhancement of wildlife habitat, and addressing invasive species, for example. Each fund has its own terms of reference that outline local priorities.



## PREPARING TERMS OF REFERENCE

Terms of reference provide a road map for fund design and implementation. They should include the following details:

- a) Purpose of the fund.
- b) Governance of the fund, including specifying the organization that will administer the fund and how decisions will be made regarding which projects receive funding.
- c) Conservation themes and goals, including targets and goals for funding, issues with the highest relevance, ineligible activities, project ranking, review process, and evaluation criteria.
- d) Annual timelines for the fund, such as call for proposals announcements, proposal submission deadlines, and funded projects announcements.
- e) Responsibilities of the partners that govern and administer the fund (i.e., various government and non-profit groups involved).
- f) Technical advisory committee guidelines, including conflict of interest provisions.

The terms of reference for existing conservation funds are linked on the guide web page ([sosc.org/conservationfundguidebc/](http://sosc.org/conservationfundguidebc/)). You can also find specific information about each of the three conservation funds currently in B.C. via the following links:

Columbia Valley Local Conservation Fund  
 Kootenay Lake Local Conservation Fund  
 South Okanagan Conservation Fund

[kootenayconservation.ca](http://kootenayconservation.ca)  
[kootenayconservation.ca](http://kootenayconservation.ca)  
[soconservationfund.ca](http://soconservationfund.ca)



## 5. Determine Financing Options

These are common categories of financing options for conservation funds. Local government staff can advise on other options, as well as what is most appropriate to the circumstances.

FINANCING OPTIONS	
<b>Property Value Tax</b>	<p>Local governments calculate property value taxes on the basis of the assessed or net taxable value of land and improvements (e.g. house, barn, garage, yard), unless exempted, and the local government tax rate.<sup>16</sup> Property value tax can also be calculated on land only or on improvements only.</p> <p>Most local governments calculate property taxes using the variable tax rate system where tax rates are based on an amount per \$1,000 of assessed property value (e.g., 10¢ per \$1,000 of assessed property value). Tax rates vary for different property classes of land such as residential, industrial, and commercial, so if the tax rate stays the same but property values rise, the local government's property tax revenue rises.</p>
<b>Parcel Tax</b>	<p>Regional districts and municipalities can apply a parcel tax to properties that receive a particular service.<sup>17</sup> A parcel tax can be imposed in one of three different ways: on the basis of the same amount for each parcel of land; on the taxable area of a parcel; or on the taxable frontage of the parcel. For conservation funds, a single amount for each parcel is the appropriate method to use. Under this method, the service establishment bylaw states the maximum dollar amount that can be taxed or requisitioned each year and that amount is divided equally across the taxable parcels in the service area.</p> <p>Note that a parcel tax does not rise as property values increase. The maximum amount that can be taxed each year remains the same over time (unless the bylaw includes a provision that the maximum is determined by so many dollars or cents per \$1,000 of taxable assessed value in the service area). In addition, a parcel tax may be significant to a property owner with several separate parcels of land. (To alleviate this issue, a municipality could perhaps waive or reduce the tax for an owner or a regional district could exclude specific parcels from the service area.)</p> <p>The local government must create a parcel tax roll to impose a parcel tax. The roll lists the parcels to be charged and includes the name and address of the owners of each parcel. Once the local government completes the parcel tax roll, they must make it available for public inspection. The local government must form a review panel to consider any complaints about the roll and to authenticate it.</p>
<b>Local Area Service Tax</b>	<p>Municipalities may impose a local area service tax where only part of a municipality will receive a benefit from a service.<sup>18</sup> Property owners may petition for a local area service, or a municipality may impose a service, subject to assent of the electors. Local area service taxes are imposed by way of a parcel or property value tax.</p>
<b>Fees</b>	<p>Both municipalities and regional districts may recover costs on a fee-for-service basis provided the fee is associated with an already established service. For example, instead of imposing a tax on property, a fee could be collected from each household as part of a local government water service (e.g., for a rainwater management program) or from park facility users (e.g., for ecosystem restoration within parks).<sup>19</sup></p>

### CALCULATING THE ANNUAL AMOUNT OF FUNDING

Regardless of the financing mechanism selected, there are several approaches that can be used to figure out how many dollars a particular financing approach could raise and what the total size of the fund would be in each case. This is a complicated exercise.

