



REGIONAL DISTRICT OF NORTH OKANAGAN
REGIONAL GROWTH STRATEGY
"One Region, One Future"

Urban Containment Toolkit



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Executive Summary

Urban Containment Boundaries can be used to achieve a number of objectives:

- Manage growth – control the amount and location of new development opportunities to achieve the outcomes of strategies like the Regional Growth Strategy.
- Create cohesive urban areas – co-ordinate and integrate new development in a way that reflects local circumstances and improves the efficiency of service delivery and transportation.
- Efficient use of urban land – make best use of development and infrastructure capacity through a staged approach to land release.
- Allow compact urban form – maintain the character of settlements and promote accessible communities that enhance the sense of community ownership.
- Ensure urban containment – safeguard rural land resource, including landscapes, by preventing urban sprawl.
- Facilitate community outcomes – to ensure growth is managed, as much as it can be, to reduce negative and maximize positive effects.

The following broad criteria are suggested to help determine Urban Containment Boundaries. This will ensure a consistent approach is taken whilst allowing local issues to be taken into account:

- Identify the amount of growth required in the settlement.
- Identify current development commitments, including zoning and resource consents.
- Establish land availability – determine whether land is genuinely available for development.
- Confirm the relationship between current and future land use activities and determine which ones need to be located close together.
- Confirm the servicing requirements for development and availability of infrastructure.
- Identify future transport opportunities.
- Identify constraints – areas where development will be restricted (e.g.: sensitive landscapes, ecological habitat, agricultural lands, and natural hazards).
- Define boundaries – use landscape features, physical features (e.g. road corridors) and property boundaries.

A successful UCB will have a number of components. It should not be overly restrictive of growth such that it halts all new development, but rather should allow for healthy and desirable growth within its boundary. Such growth should meet contiguity requirements as well since growth boundaries often contain an adequate supply of land for many years worth of development. There should be limits on how often the UCB can be altered so that the local land use plan has some stability and meaning, but there should also be a timeline by which the boundary can and should be reevaluated and reshaped as the community grows and changes. Finally, a UGB should be coupled with other tools, such as affordable housing solutions and incentives for infill development, to ensure that the community and the region realizes the maximum of benefits of this growth management tool

Table of Contents

1.0 Urban Containment Boundaries: The Tool of Choice3

2.0 Overview of Some of the Supporting Local Municipal Tools.....3

3.0 The History of Urban Containment in the North Okanagan4

4.0 Developing Urban Containment Boundaries in Six Easy Steps.....6

4.1 Defining Urban Containment Boundaries6

4.2 Urban Containment Boundary Development Process.....6

4.0 Policies and Tools that Support Urban Growth Boundaries..... 10

4.1 Phasing Growth within an UCB 11

4.2 Greenbelts 11

4.3 Urban Service Boundaries..... 12

5.4 Rural Reserves 14

5.5 Rural/Urban Transition Areas..... 15

5.6 Priority Growth Areas..... 17

5.7 Fringe Area Management 19

Urban Containment Tool-kit

1.0 Urban Containment Boundaries: The Tool of Choice

An Urban Containment Boundary (UCB), also known as an urban growth boundary, urban growth area or urban service area provides a hard edge to development. An UGB is an effective, defensible growth management tool used to curb, direct, and control growth. At its most basic, an UCB is a line on the map that distinguishes urban from rural land. A well-defined and appropriately located UCB is intended to ensure that growth occurs in a coordinated, well-planned fashion, resulting in compact urban centres surrounded by productive forest and agricultural land. By concentrating most development within urban areas, an UCB limits low-density, rural sprawl resulting in economic, social and environmental benefits for local governments and residents.

The economic benefits of a compact urban form include more efficient and cost-effective delivery of infrastructure, including transportation, utilities and community services. This allows local and regional governments to invest tax dollars in a way that provides the greatest possible benefit to the most number of people. Residents also benefit economically as compact urban areas bring together the critical number of people needed to support local commercial enterprises as well as transit.

Social advantages relate to the health benefits that come from increased walking and cycling, as well as lower levels of air pollution due to reduced automobile use. This reduction in air pollution ties into the environmental benefits that emerge when an appropriately located UCB is respected. Reduced lengths and frequency of automobile trips result in fewer greenhouse gas emissions and improved air quality. In addition, focusing development inside the UCB alleviates pressure on open spaces, natural habitat, resource lands and rural areas, preserving the functional and aesthetic integrity of the rural landscape.¹

UGBs can be used to mark the limit of central utility extensions, bound areas within which there is enough buildable land for the next 20-30 years and locate where public facilities and services are targeted. In order for UGBs to work effectively, restrictive zoning outside the boundary is necessary so that development is not enticed to jump the edge. UGBs can be used to phase development with planned utility extensions and infrastructure improvements.

2.0 Overview of Some of the Supporting Local Municipal Tools

There are numerous local government tools and policies that may be used to support the implementation of an UCB. Below are a few examples.

