



Committee of the Whole

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Committee of the Whole
to be held at
City of Penticton, Council Chambers
171 Main Street, Penticton, B.C.

Tuesday, November 15, 2016
Recessed from the Regular Council Meeting at 1:00 p.m.

1. **Call Committee of the Whole to Order**
2. **Adoption of Agenda**
3. **Delegations and Staff Presentations:**
 - 3.1 Proclamation – Restorative Justice Week – November 20 – 27, 2016 1
 - 3.2 Okanagan Hockey Group – Economic Impact Report 2015/2016
Andy Oakes, Okanagan Hockey Group Inc. 2-41
 - 3.3 Penticton Creek Master Plan Update
Ian Chapman, City Engineer
4. **Adjourn to Regular Meeting of Council**

Proclamation

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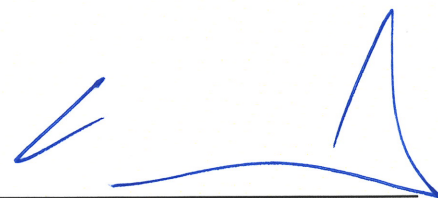
Restorative Justice Week November 20-27, 2016

Whereas: in the face of crime or conflict, restorative justice offers a philosophy and approach that views these matters as harm done to people and relationships; and

Whereas: restorative justice is a non-adversarial, non-retributive approach to justice that emphasizes healing in victims, accountability of offenders and the involvement of citizens in creating healthier, safer communities; and

Whereas: this year's theme for Restorative Justice Week is "**Inspiring Innovation**", it is an opportunity to learn about restorative justice, educate and celebrate along with other communities across the country during the week.

Now, Therefore I, Andrew Jakubeit, Mayor of the City of Penticton, DO HEREBY PROCLAIM November 20-27, 2016 as **Restorative Justice Week**.

A handwritten signature in blue ink, consisting of a series of loops and curves, positioned above a horizontal line.

Mayor Andrew Jakubeit



Economic Impact Report

2015/2016

OKANAGAN
HOCKEY GROUP



TABLE OF CONTENTS

P. 3

1.0 EXECUTIVE SUMMARY

P.7

2.0 INTRODUCTION

Project Understanding
Approach
Clarification of Technical Terms and Concepts
Methodological Considerations & Limitations
The Consultants – Lochaven Management Consultants Ltd.