It is critical to work closely with the local government's chief administrative officer and chief financial officer, who can advise on these matters. Local governments are equipped to calculate the annual amount of funding, to evaluate the options, and to choose the best mechanism for your community or region.



## 6. Understand the Establishment Options

Local governments provide a broad range of services in return for the property taxes levied. Such services can include land use planning, recreation, libraries, fire and rescue, solid waste management, water supply and distribution, and sewage collection and disposal. Other services, such as conservation funds, can also be provided.

The methods by which conservation funds can be established differ for municipalities and regional districts. The purpose of this section is to outline, in general terms, the options that municipalities and regional districts can consider, and to briefly discuss partnering with Aboriginal governments.

Because the process of establishing a service, especially for regional districts, is quite complex, it is essential to rely on local government staff to present the options to their boards or councils and to address all matters related to the legalities involved in setting up a conservation fund service.

### MUNICIPALITIES

The *Community Charter*<sup>20</sup> gives municipalities authority to provide any service that council deems necessary or desirable.<sup>21</sup> A municipal council can establish a conservation fund service to benefit:

- The entire municipality, or
- A portion of the municipality (local area service).

If the conservation fund will benefit and be paid for by the entire municipality, council can choose to authorize the fund by resolution or by bylaw. Elector approval is not required; however, council might want to seek the community's opinion by conducting a vote (perhaps in conjunction with a general local election) or by using another process they deem appropriate. The results of such a process are not binding on the council.

If the conservation fund service will only benefit and be paid for by a portion of the municipality, a bylaw is required to establish a local area service. Council can only adopt such a bylaw if:

- A sufficient petition to set up the local area service is received (strict content requirements apply), and signed by the owners of at least 50% of the parcels representing at least 50% of the assessed value of land and improvements that would be subject to the tax for the conservation fund), or
- The conservation fund local area service is proposed by council initiative and a sufficient petition against the service is not received (same 50%/50% rule as noted above applies), or
- The conservation fund local area service is proposed by council initiative and receives assent of the electors (assent is obtained by voting following the same basic rules as an election).

## REGIONAL DISTRICTS

The *Local Government Act*<sup>22</sup> gives regional districts authority to establish services. A regional district board includes representatives from both electoral areas and municipalities, and can establish a conservation fund service to benefit:

- The entire region (all electoral areas and municipalities), or
- All electoral areas (no municipalities), or
- Some electoral areas and some municipalities (e.g., a subregional service), or
- Portions of one or more electoral areas, or
- Any combination of electoral areas (or portions thereof) and/or municipalities.

In all cases, a regional district conservation fund service must be established by bylaw<sup>23</sup> and approval of the electors is required before the bylaw can be adopted (see section 7 of this guide).

## ABORIGINAL GOVERNMENTS

Aboriginal governments and local governments sometimes partner to deliver shared services; establishing a conservation fund may provide an opportunity for such collaboration.

Many Aboriginal governments in Canada have enacted laws imposing direct taxes within their reserves or settlement lands. The powers for enacting real property tax bylaws are contained in both the *Indian Act*<sup>24</sup> and the *First Nations Fiscal Management Act*.<sup>25</sup> Other taxation powers related to land are set out in the legislation that gives effect to modern treaties, comprehensive land claims, or self-government agreements. (See Fact Sheet - Taxation by Aboriginal Governments.<sup>26</sup>)



## 7. Gain Participating Area Approval to Establish the Fund

As noted earlier, a municipal council has the authority to provide a conservation fund service for the entire municipality, through resolution or bylaw, without elector approval. If a service will only benefit and be paid for by a *portion of the municipality*, a bylaw is required to establish a local area service (see section 6).

However, a *regional district* conservation fund service *must* be established by bylaw, which requires approval of the electors before the bylaw can be adopted. A regional district conservation fund service could include the entire region (all electoral areas and municipalities), or be established as a subregional service, which could include many possible combinations of whole or parts of electoral areas and municipalities.

