



WESTBANK FIRST NATION GOVERNMENT

# Community Economic Development Plan

December 2010



*Community. Leadership. Pride.*



*Community. Leadership. Pride.*


### **Letter of Endorsement**

December 2010

It is with great pleasure and enthusiasm that we, Chief and Council of Westbank First Nation, adopt the WFN Economic Development Plan with the belief that the Plan will aid in the continuance of a healthy, environmentally sustainable and dynamic economy and further WFN efforts to build an even stronger community. We also recognize that a vibrant economy requires planning and management.

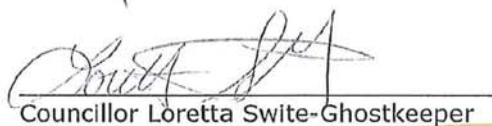
The WFN Economic Development Commission was established to, among other things, coordinate an overall community economic development vision and prepare a long-term economic development strategy for WFN. The Community Economic Development Plan is the product of their efforts along with input from senior WFN Staff, Chief and Council and the WFN Membership. The Plan, which took a year to complete, was created through a series of focus group meetings designed to engage all segments of our WFN community in discussion on what constitutes a healthy, environmentally sustainable and dynamic economy. Participation in this process from diverse segments of our community was welcomed, recognizing that each of us has a valuable role to play. With a commitment to doing our part and continuing to work toward a stronger and healthier WFN community, we will strive to take a consistent and cohesive approach to our economy for years to come.

Though some of the administrative details outlined in the Plan will be subject to further Membership input, and legal and financial advice, we support the use of this Plan as a guiding document and tool for decision-making. We also acknowledge and encourage an ongoing dialogue: a necessity in creating a healthy, environmentally sustainable and dynamic economy for the benefit of the WFN Membership, the overall economic community, and the security of future generations.

  
Chief Robert Louie

  
Councillor Mike De Guevara

  
Councillor Lorrie Hogaboam

  
Councillor Loretta Swite-Ghostkeeper

  
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## ACKNOWLEDGEMENTS

**T**his economic development strategy was commissioned by the Westbank First Nation under the guidance from Jayne Fosbery, Economic Development Officer for the Westbank First Nation, and the WFN Economic Development Commission. The consulting team acknowledges the significant contributions of those who attended the focus groups and community planning session, completed the community survey, and participated in one-on-one interviews.

The strategy was written by Victor Cumming, with research, layout and design provided by Karol Hansma, both with Westcoast CED Consulting Ltd. (Vernon, BC). Peak Solutions Inc. (Kamloops, BC) assisted with the updating of the WFN Economic Profile.





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## 1. ROLE OF THE ECONOMIC STRATEGY

In 2002-03, Westbank First Nation (WFN) prepared a comprehensive economic development strategy and established the associated Economic Development Commission (EDC). It then revised the strategy for the EDC in 2005. Since 2005, WFN has made a number of structural and legal adjustments that affect how WFN-owned enterprises are managed and operated. They have also adjusted the economic development staff roles. In 2008, WFN began working on a comprehensive community plan with a long term economic development strategy as a cornerstone. To this end, WFN is preparing a Five-year Community Economic Development Plan to reconfirm and/or adjust the 2003 economic vision, functions, goals and strategies for WFN.

The economic environment within which the economic strategy is being prepared is complex as WFN is a self-governing First Nation, with 679 members and close to 9000 non-members residing on their lands. It also has over 300 registered businesses that include big box stores as well as self-employed individuals whose interests are communicated by the WFN-EDC. A key value of WFN is self sufficiency for its members and government.

The major deliverables of the strategy development process are:

- a three to five year Economic Development Strategy with goals, objectives, strategies (including recommendations on sector targets and marketing), partnerships and action plans;
- support of socio-economic and sectoral analyses,
- a comprehensive community consultation process;
- a final comprehensive report with a user-friendly executive summary.

The Report provides:

- an introduction to WFN, its location and lands;
- the constitutional and policy mandate for economic development activity;
- a summary of the current socio-economic situation based on the larger 2008 Economic Profile which has been updated to 2009 where data are available (available under separate cover);
- a description of the structure of current economic development activities;
- an analysis of WFN's human resources (obtained through the proxy method of a significant random sample of adult members, 18-64 years of age);
- the provincial and regional economic context for the years 2010 through to 2013;
- a summary of the expected economic activity for the WFN economy, including new building and on-site infrastructure construction, associated off-site infrastructure construction, key activities planned for WFN enterprises and WFN staffing changes;
- an updated vision statement for economic development;
- recommended adjustments to WFN economic development organizational structure, based on North American information and experience;
- draft project and investment selection criteria for WFN; and,
- economic development goals, strategies, activities, costs and implementation schedule.



This document's role is to provide Chief and Council with a summary of the current situation, recommended adjustments to the structure and system of how WFN deals with economic development issues, a set of draft project and investment criteria and decision-making process, and Board goals with strategies, activities, and targets.

## 1.1 STRATEGY PREPARATION PROCESS

Preparation of the strategy started in December 2009. The literature review was completed in January 2010 and used WFN internal documents, EDC minutes, "new" socio-economic data to update the 2008 profile, and current provincial and regional economic projection information. The Human Resource Survey required two months to collect 301 completed forms out of a potential of 444 adults between 18 and 64 years of age. Appendix 1 contains a list of references used throughout the strategy process.

The economic vision was prepared with input from senior WFN staff, Chief and Council based on individual interviews, the EDC, and a public input session. The potential functions, mandates, and mission for economic development have been prepared based on key literature, and discussions with senior WFN staff and the EDC. Also, six sector focus groups meetings that identified potential opportunities for WFN took place. Figure 1 shows the strategy preparation process.

Figure 1: WFN Economic Development Strategy Process during 2009-10

	DEC/JAN	FEB	MAR	APR
Project Initiation	♦			
Literature Review	↔			
Socio-Economic Base Review & Analysis	↔			
Client Meeting #2		♦		
Assessment of Human Resources		↔	↔	↔
Prep. - Economic Vision Draft		↔		
Mission/Mandates – Econ. Dev. Functions		↔		
Focus Groups			↔	
Key Informant Interviews			↔	
Strategic Planning Workshop Report			↔	
Strategic Planning Workshop – Membership			♦	
Strategic Planning Workshop – Commission			♦	
Prepare Draft Strategy			↔	↔
Client Meeting #3				♦
Presentation of Draft Strategy to Council				♦
Final Draft Document				↔

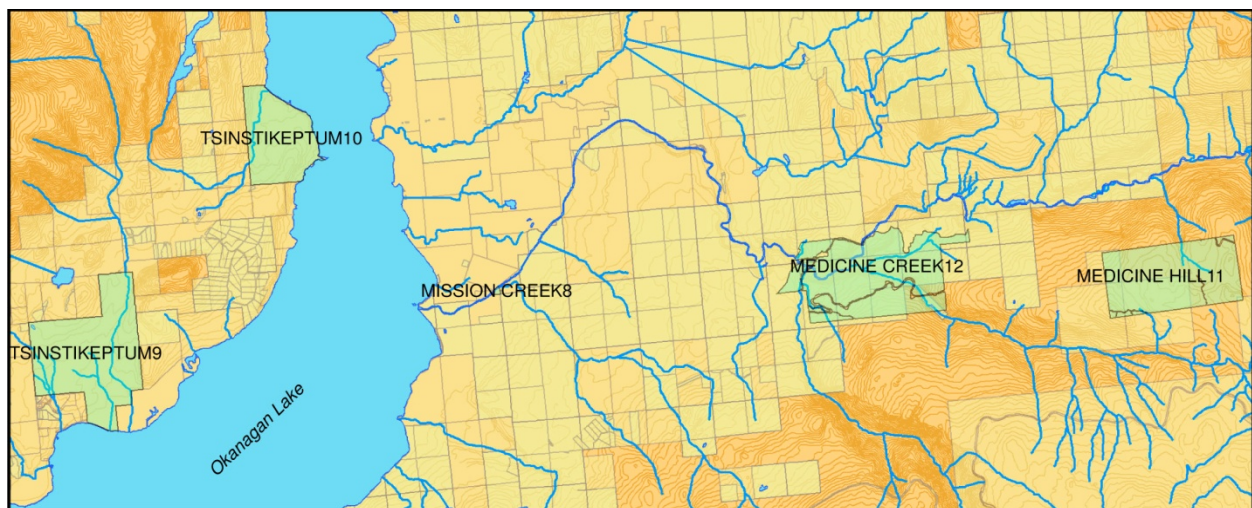




## 2. INTRODUCTION TO WESTBANK FIRST NATION

WFN is situated in the Okanagan valley on the shores of Okanagan Lake in south central British Columbia and is one of seven Aboriginal communities that belong to the Okanagan Nation. There are 679 members<sup>1</sup> of the WFN Nation with 389<sup>2</sup> living on WFN lands alongside approximately 9,000 non-member residents (2008 estimate). The WFN has a land base, on five separate land parcels, totalling 5,306 acres, all of which are located within the Central Okanagan Regional District (CORD)—population 162,276 in 2006. The two populated reserves border the west side of Okanagan Lake beside the new municipality of the District of West Kelowna (DWK) (population 27,095 in 2006). They are bisected by Highway 97 and are directly across the Lake Okanagan bridge from the City of Kelowna (population 106,707 in 2006) one of the fastest growing cities in Canada. The remaining three reserves (two large and one very small, see Map 1), located on the east side of Okanagan Lake in the Kelowna area, are unpopulated and undeveloped.

Map 1: WFN Lands<sup>3</sup>



The WFN reserves were initially part of the Okanagan Indian Band, located near Vernon, BC until the 1960s, when Westbank separated from the Okanagan Indian Band to become WFN. During the early 1900s, approximately 80%, of WFN reserve lands, were granted by Indian and Northern Affairs Canada (INAC) to individual WFN members under Certificates of Possession (CP).

<sup>1</sup> Westbank First Nation. Our People – By ON-OFF Reserve. Produced by AIS: Aboriginal Information Systems, February 5, 2010.

<sup>2</sup> Ibid.

<sup>3</sup> Westbank First Nation Community Profile, <http://www.wfn.ca/pdf/WFN%20General.pdf>.

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Even though the area experienced rapid growth, little development took place on WFN lands. In 1982, a major specific land claim was settled for lands that were taken away from Westbank reserves in the early 1900s, and negotiations were finalized to offset reserve lands that were taken to widen Highway 97. The major specific land settlement greatly expanded the WFN land base.

During the 1990s, WFN began seeking self-government through various avenues. After more than a decade of negotiations and community consultations, the *Westbank First Nation Self-Government Act* became law in 2004 and the *Westbank First Nation Constitution* was ratified the following year. WFN has implemented one of the most comprehensive sets of community laws in Canada to cover the development and regulation of reserve lands, with all persons residing or conducting business on reserve lands subject to WFN laws. Land use is guided by the *WFN Land Use Law*, which sets out a comprehensive land use plan, zoning, procedures for variance, and other matters.

It is into this context of WFN being situated in mainly urban or adjacent to urban lands, populated by a relatively small number of WFN members and a very large non-member population in one of the fastest growing regions in BC that economic development issues are placed. In addition, the large percentage of CP lands on the two populated reserves puts most current land development (and there has been very significant recent land development) in the hands of individuals. Also, full land planning and zoning for land use on reserve has only recently emerged for WFN (2007).



### 3. MANDATE FOR ECONOMIC DEVELOPMENT

Under the *Westbank First Nation Self-Government Agreement* (2004), WFN has all the rights, powers, and privileges of a natural person, which include the capacity to enter into agreements and contracts; acquire, hold or dispose of property; and to hold, spend, invest, or borrow money—all these things are key factors in economic development.<sup>4</sup> The agreement also gives WFN jurisdiction over a number of key areas that are the basis for economic development, including:

- the management, administration, governance, control, and regulation of landlord and tenant matters on WFN land;
- renewable resources, including their protection, conservation, management, development, and disposition;
- agriculture; and
- the licensing and regulations of businesses.

These jurisdictions help give WFN control over its economic destiny.

The *Westbank First Nation Self-Government Agreement* sets out the powers that form the basis of building a healthy economy, and the *Westbank First Nation Constitution* of 2005<sup>5</sup> (with amendments in 2007) gives Chief and Council a mandate for social and economic development. Section 3 of the Constitution sets out the principles for preserving land, resources, and culture for future generations and states:

“Westbank shall work to promote a healthy and prosperous future to ensure the continued existence of Westbank as a strong political, social, and cultural community.”

Amendments to the *Constitution Land Rules* in 2007 also give members with privately owned CPs the right to mortgage their lands or residence to generate capital. This was designed to give WFN members the ability to create opportunities for economic self-sufficiency.<sup>6</sup>

This mandate for combined and interlinked social and economic development based on sound environmental and cultural practices is further inscribed in the *Draft Community Plan*<sup>7</sup> on page 2:

One of the key themes of the community plan is the need to integrate social, economic and environmental objectives into decision making processes in order that high standards of living, social harmony, environmental quality and cultural heritage of the Syilx can be maintained through the generations.”

<sup>4</sup> Westbank First Nation Self-government Agreement. 2004. [http://www.wfn.ca/pdf/sga\\_final.pdf](http://www.wfn.ca/pdf/sga_final.pdf)

<sup>5</sup> The Westbank First Nation Constitution [http://www.wfn.ca/pdf/070719wfn\\_constitution\\_revision\\_final.pdf](http://www.wfn.ca/pdf/070719wfn_constitution_revision_final.pdf)

<sup>6</sup> The Westbank First Nation Community Plan – Draft September 2009

<sup>7</sup> The Westbank First Nation Community Plan – Draft September 2009

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This notion of well-being is further described in 3.1.1D (and repeated as 6.2.1B) which states:

“Ensure that the well-being and overall standard of living of, member and non-member, residents living on WFN Lands are a priority in the creation and planning of laws and policies.”

The complete Section 4 of the *Draft Community Plan* entitled “Economy: Spring Salmon” is devoted to describing the role of Community Economic Development (CED). This role ranges across the local economic development spectrum, from WFN-operated businesses, to assisting member entrepreneurs and external private investors, to establishing joint ventures with other governments. The purposes of economic development (as per the *Draft Community Plan*) are wealth generation for members, financial prosperity for the Nation and government, and wealth distribution that assures all members have an opportunity to benefit.

The purposes of CED are interlocked with governance as stated in Section 3.1.1H, which says:

“Westbank First Nation shall work to promote a healthy and prosperous future to ensure the continued existence of WFN...” This is echoed in Section 5.1.1F which states one of the policies as: “Ensure that any leasing of WFN communally held reserve lands result in a long-term financial return and economic opportunity for WFN.” Another relevant policy as stated in Section 5.3.1F states a goal is to “promote the creation of resource related jobs through responsible harvesting and management practises.” In Section 6.4.1B, the importance of education in economic development is stated as to “ensure educational opportunities for members to meet future needs in WFN government, administration, community services and businesses and other affiliates.”

The *WFN Self-Government Act*, the *WFN Constitution*, and the *Draft Community Plan* create ample breadth and depth of mandate to far outstrip WFN's current resource allocations to economic development.

In 2003, the WFN-EDC Business Plan identified the need for an Economic Development Commission for WFN lands. With the support of Council, the Commission was formed in April 2004 with a mandate to create a Charter document and strategic plan to guide and direct the WFN economic development efforts.

The Charter establishes the Westbank First Nation Economic Development Commission and sets out the duties and responsibilities of that Commission. The Commission's mission is to:

“...assist and facilitate Westbank First Nation Council and the Westbank First Nation Economic Community involving Westbank First Nation members, community members and lessees in creating a healthy, environmentally sustainable and dynamic economy on Westbank First Nation Lands, based on the value of economic self-reliance. The Commission will show respect for the heritage and cultural values of the Okanagan people.”<sup>8</sup>

As set out in the Charter, the members of the Commission must apply the values of respect, integrity, responsiveness, trustworthiness, and cultural sensitivity to their roles. Or: must embrace the values... in their roles.

As established in the revised *Economic Development Commission Strategic Plan* created in 2005, the Guiding Principles of the Commission are to:

- 1) build capacity with the members of the Westbank First Nation;
- 2) protect land and resources for future generations; and,
- 3) support initiatives based on business rationale.

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<sup>8</sup> Westbank First Nation Policy Manual (BCR 14/12/09), Economic Development Commission Charter page 5.



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The *WFN Strategic Plan for Government Operations 2008-2013*, approved by Council, articulates the **goal** for the Economic Development Department as:

“Increase participation and involvement in, and understanding of, the WFN economic community.”

The Council’s objectives for WFN’s Economic Development Department (EDD) are to:

- Expand and diversify the tax base and create a climate that supports business;
- Communicate employment and business opportunities to the Membership;
- Create a climate within the WFN economic community that fosters high value employment opportunities for the membership; and,
- Foster good relations with developers, financiers, and other third parties with respect to development opportunities.



## 4. CURRENT SOCIO-ECONOMIC SITUATION—SUMMARY

This is the summary of the current WFN socio-economic situation, which is presented in full in the *Westbank First Nation 2008 Economic Profile Updated March 2010* and available under separate cover.<sup>9</sup>

### 4.1 GEOGRAPHY

WFN reserves are situated adjacent to Kelowna on the east side of Okanagan Lake and intermixed with the District of West Kelowna on the west side of Okanagan Lake (See map on page 3). The two heavily inhabited reserves (980.8 hectares) are on the west side of Okanagan Lake both with quality lake frontage. There are two uninhabited large reserves (1178.2 hectares) on the east side of Kelowna overlook the city and one very small reserve (two hectares) is in the city. New reserve lands are being established adjacent to the current west side reserves through mechanisms which include purchases and replacement lands. WFN is surrounded by fast-growing urban and peri-urban areas and open natural areas are quickly being replaced by developed landscapes.

WFN's traditional area is part of the Okanagan Nation territory, which extends north and south of the Canada/US border.

### 4.2 POPULATION

The Band membership of 679 is split between those who live on (389 – 56.9%) and those who live off (287 – 43.1%) reserve. The on-reserve self-identified Aboriginal population was 810 (2006 Census) meaning there are twice as many non-WFN member Aboriginals as WFN members living on the reserves. The large number of non-Aboriginal people living on-reserve (6207-810=5397 in 2006) in homes on leased land dwarfs the population of Aboriginals and more so the WFN members. The population of sub-region surrounding WFN, the Central Okanagan, grew by a full 9.8% between 2001 and 2006 (147,739 to 162,276) placing WFN in a fast growing region.