P.14

3.0 AN OVERVIEW OF THE OKANAGAN HOCKEY GROUP LTD.

P.17

4.0 BACKGROUND – CONTEXT AND ALIGNMENT

Context
Alignment with Community Goals and Strategies

P.23

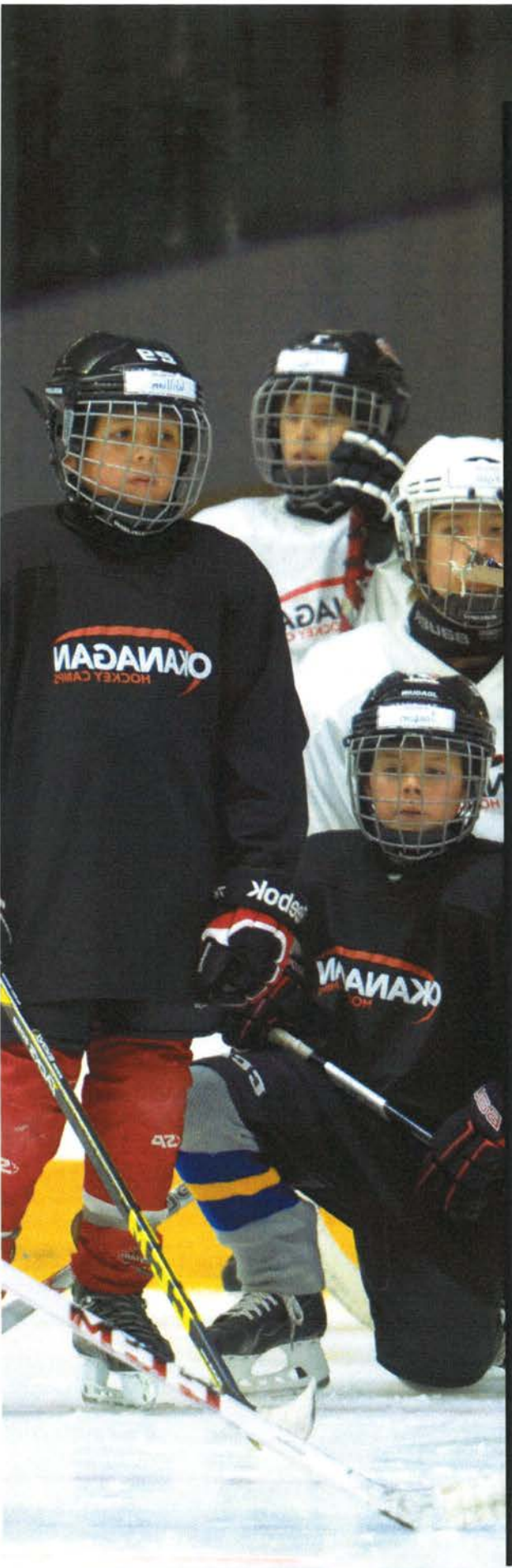
5.0 ESTIMATES OF ECONOMIC IMPACT

Direct Impacts - the Okanagan Hockey Group Ltd
Other Direct Impacts
Total Direct Impacts as a result of OHA
Okanagan Hockey School
Total Economic Impacts
Other Impacts

P.29

6.0 FINAL THOUGHTS

APPENDIX 1: Basis of Calculations – From the Research
APPENDIX 2: Interviews



EXECUTIVE SUMMARY

SECTION 1

MISSION STATEMENT

To encourage the achievement of each player's full potential in Academics, Hockey, Sportsmanship and Citizenship through a stimulating and vigorous supportive environment.

Okanagan Hockey Group (OHG) is a significant regional enterprise within the City of Penticton. Throughout a 53-year history of successful operation it has earned an enviable national and international reputation as a preeminent hockey development organization. Operationally OHG has grown into a multidimensional, multi-unit organization with an emphasis on excellence. Under the corporate umbrella of the Okanagan Hockey Group Ltd. there are three distinct, though interrelated, business units:

- ① Okanagan Hockey Academy
- ② Okanagan Hockey School
- ③ Okanagan Hockey Europe - International Business Development, Austria/England

As part of an ongoing commitment to being a good corporate citizen and an important player in the City of Penticton's economic prosperity today and into the future, OHG has undergone a comprehensive Economic Impact Assessment of their 2015/2016 fiscal year. A brief synopsis of the OHG impacts are :

18.08M TOTAL ECONOMIC IMPACT

As a result of the Okanagan Hockey Group operating in the City of Penticton the local economy benefits from \$18.08 million in total economic impacts. These contributions arise from a number of sources:

3.9M TO LOCAL ECONOMY

Okanagan Hockey Group Ltd. Directly injects \$3.95 million into the local economy by way of:

- 30 full time ongoing jobs; 100 part time jobs per year; and an annual payroll in excess of \$1.76 million/year;
- annual spending totally \$2.2 million in local businesses.

6.19M IN DIRECT SPENDING

Okanagan Hockey Academy activities contribute \$6.19 million in direct spending in the City of Penticton by way of the following:

- 47 families relocated to Penticton of which 33.3% (15 families) relocated for the school year while 66.7% (32 families) spent the entire year in Penticton resulting in an excess of \$2.98 million of new dollars being spent in the local economy;
- Visiting families of OHA activities spend \$1.51 million;
- Visiting teams of OHA spend \$635 thousand with 1,671 visitors;
- Evaluation Camps resulted in 1,020 athletes/coaches/family members visiting the City of Penticton and spending in excess of \$364 thousand on meals and gas and entertainment;
- Students athletes that attend OHA from outside the region spend \$691 thousand over the course of their school year.