Elector approval must be obtained from each of the participating areas<sup>28</sup> separately unless the regional district board, by resolution, decides that elector approval is to be obtained for the entire proposed service area. What this means is:

- If approval is obtained *from each participating area separately*, each of those areas is "counted" individually and if the results in even one of the participating areas is no, the service for the entire proposed service area does not go ahead. In this case, the council decides the method of obtaining approval for the municipality, and the regional district board decides the method for the electoral areas.
- If approval is obtained from the entire proposed service area, the participating areas are "counted" or added together as if there was only one. In this case, the regional district board decides the method of obtaining approval for the participating municipalities and electoral areas.

There are a few different processes that a regional district (or a municipality, as applicable) can use to obtain participating area approval. When making their decision, the board (or council) will examine the options as presented by administration, weigh what they deem to be the advantages and disadvantages of each option, and consider the needs and wants of the communities involved.

This section is meant to provide only a brief description of the methods for obtaining participating area approval. The amount of time and the cost associated with conducting the different processes, and other factors that must be considered, will vary depending on the size of the service area being proposed, the public process that the local government wishes to undertake, and any other jurisdictional requirements.

Due to the complexity associated with each of the different methods, it is essential to rely on local government staff to present the options to their board or council and to address all matters related to administering the participating area approval process.

## PETITION FOR ELECTORAL SERVICES

The owners of parcels in an electoral area can sign and submit to the regional district a petition for a service<sup>29</sup> in all or part of that electoral area.

- Only applies in electoral areas or portions thereof.
- The petition must describe the service being proposed, define the service area boundaries, indicate how the service will be paid for, and might include other information required by the regional district board.
- To ensure accuracy of the content, the regional district will likely prepare the petition and send it out to the individual property owners within the proposed service area along with information regarding the service and the petition process.

## Steps to Establish a Regional District Service

The conservation fund as a regional or subregional service must be established by bylaw, and approval of the electors must be obtained. Establishing bylaws must be given three readings and approved by the B.C. Inspector of Municipalities<sup>27</sup> before an elector approval process. Be aware that this can take a considerable amount of time.

The general outline of the conservation fund establishment process is as follows:

1. Determine the participating areas. It is important to do this before the bylaw is drafted and a motion put forward. If not every member municipality or electoral area in the regional district supports the idea of a conservation fund, a smaller initiative may be considered; the service area boundary is established based on areas that show support for the fund.
2. Draft the establishing bylaw.
3. Work with the Inspector of Municipalities to ensure the bylaw is acceptable.
4. Obtain three readings by the regional district board.
5. Submit the draft bylaw to the Inspector of Municipalities for approval.
6. Conduct an elector approval process.
7. Move to adopt the bylaw at the regional district board.

- The owners of all the properties within the service area are given the opportunity to sign a petition.
- For a petition to be sufficient, it must be signed by the owners of at least 50% of the parcels representing at least 50% of the net taxable value of land and improvements within the proposed service area.
- If a sufficient petition is received, the board can authorize consent on behalf of the electoral participating area(s). This is done by the electoral area director(s) consenting in writing to adopt the bylaw.

## ALTERNATIVE APPROVAL PROCESS

Participating area approval for a conservation fund service can be obtained by alternative approval process (AAP)<sup>30</sup> if the maximum amount that can be requisitioned for the service is equivalent to 50¢ (or less) for each \$1,000 of the net taxable value of land and improvements included in the service area.

- Can be used if just electoral areas (or portions thereof) or if both municipalities and electoral areas (or portions of electoral areas) are included in the service area.
- The local government must give public notice of the AAP and provide forms for electors to submit indicating that the local government cannot proceed with the conservation fund service establishment bylaw unless it is approved by an assent vote.
- Only *qualified electors* within the participating areas are eligible to submit elector response forms. The resident and non-resident property elector qualifications are the same as the qualifications to vote at a local government election or assent vote (e.g., Canadian citizen, resident of B.C. for 6 months, resident or property owner in the service area for 3 months).
- If at least 10% of the electors of the participating area or areas (see second bullet above) submit elector response forms, the local government can either abandon the proposed service or conduct an assent vote.

## ASSENT VOTING

Participating area approval for a conservation fund service can be obtained by assent voting<sup>31</sup> (formerly known as a "referendum" or "other voting").