Promotion of infill and redevelopment: Existing developed areas, such as urban centers, have vacant or underused sites. “Infill” refers to new buildings on vacant parcels. The advantages of this growth management policy include the use of existing public investments in infrastructure, such as

¹ Regional District of Nanaimo. 2008. Regional Growth Strategy Review 2007-2008: AN Assessment of Regional Growth management Related Challenges and Opportunities. Regional District of Nanaimo, March 2008, Nanaimo, BC.

water and sewer lines, and development on land whose environmental properties have already been disturbed.

Directing growth can have the effect of saving “greenfields” — undeveloped rural lands — from development. The methods used to promote infill and redevelopment include financial and tax incentives and legislation to deal with liability issues arising from potentially contaminated sites (“brownfield”).

Limits on growth: Some communities regulate the number of building permits that can be issued each year or tie permitted development to a timetable of infrastructure improvements. An extreme version of growth limits is the development moratorium, usually imposed in response to a sense of crisis in service provision or development policy. A moratorium, however, indicates the absence of growth management planning because a growth management policy should help communities avoid reaching a development crisis.

Urban growth boundaries: Urban growth boundaries (UGB) typically restrict growth for 20 years to a specific area. Beyond the boundary the land remains rural. Their purpose is to encourage compact development, an orderly and efficient extension of infrastructure, and preservation of open space and environmental resources outside the boundary,

Development permit areas: Less stringent than the UGB concept, development policy areas typically designate specific areas for different development policies: 1) an urban area of existing business centers and residential neighborhoods; 2) an urbanizing area for new development; and 3) an urban reserve, where open land is preserved until some future date when it may be opened for development.

3.0 The History of Urban Containment in the North Okanagan

Managing the Region’s land base in ways that most effectively balance environmental, social, and economic considerations is fundamental for ensuring future generations are able to enjoy the benefits and natural amenities of the Region. The Official Community Plans within the Region provide for continued growth in existing and newly developing areas, placing emphasis on growth within established areas. These OCPs have allocated sufficient lands for urban development to accommodate the projected municipal residential growth to at least 2031 (based upon the projections contained in the OCPs). These OCPs do not negate the possibility of new developments outside of established and/or serviced areas, although scattered development is discouraged. Urban and rural growth patterns, as represented in the past OCPs, may not follow intended trajectories, form, or zoning designation, or density. As a result, new growth areas within jurisdictions have been established in the last 20 years, especially in jurisdictions that have experienced the greatest growth pressure.

The City of Vernon, within the 2008 Official Community Plan, has proposed an ultimate municipal boundary that guides consideration of annexation proposals. The projected future boundary, as envisioned within the current OCP document, would involve phased annexations of parts of Electoral Areas ‘B’ and ‘C’ based upon applications by residents of these areas. The supporting policies within the 2008 OCP (Section 21.0) support the future establishment of the proposed ultimate City boundary, although residential intensification will not be encouraged within newly

annexed lands. Although annexation policies within the City have not changed significantly since the 1974 Official Community Plan (annexation application for service (sewer and water) provision), the 1989 Comprehensive Planning Strategy provides the framework for a development strategy and phasing plan which provides suggestions for the direction of growth. The Greater Vernon Settlement Plan (UMA 1996) identified Long-Term Growth Areas around the City of Vernon and identified the need for an urban growth boundary. The Official Community Plan for Rural Vernon (Electoral Areas 'B' and 'C') also puts forward the concept of a regional growth boundary for the City of Vernon and a moratorium on further annexations.

Studies have confirmed that with the inclusion of Okanagan Landing, the Foothills expansion, the O'Keefe Lands and Predator Ridge into the City of Vernon, that there is not an urgent need for the City to acquire additional land for urban expansion. The Greater Vernon Settlement Strategy completed in 1996 revealed that there is sufficient development land in the City of Vernon and the District of Coldstream to accommodate an additional 48,500 people. The current population (2006) of these municipalities is 45,415 people – an increase of approximately 4,000 people since the 1996 census. Based on current growth trends, it will be far into the future before additional urban scale development lands will be needed. While a long term strategy is necessary to identify future development land outside municipal boundaries, it is also important to curtail urban sprawl and rely on in-fill within existing municipal boundaries where services are currently available.

Armstrong, Enderby and Lumby have established development boundaries within their Official Community Plans and, with their modest growth, do not foresee the requirement for more development lands in the immediate future. Growth management throughout the North Okanagan has relied mostly on soft boundaries, such as the Agricultural Land Reserve.

Urban containment measures have been used throughout recent regional, municipal, and electoral area planning policies, with emphasis in using soft containment measures such as Agricultural Land Reserve boundaries, infill development, density bonusing, residential, commercial, and industrial clustering, and development in serviced areas. The use of containment boundaries is not as widespread through the region, mostly restricted to electoral areas 'B' and 'C', Lumby, Enderby, and Armstrong. The use of urban containment strategies could be seen as an incentive to achieving the town center objectives, as well as preserving rural landscapes that do not have the infrastructure or suitability for concentrated development.

Many of the urban containment objectives such as managing the costs of extending urban services are met by strategies already in place through respective Official Community Plans, through the ALC, and through the "Community Crown Interface" zone endorsed in the Land and Resource Management Plan. The cost of development on hillsides, environmentally sensitive areas, limited development to serviced areas, ALR lands and the present private-Crown land boundary potentially offers a natural urban boundary. Unfortunately, these natural boundaries can be eroded through re-zoning, transfer of Crown lands to private owners, ALR exclusions, and hillside development initiatives that will provide the necessary infrastructure.