WFN members are evenly distributed across all age groups with 30.6% under 20 years of age (compared to 22.3% for CORD as a whole and 38.2% for Aboriginals living on WFN reserves). There are almost twice as many members aged 50-59 as aged 60-69, meaning there most likely will be far more elderly WFN members in next decade than in the current one.

Only 8.5% of Aboriginals on WFN reserves have knowledge of Aboriginal language(s) with no one indicating that their Aboriginal language was most often spoken at home. The 2006 census indicated that there were more than twice as many divorced Aboriginal women (21.8%) as divorced Aboriginal men (9.1%) living on reserve.

<sup>9</sup> Kettle Valley Research. *Westbank First Nation 2008 Economic Profile*, November 2008 (updated March 2010 with 2009 data where available by Westcoast CED Consulting Ltd. with assistance from Peak Solutions Inc.). 45 pps.

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### 4.3 EDUCATION

In the 2006 Census, 26% of those living on WFN lands indicated they did not have a high school diploma (compared to 19.9 % for BC as a whole) and 30% indicated that a high school diploma was their highest level of formal education (compared to 27.9% for BC as a whole).

### 4.4 INCOME

The only income statistics are for self identified Aboriginals who chose to answer the income question on the census. The average income for Aboriginals living on WFN lands was \$18,019 which is higher than Aboriginals in general in BC at \$15,836. Those living on WFN lands have a higher percentage (60.3%) of low incomes (under \$25,000/year) compared to CORD as a whole (44.6%). There are also significantly fewer (13.7%) with higher incomes (\$45,000 annually and above) as compared to CORD as a whole (24.7%). The median income for households was substantially less than BC as a whole, the median income was up with a similar increase as the province as whole between 2001 and 2006. However, median income increased between 2001 and 2006 at the same rate as BC as a whole.

### 4.5 HOUSEHOLD CHARACTERISTICS

16.5% of households on WFN lands have children, as compared to 26.3% provincially. The household size on reserve is smaller (2.2 persons) than BC as a whole (2.4 persons). There is a higher percentage of two person households on WFN lands than in BC in general (48.3% compared to 40.6%) and a full 91.1% of all private dwellings on reserve are owned with only 8.5% rented. There were no rental apartments on WFN lands in 2006. 51.4% of all WFN dwellings are classified as "other dwellings" which usually means mobile homes. Of those that self identified as Aboriginal, 45.2% live in dwellings classified as "other".

### 4.6 LABOUR FORCE (2006 DATA)

The participation rate was lower (54.9%) for all people living on WFN lands than Aboriginals in the province as a whole (65.6%), yet unemployment rate was slightly lower at 5.7% as compared to BC at 6%. The participation rate (71.4%) and employment rate (66.3%) for Aboriginals on WFN lands were much higher than for Aboriginals in the province in general at 65% and 55.3% respectively. Unemployment rates were also much lower for Aboriginals on WFN lands (8.6%) than Aboriginals in the province in general at 15%. The higher participation and employment rates are not surprising given the availability of jobs during the boom in the Central Okanagan economy in 2005, 2006, and 2007 fuelled by the construction industry. The combination of low cost housing on WFN lands and the relatively high wages for unskilled, semi-skilled, and skilled workers may have made it easier to get a job. Unemployment rates for males living on WFN lands were exceptionally low at 5.2%, which reinforces this. There may have also been more retired aboriginal people living on WFN lands, which would lower the participation rates.

Residents on WFN lands worked across all sectors of the economy, showing a diversity of skills and interests. There were twice the as many working in the construction industry (14.5% as compared to 7.6% provincially) and the rate was more than one third higher in the retail industry (15.7% as compared to 11.4%) reflecting the business mix on reserve. The WFN rate was almost 2% more for people working in the health care and social service sectors than the provincial rate and 2% less in the manufacturing sector. Employment in educational services was less than half the provincial average. Aboriginals on WFN lands were more than twice as likely to be in the construction industry, or health care and social services than Aboriginals in BC in general (20.3% compared to 9.9% for construction and 18.8% compared to 9.5% for health care and social services). Aboriginals living on WFN lands had a significantly lower percentage of employment in retail (30% less), business services (38% less), and educational services (26% less) than Aboriginals in the province. And, not surprisingly, they had many

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more employed (2.5 times the provincial average) in finance and real estate, matching the boom in on and off-reserve real estate development in the region.

In general, people living on WFN lands had occupations that were substantially higher proportion in sales and service occupations than BC as whole, as were trades, transport and equipment operators. They were less likely to be employed in management, social science, education and government, health occupations, natural and applied sciences and art, culture and recreation than residents of BC as a whole. When looking at classes of workers (employed, self employed, incorporated), Aboriginals on WFN lands are half as likely to be self employed and incorporated as other workers in CORD, and even less likely to have employees. The percentage of workers that are self employed and unincorporated is about the same as CORD in general.

It is critical to remember that there was a rapid increase in the WFN labour force between 2001 and 2006 (1,315 to 2,910). Most residents of WFN lands work in Kelowna while a large portion of the remainder works in Electoral Area J which, after 2006, became the District of West Kelowna (DWK). Given the large number of mobile home units on WFN lands (1430) and people consistently working across local government boundaries, WFN provides key low cost housing to the sub-regional open economy of CORD.

#### **4.7 LAND AND IMPROVEMENTS—VALUE AND TAXATION**

The assessed value of properties on WFN lands quadrupled between 1998 and 2009 (\$264.4 million to \$1,166 million), reflecting the massive rate of development and dramatic increase in the value of WFN buildings and lands. The value of building permits issued since the enhanced legal foundation for WFN lands was established in 2004 increased dramatically from \$9.9 million in 2005 to \$53.1 million in 2006, even holding at \$32.6 million in 2009 during the regional, provincial, national, and international recession. The level of development far outstripped Peachland, Lake Country, and West Kelowna on a relative basis (population and land area). Local taxation rates across the Central Okanagan are similar to the rates charged by WFN, which means a relatively even playing field for industrial, commercial and residential properties.

#### **4.8 KEY CONCLUSIONS WITH IMPLICATIONS FOR ECONOMIC STRATEGIES**

The west side reserves will add land and will increasingly be surrounded by fully developed urban areas. There are more non-WFN member Aboriginals living on the reserves than WFN members. There is a higher percentage (one third more) of Aboriginal youth on the reserves than in the Central Okanagan. The number of WFN elders will double in the next decade. The non-Aboriginal population on-reserve dwarfs the Aboriginal population. There are more people living on-reserve that have lower education levels than in CORD.

There is a higher percentage of individuals living on the reserve that have low incomes and a lower percentage that have high incomes than in CORD in general. Yet the Aboriginals living on-reserve have a higher average income than Aboriginals in BC. Most households' on-reserve have no children (83.5%) and half of all dwellings are mobile homes. In 2006, there was low unemployment for Aboriginals and they worked both on and off-reserve with large numbers in construction, health and social services. With the near full employment, the percentage of Aboriginals living on WFN lands working in retail were substantially less than the province as a whole as Aboriginals were more attracted to construction and other higher paying jobs. The percentage of self employed Aboriginals that are incorporated who live on WFN lands is half that of CORD but about the same for unincorporated self employed. The growth of development on WFN lands has been unparalleled in any of the surrounding municipalities on a per capita or land area basis. Municipal property tax rates are about the same as in adjacent jurisdictions.



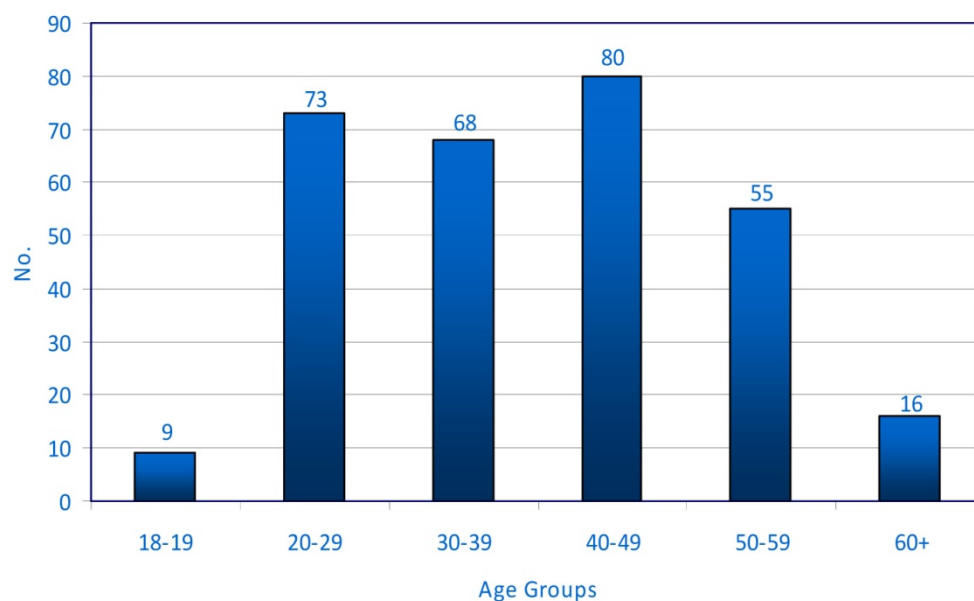


## 5. HUMAN RESOURCE ANALYSIS

The economy of a region is consistently built on the backs of the people of the region. Therefore, it is critical to clarify the current level of human capacity of WFN members for future community economic development. To do this, a significant random sample human resource survey<sup>10</sup> of WFN adult members was implemented. A list of all adult WFN members, ages 18 to 64, was created using the Aboriginal Information System (AIS)<sup>11</sup>. The total potential population for the survey was 444. The random sample was generated using Stat Trek random number generator on-line.<sup>12</sup>

There were 301 surveys completed out of a possible 444 members. The proxy method of surveying was used based on a significant random sampling of WFN members. Figure 2 shows the breakdown of respondents for each of the age groups. Of the 301 respondents, 150 are male and 151 are female while 204 live on-reserve and 87 live off-reserve and 10 chose not to indicate the location of their residence. 30 of the 301 respondents are currently attending school, with 18 full-time and nine part-time and three did not indicate whether they were full-time or part-time. Figure 3 shows the number of respondents attending school, by age group.

Figure 2: HR Survey—Number of respondents by age group

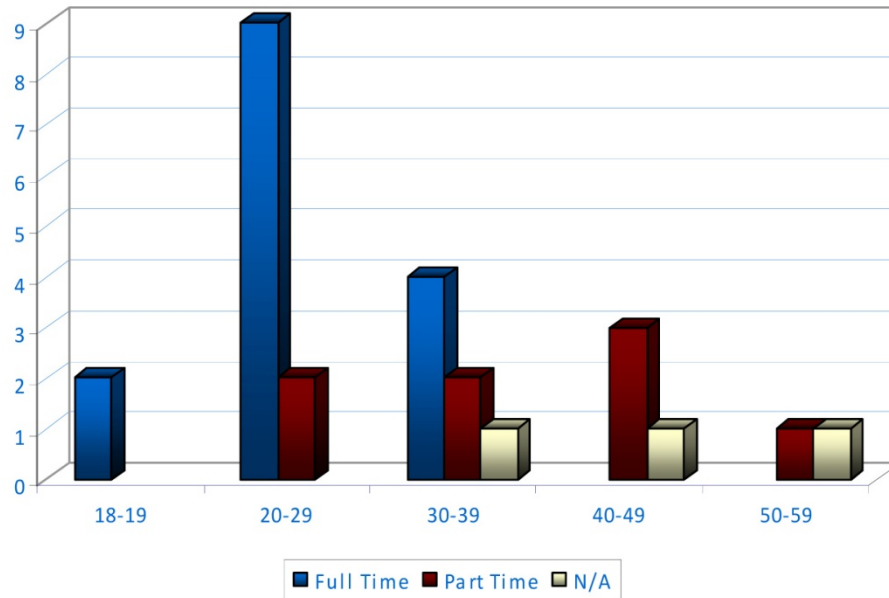


<sup>10</sup> Westbank First Nation. Human Resource Inventory Questionnaire. See Appendix 2.

<sup>11</sup> Westbank First Nation. Registry List. Printed February 9, 2010.

<sup>12</sup> <http://stattrek.com/Tables/Random.aspx>

Figure 3: HR Survey—Attending School, by Age Group



## 5.1 FORMAL EDUCATION

Figure 4 shows the education levels for the adults in each of the age groups. Of the 301 respondents, three chose other for level of education completed. The comparison of Figures 5 and 6 shows that the education levels of those living off-reserve are higher than those on-reserve for the highest level particularly for those with less than Grade 12. A much higher percentage of on-reserve members have certificates and diplomas.

Figure 4: HR Survey—Level of education completed, by age group

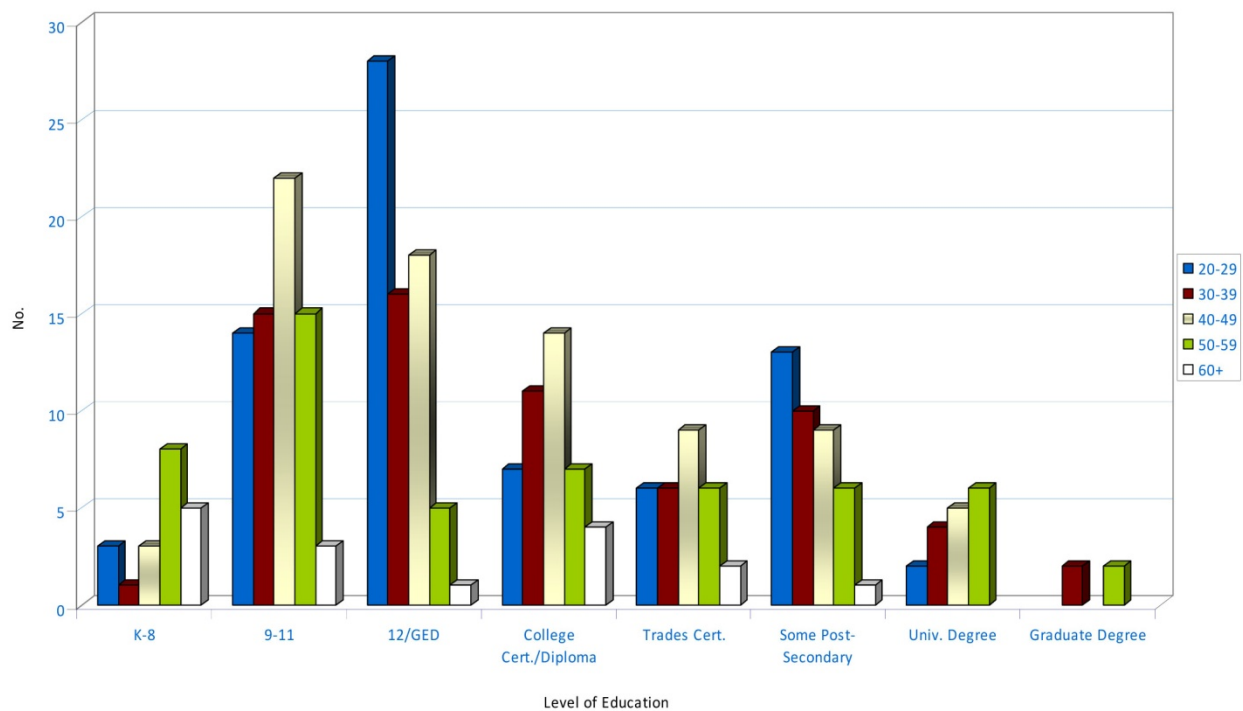


Figure 5: Level of Education—On-reserve

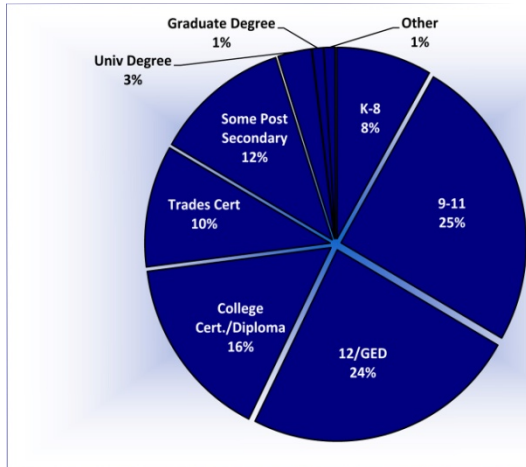
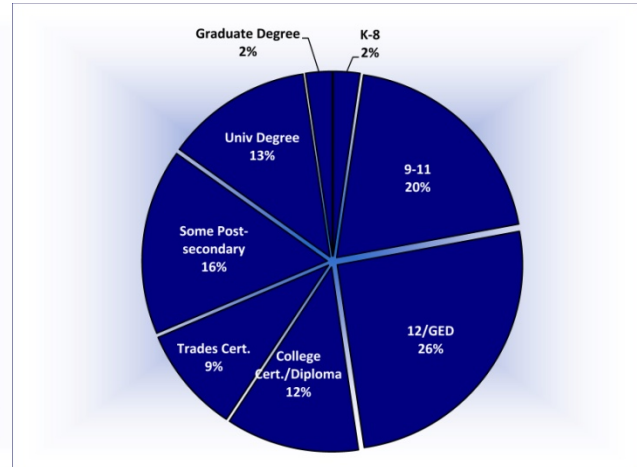


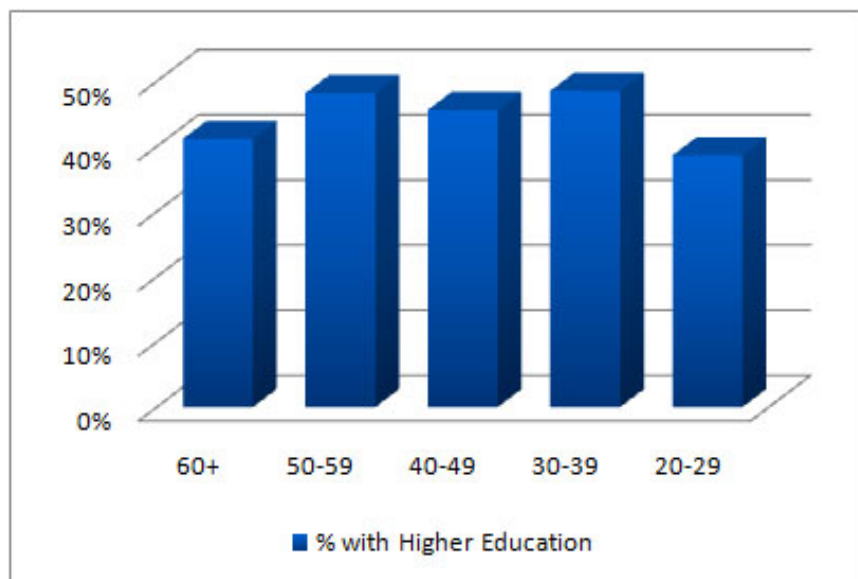
Figure 6: Level of Education—Off-reserve



There are many potential reasons for the significant difference between on-reserve versus off-reserve education levels that were not explored by this survey but what is important is that general post secondary training levels are quite high for all members. Also there are a relatively high number of on-reserve (33%) and off-reserve adults (22%) that have less than Grade 12 education.