- Can be used if just electoral areas (or portions thereof) or if both municipalities and electoral areas (or portions of electoral areas) are included in the service area.
- An assent vote is conducted in basically the same manner as a local government election, with just a few differences.
- Only qualified electors within the participating areas are eligible to vote. The resident and non-resident property elector qualifications are the same as the qualifications to vote at a local government election (e.g., Canadian citizen, resident of B.C. for 6 months, resident or property owner in the service area for 3 months).
- For the conservation fund service to proceed, at least 50% + 1 of the electors that show up to vote must vote yes. (See the introduction to this section 7 for information on how the votes are counted if participating area approval is obtaining separately for each area or for the entire proposed service area.)
- The results of an assent vote are binding on the regional district board.

## CONSENT ON BEHALF OF A MUNICIPALITY

If the proposed regional district conservation fund service includes a municipality as a participating area, the council can give participating area approval by consenting on behalf of their electors to adoption of the service establishment bylaw.<sup>32</sup> This is done by the council adopting a resolution at an open council meeting and then notifying the regional district board of its consent. What this means is that if a municipal council chooses to give consent on behalf of their electors, an alternative approval process or assent vote is not required for that municipality.



## Conclusion

Conservation funds give local people the opportunity to support local conservation goals. They allow residents a measure of control over the environmental sustainability activities that are designed to benefit their community or region. And they give residents the opportunity to invest in protecting the environment that sustains them, preserving natural treasures and creating a legacy of community health and sustainability.

The case studies that follow provide more detail about the nuts and bolts of conservation funds that have been established already. Feel free to contact the people who are involved with those funds to learn about their experiences. They are eager to support your success.

Since this guide represents experience to date, there will be new developments that are not captured here. Visit the guide web page ([soscp.org/conservationfundguidebc/](http://soscp.org/conservationfundguidebc/)) for additional documents and updates.



# Case Studies

Lake Enid Restoration Project by Wildsight. Supported by Columbia Valley Local Conservation Fund.

## Regional District of East Kootenay

### COLUMBIA VALLEY LOCAL CONSERVATION FUND

#### ESTABLISHMENT PROCESS

The Columbia Valley Local Conservation Fund was the first of its kind established in Canada.

In 2005, Kootenay Conservation Program (KCP, then East Kootenay Conservation Program)—a partnership of conservation organizations, resource industries, educational institutions, First Nations, and government agencies—saw the opportunity to establish conservation funds in Canada similar to funds being established throughout the United States.

At that time, it was unclear whether these types of funds could be established in Canada and, if so, what the available political processes were. KCP completed a basic feasibility study, and also attended a training course in the U.S.

The initial leadership team was the KCP steering committee. Eventually, a sub-committee was struck to explore the opportunity further. The team also sought out and received assistance from elected officials and senior staff within the Regional District of East Kootenay (RDEK) regarding the establishment process.

KCP was able to secure a number of capacity-building grants to develop a strategy, and to fund polling and focus group research. The leadership team used this baseline information to understand local values and priorities, and also to explore willingness to pay for a conservation fund service through a dedicated tax.

KCP conducted polling at two different times during the establishment process, and held several focus groups. This research helped select the fund service area, not only for the Columbia Valley Local Conservation Fund, but also for the Kootenay Lake Local Conservation Fund.

The original goal was to have all municipalities and electoral areas in the RDEK participate in the service; however, the conservation fund idea only received support from the Upper Columbia Valley portion of the RDEK.

The residents who were clear that they wanted the opportunity to vote on the initiative wanted it to happen in the most cost effective way possible. This translated to an assent vote (referendum) being conducted in conjunction with a general election in 2008. Only electors in the service area (Upper Columbia Valley) were eligible to vote on the question of setting up a conservation fund.

After a successful vote, the RDEK board adopted the bylaw to establish the Columbia Valley Local Conservation Fund service in the Upper Columbia Valley portion of the regional district, including the Village of Radium Hot Springs, District of Invermere, Village of Canal Flats, and RDEK electoral areas F and G (which includes the communities of Fairmont Hot Springs, Windermere, Brisco, and Spillimacheen).

Community priorities are reflected in the conservation fund's terms of reference, which list the fund themes as conservation of water, wildlife, habitat, and open space. Focusing on these themes supports the community's desire to preserve the region's rural landscape and associated quality of life.