4.0 Developing Urban Containment Boundaries in Six Easy Steps

After examining over 100 United States municipal and regional growth boundary policies, Nelson and Dawkins (2004)² recommend that the development of urban containment boundaries be based upon the following seven objectives. A containment program should:

1. Accommodate long-range population growth requirements consistent with regional and local goals and priorities;
2. Fulfill local needs for housing, employment opportunities and livability;
3. Provide public facilities and services in an orderly and economic manner;
4. Maximize efficiency for land uses in or at the fringe of existing urban areas;
5. Consider all environmental, energy, economic and social consequences;
6. Preserve all agricultural and forested lands, and other resource lands; and
7. Ensure the compatibility of proposed urban uses with nearby resource activities.

4.1 Defining Urban Containment Boundaries

The following factors should be considered in establishing Urban Containment Boundaries:

A. Service District Boundaries:

- i) Sewerage service areas;
- ii). Established water distribution service areas; and
- iii) Economy and efficiency in districting for the provision of other public facilities.

B. Major highways.

C. Natural features such as rivers, soils, floodplains and drainage areas:

- i) The urban containment boundaries should contain a minimum of land unsuitable for development because of terrain, geology, or floodplains;
- ii) The urban containment boundaries should minimize encroachment upon lands of high value for long-term agricultural use;
- iii) Urban containment boundaries should take into consideration the location of environmentally sensitive lands and important natural ecosystems (i.e. wetlands); and

D. Land use and development goals and policies.

- i) The urban containment boundaries should be large enough to accommodate projected residential, commercial, and industrial growth over a 20 year period.

4.2 Urban Containment Boundary Development Process

A variety of growth-related issues and problems confront local and regional government in the North Okanagan. Any one of these issues can provide the rationale for defining urban containment boundaries. Complex issues created by sprawl development often require complex inter-jurisdictional solutions that can be addressed through the Regional Growth Strategy.

² Nelson, Arthur and Dawkins, Casey. 2004. Urban Containment in the United States: History, Models and Techniques for Regional and Metropolitan Growth Management. American Planning Association, Planning Advisory Service, March 2004, Chicago, IL, pp. 129.

The reasons for creating the boundary greatly affect the methodology that will be used to develop a realistic line. This is true even though the common goal of all such growth boundaries is to identify growth and non-growth areas.

The process below presents a comprehensive listing of the types of information that should be collected and analyzed when preparing an urban containment boundary. It is intended as a guide only.

The Basic Steps

Regardless of the level of detail to be pursued, urban containment boundary delineation should follow certain basic steps:

1. Identify problems and issues the boundary must address.
2. Establish a public participation process to generate support for the boundary (RGS Participation Plan).
3. Determine specific goals for the boundary and its role in the Region's growth management efforts.

Identified Problems and Issues

1. Gather and analyze data needed to determine the location of the boundary and the amount of land to be included within it.
2. Draw the boundary.
3. Enact necessary inter-jurisdictional agreements after the boundary(s) have been established.
4. Amend the plans and other implementation tools to reflect the urban containment boundary.

Before deciding on the type of urban containment boundary it needs, the Region must first identify the development-related problems that the UCB would address. The following are typical:

- Difficulty reaching consensus concerning where, and in what direction, a municipality should grow.
- A development pattern that threatens agricultural land and other rural resources.
- Growth that overburdens public services.
- Development that forces illogical or inefficient extensions of public services.
- Prohibitively high taxes for infrastructure construction or maintenance, now or for future, if existing development trends continue.
- Development leaving unused service capacities in some areas while overburdening those elsewhere.
- Leapfrog, or sprawl development that bypasses significant amounts of developable land.
- Abandoned and deteriorating older urban areas as development moves outward.

After identifying issues and the problems of growth, the Region must determine how an urban containment boundary would help. The following are specific goals that could apply to the development of an urban containment boundary:

- Promote compact development.
- Provide efficient, cost-effective infrastructure.
- Preserve natural resource lands and open space, including farmland.
- Prevent traffic congestion on rural roads.
- Retain identifiable edges of towns and maintain community character.
- Prevent sprawl by defining urban growth areas.
- Prohibit development that requires or encourages urbanization of lands that are unsuitable.
- Contain urban development in planned urban areas where basic services, such as water, sewerage, schools, police and fire protection can be efficiently and economically provided.

Determine Urban Containment Boundary Goals

The development of any urban containment boundary and supporting policies requires a clear understanding of the goals that this boundary will address. Some examples of boundary goals are:

- Ensure the economical use of tax dollars in locating infrastructure and providing services for the benefit of all citizens within the urban growth area.
- Avoid tax increases for the purpose of financing duplicative or other inefficient infrastructure expansions.
- Provide property owners greater security in long-range planning and investments by delineating exactly where urban growth can, and cannot go.
- Protect the integrity and economic viability of cities and other urbanized commercial areas.
- Promote rational funding of utility extensions, transportation facilities and schools, to match planned growth.