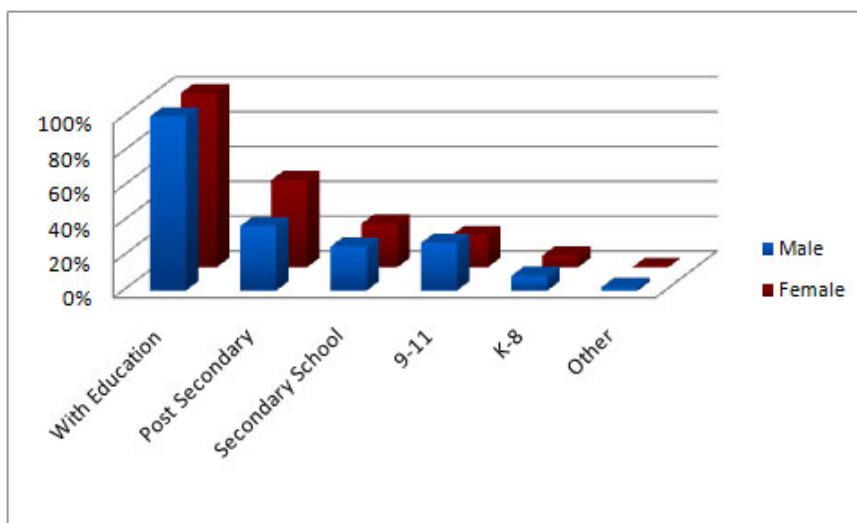
The relation between age and education, Figure 7, show that the 30-39 age grouping has the highest level of post secondary education but that it is not significantly higher than the older age groups. The data shows that the trend is to seek higher formal levels of education earlier, and that it is becoming more common for members to continue their education through their forties and fifties.

Figure 7: Post Secondary Education and Age



The data for the relationship between gender and education, Figure 8, shows that there are a few situations where gender has an influence on education levels of WFN members. The first is that the percentage of male respondents having achieved a level of education less than secondary school, at 8.4% for K-8 and 27.3% for 9-11, is much higher than that of female respondents, at 6.6% for K-8 and 18.4% for 9-11. The second is for those who have completed Grade 12, there is almost no difference relating to gender with 25.3% of male respondents and 25% of female respondents. The third and most drastic situation is apparent when it comes to post secondary education where only 37% of male respondents had had some experience with higher formal education compared to an even 50% of female respondents. The last situation is not unusual as the described results often relate to the difference in availability of higher paying unskilled or semi-skilled jobs for men which traditionally have not been accessible to women providing women with a strong incentive to seek higher formal education.

**Figure 8: HR Survey – Gender and Education**

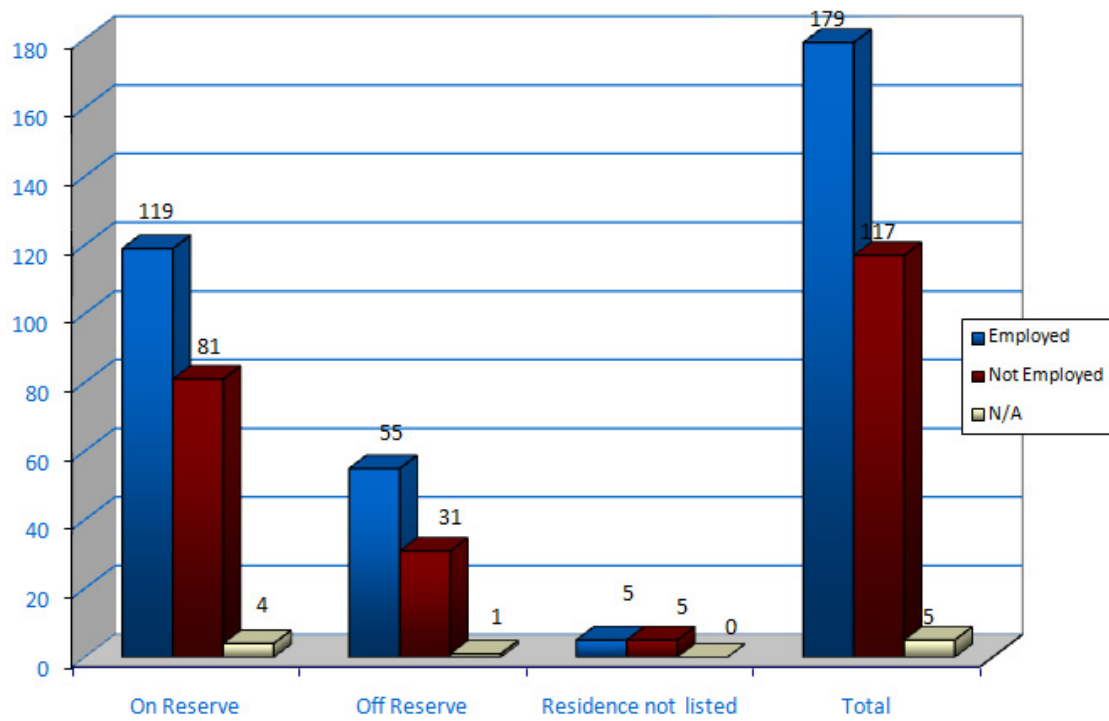


## 5.2 EMPLOYMENT

Of the 301 respondents, 179 were employed (59%) at the time of the survey and 117 indicated they were not employed (39%). Five respondents did not complete this question. Of the 179 respondents employed, 119 lived on-reserve and 55 lived off-reserve with five respondents not listing their primary place of residence (see Figure 9). Of those who were employed, 133 were employed full time, 30 are employed part time and 13 were seasonally employed. Three chose not to answer this question. 63 of the 179 respondents indicated that their employment level was management of which 21 were owner-operators and seven were owners. The remaining 35 responded that they were either an assistant manager or manager for a company.



Figure 9: HR Survey—Employment





## 6. ECONOMIC CONTEXT

### 6.1 CANADA AND BC

The provincial economy, like the Canadian economy, is expected to grow in 2010, mostly in the Lower Mainland and southern Vancouver Island, based on a boost from the Winter Olympics, the global economic recovery, and a rebound in some domestic sectors. Central 1 Credit Union, in its B.C. Economic Forecast 2010–2014, asserted that the economy in BC is emerging from its worst recession since 1982 and is on a path of moderate recovery for the next two years, before growth accelerates in the final period of the five-year forecast (see Figure 10).<sup>13</sup>

A key indicator of economic recovery is the return of job growth and during 2010 employment is forecast to be 0.9% higher than in 2009 in BC. Unemployment in 2010 is expected to average 8.1% compared to 7.6% in 2009. The more favourable economic conditions after 2010 should mean higher job growth and a declining unemployment rate—unemployment should fall to less than 7% by 2013, with a further reduction to 6.1% in 2014.<sup>14</sup>

Real Gross Domestic Product (GDP) in BC is expected to grow by 2.4% in 2010, mainly on the strength of the Olympic Games, which suggests the positive effects will mostly be felt in the Lower Mainland. While the economy will grow in 2010 by around 2.5% in 2002 dollars, it does not gain pre-recession levels until 2011.<sup>15</sup> A high Canadian dollar will restrain exports and encourage imports, resulting in a widening trade deficit.

**Figure 10: Short-term BC Economic Forecast (annual % change)**

	2009	2010	2011	2012	2013	2014
Real GDP	-3.1	2.5	2.6	3.5	4.2	3.8
Employment	-2.4	0.9	2.3	2.9	3.0	2.9
Unemployment Rate (%)	7.6	8.1	7.8	7.2	6.6	6.0
Personal Income	-1.2	3.7	3.6	5.1	5.9	5.8
Housing Starts (units)	15,100	23,400	25,300	31,300	35,500	39,300

Source: Central 1, BC Economic Forecast 2010-2014, Economic Analysis of BC.

<sup>13</sup>Central 1 Credit Union. 2010. B.C. Economic Forecast 2010-2014. 30 (1)

[http://www.central1.com/publications/economics/pdf/ea/ea%202010\\_01.pdf](http://www.central1.com/publications/economics/pdf/ea/ea%202010_01.pdf)

<sup>14</sup> *Ibid.*

<sup>15</sup> *Ibid.*

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## 6.2 CENTRAL OKANAGAN

WFN's economy is situated within the regional economy of the Okanagan and the sub-regional economy of the Central Okanagan. Given that WFN is situated within an open regional economy this means that as the sub-regional economy shifts and changes so will the WFN local economy. Therefore, it is important to understand the current trends in the sub-regional economy. This section provides a quick overview of the Central Okanagan's economy.

Kelowna, with a population of 118,507, is the largest community in the Central Okanagan and continues to be one of the fastest growing cities in BC with manufacturing, high technology, health care, tourism, and post-secondary education sectors in particular attracting new business and residents to the area. The city's many retail and commercial businesses attract a trading area of approximately 450,000 residents, making it the largest centre for urban development, business, commercial, retail, and health care services between the Lower Mainland and Calgary.<sup>16</sup>

Diversification is one of the Central Okanagan's greatest economic strengths. The economy is based on many sectors including: agriculture, forestry, and tourism. Two key drivers for growth in the region are the Kelowna International Airport and UBC Okanagan. The new William R. Bennett bridge across Lake Okanagan opened in May 2008, and provides for significantly improved traffic flows through the region. Although there were heavy job losses in some economic sectors during the past few years, the Central Okanagan continues to experience a shortage of workers, and this has actually become a constraint to economic growth. Other concerns include high housing costs and near zero rental vacancy rates, particularly for those businesses wanting to hire low- and middle-wage earners. While Kelowna's unemployment rate did slightly increase in 2009, it is predicted to remain at record low levels.

The population of the Central Okanagan grew between 2006 and 2009 from 167,417 to 180,234, an increase of 7.7%. Population growth in the Central Okanagan has historically been higher than the province overall. In fact, high flows of newcomers to the region have resulted in the population of the region increasing by 90% from 1986 to 2009. While the rate of growth was highest in the 1990s at 4% annually, the average rate of growth was still 2.1% from 2000 to 2009. With such consistent high population growth, both the employment and unemployment rates increased from 2007 to 2008 (4.5% to 5.1% respectively), due in large part to a significant increase in the overall size of the labour force.

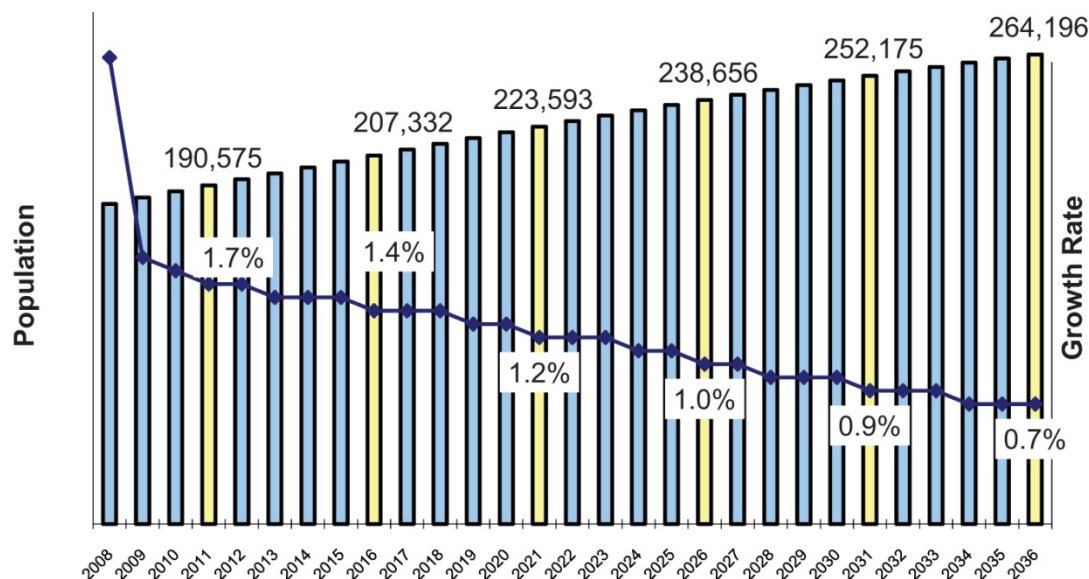
The provincial economy contracted in 2009 with a partial recovery in 2010 before predicted growth in 2011 and beyond. The Central Okanagan regional economy is expected to at least match the growth projections for BC over the next three to five years. The growth in the Central Okanagan is based on the strength of the existing expanding economic base plus the in-migration of people attracted by the climate, geography, and lifestyle, particularly those in the growing retiring baby boomer demographic. A significant component of in-migration is made up of people from large Canadian urban settings (for example, Calgary, Vancouver, Edmonton, and Greater Toronto), where the value of what they are usually selling matches or exceeds what they purchase in the Central Okanagan.

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<sup>16</sup> Central Okanagan Economic Development Commission - 2009 Economic Profile: Regional District of the Central Okanagan. <http://www.investkelowna.com/documents/2009RegionalProfile-Population.pdf>

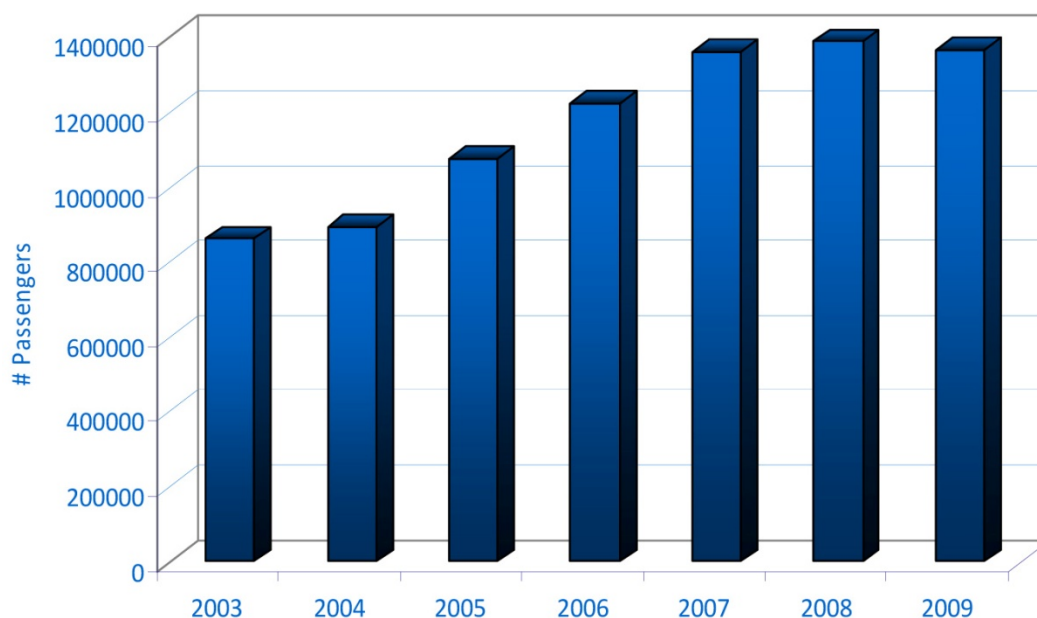
The continuing strong energy-based economy of Alberta and the large relatively stable economy in Vancouver are the key drivers for enabling this in-migration. The overall population of the Central Okanagan is projected to continue growing over the next 25 years but at a declining rate as projected by Stats BC (see Figure 11).

**Figure 11: Population Growth Central Okanagan<sup>17</sup>**



The historic growth of passenger travel through Kelowna reflects overall growth of the regional economy that far surpasses the airport projections prepared in the late 1990s (see Figure 12). See Appendix 3 for information related to the Kamloops Airport which grew much slower from a lower base level.

**Figure 12: Kelowna Airport Traffic, 2003-2009<sup>18</sup>**



<sup>17</sup> Central Okanagan Economic Development Commission - 2009 Economic Profile: Regional District of the Central Okanagan. <http://www.investkelowna.com/documents/2009RegionalProfile-Population.pdf>

<sup>18</sup> City of Kelowna: Facts and Statistics. <http://www.city.kelowna.bc.ca/CM/Page182.aspx>



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### 6.3 WFN'S LOCAL ECONOMY

The economy of WFN is not well documented. In general, regional economies are divided into basic and non-basic sectors. Basic sectors are those where income is brought into the local economy. Non-basic sectors are those where income is internally circulated. The primary drivers of the local economy are the basic sectors.

The components of the basic sectors for WFN economy are:

- Lease payments paid by outside individuals and businesses for use of WFN lands (direct rents and lease payments).
- Development cost charges, hook-up charges, building permits, and fees paid by outside individuals to WFN for on-reserve developments.
- Wages earned by WFN residents who work off WFN lands but live on WFN lands.
- Wages earned by WFN residents who work for on-reserve businesses but their customers (or tenants) are mainly from off-reserve including most housing developments.
- Direct income and wages obtained through transfer payments from senior levels of government.
- Income obtained through transfer payments from off-reserve investments or pensions.
- Royalties (rents) obtained from resource users in the traditional territory.
- Agriculture, forestry and manufacturing that add value to products on-reserve and sell them off-reserve.
- The income WFN companies earn operating off-reserve or operating on-reserve but paid for by off-reserve individuals and organizations.
- Taxes collected by WFN from individuals and companies earning their income from off-reserve activities or sales to customers living off-reserve.