4.8M IN DIRECT SPENDING FROM 8 WEEKS OF PROGRAMMING

As a result of Okanagan Hockey School offering eight weeks of programming the local economy benefited by an additional \$4.8 million in direct spending.

- 1,952 out of region players attended OHS accompanied by 3,866 family members totaling 5,818 visitors.

OHG activities add greater leverage and impact to the local community through many qualitative means such as (but not limited to):

- Okanagan Hockey Academy students give back to their “adopted” community and are important role models as student athletes (84% of these young athletes are on the honor role at local schools).
- OHG increases the City of Penticton national and international marketing exposure for tourism, citizen attractions and inbound investment exposure with over the past 5 years OHG has seen players from over 20 different countries. During the 2015/2016 school year families that traveled Internationally came from a diverse array of countries such as Dubai, Japan, China, UK, Denmark, Mexico, Switzerland and Austria.
- While School District 67 is under funding protection the increase of students as a result of OHA does not increase our School Districts budgets. However it is important to look into the future and when student numbers allocates the additional students funding protection ends and budgets from OHA will be very valuable.
- The increase of students into Pen High allows the school to offer some courses that might otherwise not due to insufficient enrollment/interest.
- OHG professional coaches give to minor hockey through providing Penticton Minor Hockey with three free coaching sessions per team.

“I feel like OHG is undervalued in the community for their longevity /duration and the impact on the region from having this wonderful organization”

- Hotelier



Of course with operational success comes growth, which is not only of significant benefit to OHG but to the City of Penticton as well. And over these past few years there has been significant growth within OHG in all divisions. As illustration of how this benefits the City of Penticton, during the 2015/2016 business year, according to our corporate Economic Impact Assessment, increased regional impacts, both in terms of the breadth of impacts and the depth and sustainability of these impacts were clearly demonstrated. By way of example, some of the growth OHG has experienced and the City of Penticton and nearby region have benefited from, include the following:

Meaningful employment growth built on conscientious attention to talent attraction and sustainable jobs

Within OHG’s corporate head office and facilities located in the City of Penticton full time staff has increased from 25 (2010) to 30 (2016) and is projected to grow additionally to 35(2017).

Seasonal staff in the City and region is projected to be maintained at 100 for both 2016 and 2017.

Visible operational and participant growth at the Okanagan Hockey Academy in the City of Penticton:

	2010	2016	2017
Teams	4 Teams	7 Teams	8 Teams
Male Student Athletes	85	120	120
Female Student Athletes	0	20	40
Total Student Athletes	85	140	160

OHA provides significant visitor and tourism benefits supporting Penticton's important tourism industry

OHA's participation in the Canadian Sport School Hockey League (CSSHL) has yielded significant and measurable visitation benefits to the City of Penticton's tourism efforts and local enterprises focused on tourism development (especially in non-peak times of the year):

- CSSHL Championship Tournament with (5 days) 33 teams (27 teams from outside the region);
- Five 3-day CSSHL host weekends (ranging 3 to 11 teams per host weekend resulting in over 1,600 in visitors);
- Three 3-day Evaluation Camps (resulting in 384 student athletes plus parents).

Growth and Prosperity within the Okanagan Hockey Camp is evidence of a sustainable year round economic presence which benefits the City and Region

- 2016 operations of the camp include an increase from 6 weeks to 8 weeks of programming; and an increase from 1,809 player participants to 2,000 which represents a total of 5,961 out of town visitors who spent a total of \$4,919,160 (outside of OHC registration);
- Further the new Christmas Camp with 60 athletes and Spring Camp with 30 athletes totaling 90 athletes collectively serve to add balance and emphasis to an emerging corporate emphasis on balancing year round activities.