Property owners in the service area pay a parcel tax of 5¢ per \$1,000 of taxable assessed value, up to a maximum of \$230,000 annually (this works out to about \$20 per parcel).

The RDEK has engaged KCP, through a fee-for-service contract, to administer the grant application and review process. This process draws on the expertise of a volunteer technical review committee to ensure that funded projects meet the fund's terms of reference and other criteria.

The RDEK maintains oversight by reviewing and making final decisions on applications for funding, developing direct contribution agreements between the RDEK and the successful proponents, as well as holding the parcel tax funds to deliver the conservation fund service.

The RDEK has been recognized for establishing the Columbia Valley Local Conservation Fund. In 2013, the initiative was a public sector finalist in the Real Estate Foundation of BC's Land Awards program.

## FUNDED PROJECTS

From 2010 to 2017, the Columbia Valley Local Conservation Fund approved 69 grants totalling \$1.7 million. This local investment has leveraged six times that amount in additional grants. Here are a few projects funded by the RDEK over the past eight years:



**Farmland Advantage agricultural incentive program** by Windermere District Farmers Institute.



**Rehabilitation of Abel Creek** by Lake Windermere District Rod and Gun Club.



**Ecosystem Restoration using prescribed fire** by Nature Conservancy of Canada.



**Columbia Lake - Lot 48 Purchase** by Nature Conservancy of Canada

## Contact

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Shannon Moskal – Corporate Officer, Regional District of East Kootenay  
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*"It is heartening to see our Upper Columbia Valley community willing to invest directly in land conservation and biophysical protection through taxation. The micro projects we are funding are right here in our immediate environs. For most people here that's important. We have a say in and can see what's being done. We can experience and understand it and we can be proud that we said yes to conservation."*

Gerry Wilkie – Director, Regional District of East Kootenay

# Regional District of Central Kootenay

## KOOTENAY LAKE LOCAL CONSERVATION FUND

### ESTABLISHMENT PROCESS

Building on the experience of establishing the Columbia Valley Local Conservation Fund, Kootenay Conservation Program (KCP) led the initiative to establish a conservation fund in the Regional District of Central Kootenay (RDCK). KCP's full steering committee formed the initial leadership team, and RDCK elected officials and senior staff provided assistance on matters related to the establishment process.

Because KCP had polled widely in the Kootenays prior to the establishment of the Columbia Valley Local Conservation Fund, there was some information already available to support the Central Kootenay process.

In addition to widespread polling, the leadership team held six focus groups in 2013. As was the case with the Columbia Valley Local Conservation Fund, this research helped to determine the RDCK fund's service area, as well as offering insight into residents' values, priorities, and willingness to pay for a conservation fund service. Community open houses and roundtables also helped in this regard, as ways to ground truth the public opinion research.

Even with residents' support, it was the elected officials' role to decide whether or not establishment would proceed. In this case, of the areas that indicated support at the public opinion research stage, one municipality opted out, and so the assent vote (referendum) question was posed, on a subregional basis, to voters in three RDCK electoral areas.

The RDCK established the Kootenay Lake Local Conservation Fund after a successful vote in November 2014, which was held in conjunction with the local election in electoral areas A, D, and E. The financing mechanism is a parcel tax of \$15 per parcel per year, which is applied to all parcels (residential, industrial, commercial) in the service area.



**Kootenay Community Bat Project.** Supported by Kootenay Lake Local Conservation Fund.

As participating communities are located on Kootenay Lake, water issues emerged as an important focus. The conservation fund's terms of reference reflect this, listing aquatic systems and conservation of water, wildlife, and habitat as the fund themes.

The RDCK has engaged KCP, through a fee-for-service contract, to administer the grant application and review process. This process draws on the expertise of a volunteer technical review committee to ensure that funded projects meet the fund's terms of reference and effectiveness criteria.

The RDCK maintains oversight by reviewing and making final decisions on applications for funding, developing and holding direct contribution agreements with proponents, and holding the parcel tax monies in a dedicated fund to deliver the conservation fund service.