Collect data

Before urban containment boundaries can be drawn, the Region must thoroughly examine available information about the status of land use and development, infrastructure availability and regulatory considerations.

The knowledge of existing conditions is needed to devise an adequate boundary and supporting implementation programs. The following is a list of information topics to consider:

- Examination of services (such as water/sewerage, schools, police and fire protection) provided to the area under consideration, such as:
 - facility locations

- service areas of each facility
- levels and capacities of services provided
- plans for expansion or extension
- adequacy of each service, present and future

The urban containment boundaries can be derived by comparing the various maps of service areas and taking into account the desired level of service and available funding. As well, key information will include:

- Demographic data
 - current and projected population
 - existing housing units by type
 - projected housing needs by type based on existing trends and development scenarios
 - economic and commercial development projections
- Land use data
 - existing land uses, residential densities and nonresidential intensities
 - approved, but un-built or incomplete, developments, with proposed densities and intensities.
 - natural feature data and mapping, with emphasis on conditions that limit or prohibit development:
 - floodplains
 - steep slopes
 - endangered species habitats
 - watersheds, particularly areas to be left undeveloped or developed under constrained circumstances
 - water bodies, including streams and their buffers
 - agricultural land
 - geologic features
 - aquifer recharge areas
 - drainage basins
 - wetlands
 - forest lands
 - other natural areas
 - historic sites
- Local and regional policies related to land use and development concerning:
 - annexation
 - proposed housing types and densities
 - redevelopment and infill
 - intergovernmental coordination.

Draw Boundary

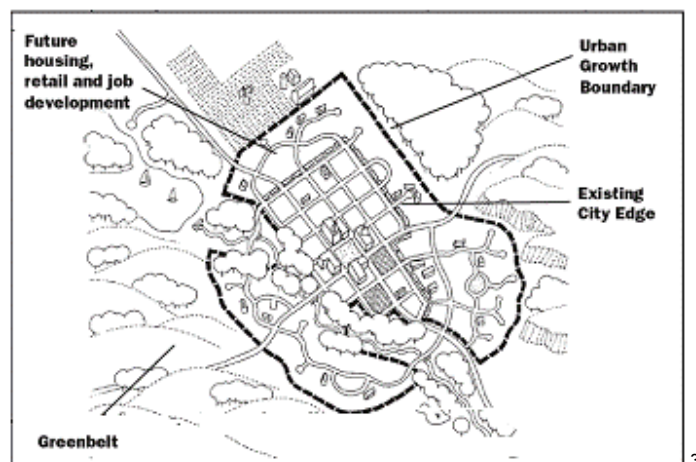
Once this information has been collected and properly analyzed it becomes the basis for drawing the actual boundary. Of significant importance is the fact that this data provides the ability to determine how much land will be needed within that urban containment boundary. The boundary must encompass the existing urban area, plus the amount of land that will be needed to accommodate projected requirements. The following factors must be considered in determining the optimal size of the area to be included in the boundary:

- overall residential density goal set for the land lying within the boundary.
- existing density ranges as established by local zoning.
- density achieved under existing development pattern.
- existing infrastructure capacities.
- projected population, commercial and industrial growth.
- years of growth the boundary is expected to accommodate.
- overall target density proposed for the land within the boundary.
- amount of land needed to accommodate growth and supporting infrastructure
- density limits established by existing zoning and density achieved under the existing development pattern.
- proposed density and proposed infrastructure capacities.

Once these factors have been properly analyzed, the line itself is drawn. While lands that are environmentally sensitive areas, agricultural lands, green infrastructure (i.e. wetlands, riparian areas, etc.) and appropriate protective buffers will undoubtedly fall within the boundary, these areas must not be considered as part of that lands needed to support growth.

4.0 Policies and Tools that Support Urban Growth Boundaries

The development of urban containment boundaries are just the beginning of any growth management program and initiative.



3 Source: Greenbelt Alliance. "At Risk: The Bay Area Greenbelt." 2000. www.greenbelt.org/downloads/resources/report_at_risk_summary.pdf

Supporting policies must be developed to address regional and local priorities, major issues and the guiding principles and objectives of the Regional Growth Strategy. A number of growth management policies and tools have been compiled that provide a 'tool-box' of urban containment strategies that may be considered.

4.1 Phasing Growth within an UCB

Pierce County and Port Townsend/Jefferson County, WA are exploring the use of growth phases or tiers within its UGAs. Communities in other US states offer some tested examples of growth phasing techniques. The Twin Cities, Minnesota Metro Area and Summit County, Utah have implemented a similar system. The Summit County system limits development in its second and third tiers to 25 to 50 percent of the units allowed once the area becomes first tier. To develop at 50 percent, the developer must provide all major facilities needed to serve the development. The Twin Cities Metro Area uses tiers as a basis for tailoring different growth management strategies to different geographical policy areas. For instance, in the city centers (tier I), the emphasis is on redevelopment, in other fully developed areas (tier II) the emphasis is on infill, and in developing areas the emphasis is on rounding out available facilities. Special strategies can be applied to freestanding centers (tier IV), which have their own infrastructure systems and which serve rural areas. The City of Vernon has developed, and is the process of implementing, a tiered growth management system through the Environmental Development Permit Areas and 2008 Official Community Plan. Use of tiered urban growth areas or other phasing strategies also can help assure that concurrency requirements don't tend to push development outward into areas where roads and other infrastructure have greater capacity.