The components of the non-basic sectors are mainly the service sectors that provide on-reserve services to those living on reserve. Currently, it is not possible to estimate or model the WFN economy as there are no data sources related to most of these variables. To increase the size of the WFN's economy requires increasing the basic sectors and also the non-basic sectors in order to decrease leakage and increase the multiplier impact.



## 7. WFN EXPECTED ECONOMIC ACTIVITIES—2010-2012

The economic development strategy, as pointed out earlier, will be implemented within a regional economic context over the next five years. This section lays out the expected economic activity assuming consistent governance by WFN, as has been the case over the last five years. The expectations extend to all economic activity taking place on WFN lands, including activity undertaken by non-member residents and non-residents. WFN's **economic community** includes all those undertaking economic activity on WFN lands. The expected economic activity is divided into construction activity, taxation, commercial activity, major land developments, government services, and WFN government enterprises, as described below.

### 7.1 ECONOMIC COMMUNITY OF WFN

#### Construction Activity

The economic community on WFN lands has grown dramatically in terms of both population and buildings as demonstrated by the growth in assessed value which has almost tripled in six years (\$398 million in 2005 to \$1.12 billion in 2010).<sup>19</sup> Building permits issued between 2005 (a slow year) and 2009 total \$208 million. These do not include off-site infrastructure development.

Key for the economic strategy is that construction, measured by building permits (see Figure 13), is expected to continue at a rate similar to 2008 at \$40 million per year if the market returns as predicted. The anticipated construction activity is based on the already permitted construction as well as projects in their final stage of approval. The conservative projection of 208 units per year (see Figure 14) is well below what the individual developers are expecting (and in some cases requiring) in terms of both construction and sales. If the units average 1000square feet each (conservative) and the construction costs are \$200 per square foot, then residential construction activity in 2010 will be \$41.6 million. The level of residential construction is expected to maintain the 2010 pace for three more years based on existing (on the books) projects.

Figure 13: WFN Building Permits and Values 2005 – Present<sup>20</sup>

Westbank First Nation	2005	2006	2007	2008	2009
<b>Total Number of Permits</b>	169	188	215	248	154
<b>Total Permit Values (000s)</b>	9,944	53,154	69,007	43,600	32,588
<b>\$ Value of Residential Permits (000s)</b>	5,574	39,644	36,921	24,032	26,064
<b>\$ Value of Commercial Permits (000s)</b>	570	12,815	32,086	19,568	4,525
<b>\$ Value of Industrial Permits (000s)</b>	0	0	0	0	0
<b>\$ Value of Institutional Permits (000s)</b>	3,800	695	0	0	0
<b># of New Residential Units</b>	52	285	187	113	164

<sup>19</sup> Kettle Valley Research. Westbank First Nation 2008 Economic Profile, November 2008 (updated January 2010 with 2009 data where available by Westcoast CED Consulting Ltd.), pg. 41.

<sup>20</sup> *Ibid*, pg. 42.

Figure 14: WFN Current Projects List

Feb. 2010 - Development Projects underway						Projections			
Project	Total No. of Units	Type	Already Constructed or Under Construction	Industrial / Commercial Development Site Acres	Buildings Size Sq. Ft. yet to be built	2010	2011	2012	2013
1 Sage Creek (Residential)	270	SFD (modular)	81	n/a	n/a	30	30	30	30
1(b) Sage Creek (Commercial)	n/a	(commercial)	0	17.00	No Plans Yet				
2 Swite Development	140	SFD (mobile)	15	n/a	n/a	0			
3 Sonoma Pines	540	units	140	n/a	n/a	30	30	30	30
4 Estates Square	n/a	Bldg # 4 to 9	24,000sq.ft.	n/a	56,000	24,000 sq	24,000 sq		
5 Sierra's Westside	98	units	40	n/a	n/a	10	10	10	10
6 Superstore	n/a	(commercial)	120,000	n/a		120,000sq			
7 Kelowna West Estates MH Park	69	units	52	n/a	n/a	0			
8 Elk Ridge	86	units	0	n/a	n/a	15	20	20	20
9 Tuscany Villa	75	units	75	n/a	n/a	Complete			
10 Cougar Ridge	80	units	20	n/a	n/a	0	0		
11 Wildstone Towers	80 120	residential units / guest suites & commercial	0	n/a	32,000 commercial	0	0		
12 Copper Sky	536	units	192	n/a	n/a	98 built	60	60	60
13 Top 5	122	units	0	n/a	n/a	0	0		
14 M -112 Enterprises (Remax)	n/a	Commercial re-development	15,000	n/a	30,000		15,000sq		
15 West Harbour	350	units	0	n/a	n/a	25	25	25	25
16 Calidus Homes	9	units	0	n/a	n/a	0	0		
17 New Self Storage Facility	n/a	Light Industrial	0	6.82	n/a	0			
18 Ferry Landing (Orchard Beach)	575	units	0	n/a	n/a		50	50	50
19 McDougll Place		(commercial)	0	11.5	n/a	15,000sq			
20 Ridge Estates	50	units	0	n/a	n/a	0	0	10	10
21 Anthem Joint Venture Lot D	n/a	(commercial)	0	n/a	196,125		100,000sq		
22 Anthem Lot 209	n/a	(commercial)	0	n/a	29,680	30,000sq			
23 Westside Centre Properties	n/a	mixed use (commercial lots with multi-residential)	15,400	12.6	n/a	15,000sq	15,000	15,000	15,000
24 Glen Derrickson	n/a	RV Park	0	7.1	n/a	70 stalls			
25 Okanagan Tech Centre	n/a	light industrial - proposed 6 bldg phased dev	0	7.7	90,340	20,000		20,000	
<b>TOTAL sq ft commercial</b>				<b>55</b>	<b>402,145</b>	<b>104,000</b>	<b>154,000</b>	<b>35,000</b>	<b>15,000</b>
<b>TOTAL residential units</b>	<b>3,000</b>					<b>208</b>	<b>225</b>	<b>235</b>	<b>235</b>

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Commercial construction, at higher costs per square foot, is expected to exceed 100,000 square feet per year in 2010 and 2011, adding at least another \$20 million in construction per year. This does not include many small projects, the off-site infrastructure projects, or the large Superstore being built in 2010.

### **Taxation—Projected Values**

The value of improvements is expected to grow by at least \$50 million per year for the next three years. Total assessed value on the improvements plus increased land value, unconnected to general valley-wide increases, could grow at \$100 million a year for the next three years.

### **General Commercial Activity**

The general commercial activity on WFN lands is expected to continue to grow dramatically as Superstore, Winners, and other major “big box” stores establish themselves on WFN lands in 2010/11. The growth in commercial space is expected to bring substantial increased growth in day-to-day commercial activity. The recent growth in visitor facilities, including the new Best Western Hotel (99 rooms), and a series of restaurants on IR #9, is expected to add to the on-reserve commercial activity.

### **Major Land Developments**

There are major projects currently in the planning and design stages (for example, a large shopping mall, golf course, and residential area) which will have a significant impact on construction expenditures and asset accumulation when they move to their implementation phase. These projects are expected to begin within the horizon of this economic development strategy.

## **7.2 WFN GOVERNMENT**

### **Administration Staffing**

There are 131 staff working in WFN administration (2010). This does not include those working for WFN companies and affiliated organizations (for example, Pine Acres Care Facility or Heartland Economics LP). WFN's annual administration expenditures are expected to be \$4.47 million in 2010/11, and increase slightly each year based on property tax growth and Financial Transfer Agreement growth each year.<sup>21</sup>

### **Infrastructure Construction & Capital Expenditures**

Infrastructure development and capital expenditures are expected to be \$8.1 million in 2010/11 (including \$600,000 for land purchase) and \$5.7 million in 2011/12. See Figure 15.

**Figure 15: Projected Capital Project, 5 Year (\$,000)<sup>22</sup>**

	2010	2011	2012	2013	2014
<b>Total By Year</b>	\$8,085	\$5,690	\$4,480	\$1,900	\$2,150

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<sup>21</sup> Westbank First Nation. 5 Year Financial Plan and Annual Provisional Budget. March 11, 2010. Page 20-21.

<sup>22</sup> *Ibid*, pg. 22.



## 7.3 WFN GOVERNMENT—ENTERPRISES

### Pine Acres

Pine Acres is the largest employer (80 permanent positions and 25 casual) and has the largest expenditures (\$4.16 million) of all the enterprises connected to WFN. There is obvious regional demand that creates the potential for expansion of Pine Acres.

### Community Forest Agreement and WFN Wood Lot

The Heartland Economics Limited Partnership is the second largest enterprise associated with WFN. It is the operating arm of the community forest (Annual Allowable Cut [AAC] approximately 55,000 m<sup>3</sup> plus a current 30,000 m<sup>3</sup> MPB uplift) and the WFN wood lot (1,500m<sup>3</sup> AAC). Heartland Economics has only a few staff as most activities are handled through direct contracts for services. Its annual revenue and expenditures have fluctuated dramatically as a result of major changes in market conditions from 2006 through to 2009, with revenues and expenditures in 2009 of approximately \$3.5 million.

### Trading Post

WFN's store, which sells convenience goods, tobacco, and local art, had sales of \$427,500 (2009/10) and expenditure projections of \$398,000 for 2010/11.

### Potential Cultural Centre

There has been significant on-going discussion about creating a cultural centre to include a museum, a visitor centre, an art gallery, and a gathering place in order to meet a mix of needs. This initiative is expected to receive substantial attention from WFN during the planning period of the economic development strategy.

## 7.4 WFN EXPENDITURES—TOTAL

WFN, through all its activities, is expected to spend \$26.3 million in 2010/11 and continue spending at that level or higher from 2011 through 2014 based on increased activities across the board. Expenditure will be funded through increased land and improvements taxation (approximately 32% of revenue), federal transfer agreements including health (approximately 23% of revenue), and a wide variety of other revenue sources. See Figure 16.

Figure 16: 5-Year Expenditure Projection<sup>23</sup>

	2010/11	2011/12	2012/13	2013/14	2014/15
<b>Total Expenses</b>	26,328,667	26,345,248	26,900,267	27,400,126	28,194,887

## 7.5 SUMMARY—WFN ECONOMY'S EXPECT GROWTH, 2010-2013

The WFN economy is a primarily a subset of the Central Okanagan regional economy. The Central Okanagan regional economy is expected to at least match the growth projections for BC over the next three to five years. The growth in the Central Okanagan is based on the strength of the existing and expanding economic base plus the in-migration of people attracted by the climate, geography and lifestyle. The combination of the attractive Central Okanagan characteristics, the Canadian demographic shift, and the retirement of the large baby boomer demographic, creates a significant subset that is keenly interested in semi-retirement or retirement in the Central Okanagan. Many have the accumulated wealth and pension income to do so.

<sup>23</sup> Westbank First Nation. 5 Year Financial Plan and Annual Provisional Budget. March 11, 2010. Page 19.

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A strong component of the in-migration is people from large Canadian urban settings, e.g., Calgary, Vancouver, Edmonton, and Greater Toronto where the property value of what they are usually selling matches or exceeds what they are relocating to in the Central Okanagan. The continuing strong energy based economy of Alberta and the large relatively stable economy in Greater Vancouver are the key drivers for enabling this in-migration.

With the Central Okanagan sub-regional economy as a back drop, the combination of existing commercial activity and the expected \$120 million of commercial improvements on WFN lands alone, plus the substantial commercial and industrial base in the Central Okanagan, is expected to provide lease income and jobs for many, including WFN members. The construction of significant commercial space scheduled for 2010 and 2011 will add to this economic activity both in the construction phase and in the operation of the businesses that establish themselves in the buildings. In addition, residential growth resulting from developers building more than 200 units per year on WFN lands for the next three to five years will add to the economy both at the construction stage and through the expenditures by households who take-up residence in these dwellings.

The combination of increased commercial and residential development is expected to increase local taxation revenue and also increase expenditures by WFN government on local government services, such as water, sewer, road maintenance, street lighting, etc. (as presented in Figure 13). Providing additional services to meet the needs of the growing infrastructure and population will increase the number of individuals employed at WFN.

The WFN enterprises, Pine Acres, and the Trading Post, are expected to continue operating at their current level or show slight growth over the next two to three years. Plus Pine Acres is expected to make a decision regarding expansion and act on it. Also, in the next two to three years, the MPB uplift for the CFA is expected to be completed with a resulting decline in the overall AAC for Heartland's harvesting operations unless additional AAC can be obtained through other tenure allocations.

The obvious focus on high school and post secondary education by members and their young adult off-spring will enable members the greatest opportunity to integrate into the workforce and migrate up the responsibility and income ladders. The potential new major developments on WFN lands are expected to be at the shovel ready stage and progressing based on the sub-regional economy's expected growth in 2012-13.

The key conclusion drawn is that over the next two to three years the combination of:

- expected growth in the sub-regional economy;
- expected commercial and residential construction on WFN lands;
- added commercial activity in new commercial buildings completed in 2009, 2010 and 2011;
- infrastructure development by WFN to meet these expanding needs;
- expanded WFN government services;
- stable activity (or slight growth) by WFN's enterprises; and
- increased capability and formal education of WFN members

is expected to maintain a fast growing economy for the next three years—similar to the last three years—if most projects continue to evolve.

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## Potential Downside

If the western Canadian economy contracts based on a global stall in growth (the double dip), the economies of BC and Alberta are expected to follow suit. The likely impact for the Central Okanagan is a slowing of growth as experienced in 2009 and early 2010. The magnitude of the demographic change and worldwide appetite for energy are expected to mitigate the negative impact on Alberta's economy and on the in-migration to the Central Okanagan, as the majority of individuals who were planning to shift to the region to retire are still likely to do so and will bring with them substantial cash and post retirement incomes. The likely impact of the contraction on the WFN economy will be a slowing of residential construction, to 2009 levels, a slowing of the commercial expansion of activities and new construction, and limited employment in the construction sector. The WFN government activities would probably grow more slowly, as would their enterprises. The combination of these factors would slow the economy but is not expected to reverse the growth trend of WFN's economy.

## Key Impact of the Growth Scenario on the Economic Development Strategy

There are three key impacts of the growth scenario:

1. The pressure on government services is expected to continue particularly in the planning, engineering, taxation, and infrastructure development areas;
2. The growth in the economy is set for the next three years so WFN leaders need to make plans for the economy and thus the community in 2013/14 and beyond;
3. There will be some members who are expecting the urbanization of the IR#9 and IR #10 to slow, and they may not be happy with the continued rapid urbanization of the two reserves over the next three years.

## Key Impact of the No-Growth Scenario on the Economic Development Strategy

If indeed there is a "negative" double dip in the global economy then the expected impact on WFN government will be that:

1. Pressure on expanding government services including physical infrastructure will lessen;
2. Leaders may choose to intervene in the WFN economy to meet economic goals including increasing economy activity, and/or jobs for members;
3. Some members will be pleased that the rate of growth has subsided.



## 8. VISION

### 8.1 INTRODUCTION

In strategic planning, one of the foundation principles is that it is critical to identify what the desired end point is and then put in place organizations, strategies, measureable goals, and individual action plans to move towards the desired end point, which is referred to as **the vision**. Given this principle, an economic vision for WFN has been prepared through combining the ideas from previous WFN reports, with input from Chief and Council members, key senior WFN staff, the EDC, and community members at the community workshop. The vision is presented as a draft here. See Appendix 4 and 5 for further notes on the visioning process as well as vision notes from the community forum in March 2010.

### 8.2 WFN – 2030 VISION (DRAFT)

In the year 2030, the Westbank First Nation community and its members will be more independent and self-reliant, driven by the economic, social, and emotional stability that exists within the community. Many members will have advanced trades and college/university education and have become skilled operators, journeymen, certified technicians, technologists, professionals, managers, and business owners making a prosperous living. There will be many opportunities for individual members to move up the employment ladder, starting their careers at the entry level, moving through the spectrum of career progression from technical to professional to management. For some, more now than ever before, this will lead to the start-up of small, successful WFN-owned businesses. This improvement in job quality is largely based on the positive attitude towards work, the cutting-edge skills of members and the tight relationship between WFN and surrounding communities. Along with secure employment and economic development will come personal growth for many WFN members, and prosperity shared amongst everyone in the community. Successful economic development is a tide that raises all boats in the Westbank First Nation community, not just a few, and there will be continued willingness to reinvest in social and cultural development.

Key to the economic growth of the Westbank First Nation is a government that provides stability, with certainty and fairness for all those investing and residing on WFN lands. WFN acts like a mature municipality by maintaining and implementing strong zoning policies. Services, such as water, sewer, and roads, are maintained to municipal standards, at similar pricing to other jurisdictions in the region. Infrastructure, which in some cases is shared with the District of West Kelowna, is often available ahead of land development and adds to economic and planning certainty. This is a government that has proven that it honours and respects contracts, head leases, and sub-leases.

The Westbank First Nation government, like its members, is primarily financially independent from senior levels of Canadian government, with transfer payments at levels that are equal to all Canadians. WFN is a self-reliant community, with no need to seek outside assistance for basic on-reserve infrastructure such as roads, water, sewer, and housing. While growing in both staff and facilities, the WFN government respects its traditional lands by reducing its ecological footprint and establishing itself as ecologically sustainable.



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Many new physical developments will have occurred by 2030, particularly in education, business, recreation and community infrastructure. A college/technical institute/university is located on WFN lands to provide higher education to not just WFN members, but to other First Nations members and the broader community as well. This institution attracts high-level businesses and services that reach out to other communities in the Okanagan. These businesses, located in top-quality “green” office buildings, are located within the enhanced residential developments. There are even a few high rise buildings in appropriate places. A First Nations-owned convention centre/hotel/resort exists on WFN lands and a museum and cultural centre has been built in conjunction with a world-class Visitor Centre. The second crossing of Okanagan Lake has been planned for with key agreements with WFN in place.