## FUNDED PROJECTS

From 2016 to 2017, the Kootenay Lake Local Conservation Fund approved 10 grants totalling just over \$108,000. This local investment has leveraged twice that amount in external grants and \$81,000 in in-kind support. Here are a few projects funded by the RDCK over the past two years:



**Kootenay Community Bat Project** by Kootenay Centre for Forest Alternatives and Wildlife Conservation Society of Canada.



**Darkwoods Ecosystem Restoration** by Nature Conservancy of Canada.



**North Kootenay Lake Water Monitoring Project** by Kootenay Centre for Forest Alternatives



**Kootenay Lake Osprey Nest Monitoring Project** by Friends of Kootenay Lake.

### Contact

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*“Community-led conservation based on regional priorities promotes stewardship at the local level. This is a necessary effort. The Kootenay Lake Local Conservation Fund provides a meaningful opportunity for conservation groups to establish projects that are worthwhile and long lasting.”*

Ramona Faust – Director, Regional District of Central Kootenay

## Regional District of Okanagan-Similkameen

### SOUTH OKANAGAN CONSERVATION FUND

#### ESTABLISHMENT PROCESS

The South Okanagan Similkameen Conservation Program (SOSCP)—a partnership of 50 government and non-government organizations working towards shared environmental conservation goals—proposed the establishment of a conservation fund for the South Okanagan region and worked with local government partners to explore and advance the concept. SOSCP was aware of the success of the conservation funds established in the Kootenays, and saw this as a significant tool to address the region's capacity for environmental and biodiversity protection.

SOSCP assembled a leadership team from within its partnership, a team that included local government staff at the direction of the Regional District of Okanagan-Similkameen (RDOS) board. SOSCP conducted both focus groups and polls, and engaged the community in other ways to determine priorities and gauge support for the proposed conservation fund.

Elected officials decided whether or not their electoral area or municipality was interested in participating in the environmental conservation service. In the end, it was decided that the bylaw would be proposed as a subregional service for 5 of the 8 electoral areas and 3 of the 6 municipalities within the region. Public approval for the bylaw was sought through alternative approval process conducted for the entire proposed service area.



The alternative approval process was concluded with less than one percent of eligible voters in opposition to the proposed bylaw. In December 2016, the RDOS board approved the environmental conservation service bylaw that established the South Okanagan Conservation Fund.

South Okanagan property owners pay a property value tax of 3.72¢ per \$1,000 of net taxable value of land and improvements, to a maximum of \$450,000 annually, in the communities of Summerland, Penticton, and Oliver, and rural RDOS electoral areas A, C, D, E, and F.

The conservation fund's purpose, as specified in the terms of reference, is to provide financial support for projects that will contribute to the conservation, protection, enhancement, and restoration of South Okanagan valuable natural areas, including water and land based ecosystems, wildlife, and habitat.



The fund is held and overseen by the RDOS in a dedicated account earmarked for conservation only. Community groups and organizations may apply to the conservation fund to support their environmental conservation projects.

SOSCP has been engaged to assist with the administration of the granting process through contract and fee for service, and a volunteer committee of technical experts with clearly established criteria has been put in place to ensure that projects are technically sound and contribute to important conservation goals.

The RDOS maintains oversight by reviewing and making final decisions on applications for funding, developing and holding direct contribution agreements with proponents, and holding the parcel tax monies in a dedicated fund to deliver the environmental conservation service.

In early 2017, the RDOS was recognized with a peer-nominated award of excellence for establishing the South Okanagan Conservation Fund by a working group of B.C. local governments and the B.C. Ministry of Environment, whose members have been collaborating to enhance the protection of species and habitats at risk.

The first round of applications to the fund opened in September 2017.

### **Contact**

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*"The creation of a regional conservation fund was a major accomplishment for the RDOS Board. This fund will allow for the preservation of land and species at risk through opportunities of land purchases and/or environmental conservation projects through joint partnerships."*

Karla Kozakevich – Board Chair, Regional District of Okanagan-Similkameen

## Parkland Acquisition Funds

Common features of parkland acquisition funds with environmental conservation as a primary objective include:

- The funds meet conservation objectives laid out in local government parks and greenways plans (i.e., they fit into a larger context or strategy).
- Often, they are intended to be temporary measures to raise money to establish new parks or expand existing parks.
- They may be part of an overarching strategy where the local government plans to use property value taxes or requisitions in concert with government borrowing and existing budgets, as well as co-funding land purchases with non-profits and other levels of government.