Clark County, WA and some cities within the county have established urban holding zones within UGAs, applying 10 or 20 acre minimum lot sizes until concurrency requirements are met.

The Oregon Department of Land Conservation and Development has developed interesting recommendations for growth phasing within the UCA. With this approach, local government would provide off-site urban service facilities within the UCAs with the goal of adding fully-served land to the urban land supply. All such public investment would be primarily in focused "public investment areas (PIAs)" within the UCAs. To develop outside the PIAs, even though still within the UCAs, a developer would need to provide all facilities at his or her own expense. This approach has successfully worked to focus development in Salem, WA.

4.2 Greenbelts

The first official proposal "to provide a reserve supply of public open spaces and of recreational areas and to establish a green belt or girdle of open space" was made in England by the Greater London Regional Planning Committee in 1935. The codification of Green Belt policy and its extension to areas other than London came in 1955 with a historic circular inviting local planning authority to consider the establishment of Greenbelts.

The Greenbelts approved through structure plans now cover approximately 1,556,000 hectares, about 12 per cent of England. There are 14 separate Green Belts, varying in size from 486,000 hectares around London to just 700 hectares at Burton-on-Trent.

The fundamental goal of a Greenbelt policy is to prevent urban sprawl by keeping land permanently open; the most important attribute of Greenbelts is their openness. Greenbelts can shape patterns of urban development at sub-regional and regional scale, and help to ensure that development occurs in locations allocated in development plans. They help to protect the rural areas and can assist in moving towards more sustainable patterns of urban development.

It is necessary to establish greenbelt boundaries that will endure. Otherwise there is a risk that encroachment on the Greenbelt may have to be allowed in order to accommodate future development. If boundaries are drawn excessively tightly around existing built-up areas it may not be possible to maintain the degree of permanence that Greenbelts should have.

A Greenbelt should be several kilometers wide and boundaries should be clearly defined, using readily recognizable features such as roads, streams, agricultural lands, treed areas, grasslands and natural edges where possible. Well-defined long-term Greenbelt boundaries help to ensure the future agricultural, recreational and amenity value of Greenbelt land.

Without additional supporting growth management tools, development has 'jumped over' greenbelts in several instances that resulted in satellite towns that act as suburbs. That has been the situation within the City of Ottawa, which established a Greenbelt in the 1950's through the Federal Government's acquisition of natural lands.

There are numerous methods of developing Greenbelt policy, including government or non-government organization acquisition of lands, creative zoning, the use of DCCs, or conservation easements and open space subdivisions.

Example: Athens-Clarke Greenbelt, Georgia

The 1999 Comprehensive Plan, for Athens-Clarke County, Georgia called for the designation of "areas that are predominantly rural in character as a boundary for limiting expansion of urban development." To achieve this goal, the plan emphasized that it was desirable "for agricultural areas on the periphery of the urban area to remain as productive agricultural lands by using techniques such as transfer of development rights, conservation easements and open space subdivisions." The ring of protected greenspace around Athens has come to be known locally as the "greenbelt." At present the greenbelt area is zoned for a ten acre minimum lot size, but a conservation subdivision can be done at one unit per five acres. Nonresidential uses are possible, but severely limited. The current regulations have, in general, prevented sprawl-type development from occurring in the greenbelt.

4.3 Urban Service Boundaries

An urban service area is a geographically defined boundary that specifies where the local government will provide urban services, such as water supply or sewage treatment, in the future. By delineating an urban service area, local government is effectively saying that it will support new development at urban densities only within this area. This will encourage higher density infill development within the urban service boundary, while helping to maintain the rural character of areas lying outside the boundary. The process that can be followed is very similar to the

establishment of an urban growth boundary, although urban service boundaries are normally intended for 5-7 years. A phased approach is also possible, with multiple urban services boundaries that have either timeframe or density thresholds associated with them. A general process for development of an urban service boundary is:

1. *Establish desired development patterns.* Identify the development patterns (types and locations of development) that your community or region is seeking to achieve. Identify land areas that should be set aside from development in order to protect critical environmental resources
2. *Identify likely service areas.* Identify any undeveloped areas already served by public facilities that will need to be included within the urban service boundary. Determine where new development is likely to occur, based on market trends and the location of critical facilities such as roads. Don't forget to also identify areas that cannot feasibly be served by particular public facilities, due to topography and other engineering factors.
3. *Project expected development.* Based on market trends and population projections, project the amount of land that will be required to accommodate growth over the next 5 to 7 years.
4. *Delineate the urban service area.* Factor desired development patterns, likely service areas and projected land requirements. Draw the boundary so that urban services will not be extended into areas that should be set aside from development, even if this means creating "islands" where urban services will not be extended.
5. *Periodically re-evaluate the boundary.* Since the urban service boundary is drawn to accommodate development over a 5 to 7-year period, it will be necessary to periodically re-evaluate and expand the boundary as necessary to permit ongoing gradual expansion of the urbanized area.