To ensure the health of all those on WFN lands, there are new health facilities, including care-a-minimums, an expanded intermediate care facility, a health centre, and even a location set aside for a hospital on the West Side. Pine Acres Intermediate Care Facility has become a professional teaching facility for care aides, LPNs, nurses, and other health professionals completing their practicums. The WFN daycare has also become a registered training facility for early childhood education. Many of the local sports and recreation facilities and parks have been upgraded or expanded in combination with advanced fitness centres and playing fields to reflect the active members’ lifestyle, improved diet, and health, from babies to youth to adults to elders.

All these things have helped create a socially connected Westbank First Nation, with safe, secure, healthy, and financially independent members who have grown in their traditional culture and who use common Okanagan language phrases in their day-to-day conversations—some are even fluent. Members feel that they belong. The overall prosperity of WFN is obvious to all who visit, with landscaping, parks, and walkways beautifying the community and reflecting the pride within while avoiding many of the social pitfalls that come with prosperity. There are more green spaces and natural areas near and in the community cores, while outside these cores there are undeveloped waterfront areas available for the enjoyment of members and residents. There is quality housing for all members. Walking trails within the community and between the bridge and West Kelowna’s core connect members within and outside their own social circle.

To achieve this vision for Westbank First Nation, many things will have happened. CP holders have increased their involvement in economic development by owning and managing more enterprises on their land. Community members regularly donate their personal time and expertise to advance WFN. More land, particularly along Westside Road, has been made available to WFN thanks to new purchases and development leverages. Infrastructure is in place for the Gallagher lands. An enhanced community land plan and stable zoning laws have been developed to govern the land. Plus many members think about economic development on a global level. WFN has streamlined their development process, consistently out-performed other jurisdictions, and have numerous other benefits, making it the first choice place to do business.

WFN membership has grown and Aboriginal Title and Rights have been asserted in many situations including land claims and strategic land selection, to create revenue flows to this expanding population. To keep member businesses growing, a business development centre was created to focus on assisting WFN members. Many of the new developments and businesses, are joint ventures with WFN members plus joint ventures with other First Nations particularly from the Okanagan Nation,. On-the-job management training to run these businesses has been operating within existing organizations for 20 years. All new developments on WFN land comply with the community’s high standards for quality employment, ownership of enterprises, financial returns, and environmental protection, with buildings constructed to high environmental standards.



## 9. STRUCTURE

The description of the structure lays out the relationship between economic development and other activities undertaken by WFN, and who does what. Activities include those undertaken by other actors and agencies in and around the community.

### 9.1 CURRENT STRUCTURE—ECONOMIC DEVELOPMENT ACTIVITIES

Economic activities for WFN are handled by a number of different departments and agencies currently all working under the WFN broad strategic plan (2008-2013) as follows:

WFN Community Lands Development—handled by Chief and Council and Director of Operations and appointed Directors which sometimes includes senior WFN Government staff  
⇒ Requires membership approval

WFN Businesses—handled by Chief and Council through:  
Limited partnerships and individual wholly owned companies  
⇒ Directors appointed by Council, e.g., Heartland Economics LP

WFN Business Climate & Economic Planning and Research—handled by the Economic Development Commission  
⇒ Economic Development Officer

WFN Enterprise Facilitation—handled by the Economic Development Officer

WFN Title and Rights—handled by Chief and Council  
⇒ Intergovernmental Affairs/Title and Rights Manager (for example, Community Forest Agreement, Interim Agreements and Land Use Referrals)

### 9.2 FIRST NATION'S INVOLVEMENT IN ECONOMIC DEVELOPMENT

First Nations have been involved in economic development activities across North America for the last 100+ years. Historically, formally selected or elected community leaders identified economic development opportunities based on their understanding of community needs. However, the next step was often for them to become directly involved in securing and operating the economic development opportunity. It's here where the problems arose.

If the economic activity was in an area of specialization in which the leadership had both work experience and “successful” management experience, then the leaders would move rapidly from being policy makers to being operational managers.

The requirements of the business either pulled them away from their other duties or they attempted to maintain their other duties and were not able to provide the timely management advice the business needed. The lack of attention on the business created all kinds of problems.

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In addition, sometimes businesses decisions were politically influenced to the detriment of the business. A good example is when people are hired before they are really needed or different people are hired for political reasons instead of sound business reasons. Managers that are hired are then not able to manage the business because their decisions are either trampled or changed by their political masters who are taking direct involvement in day-to-day operations. There are ample recorded, and not recorded, examples of each of these types. Canadian experience with these issues includes large, small, urban, rural, experienced and inexperienced First Nations.

Other situations arise when leaders have either no specialized experience, or some experience in the relevant business, but at a level below management. The problems then quickly got out of hand. The examples where competence did not exist and politicians chose to operate the business are numerous.

One of the critical differences between public bodies owning and operating a business and individuals owning and operating a business is that when an individual owns and operates a business and it does not work out, the individual deals with the fall out. If it is a public body that owns and operates a business, it is the members of the community that have to shoulder the fall out, should the business get into trouble or fail.

Politicians are elected for reasons of community representation and decision-making and not usually for their ability to operate a business. A manager is hired to run the business. If they are unsuccessful at operating the business then they are released and a new manager is hired. If an elected official demonstrates that they cannot run the business, there is no mechanism to remove them from operating the business because they are the authority representing the owners of the business.

The John F. Kennedy School of Government, Harvard University, did major research in the 1980s on this topic, which continued for more than two decades.<sup>24</sup> The research, done with many US First Nations (the cited report is based on 67 US Tribes with populations over 1000) across many states, consistently showed that the First Nations that separated politics from business operations fared far better than those that mixed the two.

“Enterprises whose management is insulated from elected bodies face odds of profitability of nearly seven-to-one, where enterprises where elected leaders participate in management face odds of profitability little better than one-to-one.” page 7

There are FNs that have managed successfully to mix politics with business but they are exceptions with unique situations in terms of leadership, leadership capacity, and community politics. WFN has been able to establish a government system of laws, land management, and municipal type of infrastructure operations that appear second to none. It appears that it is time to make the same shift in the area of economic development.

### 9.3 STRUCTURE

The first and most important conclusion is that WFN needs the same high-quality economic development legislative and policy structure that has so successfully worked to create good governance, a stable land legal structure, and its property tax system. This structure includes removing politics from day-to-day operations and establishing sophisticated balancing mechanisms in WFN's laws and dispute resolution systems. The “new” high quality economic development structure must place legislative and policy matters in the hands of WFN membership and their elected

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<sup>24</sup> Jorgensen, Miriam and Jonathan B. Taylor. [What Determines Indian Economic Success?: Evidence from Tribal and Individual Indian Enterprises](http://www.hks.harvard.edu/hpaied/pubs/pub_003.htm). The Harvard Project on American Indian Economic Development: John F. Kennedy School of Government, Harvard University. June 2000.  
([http://www.hks.harvard.edu/hpaied/pubs/pub\\_003.htm](http://www.hks.harvard.edu/hpaied/pubs/pub_003.htm))

representatives, and set all business operational matters at arms' length from political decision makers.

### Recommended Structure

The recommended structure is to empower, through legislation, an economic development board to be responsible for all operational economic development matters (see Figure 17). To do this requires providing an economic development board (legal entity) appointed by Chief and Council with the human capacity to act responsibly on WFN's behalf. The current Economic Development Commission members have this type of human capacity. New capacity will be needed for the economic development board. Chief and Council would still provide the policy direction for economic development but not be directly involved in providing enterprise level decision-making on new or existing individual enterprises or being the champions of new enterprises. Chief and Council would act as key adjudicators on new business investments and overall economic development strategy selection and implementation.

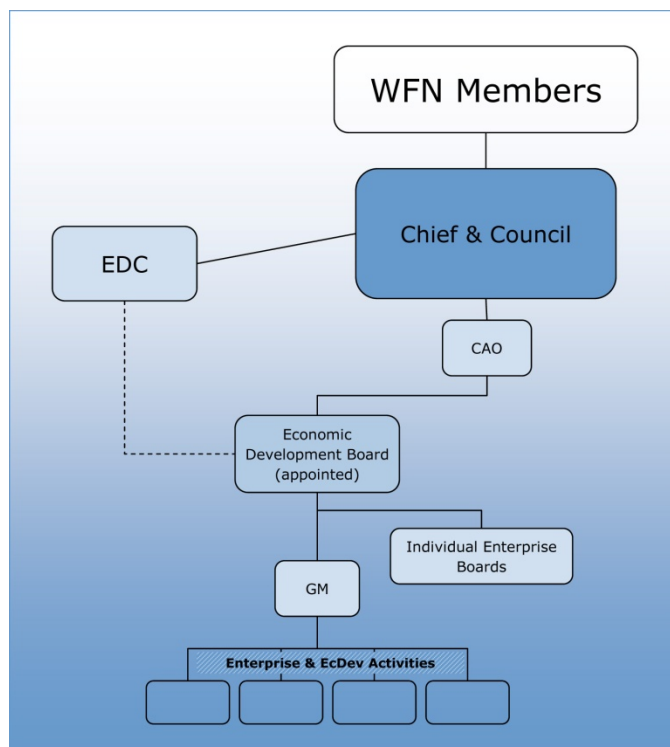
The Board would manage the existing and new WFN enterprises and joint ventures under the policies established by Chief and Council and the membership under an open, community involved, investment decision making system. Also, it is the economic development board that would prepare, monitor and revise the comprehensive community economic development strategy under the direction of Chief and Council with solid membership involvement. The economic development board would also be responsible for the staff resources to implement the community economic development plan. The manager of the economic development entity would report to the Director of Operations for WFN. The managers of the enterprises would report to the manager of the economic development entity.

The economic development entity may also house the economic development officer (EDO), or the EDO may fall under a department separate from the economic development entity. The EDO would handle the issues of business climate, assistance for individual member entrepreneurs, and general promotion of WFN and its lands. In all but very unusual situations, the EDO would be under the economic development entity. The EDC will maintain its existing chartered mandate.

## 9.4 INVESTMENT PROCESS

Figure 17 shows the recommended investment decision-making tree representing the legislated steps created by Council and WFN members. The combination of organizational structure, competent capacity in the economic development bodies, and legislated investment decision-making combine to create the needed economic development system required to dramatically improve the probability of success for economic development initiatives.

Figure 17: WFN Organization Structure



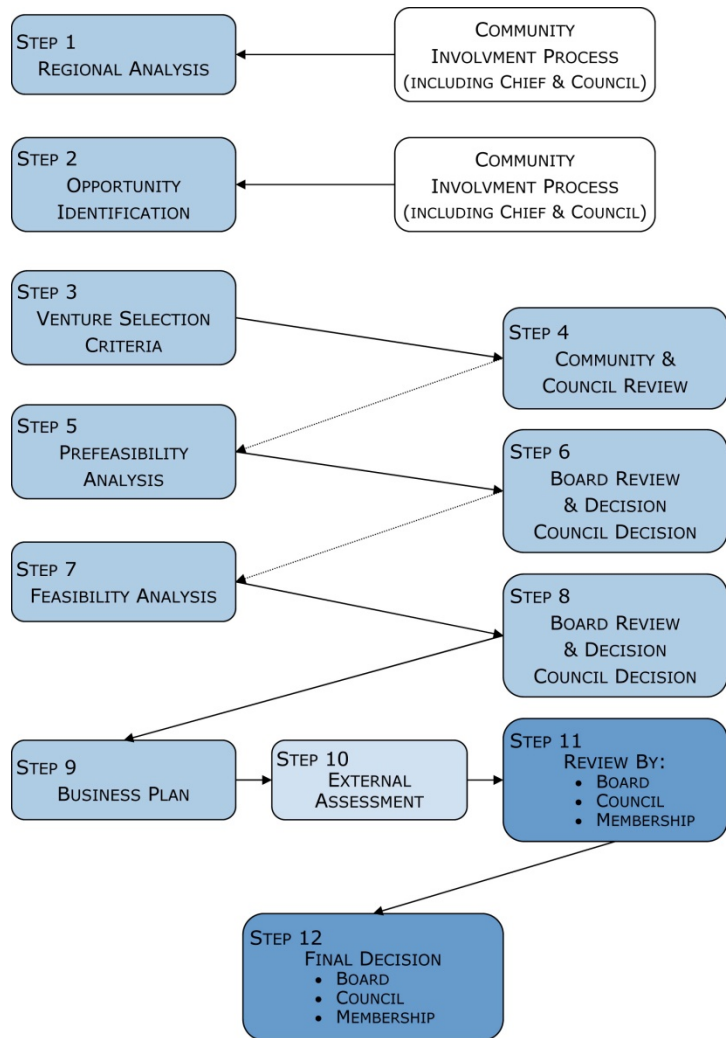


Under the proposed investment decision-making system, the community would be involved in contributing to the regional analysis (the foundation of an economic development strategy) identifying opportunities and approving the selection criteria that would be used to select or reject project or investment opportunities. See Figure 18. The community would also be involved at the end of the process when an investment decision would be required. Chief and Council would be involved in the initial community processes as members and then in the review of the selection criteria. They would decide on new investments in the feasibility analysis and business planning stages and take the proposed new investment for community approval at the appropriate steps.

The Economic Development Board would be involved in operating existing enterprises and making decisions at each step in the new investment decision making process. The final decision to proceed to the next steps (investing further resources in viability analysis and planning), would be in the hands of Chief and Council.

The new structure may seem similar to an older one that “didn’t work”, but the older one was lacking: 1) legislated stability, 2) capacity in the economic development bodies and staff, and 3) a formalized investment decision-making process linking investment decisions back to Council and membership.

**Figure 18: Suggested Investment Decision-Making Process**





## 10. MISSION/MANDATE

A mission statement or a mandate describes what function or functions a department or organization will perform. It needs to describe who the organization serves, what the department/organization will do and how it will do it. A mandate is a commission to act coming from the organizational body that creates the department or organization that, to be clear, needs to answer the same three questions as a mission.

The organization's mission needs to answer three key questions:

***Who will the economic development entity serve?***

***What will the entity do?***

***How will the entity do it?***

The local ingredients diagram (see Figure 19) creates a framework for understanding what the critical ingredients for successful local economic development are.

**Figure 19: Key Ingredients of Local Economic Development**



### 10.1 LOCAL ECONOMIC DEVELOPMENT—KEY INGREDIENTS

In a community, a variety of individuals and organizations may make it their business to provide one or more of these ingredients. For a local development strategy to succeed, it is imperative that systems and organizations be in place so that all ingredients are readily available to the community and its members. To get and keep a local economy going requires the following key ingredients: human development, promotion and brokering, equity, social capacity, infrastructure, planning and research, and loan funds.

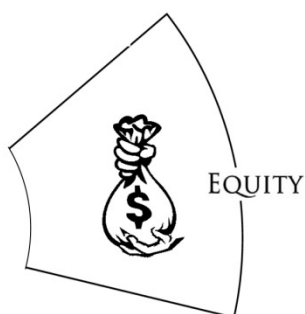
It is critical that an area have an education system that trains people to meet local economic needs and opportunities. This means more than schools. Some of the best training available is that which occurs on the job. In addition to technical skills, training is needed to ensure that community members develop the capacity to be business owners and manager, not to mention directors and staff members of organizations involved in the community's economic development. The following are responsible for human development:



- WFN—Life Skills Program
- WFN—Post Secondary Education Funding
- Delivery—public institutions
- CFDC-Central Okanagan—Entrepreneurial Training

Promotion and brokering involves people capable of completing marketing plans and arranging subcontracts, partnerships, and joint ventures. This is the catalyst that pulls together the actors and sees a project through. At the community level, there are often opportunities and the ingredients necessary for effective action. But people are needed to identify them and to sew it all together into a working development system. The following are responsible for promotion and brokering:

- WFN Economic Development Department
- Central Okanagan Economic Development Commission
- Chambers of Commerce and their membership
- WFN Economic Development Commission



Vital to many business deals is access to investment capital or "equity," that is, people and organizations that are willing to take the risk to become part owners of an enterprise. In small businesses, the investors may be the entrepreneurs and their family members or friends. In larger businesses, considerable equity may be invested by banks, corporations, and complete strangers. A lack of equity is the major barrier for many people who want to start a business or community venture. The following are responsible for equity:

- WFN – CP holders
- WFN Government
- Non-member investors

Communities need to promote the building of social capacity and community resilience by assisting individuals and groups to improve their social and decision-making skills, and by giving them opportunities to broaden their choice sets and utilize their own resources. Building on the individual will assist society at large in coping with current as well as future social challenges. The following are responsible for social capacity:

- Social Development Department
- Not-for-Profit Groups
- Formal Education providers



Without community-based systems to supply and maintain roads, water, electricity, telephone, and sewers, enterprises must sustain the costs of providing these services on their own. These added costs deter new ventures from making a start in a community. Other forms of support for development can also be considered infrastructure. From a business point of view, infrastructure includes such things as the attitudes of residents and local government, information services, and business organizations - in short, the climate for enterprise in a community. The following are responsible for infrastructure:



- WFN Government
- Central Okanagan Regional District
- West Kelowna - Municipality
- WFN Economic Development Commission

People working in economic development have to have up-to-date information about the regional and local economy. Statistics on community sectoral activity, key actors, regulations, new opportunities, the human resource situation—all this and more must be readily accessible and steadily replenished and updated if people are to have the facts they need to make wise decisions. Each organization also needs the research capacity to seek out new markets and to create new products. It is also important to establish goals and objectives for local economic development that are realistic, and based on the regional economic situation. This requires an accurate interpretation of the research for planning purposes. The following are responsible for economic planning and research:



PLANNING & RESEARCH

WFN Economic Development Commission

WFN & RDCO – EDOS



Loan funds must be provided to help businesses to start up or expand. The businesses may be individually owned or may be controlled by the community. They may turn to a variety of sources to secure the necessary financing: banks, credit unions, individuals, and government programs are among the best known. The following are responsible for loan funds:

Chartered Banks and Credit Unions

Peace Hill Trust, All Nations Trust

CFDC – Central Okanagan

Business Development Bank of Canada

## 10.2 MISSION—WFN ECONOMIC DEVELOPMENT

The economic development agency/department would serve WFN members, WFN enterprises, WFN government, and the economic community on WFN lands. The agency/department would:

- Prepare an overall community economic development strategy that includes monitoring and evaluating the success of its implementation;
- Communicate the economic development strategy and economic activities to other WFN departments and agencies and to Central Okanagan municipalities and agencies;
- Link WFN entrepreneurs to financing, training, and technical assistance;
- When requested, act as a broker for WFN members and other investors who are interested in economic activities on WFN lands;
- Initiate and manage the new investment decision-making process including completing the necessary commercial quality research for WFN potential and existing ventures;
- Manage the WFN owned enterprises according to the goals and policies established by Chief and Council;
- Provide WFN Planning & Engineering with economic impact assessments for various infrastructure options; and
- Where requested, and approved by Chief and Council and community membership, make direct business investments in individual enterprises.