The following are examples of successful, long-standing parkland acquisition funds in different regions of B.C.

### CAPITAL REGIONAL DISTRICT

In 1997, the Capital Regional District (CRD) board of directors adopted the Regional Green/Blue Spaces Strategy<sup>33</sup> in order to maintain, conserve, and restore land and water areas on public and private land in the region. The strategy includes areas with a variety of values, including ecological, aesthetic, renewable resource, outdoor recreation, and greenway. It refers explicitly to safeguarding at-risk species and sensitive ecosystems.



In 2012, the board adopted the CRD Regional Parks 2012-2021 Strategic Plan,<sup>34</sup> which replaced the earlier Regional Parks Master Plan of 2000. The strategic plan describes the vision and purpose for CRD Parks and identifies areas of park potential for land acquisition. The general areas identified in the strategic plan are further assessed, and priorities for land acquisition for the park system are set out in a land acquisition strategy, which is approved by the CRD board. The land acquisition strategy includes sufficient flexibility that priorities may be changed with the approval of the board if an unforeseen opportunity to acquire a high value parcel of land arises during the term of the strategy.

The Regional Park Land Acquisition Fund<sup>35</sup> was originally created for a period of ten years: 2000 to 2009. Its goals are to purchase priority conservation land for regional parks and trails as identified in the above-mentioned plans. Due to its success, the fund was extended for ten more years, to 2019.

In 2000, the cost per average residential household was a flat parcel property tax levy of \$10. Over ten years, it became obvious that there was a disadvantage to the fixed \$10 approach, in that land prices had increased greatly and the fund had lost buying power.

In order to maintain the benefits of the fund, the CRD board approved an increase in the levy, starting at a rate of \$12 per average residential household assessment, increasing by \$2 per year to maximum of \$20 in 2014, and then remaining at this rate until 2019.

Revenues from the levy are now approximately \$3.73 million per year. These funds are occasionally supplemented by revenues from the sale of land determined to be surplus to regional park requirements. CRD bylaws require that revenues from the sale of land dedicated as a regional park must be used to fund further land acquisition for parks.

Since the establishment of the Land Acquisition Fund, the CRD, with its partners, has acquired 4,582 hectares of land totaling approximately \$51.8 million. Of that total, the CRD has contributed approximately \$36.7 million (70%) and partners approximately \$15 million (30%). Partner donations have come from land conservancies, the governments of Canada and B.C., individuals, and businesses.

*“The lands acquired for the regional parks and trails system through the land acquisition fund contribute significantly to the environmental, economic, and social sustainability of the region. Regional parks are a defining ingredient in the quality of life for CRD residents, and the value of these areas will increase over time as our population continues to grow.”*

Mike Hicks – Chair, CRD Regional Parks Committee

## REGIONAL DISTRICT OF CENTRAL OKANAGAN

The Regional District of Central Okanagan's (RDCO) parks and conservation land acquisition program focuses on securing parks and greenways that are "regionally significant," representing a complete range of Central Okanagan ecosystems and offering outdoor opportunities that attract people from across the region.

The program is supported by the official regional parks plan (2000),<sup>36</sup> the 2006 FUTUREOK Sustainable Region Initiative,<sup>37</sup> the 2008-2020 Regional Parks and Greenways Plan,<sup>38</sup> A Central Okanagan Regional Parks Legacy Program: Ten Year Park Land Acquisition Strategy (2007-2017),<sup>39</sup> and the work of key federal, provincial, First Nation, conservation, and private stakeholders.

The RDCO's ten-year land acquisition strategy got underway in 2007 with the establishment of the Regional Park Legacy Reserve Fund.<sup>40</sup> At that time, the RDCO board considered an annual requisition of 2¢ per \$1,000 of assessed property value to be in line with residents' ability to pay for future parkland acquisitions, and the 2007-2011 annual budget bylaw included this tax.