Development may still occur outside your urban service boundary if one of the following conditions apply:

1. New developments utilize alternative means to meet "urban service" needs, such as on-site wells and septic treatment systems.
2. Areas outside the boundary are controlled by other local governments whose land use regulations or public facility policies do not support maintenance of the boundary.

This tool is used extensively by local and regional governments in the United States to direct growth, either with or without an urban growth boundary. This growth management tool is most popular with municipalities that have significant fiscal resource issues related to providing expanded services and infrastructure. North Okanagan municipalities have a de facto urban service boundary that corresponds to the established municipal boundaries, which can be expanded through current annexation policies.

Example: Minneapolis-St. Paul Urban Service Boundary

In Minneapolis-St. Paul, the urban service area boundary is drawn based on a calculation of the 10-year capacity to support new growth. Local planners base the location of the boundary on their employment and population projections for the region. Maintenance of the Twin Cities' urban service boundary is supplemented by regulatory controls that encourage infill development within

the urban service area and discourage new development outside it. The urban service area boundary is reconsidered every five years.

Example: Capital Regional District Regional Growth Strategy (2003)

The Regional Urban Containment and Servicing Policy Area include lands designated in official community plans primarily for urban development. The Regional Growth Strategy proposes that the majority of future development that requires urban sanitary sewer and water services take place within this designated area. The Regional Growth Strategy proposes no extension of urban-standard sanitary sewerage and water services beyond the boundary of this policy area

5.4 Rural Reserves

Urban growth boundaries (UGBs) are the primary tool to protect farm and forest land, and to separate urban and rural land. UGBs protect farm and forest land but UGB expansion will, over time, consume a certain amount of such land, especially around the major urban centres.

Rural reserves may also include important natural landscape features that limit urban development or help define appropriate natural boundaries of urbanization, including plant, fish and wildlife habitat, steep slopes and floodplains.

Some rural lands adjacent to and nearby an urban containment boundary may be designated as rural reserves. Rural reserves may be designated in areas that are most threatened by new development, in areas that separate communities, or in areas that exist as special resource areas. Rural reserves may also separate cities or towns.

Rural reserves support the development of an urban containment boundary by:

- Maintaining the rural character of the landscape.
- Supporting and maintaining the agricultural economy.
- Avoiding or eliminating conflicts with agricultural and natural resource practices.
- Helping to meet regional needs for open space and wildlife habitat.
- Helping to clearly separate urban from rural land.

Rural reserves are further protected from development pressures by the rural zoning of adjacent municipalities or electoral areas. New rural commercial or industrial development is restricted using urban reserves. The reserves may include some purchase of natural areas adjacent to rivers, streams and lakes to ensure that water quality is protected and wildlife habitat enhanced. Large natural features may be included as rural reserves because they buffer developed areas and are poor candidates for urban development.

The primary means of achieving rural reserves throughout the North Okanagan would be through the Regional Growth Strategy and voluntary agreements between the municipalities and the Regional District.

Metro Portland, Oregon (2003)

Metro Portland has determined that rural reserves were necessary would be used in conjunction with urban reserves to protect rural and unincorporated areas from urban encroachment. Rural reserves are defined as land reserved to provide long-term protection for agriculture, forestry or important natural landscape features that limit urban development or help define appropriate natural boundaries of urbanization, including plant, fish and wildlife habitat, steep slopes and floodplains.

According to Metro Portland (Oregon), a rural reserve designation means that identified rural land will not be considered for inclusion within an urban growth boundary for the next 40 to 50 years. All other current legal uses are not affected.

At the same time, the designation of rural reserves provides a means for protecting the region's most valuable and financially viable farms and commercial forests. This designation can also be used to protect significant natural features like wetlands, rivers and their floodplains, grasslands and rare or sensitive ecosystems from urban development.

In contrast, urban reserves have been designated on lands currently outside the urban growth boundary that are suitable for accommodating urban development over the next 40 to 50 years.

These broad land use designations will not change current zoning or restrict landowners' currently allowed use of their lands. They will provide greater clarity regarding the long term expected use of the land and allow both public and private landowners to make long term investments with greater assurance.

5.5 Rural/Urban Transition Areas

Transition Areas are areas outside current contiguous boundaries of urban municipalities, where change from one use designation to another occurs. Many definitions or distinctions between urban and rural do not address areas of overlap in the types of settlement, land use, and development that may be found in the transition areas between municipalities and/or electoral areas.

There are numerous forms that rural/urban transition areas can be developed, based upon the urban containment objectives that have been identified, the supporting policies that may be pursued and the land uses that are considered.

Based upon the County of Loudoun's work⁴ on this subject, the following issues have been developed to assist in determining the transition area policy:

1. Whether the Transition Area should be a future development (phasing) area to accommodate the projected housing demand over a 20-year forecast period;
2. The benefit of a hard "land use and utility" edge versus a "soft" transitional edge;
3. The location of central utilities (water and sewer) in the Transition Area;

⁴ County of Loudoun. 2001. County of Loudoun Planning Department Memorandum: Transitions Policy Area Options Report. County of Loudoun, Planning Department, Loudoun County, Virginia, July 21, 2009.