These activities will be all undertaken by competent staff using resources provided by Chief and Council allocations.





## 11. SELECTION CRITERIA—PROJECTS AND INVESTMENTS

Given the fast growing regional economy and the advantages of locating businesses on WFN lands and/or partnering with WFN, there is a need for an efficient mechanism to quickly assess the quality of an economic opportunity. The best method is for each “new” opportunity to be quickly assessed for its fit with WFN’s priorities by ranking the opportunity’s ability to meet the needs and desires of WFN. Those that score highly would receive further WFN attention; those that do not, would not. The matrix in Figure 20 provides the initial draft selection criteria as suggested by the EDC and the community input session. Each criteria has a calibration system, on a scale of 1 to 5, for establishing its rating. The ratings for each criteria are then totalled to obtain an overall rating for the opportunity. This allows for comparison between ideas and provides a system to give consistent feedback to potential proponents on the “level” of interest by WFN plus the opportunity’s short comings when assessed against WFN’s priorities. The initial 14 criteria need to be further refined to a maximum of 10 criteria for ease of use by WFN.

Figure 20: Selection Criteria

VENTURE OPPORTUNITIES	Opportunity 1	Opportunity 2	Opportunity 3
<b>SELECTION CRITERIA—Draft</b>			
Knowledge of the business			
Profitable with lower risk and long term returns			
Contributes to economic diversity			
Brings revenue into the local economy			
Joint venture model – ability to increase ownership with knowledge			
Opportunity for employment (careers) of members			
Uses community expertise			
Located on or close to reserve lands			
Smallest carbon footprint			
Promotes healthy lifestyle including community interaction			
Beautification			
Complements, rather than competes with, existing community business/services			
Niche/unique and puts WFN on the map with pride			
Focuses on youth & youth activities			
<b>Total</b>			





## 12. ECONOMIC DEVELOPMENT GOALS, STRATEGIES & ACTIVITIES

It is important to remember that this is the WFN economic development strategy and not just the WFN government's economic development department agenda. Therefore, the goals and strategies tie in with growing the WFN economy as a whole and are directed towards many parts of WFN's government, including the economic development department and the EDC.

### Goal 1: Maintain and expand the existing mixed economy on WFN lands.

#### Rationale

Clearly, the bulk of economic activity on WFN lands is undertaken by those with a long term lease or a sub-lease connected to a long term head lease. The economic activity is split mainly between commercial and residential, with very limited light industrial activity. This is well understood and therefore no change is expected during the plan period (2010-2013). All research shows that maintaining and growing existing enterprises is much easier and has a greater probability of success than establishing new ones. Also, there are distinctive advantages to location of both IR #9 and #10 and to land being controlled by WFN, as opposed to Indian and Northern Affairs Canada. This needs to be continually communicated to existing and potential investors.

#### Strategy

- 1.1: Maintain the existing legal and property tax rate stability for lands under WFN jurisdiction.**

#### Activities

- Council, with the backing from the senior administrators, "holds the tiller", maintaining the accountable, consistent legal system attached to WFN lands with specific respect to head leases, sub-leases, and tenants.
- Council with support from the Director of Operations, Director of Finance, the Surveyor of Taxes, and the Advisory Council, maintains the appropriate property tax structure and mill rates that create value for money and maintain a level playing field with surrounding jurisdictions.

<b>Lead:</b> Council Director of Operations EDC	<b>Target:</b> \$100 million/year of real total assessment growth – 2010-2015
<b>Resources:</b> EDC – minimal expenses	<b>Monitoring:</b> Surveyor of Taxes – Annual Report

## Strategy

- 1.2: Maintain the critical brokering, promotion and communication role between WFN and existing and potential businesses and investors on WFN lands.**

## Activities

- Council continues to function as economic development ambassadors to internal and external entrepreneurs and investors, while directing them through the recommended project/investment selection process.
- Economic development department continues to provide its full set of brokering, promotion, and general communication activities building on the role of being the point of first contact for interested investors on WFN lands and potential off-WFN-reserves joint ventures.
  - Providing “counter service” for drop-in investors.
  - Prepare and circulate materials that make potential investors aware of the opportunities on WFN lands.
  - Link investors with land planning and engineering staff regarding potential on-reserve projects.
  - Link investors to appropriate current businesses, potential partners, and key business services.
  - Prepare and circulate economic profile information.
  - Prepare and circulate materials that promote WFN lands as a positive place to invest.
  - Maintain links with key on-reserve business owners and operators.

<b>Lead:</b> EDO EDC	<b>Target:</b> Continued growth of successful businesses
<b>Resources:</b> .75 FTE \$50,000 annually for communications	<b>Monitoring:</b> Annual business licences – total Employment by sector – BC Stats

## Strategy

- 1.3: Maintain solid relationships between WFN and surrounding local and regional governments and their economic development agencies.**

## Activities

- Have WFN economic development staff and Council members serve on the boards of economic and business development agencies in the Central Okanagan and participate freely in their full set of economic development activities.
  - Serve on the Board of RDCO – EDC, the Board of Westbank and District Chamber of Commerce, and seek other opportunities in order to have input into setting local and regional priorities.

<b>Lead:</b> EDO EDC	<b>Target:</b> Board member of CORD-EDC, CoC 2 joint projects annually
<b>Resources:</b> .25 FTE \$50,000 annually for joint projects	<b>Monitoring:</b> Positive Media Report on WFN participation in joint local projects

## Strategy

### 1.4: Provide business retention and expansion services (BR&E) to existing businesses and lease situations.

#### Activities

- Conduct a quick survey (face to face or telephone) of current business owners/operators on WFN lands to gauge their interest in receiving BR&E.
- Categorize the needs and establish a follow-up program focused on expanding markets and management capacity for businesses in the employment growth stages.
  - Using the established contacts with existing operations and the rapport with the key business services providers, link businesses with development needs with those businesses and agencies that can provide the required services to guide and ensure growth.
  - Monitor provision of services and quality of impact.
  - Identify opportunities to educate existing businesses about WFN and its vision for a robust and enduring economy.

<b>Lead:</b> WFN EcDev Dept EDC	<b>Target:</b> 50 businesses contacted annually 10 businesses systematically assisted 25 employees retained or added annually
<b>Resources:</b> .5 FTE \$25,000 for communications materials	<b>Monitoring:</b> Letters of thank you from assisted businesses Businesses assisted confirmation forms completed and summary data circulated

## Strategy

### 1.5: Systematically upgrade the quality of both IR #9 and #10 lands through enhanced off-site planning and servicing to create improved "quality of place", and resulting in improved value of WFN lands and the quality of visitor and resident experiences.

#### Activities

- Upgrade the zoning bylaw to improve the quality of required landscaping, non-motorized trails and other off-site amenities.
- Economic development staff to assist the WFN Planner and Chief and Council to adjust the legislative requirements.
- Upgrade overall neighbourhoods and links between neighbourhoods (including those neighbourhoods in the District of West Kelowna).
  - Economic development staff to assist the WFN Planner and Chief and Council to first set neighbourhood planning requirements and then assist WFN to focus the resources for preparing them.

<b>Lead:</b> Senior Planner Supported by: WFN EcDev Dept	<b>Target:</b> Landscape standards complete Oct 2010 1 neighbourhood Plan per year Infrastructure links planned – Jan 2011
<b>Resources:</b> 1 FTE \$15,000 for plan communication materials	<b>Monitoring:</b> WFN Neighbourhood plans

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## Strategy

- 1.6: Systematically improve the quality of on-site development to improve the quality of liveability for residents, visitors, and customers.**

## Activities

- Upgrade the zoning bylaw to improve the quality of landscaping, frontages, and other on-site amenities requirements.
  - Economic development staff assist the WFN Planner and Chief and Council to adjust the legislated requirements.

<b>Lead:</b> Senior Planner Supported by: WFN EcDev Dept	<b>Target:</b> Landscape standards complete Oct 2010
<b>Resources:</b> .1 FTE in 2010 only \$5,000 for communication materials	<b>Monitoring:</b> New site development – Planning Department review

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## Goal 2: Increase the number of high paying career jobs on WFN lands for members.

### Rationale

Members desire higher incomes, satisfying employment and management/entrepreneurial experiences. Higher income earning opportunities require bright, capable people with recognized certification. One of the keys to these opportunities is higher education which requires quality education and education support from K to 12. Also, all long term economic analysis points to an ever-changing world where constant learning and at times re-education is required to consistently maintain income flows for households. Solid education not only teaches skills, knowledge, and attitudes and how to apply them, it also teaches how to create a base skill set for quickly learning how to apply new skills, knowledge and attitudes. To maximize the impact of this strategy and to maximize the distribution effect (equality for all members), the investment needs to be focused on the least skilled/educated adults, and youth where there is the highest return on the lowest investment.

### Strategy

**2.1: Consistently invest and reinvest in education of members, including those in the 0-5 years and K-12 age groups, and all post secondary school certified training.**

### Activities

- Assist the Education Department to prepare and implement an education investment strategy focused on all levels from Head Start to post graduate.
  - Directly link the education investment funds to the revenue obtaining mechanisms within the economic development activities (for example, sponsor students to attend NVIT's forestry diploma program).
  - Link education investment in children, youth and adults to future WFN needs. For example wilderness camps for youth (Sliver Lake Forestry Centre, Educo and Earth Quest, international exchanges for young adults to other First Nations in the Americas), professional exchanges with leading FN administrations in the Americas.

<b>Lead:</b> WFN Education Department Supported by: WFN EcDev Dept	<b>Target:</b> 1 post secondary student per year in each of the top 5 priority program areas
<b>Resources:</b> .25 FTE – Plan development Resources for implementing the Education Plan	<b>Monitoring:</b> WFN Annual Report based on student success data

### Strategy

**2.2: Systematically link post secondary students with existing on-reserve employers to increase the probability of them being hired by firms located on WFN lands.**

### Activities

- Create a linking program between students currently in post-secondary training with employers on the Westside (focus on WFN located businesses first) for summer employment, practicums, and post graduation employment.
  - Create an inventory of employers and through direct contact identify those looking to hire students (summer and other semesters).



- Through the WFN Education Department create and keep updated a list of current post secondary WFN students. Contact each student and identify their topics of interest and work placement desires.
- Link, through written and verbal connections, current students with potential employers.

<b>Lead:</b> WFN Education Department Supported by: WFN EcDev Dept	<b>Target:</b> 10 post secondary student per year obtaining "real" job experience
<b>Resources:</b> .5 FTE – Inventories and links	<b>Monitoring:</b> WFN Annual Report based on employment placement data

### Strategy

- 2.3: Systematically support certified in-service training for all WFN members and staff.**

### Activities

- Create staff development plans for all WFN staff.
- Create a staff enhancement fund for paying for systematic upgrading of current staff.

<b>Lead:</b> WFN Operations Manager Supported by Dept. Managers	<b>Target:</b> 50% of staff per year
<b>Resources:</b> \$100,000 annually	<b>Monitoring:</b> WFN Annual Report based on HR Dept Rpt

### Strategy

- 2.4: Establish expanded in-house capacity for community planning and engineering using resources that are currently spent on contracting out these services.**

### Activities

- WFN hires one additional engineer and an engineering technologist, with a preference for hiring a WFN member.
- WFN hires one additional planner with subdivision/urban design capability and a planning technician who could be a planning technologist or a geography graduate with an interest in land planning, with preference for hiring WFN members.

<b>Lead:</b> WFN Operations Manager Support from WFN Engineer and Planner	<b>Target:</b> 4 new staff in 2010-11
<b>Resources:</b> Re-allocated from current contract services	<b>Monitoring:</b> WFN Annual Report

## Strategy

- 2.5: Conduct a specialized health sector opportunity assessment including pre-feasibility analyses for expanding health and home care services for seniors on the Westside.**

### Activities

- Obtain \$25,000 to hire external capacity to quickly identify the top business opportunities and prepare pre-feasibility analyses on the top 2 or 3 opportunities.
- Review the opportunity analyses and pre-feasibility reports and select the top business for business plan preparation.
- Obtain appropriate resources to prepare a business plan for the top opportunity.
- Implement the business plan.

<b>Lead:</b> EDO Support from Community Services Mgr	<b>Targets:</b> 5 Opportunities, 2-3 Pre-feasibility analyses 1 new business started in 2011
<b>Resources:</b> \$25,000 for Opportunity Assessment Additional equity investment for the top opportunity	<b>Monitoring:</b> Opportunity assessment report Pre-feasibility analyses Business plan and start-up—Annual Rpt

## Strategy

- 2.6: Conduct a specialized First Nations business services sector (legal, accounting, appraising, taxation, financing) opportunity assessment including pre-feasibility analyses for expanding these services for other First Nations in BC and the rest of Canada.**

### Activities

- Assemble key members of the Business Services focus group for an intensive discussion on this specific potential.
- Prepare an implementation plan concept and business case for review by the EDC, the Education Coordinator and Chief and Council.
- Implement the plan with assistance from the EDC.

<b>Lead:</b> EDO Support from EDC Chief's participation	<b>Targets:</b> 5 additional staff with Business Service companies by 2014 and 20 by 2016 of which 3 are professional designated
<b>Resources:</b> 20 days of time—EDO	<b>Monitoring:</b> Business Services Sector Enhancement Report New staff hired by the business sector—confirmed by WFN Ec Dev staff

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**Goal 3: Maximize the success of existing WFN businesses and establish new business investments (wholly owned, joint ventures and minority equity investments) that meet the investment criteria and maximize both quality employment opportunities and return-on-investment.**

#### **Rationale**

WFN owned businesses have been established for a mix of service, profit, and resource control reasons. It follows that the more successful they are the better they are at providing services, profits, and resource control. Research consistently shows that the probability of business success rises dramatically if politics is kept separate from establishing and operating these businesses. Therefore, it is in WFN's best interest to establish a system that has a strong "fire wall" between political decision-making and business operations while still maintaining Council control of the policies and strategies that the businesses operate under.

#### **Strategy**

**3.1: Establish a membership working group to create the recommended economic development organizational structures that firmly separate the required political decisions and decision makers of WFN from their own business operations and activities. This includes businesses established as part of Title and Rights agreements.**

#### **Activities**

- Establish Terms of Reference for a members' working group that is approved by Chief and Council.
- EDO recommends, and Council appoints, members to the working group that have considerable experience in FNs economic development and WFN economic development.
- Economic development/business management working group to report to Council and membership by the end of October 2010 with recommendations on WFN's structure to manage and establish its businesses.

<b>Lead:</b> EDO Support from EDC Support from Council Secretariat	<b>Target:</b> Economic development structure for WFN enterprises by the end of October 2010
<b>Resources:</b> 20 days of time – EDO EDC appointed members' time	<b>Monitoring:</b> Council meeting official minutes and WFN newsletter article

#### **Strategy**

**3.2: Establish and use an investment selection process that includes community endorsed selection criteria.**

#### **Activities**

- The working group (as per 3.1) reviews and adjusts the draft selection criteria provided in the draft strategy.
- The working group (as per 3.1) reviews and adjusts the draft project/investment decision making process and provides a draft framework for membership and Council approval.
- Legislation and policy impact is reviewed and then adjusted to formalize the project/investment decision making process.

- The working group obtains systematic community input on the draft selection criteria, and the project/investment decision making process.
  - The health care opportunities and the business services opportunities could be the first opportunities to be adjudicated by the selection criteria.

<b>Lead:</b> EDO Support from EDC	<b>Target:</b> Investment selection criteria and investment decision making process is approved by Council and endorsed by membership by April 2011.
<b>Resources:</b> 20 days of time – EDO EDC appointed members' time	<b>Monitoring:</b> Council meeting official minutes and WFN newsletter articles

### Strategy

- 3.3: Prepare and implement business plans for the three existing high profile commercial ventures – Pine Acres (including expanding its role as a site for practicums, training and research), Heartland Economics (including post-harvest activities) and the Trading Post.**

### Activities

- Prepare a business plan for Pine Acres that will lay out the options for growth and the process for obtaining the approvals and capital for the potential expansion.
- Prepare a business plan for Heartland Economics that will lay out a whole log wood marketing/sales system and other potentials for growth including the process for obtaining approvals for expansion and (if needed) the capital for expansion.
- Prepare a business plan for the Trading Post that lays out the market potentials for growth and the process for obtaining the approvals and (if needed) the capital for expansion.

<b>Lead:</b> EDO, Manager - Community Services, Manager - Heartland Economics LP. Approval and participation from the managers of the three enterprises	<b>Targets:</b> Pine Acres Business Plan completed 2010. Heartland Econ. Business Plan completed 2010 Trading Post Business Plan completed 2010
<b>Resources:</b> Pine Acres Business Plan - \$25,000 Heartland Economics Business Plan - \$25,000 Trading Post Business Plan - \$10 – 15,000 Managers time – 5 days each over 3 months	<b>Monitoring:</b> Completed business plans Expansion of WFN enterprises

### Strategy

- 3.4: Prepare a Cultural Centre business concept analysis that incorporates the demand for Okanagan Nation members' art, its history and current activities and provides recommendations for future activities. This project assessment needs to be done quickly before piecemeal decisions that need to be significantly changed based on a later full project concept, get made.**

## Activities

- Establish Terms of Reference for a three phase (concept, feasibility, business plan) assessment of the potential to establish a Cultural Centre.
- Secure \$55,000 for the three phase assessment process.
- Select suitable external capacity to conduct the assessment.
- Supervise the assessment and feedback process.
- Prepare a project case analysis for the initial small pit house to be located near the Social Development office and Sensisysten School.
- Prepare a business case for ethno-botany greenhouse operation.
- Prepare a feasibility analysis for an artists' co-op and associated gallery.
- Prepare a pre-feasibility analysis on the glass blowing concept.