The following spring, the board reviewed the results of a statistically valid survey about Central Okanagan residents' interest in and ability to fund such a program. Results showed that over 60% of residents supported a tax increase of approximately \$36 per household to finance the new fund. This was about three times the legacy reserve fund requisition initiated in 2007 (i.e., 7¢ vs. 2¢ per \$1,000). And so, in April of 2008 the RDCO board unanimously voted to support the implementation of a Regional Park Land Reserve Fund in the 2009-2013 budget period. This was to be a special tax requisition over five years to build the fund in order to leverage the purchase and protection of important properties for the regional park system.

The acquisition fund program was to commence in the spring of 2009. However, in the fall of 2008, plans were influenced by a downturn in the economy, and the regional district board decided to cut the program in half, making the requisition 3.5¢ per \$1,000 of assessed property value.

In 2014, when the economy had improved, the annual property tax requisition associated with the Park Land Reserve Fund program was increased to the level that had been initially supported in 2008 (7¢ per \$1,000 of assessed property value), and included in the 2014-2018 RDCO annual budget.

Even with the effects of economic variability, these parkland funds have contributed \$23.5 million to the RDCO's parkland acquisition program over the past ten years, and a total of 736 hectares of parkland have been purchased.

Along with land donations and Crown tenure agreements valued at \$11.3 million, almost 1,011 additional hectares of land worth over \$33.4 million has been added to the regional park system, including geographically, ecologically, and culturally significant lands.

*"We've had incredible support for expanding our regional park system in the Central Okanagan, protecting sensitive ecosystems and species. Since 2008, our parks legacy funds have helped us acquire more than 730 hectares of significant land that may have been lost forever."*

Gail Given – Board Chair, Regional District of Central Okanagan

# Glossary

**Alternative Approval Process (AAP)** means the process for obtaining approval of the electors established by section 86 of the *Community Charter*.

**Assent Voting** (formerly known as "referendum" or "other voting") is a process to receive the assent of the electors on questions that municipal councils and regional boards have the power to act. An assent vote may be held at the same time as local elections or at other times. The results of an assent vote are binding (which means the council or board must follow the will of the electors).

**Assessment** in B.C. is the market value of real property as determined by B.C. Assessment, a Crown corporation, in accordance with the *Assessment Act*.<sup>41</sup> Assessors assign a parcel to a property class, determine the market value of land and improvements, and enter those values on an annual Assessment Roll. Local government then uses the assessed values to determine property value taxes.

**Bylaws** are laws enacted by locally elected officials to govern and control the actions and services of municipalities, regional districts, and the Islands Trust.

**Community Charter** is B.C. legislation that provides all municipalities with a framework for their core areas of authority, including broad powers, taxation, financial management, procedures, and bylaw enforcement.

**Local Government** in B.C. can mean either the council of a municipality, the board of a regional district, or a local trust committee of the Islands Trust.

**Local Government Act** is the primary legislation for regional districts and improvement districts, and certain municipal provisions remain in effect for matters not covered by the *Community Charter*.

**Parcel** is a piece of property of any size. Each parcel receives a separate assessment and tax notice.

**Parcel Tax** is a tax imposed on property owners for services that are only provided to them. For example, the group may be the entire regional district, or part or all of an electoral area.

**Participating Areas** are the electoral areas and/or municipalities that are included in a regional district service.

**Property Class** means a property class under the *Assessment Act*.<sup>42</sup> Most municipalities assess each property class (e.g., residential, utilities, business, farm) with a different rate of taxation.

**Property Value Taxes** are taxes under Part 7 - Municipal Revenue of the *Community Charter*. Every property owner in B.C. contributes to the funding of local government. Each year, property owners are sent two notices: an assessment notice and a tax notice. Both notices reflect the process through which each property owner's share of the local tax base is calculated. Calculation of property value tax is a two-step process. The first step is to set the value of the property (the "assessed value"). The second step is to apply a tax rate to the assessed value of the property to determine the property taxes payable. The amount of tax a property owner will pay is calculated as: Assessed Value x Tax Rate = Property Value Tax Payable.

**Service Area** means the defined area in which a service is provided.

**Tax Rate** is the amount (e.g., 30¢ or \$1.10) set to be taxed on every \$1,000 of assessed value of land and improvements, land only, or improvements only. The tax rate was called the mill rate in years past.

**Variable Tax Rate** is system by which individual tax rates for a specific taxation year are determined and imposed for each property class to which the system applies.

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