4. Whether different parts of the Transition Area should be planned differently and whether the Transition Area should have its own land use plan or whether it is the outer edge of the other (i.e. Suburban, Rural) Policy Areas;
5. The location of the urban boundary;
6. Appropriate land uses that represent a transition from (sub)urban land uses to rural land uses;
7. Desired pattern and design characteristics of development in the Transition Area;

These are examples of options for the development of a transitional area:⁵

Options for Transition Policy Area Boundaries				
Option	Outer Boundary	Inner Boundary		Description
A	Rural	Transition	Suburban	<ul style="list-style-type: none"> ◆ Hard boundary between the Rural Area and the Transition Area. ◆ Hard boundary between the Transition Area and the Suburban Area.
B	Rural	Transition	Suburban	<ul style="list-style-type: none"> ◆ Hard boundary between the Rural Area and the Transition Area. ◆ Soft boundary between the Transition Area and the Suburban Area.
C	Rural	Phased Development Area(s)	Suburban	<ul style="list-style-type: none"> ◆ Hard boundary between the Rural Area and the Transition Area. ◆ UCB between the Transition Area and the Suburban Area.
D	Rural	Transition	Suburban	<ul style="list-style-type: none"> ◆ Soft boundary between the Rural Area and the Transition Area. ◆ Hard boundary between the Transition Area and the Suburban Area.
E	Rural	Transition	Suburban	<ul style="list-style-type: none"> ◆ Soft boundary between the Rural Area and the Transition Area. ◆ Soft boundary between the Transition Area and the Suburban Area.
F	Rural	Suburban		<ul style="list-style-type: none"> ◆ Hard boundary between the rural area and the Suburban area. ◆ No Transition Area.

Example: City of Sultan, WA Comprehensive Plan (2008)

The City of Sultan, during the development of their comprehensive plan, developed a broad policy framework for transition areas.

Policy: Urban/Rural Transition Area: Jointly create an urban/rural transition area with Snohomish County to preserve the existing, undeveloped character of the lands adjacent and north of the urban growth area. The purpose of the urban/rural transition area will be to prevent properties from being subdivided or otherwise altered into a use or pattern that:

⁵ Ibid.

- could not be developed for additional urban uses, should there ever be a need, and that
- would detract from the rural, agricultural character and productivity of existing activities.

Example: Regional District of Nanaimo Regional Growth Strategy (2003)

The Regional District of Nanaimo took the approach of a phase Urban/Suburban/Rural Policy Areas, without developing a transitional policy area. The result is a hard urban containment boundary between the rural and suburban. Instead, the concept of a fringe management area was proposed and will be discussed later in the toolkit. The following policy was proposed within the Regional Growth Strategy.

Policy: The RDN and member municipalities agree to approve new urban development only on land designated Urban Area inside Urban Containment Boundaries or on land designated as Sub-Urban Area. Urban development on land designated Urban Area inside Urban Containment Boundaries includes residential development at a density greater than 1 unit per hectare, commercial uses, and institutional uses. Land that is designated as Sub-Urban Area may only be used for residential development to a maximum density of 7.5 units per hectare, consistent with the official community plan in place at the date of adoption of this Regional Growth Strategy.

5.6 Priority Growth Areas

Regional priority growth areas are identified urban communities or non-rural settlement areas that have the necessary infrastructure and services to facilitate residential, commercial and/or industrial growth. The identification and location of priority growth areas is one of the most important exercises in regional planning initiatives throughout the world. These areas will form the basis of a regional plan and define the location and size of any urban containment measure, as well as provide the basis for rural preservation policies.

The City of Vernon, through their 2008 Official Community Plan, has identified three priority growth areas within the City's boundary. The inclusion of the priority growth area concept locally may provide the initial framework for exploring a regional priority growth areas approach.

Example: Regional District of South Okanagan Regional Growth Strategy (2008)

The Regional District of South Okanagan, to support the commitment of compact communities, used the concept of priority growth areas in conjunction with urban containment boundaries. The South Okanagan has several limiting factors that influence the identification of potential development areas, including water availability and limited developable land.

The Regional Growth Strategy was developed to keep urban settlement compact by encouraging and directing development, concentrating on areas where services are located to protect the integrity of rural areas.

The Regional Growth Strategy identified 'priority growth areas' as serviced areas where growth should be preferentially directed (larger communities) and 'secondary growth areas' as areas close to essential services with some infrastructure in place and a second consideration for development (smaller communities) Potential growth areas are determined based upon the following criteria:

Priority Growth Areas - essential services to accommodate growth
- all necessary infrastructure

Secondary Growth Areas - close to essential services
- some infrastructure is in place

The following policy (page 17 of the RGS) is an example a strategy dedicated to the development of priority growth areas.