<b>Lead:</b> Curator Participation from the Manager of Intergovernmental Affairs/Title and Rights	<b>Targets:</b> Cultural Centre Analysis Concept – Dec 2010 Pit House project concept – Dec 2010 Ethno-botany greenhouse Business Case – April 2011 Artists' Co-op and Gallery Feasibility Analysis – Sept. 2011
<b>Resources:</b> Cultural Centre Concept & Analysis - \$55,000 Pit House project concept - \$15,000 Ethno-botany greenhouse Business Case - \$15,000 Artists' Co-op and Gallery Feasibility Analysis- \$25,000	<b>Monitoring:</b> Completed Analyses WFN Newsletter articles and annual reports

## Strategy

### 3.5: Prepare and implement a Community Forest Agreement AAC expansion strategy to secure at least an additional 45,000 m<sup>3</sup> of AAC.

## Activities

- Prepare detailed request to the BC Ministry Forests and Range for the expansion of the CFA to 100,000 m<sup>3</sup> of AAC.
- Explore the potential to manage some of the timber harvesting in the region for BC Timber Sales and the potential of accessing other current timber allocations in the region.

<b>Lead:</b> Manager – Heartland Economics Manager of Intergovernmental Affairs/Title and Rights Chief	<b>Targets:</b> Proposal for AAC increase – Nov. 2010 AAC increase April 2012
<b>Resources:</b> 20 days of management time - proposal 20 days of management time - negotiations	<b>Monitoring:</b> AAC Agreement – BC Gazette WFN Newsletter articles and annual reports



## Strategy

- 3.6: Identify and investigate opportunities to provide quality services and events including recreation, education, arts and culture on a cost recovery basis to Aboriginal youth. WFN has demonstrated the ability to consistently provide social programs and as there is growing number of Aboriginal youth (WFN members and others on WFN lands and in the Okanagan in general), the demand for Aboriginal youth activities and programs will grow for the next few decades. An Aboriginal youth camp maybe a real possibility (use Silver Lake Camp in the fall and spring if it sits empty).**

## Activities

- Conduct a systematic needs assessment for Aboriginal youth recreation, education, arts and culture including daily, weekly, and annual activities.
- Prepare an opportunity analysis for youth activities, based on the results of the systematic needs assessment.
  - An example of an opportunity (non-business) would be to establish a systematic connection between the best Aboriginal hockey players in western Canada and the Westside Warriors. They could be billeted with WFN families to maintain the FN connection and reserve-type tight social life that many are accustomed to.
- Prepare pre-feasibility analyses on the top 3 opportunities.
- Prepare a business plan for the top opportunity.
  - The business plans may be prepared by entrepreneurs and therefore the implementation of the business will be by entrepreneurs as well.
- Implement the business plan.

<b>Lead:</b> EDO with assistance from: Manager – Community Services Recreation Coordinator Curator	<b>Targets:</b> Securing funding – Sept. 2010 Needs assessment – Dec. 2010 Opportunities Analysis – March 2011 Pre-feasibility Analyses – May 2011 Business Plan – Sept. 2011
<b>Resources:</b> \$30,000 – Needs assessment \$15,000 – Business Opportunities Analysis \$15,000 – 3 Pre-feasibility Analyses \$15,000 – Business Plan	<b>Monitoring:</b> WFN Annual Report WFN Newsletter articles

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## Goal 4: Increase WFN's investment portfolio and investment return in the short and long term for both WFN's government and its members.

### Rationale

It is the vision of the Nation to increase in population, land area, and economic strength and to be economically independent from senior levels of government. In addition, the Nation wants to provide social, health, education and community activities above what might be available through funding agreements. To do these things will require additional resources. These resources can be obtained through a variety of methods including Title and Rights agreements and returns-on-investments. Whichever way the resources are initially obtained, it is prudent to diversify and expand the investment returns to maximize future returns and minimize business risks.

### Strategy

#### 4.1: Prepare investment goals, plans, and strategies for current investments.

### Activities

- Prepare investment goals and expected returns for each of the existing investments held by WFN.

<b>Lead:</b> Director of Finance EDO (new investments only) Business Operations Managers	<b>Targets:</b> Investment goals by Feb 2011
<b>Resources:</b> \$10,000 publication - investment goals supplement	<b>Monitoring:</b> WFN Newsletter articles & annual rpts

### Strategy

#### 4.2: Prepare land use options with full cost/benefit analysis for resources and land use for IR #11 and #12 and for additional lands that are in the process of being acquired, in order to upgrade member and Council discussion and decision making regarding land use, investment return, and future investments.

### Activities

- Conduct a resource assessment for current undeveloped lands held by WFN.
- Prepare a highest and best use analysis of key WFN lands.
- Prepare land use options for IR #11 and #12 taking into account the long term residential needs of WFN.
- Establish a community member public participation process to obtain input on the land use options for IR #11 and #12 that is informed by the results of the resource assessment, highest and best use analysis, and potential returns of a variety of potential associated site related business opportunities.

<b>Lead:</b> Senior Planner EDO EDC Special Projects Engineer	<b>Targets:</b> Resource Assessment Key locations – Nov 2010 Highest & Best Use Analysis - Mar 2011 Landing Use Options – Nov 2011
<b>Resources:</b> \$150,000 per reserve Experienced team of planners, engineers, and	<b>Monitoring:</b> WFN Newsletter articles and annual reports

### Strategy

- 4.3: Prepare a reporting system on each investment presenting the return target, the level of achievement, and future investment prospect/plan.**

### Activities

- Prepare a management and communications system to keep Council (quarterly) and members (annually) informed on performance of key investments.
- Prepare a consistent communication and reporting summary on business investments through a supplementary attachment to the annual report and semi-annual updates if required.

<b>Lead:</b> CFO Business Managers EDC	<b>Targets:</b> Investment Communications System Jan. 2011 Investment Communications vehicles Mar. 2011
<b>Resources:</b> \$10,000 External Assistance for system design Managers' and Director of Finance's time	<b>Monitoring:</b> Communication vehicle WFN Newsletter articles and annual reports

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## 13. IMPLEMENTATION & MONITORING

All the strategies outlined in section 12 are of high or very high priority based on the intersection of their potential impact, high probability of success, and high benefit/cost ratio of implementation. There are many other potential strategies that have been discarded in the filtering process given the requirement to match internal implementation capacity with the high priority and probability of success. Outlined below are the individuals with lead responsibility for implementation, its timing, and cost and the expected impacts. Monitoring and reporting on the implementation of the Economic Development Plan is a critical component that is also described below.

### 13.1 RESPONSIBILITY

The economic development strategy has activities that are the responsibility of more than the economic development department and the EDC as the strategy has implications for other departments as well including: land planning, engineering, education, intergovernmental affairs, taxation, internal government operations, social development, health, and managers of existing enterprises. Also, many of the individual strategies are linked to other strategies and the expected impacts are enhanced when the strategies are implemented in concert, such as implementing the post secondary education in healthcare fields' strategy, at the same time as identifying and then implementing new business activities in the health sector. (See Figure 21.)

### 13.2 IMPLEMENTATION PHASING

The staging of implementation has been given considerable thought and analysis especially given that all of the strategies and their associated activities are of equal (high) priority. The staging, therefore, is based on which strategies already have the implementation capacity in place (many are currently underway) and which strategies require other strategies to be started or capacity created or freed-up before they can be implemented. (See Figure 22.)

Strategies 1.1, 1.2, 1.3, are all critical on-going initiatives of WFN departments that have proven to be quite successful based on the level of land development and feedback obtained from the variety of methods during the strategy development process. Therefore, these activities continue throughout the plan period. Strategies 1.4 and 1.5 will require focused effort by those leading these strategies after other strategies and activities are initiated. They need to follow the implementation of other strategies, e.g. implementing Strategy 1.5 – Upgrading of IR lands – will follow implementing of Strategy 2.4 – Expanding in-house planning and engineering capacity. The activities in Strategy 1.6 are already currently being worked on and therefore they are scheduled to continue.

Strategy 2.1 is an on-going activity where ramping up the level of activity is foreseen. The implementation of Strategies 2.2 and 2.3 needs to begin in the last quarter of 2010-11 coinciding with the availability of most post secondary students. Strategy 2.4 needs immediate attention given current demand for these services and a series of other compelling factors articulated earlier. The implementation of Strategies 2.5 and 2.6 needs to get underway as soon as the work in Strategy 3.1 is well advanced. Strategies 2.5 and 2.6 are best implemented under a revised WFN enterprise development system. Both of these strategies have activities that will produce outcomes that are expected to need systematic attention through-out all of the later years of the plan period – 2012-2015.

Figure 21: Implementation Responsibility

	LEAD
<b>Goal 1: Maintain &amp; expand existing mixed economy on WFN Lands</b>	
1.1. Maintain existing legal & property tax rate	▸ Council, DOO, EDC
1.2. Maintain critical brokering, promotion & communication role	▸ EDC, EDO
1.3. Maintain relationships between WFN and local & regional governments and agencies	▸ EDC, EDO
1.4. Provide BR&E to existing businesses & lease situations	▸ ED Dept
1.5. Upgrade quality of IR#9 and IR#10 lands	▸ Sr. Planner, ED Dept
1.6. Improve quality of on-site development	▸ Sr. Planner, ED Dept
<b>Goal 2: Increase number of high paying career jobs on WFN lands for members</b>	
2.1. Consistently invest & reinvest in education of members	▸ Education Dept, ED Dept
2.2. Systematically link post secondary school students with existing on-reserve employers	▸ Education Dept, ED Dept
2.3. Systematically support certified in-service training for all WFN members & staff	▸ DOO, Dept Managers
2.4. Establish expanded in-house capacity in community planning & engineering	▸ DOO, Eng. Mgr & Planners
2.5. Conduct specialized health sector opportunity assessment	▸ EDO, Comm. Services Mgr
2.6. Conduct specialized First Nations business services sector opportunity assessment	▸ EDO, EDC
<b>Goal 3: Maximize success of existing WFN businesses &amp; establish new business investments</b>	
3.1. Establish membership working group	▸ EDO, EDC, Council Secr.
3.2. Establish and use investment selection process	▸ EDO, EDC
3.3. Prepare & implement business plans for the three existing commercial ventures	▸ EDO, Community Services Mgr, Heartland Econ. Mgr
3.4. Prepare a Cultural Centre business concept analysis	▸ Curator, Manager IA/T&R
3.5. Prepare and implement a Community Forest Agreement AAC expansion strategy	▸ Heartland Economics Mgr, Mgr IA/T&R
3.6. Identify & investigate opportunities to provide quality services & events on a cost recovery basis to Aboriginal youth	▸ Community Services Manager, Recreation Coordinator, EDO
<b>Goal 4: Increase WFN's investment portfolio &amp; investment return in the short and long term for both WFN government and its members</b>	
4.1. Prepare investment goals, plans and strategies for current investments	▸ DOF, EDO, DOO
4.2. Prepare land use options with full cost/benefit analysis for resources and land use of IR#11 and IR#12	▸ Senior Planner, EDO, EDC, Special Projects Engineer
4.3. Prepare a reporting system	▸ COF, Business Mgrs, EDC



Figure 22: Implementation Phasing

	2010-11	2011-12	2012-13	2013-14	2014-15
<b>Goal 1: Maintain &amp; expand existing mixed economy on WFN Lands</b>					
1.1. Maintain existing legal & property tax rate					
1.2. Maintain critical brokering, promotion & communication role					
1.3. Maintain relationships between WFN and local & regional governments and agencies					
1.4. Provide BR&E to existing businesses & lease situations					
1.5. Upgrade quality of IR#9 and IR#10 lands					
1.6. Improve quality of on-site development					
<b>Goal 2: Increase number of high paying career jobs on WFN lands for members</b>					
2.1. Consistently invest and reinvest in education of members					
2.2. Systematically link post secondary school students with existing on-reserve employers					
2.3. Systematically support certified in-service training for all WFN members & staff					
2.4. Establish expanded in-house capacity in community planning & engineering					
2.5. Conduct specialized health sector opportunity assessment					
2.6. Conduct specialized First Nations business services sector opportunity assessment					
<b>Goal 3: Maximize success of existing WFN businesses &amp; establish new business investments</b>					
3.1. Establish membership working group					
3.2. Establish and use investment selection process					
3.3. Prepare & implement business plans for the three existing commercial ventures					
3.4. Prepare a Cultural Centre business concept analysis					
3.5. Prepare and implement a Community Forest Agreement AAC expansion strategy					
3.6. Identify & investigate opportunities to provide quality services & events on a cost recovery basis to Aboriginal youth					
<b>Goal 4: Increase WFN's investment portfolio &amp; investment return in the short and long term for both WFN government and its members</b>					
4.1. Prepare investment goals, plans and strategies for current investments					
4.2. Prepare land use options with full cost/benefit analysis for resources and land use of IR#11 and IR#12					
4.3. Prepare a reporting system					

Key

-  Activity
-  Key Deliverable
-  Potential Activity

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Strategy 3.1 is the cornerstone of the “new way” for WFN internal business development activities and therefore needs immediate attention so that other strategies that depend on it, can be implemented. Strategies 3.3, 3.4, and 3.6 all need to be phased in as soon as the bulk of the work is completed in implementing Strategy 3.1 based on available capacity and resources. All three of these strategies have activities that will produce outcomes that are expected to need systematic attention through-out in all of the later years of the plan period – 2012-1015 - similar to Strategies 2.5 and 2.6. It is important to reiterate that Strategies 2.5, 2.6, 3.3 and 3.6 particularly, are designed to create the desired high skill, high paying long term income earning opportunities. Strategy 3.5 can be implemented as soon as the staff resources are able to be applied to it, probably the last quarter of 2010-11.

Strategies 4.1 and 4.3 are best implemented along with the other WFN budgeting cycle and reporting items, e.g. the Annual Budget and Annual Report. Strategy 4.2 is expected to be implemented later in the plan period based on the speed of implementation of many other projects on the two west side reserves – IR 9 and IR 10.

### **13.3 BUDGET IMPLICATIONS**

The budget implications of the strategies are outlined below on an annual basis for the five years of the overall strategy. (See Figure 23.) Many of these strategies and their associated activities will be undertaken as part of the existing work load for current staff and agencies and therefore will be covered within existing budget allocations. Costs have been estimated for the remainder of the strategies and activities that will require additional funding outside of the current budget allocations. A series of the initiatives, as described above in 13.2 Implementation Phasing, are likely to have downstream costs and benefits, including revenue streams, who's magnitudes will only be known after the initial assessments and decisions have been made, so those costs have not been included here.

Implementing the overall strategy will require the Economic Development Department to grow to include its existing EDO plus a full time economic development assistant (estimated total cost \$50,000-60,000 annually). In addition, the WFN new enterprise management structure, to be investigated by the Membership Working Group and decided by Council, will likely require a full time manager and shared administration assistant, at an estimated cost of \$150,000 annually. It is expected that these costs will be more than recovered from increased profitability of the WFN's existing and new enterprises as has been experienced by progressive First Nations all across Canada and the US.

Figure 23: Implementation Budgeting

	2010-11	2011-12	2012-13	2013-14	2014-15
<b>Goal 1: Maintain &amp; expand existing mixed economy on WFN Lands</b>					
1.1. Maintain existing legal & property tax rate	WCB				
1.2. Maintain critical brokering, promotion & communication role	WCB				
1.3. Maintain relationships between WFN and local & regional governments and agencies	WCB				
1.4. Provide BR&E to existing businesses & lease situations	WCB				
1.5. Upgrade quality of IR#9 and IR#10 lands	WCB				
1.6. Improve quality of on-site development	WCB				
<b>Goal 2: Increase number of high paying career jobs on WFN lands for members</b>					
2.1. Consistently invest and reinvest in education of members	\$100	\$200	\$300	\$400	\$500
2.2. Systematically link post secondary school students with existing on-reserve employers	\$30	\$30	\$35	\$35	\$40
2.3. Systematically support certified in-service training for all WFN members & staff	\$50	\$50	\$50	\$50	\$50
2.4. Establish expanded in-house capacity in community planning & engineering	WCB				
2.5. Conduct specialized health sector opportunity assessment	\$25	\$35			
2.6. Conduct specialized First Nations business services sector opportunity assessment		\$25	\$35		
<b>Goal 3: Maximize success of existing WFN businesses &amp; establish new business investments</b>					
3.1. Establish membership working group	\$40				
3.2. Establish and use investment selection process	WCB				
3.3. Prepare & implement business plans for the three existing commercial ventures	\$25	\$40			
3.4. Prepare a Cultural Centre business concept analysis	\$55	\$30	\$25		
3.5. Prepare and implement a Community Forest Agreement AAC expansion strategy	WCB				
3.6. Identify & investigate opportunities to provide quality services & events on a cost recovery basis to Aboriginal youth		\$30	\$45		
<b>Goal 4: Increase WFN's investment portfolio &amp; investment return in the short and long term for both WFN government and its members</b>					
4.1. Prepare investment goals, plans and strategies for current investments	\$10	\$10	\$10	\$10	\$10
4.2. Prepare land use options with full cost/benefit analysis for resources and land use of IR#11 and IR#12				\$150	\$150
4.3. Prepare a reporting system	\$10	\$10	\$10	\$10	\$10

( dollar amounts are in \$,000's  
WCB—within current budget )

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## 13.4 MONITORING

The Economic Development Department (EDD) in combination with the EDC have the responsibility to monitor and report on the implementation of the Plan once it has been adopted by Council. The monitoring will require consistent quarterly review of progress and reporting to the DOO and Council as well as reporting to members as part of the annual reporting process – through face-to-face sessions and written materials. The monitoring undertaken by the EDD and EDC need to report on progress of implementation versus the plan, plus the results of the implementation in terms of movement towards both the individual targets by strategy and activity plus the movement towards the expected impacts as outlined in Section 13.5. It is this later monitoring function, measuring movement towards targets and impacts, where monitoring resources and reporting to the DOO, Council and members need to be focused.

The Plan is designed to be used by all department heads, and therefore for Council, for both their annual work planning and their annual budgeting process. There is the full expectation that the strategies and particularly the activities will need to be honed in the later years of the plan but the vision, strategy level targets and expected impacts need to be maintained as the bench marks for the prescribed “course” as set by the community. WFN will most likely find it necessary to systematically revisit the plan in three years like other communities, both First Nation and non-First Nation, that use this type of economic development strategy and implementation system have found.