Policy: Dialogue between rural and urban communities to direct development to potential growth areas and to coordinate and collaborate on human settlement. The south Okanagan municipalities and electoral areas agree to:

1. Consider setting growth boundaries around priority growth areas, which may or may not coincide with current municipal boundaries.
2. Collaborate on fringe planning decisions on major development in the vicinity of rural / municipal boundaries.
3. Consider entering into a memorandum of understanding on the process of determining municipal boundary extensions.

Policy: Promote compact urban form. The south Okanagan municipalities and electoral areas agree to:

1. Recognize priority growth areas where 85% of the region's growth should occur and secondary growth areas where the greater part of the remainder will locate, in accordance with the South Okanagan Potential Growth Areas map (pg.20).
2. Support infill of existing, serviced development areas as a first priority.
3. Create walkable, livable mixed-use neighbourhoods and communities.
4. Encourage accessible commercial, institutional and appropriately located light and heavy industrial development within urban areas.
5. Integrate transportation infrastructure within and between communities.
6. Ensure that new development is adequately serviced according to a community infrastructure plan.
7. Communicate and work with Aboriginal leaders on cost sharing, delivery of services, capacity building and/or development plans.

Policy: Protect the character of rural areas

The south Okanagan municipalities and electoral areas agree to:

1. Strengthen policies in Official Community Plans to discourage incremental and additional rural growth outside of secondary growth areas and developments that do not closely adhere to OCP guidelines for protection of rural and resource areas.
2. Create policies and set rigorous criteria that discourage new development outside of secondary growth areas.

3. Create policies that discourage the rezoning of large rural land parcels to smaller parcel size.
4. Identify areas where rezoning to larger minimum lot sizes is necessary to protect agricultural and rural uses.
5. Discourage new development in areas of moderate to high risk for natural disasters.
6. Communicate and work with Aboriginal leaders on cost sharing, delivery of services, capacity building and/or development plans.

5.7 Fringe Area Management

Much like an urban/rural transition area, fringe area management is a growth management tool to ensure that compatible land uses occur in the rural areas directly outside of the urban containment boundary.

Example: Regional District of Nanaimo Regional Growth Strategy (2003)

Policy 1: The RDN and member municipalities agree to review the Urban Containment and Fringe Area Management Implementation Agreement to address issues regarding the level and type of development that warrants consideration as an urban development on land inside the UCB and to better coordinate between jurisdictions urban land use and development on land within the UCB.

Things to Consider

A successful UCB will have a number of components. It should not be overly restrictive of growth such that it halts all new development, but rather should allow for healthy and desirable growth within its boundary. Such growth should meet contiguity requirements as well since growth boundaries often contain an adequate supply of land for many years worth of development. There should be limits on how often the UCB can be altered so that the local land use plan has some stability and meaning, but there should also be a timeline by which the boundary can and should be reevaluated and reshaped as the community grows and changes. Finally, a UCB should be coupled with other tools, such as affordable housing solutions and incentives for infill development, to ensure that the community and the region realize the maximum of benefits of this growth management tool. There are several additional issues to consider when defining a UCB.

Growth pressures: This is the most important factor in sizing the UCB. Assuming that growth forecasting is done responsibly and the jurisdiction's "fair share" of development will be accommodated, a forecast of rapid growth requires a large UCB.

Potential for growth deflection: UCBs and similar growth management initiatives have can lead to development moving outside of the boundary, typically into less regulated and less expensive lands. Where growth is managed at a regional scale, this need not necessarily occur. In general, however, outward deflection leads to scattershot, leapfrog growth throughout a region.

Fiscal capacities and strength: Typically, a moderate-income bedroom community cannot support a massive population expansion unless that expansion brings major economic benefits. Typically, wealthier communities will be more successful in coping over time with the economic stresses of a major expansion. One indicator of fiscal capacity might be the proportion of the town's assessable

tax base that is non-residential. An assessable base that is 25 percent or more non-residential would be doing well. A non-residential base under 10 percent would be a fiscal red flag.⁶

Deferral areas outside the UCB: If the lands outside of a potential UCB are subject to very low-density zoning or are otherwise limited in development potential, then an UCB can be drawn tighter because it is theoretically possible to expand it later on, since it will not be dotted with new rural homeowners. Conversely, if no protective zoning or subdivision rules limit the conversion of outlying areas, the UCB should be drawn more loosely.

Potential for changes in infrastructure capacity: Understanding whether areas can be served by public sewer and water is key to establishing meaningful growth boundaries. Sewer and water planning is typically done on a very long time horizon because of the cost and investment in treatment plants and distribution systems. If existing supply, treatment, and conveyance systems cannot serve the potential UCB, the UCB should be tightened, or an adequate long-term facilities plan should be developed and budgeted.

Institutional capacity: Managing growth requires sophisticated governing structures, policies, and procedures. The capacity to monitor land, integrate a comprehensive plan with sewer, water, and transportation plans, develop realistic implementation agreements, and implement the UCB through appropriate zoning, subdivision, and other tools requires institutional capacity. Where institutional capacity is limited, a tighter UCB may be considered. A large UGB will require planners to manage growth in a concerted way *within* a UCB.

⁶ Avin, Uri and Mayer, Michael. 2003. Right-sized Urban Growth Boundaries. Planning, February 2003, pp. 22-27.