## 13.5 EXPECTED IMPACT

The impacts of the implementation of the community economic development plan will enable WFN to achieve its four broad goals and move closer to living out its articulated economic vision. This movement toward the vision is created by implementing the associated actions for each of the twenty-one strategies attached to the four goals. The success of implementation and achievement of the goals will be measured using the monitoring data sources presented and judged against the assigned targets.

At the end of the plan period, if the plan is implemented as recommended, bearing in mind the need to hone the plan based on economic and organizational changes, there will be:

- A much expanded mixed economy on WFN lands resulting in total assessments rising by between \$250 million and \$500 million;
- Noticeably improved quality of on-site and off-site development;
- The pace of post secondary training of members will have been maintained and for areas of particular economic need they have accelerated;
- An increase in the number of high paying career jobs on WFN lands available for members, at a pace that matches the rate of post secondary education graduates, with particular growth in the health care and professional services sectors;
- A solid member-supported, structural separation between WFN owned enterprises and the political and administration systems of the WFN government;
- Four new WFN owned and operated enterprises plus have significant investments in other enterprises;
- A clear understanding of the economic development and WFN investment goals, targets and outcomes for all of the communal investment assets by members; and
- A sense of involvement and pride in the economic development success by members.

If the implementation of the economic development plan achieves these impacts, WFN will be more economically diversified, sophisticated, and able to assist all members to enjoy the quality of life associated with living in this high quality community.





## APPENDICES

### APPENDIX 1—REFERENCES

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## APPENDIX 2—HUMAN RESOURCE INVENTORY QUESTIONNAIRE

**Westbank First Nation  
Human Resources Inventory Questionnaire**

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1. Gender ☐ Male ☐ Female

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2. Primary Residence (Select only one box) ☐ On Reserve ☐ Off Reserve  
 ⇒ If Off Reserve, please indicate where ☐ Local-Okanagan ☐ Other \_\_\_\_\_

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3. Age Group of Band Member  
☐ 18-19 ☐ 20-29 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60+

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4. Are you currently at school? ☐ Yes ☐ No  
 ⇒ If yes, are you attending full time or part time? ☐ Full Time ☐ Part Time  
 ⇒ If yes, please indicate what program enrolled in? (i.e., GED, Trade, Tech, Arts, Science)  
 \_\_\_\_\_  
 \_\_\_\_\_

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5. What is the highest education level you have completed?  
☐ K-8 ☐ Trades Certificate ☐ University Degree  
☐ 9-11 ☐ Some Post-secondary ☐ Graduate Degree  
☐ Gr. 12/GED ☐ College Certificate/Diploma ☐ Other \_\_\_\_\_

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6. Are you currently wage employed? ☐ Yes ☐ No  
 ⇒ If yes, are you self-employed? ☐ Yes ☐ No  
 ⇒ If yes, are you under-employed? ☐ Yes ☐ No  
 ⇒ If no, please explain. \_\_\_\_\_

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7. What is your current job or jobs?  
 \_\_\_\_\_  
 \_\_\_\_\_

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8. Is your position full time, part time or seasonal?  
☐ Full-time ☐ Part-time ☐ Seasonal

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9. Is your job a management position? ☐ Yes ☐ No  
 ⇒ If yes, please check the appropriate box:  
☐ Owner-operator ☐ Owner\* ☐ Employed Assistant Mgr/Mgr

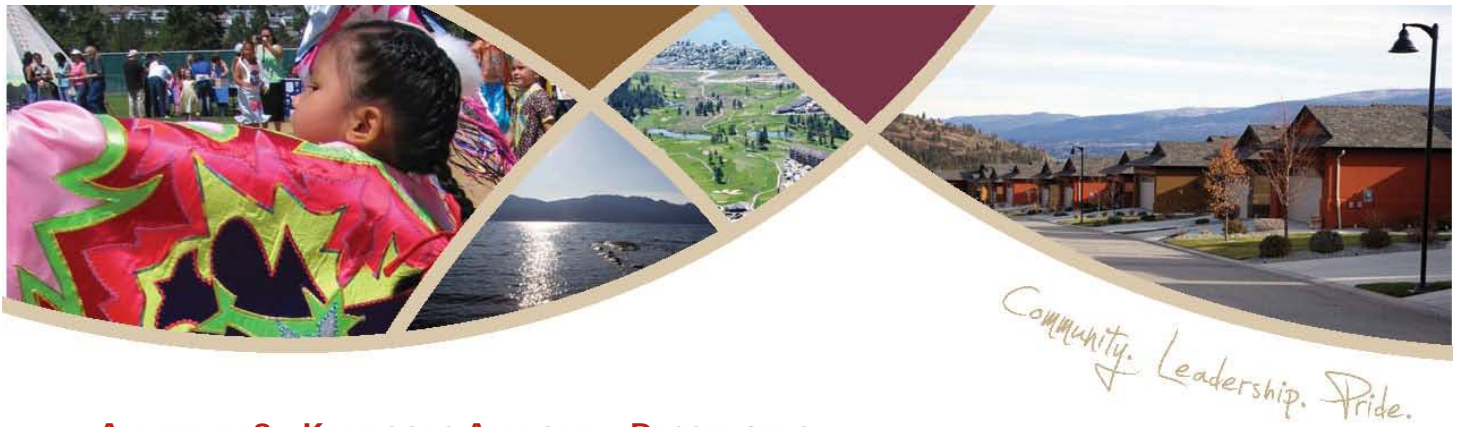
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10. Are you presently taking any training or upgrading courses? ☐ Yes ☐ No  
 ⇒ If yes, please list:  
 \_\_\_\_\_  
 \_\_\_\_\_

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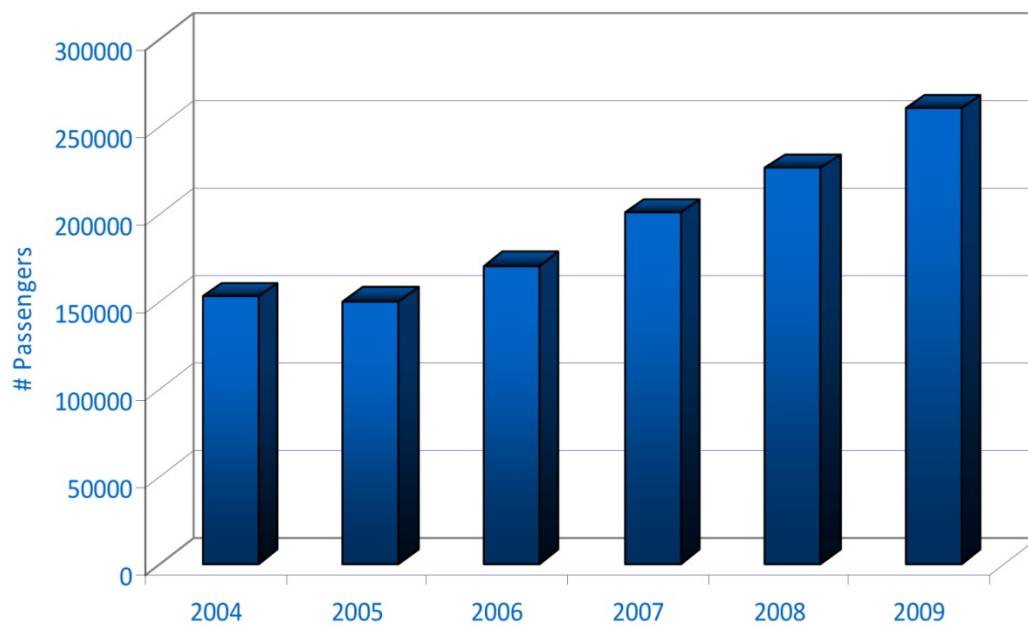
11. Please list key work-related skills you have (i.e., mechanical, computer, first aid, etc. List as many as you are able: 4 or 5 are great, 2 or 3 are good.)  
 \_\_\_\_\_  
 \_\_\_\_\_

*\*Owner—manages employees versus owner-operator who also does day to day hands on tasks.*



### APPENDIX 3—KAMLOOPS AIRPORT – PASSENGERS

Figure 24: Kamloops Airport Traffic, 2004-2009<sup>25</sup>



<sup>25</sup> Venture Kamloops: Transport and Logistics. <http://www.venturekamloops.com/transportationlinkto.htm>



## APPENDIX 4—VISION

### WFN – Economic Vision for 2030 – Components (Version 2)

#### Overall Themes (General Agreement)

##### Independence and self reliance of WFN members and their families

- Emotional and social stability.
- Advanced education including skilled operators, journeymen, certified technicians, technologists, professionals, managers and owners.
- Individuals moving up the employment ladder from entry level to technical to professional to management.
- Successful business operators and the businesses are successful.
- Personal growth.
- All boats being lifted by the economic development tide not just a few people/families.
- Continued willingness to reinvest in social development.

##### WFN government provides stability, certainty and fairness for those investing and residing on WFN Lands.

- WFN works with strong consistent land use policies and implementation of those policies.
- Services – water, sewer, roads – are maintained to urban standards at similar regional pricing.
- Contracts, head leases and sub leases are honoured and respected.

##### WFN government is financially independent from senior levels of government.

- There are no “required” transfer payments that are different from or in addition to what other Canadian citizens would expect.
- WFN does not need to seek outside grant assistance for basic on reserve infrastructure, roads, water, sewer, housing, etc.
- WFN government is both financially and ecologically sustainable.

##### What would be different in 2030?

- There will be a College/Technical Institute/University on WFN lands to provide higher education to WFN members, other FN's people, and high skill level employment for WFN members and their families. Plus generate high level businesses and services that can be used in the community and in other communities.
- There will be many more member operated businesses in a variety of sectors.
- There will be a FN convention centre/hotel/resort on WFN lands.
- Foreshore development.



- 
- Second bridge crossing discussions underway and “readiness preparation” with WFN and provincial involvement.
  - Health facilities including care-a-minimums, intermediate care facilities, a health centre, and potentially even a place for a hospital.
  - Pine Acres Intermediate Care Facility will be a professional teaching facility for care aides, LPNs, Nurses and professional practicums specializing in First Nation care.
  - The day care will be a registered training facility for early childhood education.
  - Community sports facilities will be upgraded to include advanced fitness centres and be reflective of the goal of active healthy membership.
  - Individual fitness activity has increased resulting in better health.
  - There will be world class “green” office and residential developments that are two, three or four storeys high with mixed residential and commercial space. High-rises in key locations on WFN lands.
  - General improvement in the quality of jobs for WFN members based on members’ enhanced, cutting edge, skills, solid attitudes towards work, and tighter relationships between WFN and business owners in the area.
  - There will be community gathering places, including specific places where people of all ages can gather.
  - A museum and cultural centre will be built alongside or as a component of a Visitor Centre.
  - The WFN land base will have grown, with infrastructure in place (where desired) ahead of land development.
  - There will be serviced residential land for all members for the housing needs identified.
  - Housing for members.
  - A community central core
  - WFN has re-purchased some of the land leases and renegotiated some other leases.
  - Infrastructure for Gallagher Canyon lands is in place with development projects underway.
  - More shared services with the District of West Kelowna .

#### **How will these things happen?**

- Certificate of possession (CP) holders to be more involved in the management and ownership of the enterprises on their lands to move up the risk and reward paradigm.
- The community land plan and zoning stability has been maintained.
- There will be an increase in land base through purchases, land claims, and development leverages includes lands along Westside Road.
- The membership of WFN will grow.
- Buildings will be built to high sustainability standards.
- There will be a small business development centre focused on assisting WFN members.
- WFN members will think on a global level.
- Many more of the developments and businesses will be joint ventures with WFN and its members including some off-reserve joint ventures with other First Nations and other countries.
- On-the-job management training with existing operations has taken place over the last two decades.
- High standards in regards to quality employment, ownership of enterprises, and financial return have been maintained for developments on community lands.

- Aboriginal title and rights have been asserted, including lands claims settlement and strategic land selection, and have created revenue flows to the Nation .
- Relationships are fostered between levels of government using partnerships and education about WFN culture.
- Enhanced benefits for developers and TPs (?) to make living and doing business on WFN lands attractive.
  - Streamlined consistent development systems that out-perform other jurisdictions
  - High quality development partners have been accepted
- More community people donating personal time and expertise to advance WFN.

## Results

- Socially connected, safe, secure, healthy, and financially independent members.
- Drug and substance abuse substantially reduced.
- Community beautification including landscaping, parks, walkways, etc.
- More green spaces and natural areas near and in the community core and outside the community core, including undeveloped waterfront areas are enjoyed and supported by members.
- Walking trails in the community and between the bridge and West Kelowna's downtown core.
- WFN government will have reduced their ecological footprint even while it has grown.
- Okanagan language – common phrases are used regularly and culture has grown .Full immersion instruction increases the number of language speakers.
- General increase in individuals' sense of pride.

## Other Themes (No General Agreement)

- WFN government will own and operate substantial businesses on and off reserve.
- The Community Forest Agreement (CFA) tenure (land based) will have advanced to be a permanent land based tenure with:
  - Timber harvesting
  - Comprehensive silviculture
  - Control of road access
  - Control of wildlife harvesting
  - Network of walking, hiking, and biking trails
  - Layers of other tenures including guide outfitting, snowmobiling, etc., to control use of the area
  - Shared community understanding and support for the CFA
- Annual financial payouts for all members
- Highway 97 corridor mostly developed with key road interchanges with a hierarchy of decisions based primarily on WFN needs.
- Gaming facility(s) underway [on WFN lands] and operating successfully.

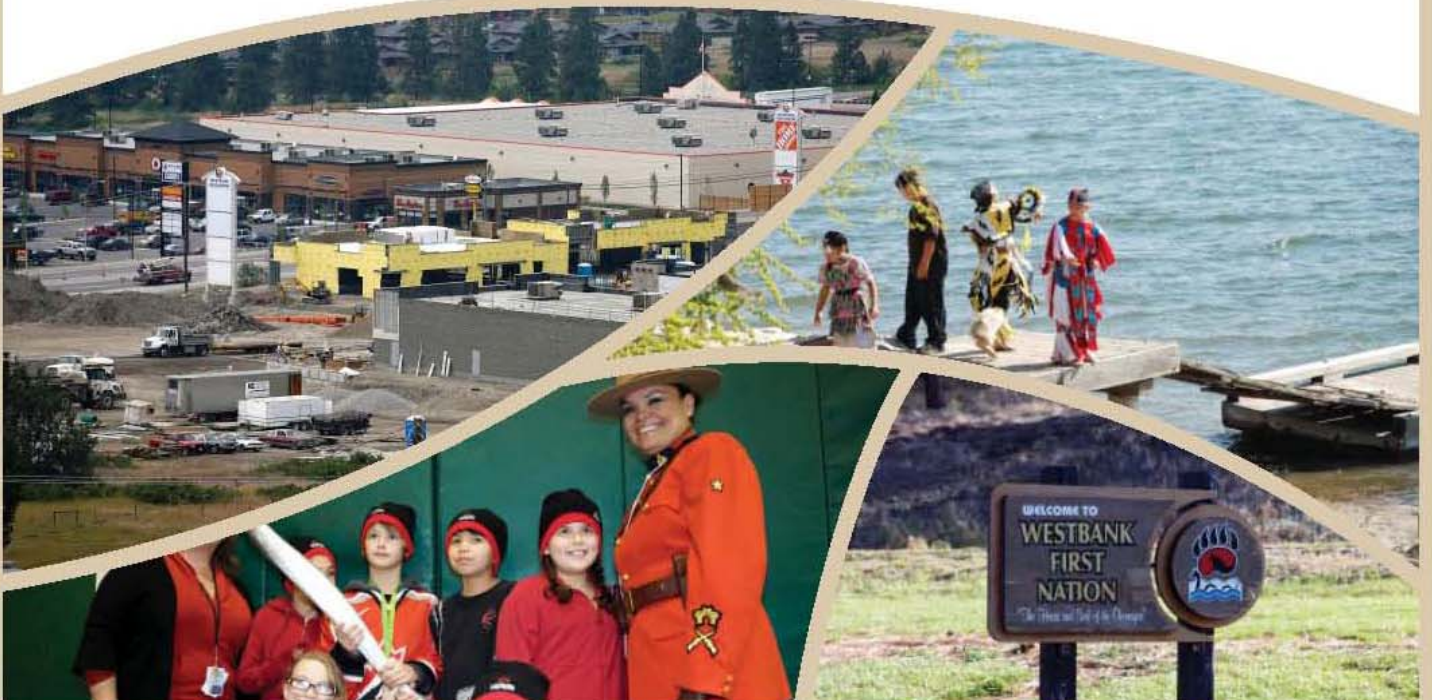


## APPENDIX 5—VISION 2020

### VISION 2020 (from community forum on March 25, 2010)

- Greater business retention for WFN entrepreneurs → increased success rate
- Educational post secondary—here
- Long term sustainable ecological and economy
- Young population → many opportunities education and employment
- More incentives for entrepreneurs to start new business
- Equal opportunities for members
- Self government move away from enabling → social/economic
  - o Encourage people to support themselves
- More green space – park
- To move forward culturally
- Medical centre
  - o Chiropractor/Dental/Vision
  - o Wellness Centre
- Amenities—recreation, pool, skating rink, skate park
  - o More for small children – climbing gym
- Expand on social services
  - o Pine Acres
  - o Children's needs
- More low skill jobs as stepping stones
- Prosperity without the pit falls
  - o Loss of community
  - o Addition
- Financially independent – families and individuals
- Boutique type area
  - o No driving
  - o Cobble stones
  - o Market squared common theme
- Housing for members
- Good stable government water/sewer
  - o Sustainable/pavement
- Culture centre, conference centre (Casino)
- Physically well being—healthier lifestyle and diet
- Youth initiatives (skate park, employment centre, clothing drives)
- Joining with other Bands – joint strengths
- Job shadowing
- Community theatre & performance
- Community participation and involvement
- Advanced fields—sport (rugby, artificial turf)
- WFN best in something (strive forwards)
- Car dealership
- RV Park/camp ground (Bear Creek Park)
- Higher percentage of professional (skilled labour) services by Band members
- Community beautification and pride
- Sense of belonging and pride and happy to be here

## NOTES





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