Okanagan Hockey Europe – OHG's international business development presence supports and provides an opportunity for synergies with the City's efforts to attract international investors

Since inception the Okanagan Hockey Group has operated camps in Canada, United States, Mexico, Japan, Hong Kong, United Arab Emirates, Switzerland, Austria, Germany, England, Scotland and Denmark. These efforts were partnered with OHG operations in both Austria and England all of which provide many promotional and branding benefits and potential synergies to the City of Penticton.

OHG's articulated economic impacts during the 2015/2016 fiscal year are serious and substantive. They also provide clear assurance that the organization's economic impacts within the City of Penticton and region have increased significantly over this time frame.

INTRODUCTION

SECTION 2





INCREASINGLY OVER THE PAST DECADE OR SO MANY CITIES AND REGIONS WORLDWIDE HAVE AWAKENED TO THE FACT THAT SPORT CAN BE A SIGNIFICANT ECONOMIC ENGINE OF GROWTH AND DEVELOPMENT. “SPORT HAS ALWAYS BEEN A POPULAR RECREATIONAL ACTIVITY, BUT NOW IT IS MUCH, MUCH MORE THAN THAT. HIGHLIGHTED BY THE RISING PROFILE OF SPORTS STARS, RAPID CHANGES IN TECHNOLOGY AND INCREASINGLY SOPHISTICATED CUSTOMER EXPECTATIONS, SPORT HAS BECOME BIG BUSINESS.”

And not surprisingly within the context of this realization we are witnessing an increasing number of local governments aggressively pursuing strategies that invest taxpayers' monies and bond revenues to construct local sports facilities. The rationale of these investments is usually underpinned by efforts to align resources with the realization of unique economic opportunities.

Clearly relying on sport and sporting activities and investing in sport facilities is not for the faint of heart nor for those that lack a proper understanding of the role of sports in facilitating greater achievements in economic growth and development. In times of economic uncertainty many politicians and the citizens they represent loathe to say the word "tax" and thus finding the revenues to build and maintain proper facilities can be daunting.

The City of Penticton has historically demonstrated the foresight to invest in both facilities and staff resources towards the building of a vibrant sports tourism industry.

“Tourism Penticton markets our city and operates the Wine Country Visitor Centre. They also promote your event, accommodation or experiential travel business, while attracting major sporting events.”¹

These types of investments have promoted and facilitated private sector growth within the sport and recreation sector, as evidenced by such noteworthy organizations as the Okanagan Hockey Group.

While we appreciate strategic municipal investment in sport facilities and infrastructure can yield downstream economic impacts for the community at large this isn't always the case and it is invariably a hot button topic within many communities. As such it is important to regularly identify and articulate benefits where they accrue as a reaffirmation of community investment decisions.

Typically an economic impact assessment looks at jobs and income (GDI/GDP) implications. It should be recognized however that the impacts that accrue from such investment decisions go far beyond those that are easily quantifiable but important nonetheless. There are, by way of example, numerous social impacts that have profound and far reaching impacts. With these thoughts in mind, the impact assessment that follows seeks to highlight and affirm the important role sports can play in furthering the socio-economic well-being within the City of Penticton. It focuses specifically on the exploration and assessment of the multitude of impacts arising from the operations and activities of the Okanagan Hockey Group.

2.1

PROJECT UNDERSTANDING

Pursuant to several conversations held between Lochaven Management Consultants Ltd. (LMC) and Okanagan Hockey Group Ltd. (OHG) over the past summer (2016), it is our understanding that the overall purpose of this consulting effort is to build from and update an earlier impact assessment undertaken by LMC in 2010.

As with the previous investigation this current research will seek to answer the following question:

“ What economic impacts are accruing within the geographic area of the City of Penticton as a direct consequence of the operations and activities of the Okanagan Hockey Group Ltd.”

For completeness a delineation of both short term and long-term (sustainable) economic impacts will be included.

The expected outcomes arising from this project effort will: (1) allow Okanagan Hockey Group Ltd. to publicize the value of the organization to the community; (2) strengthen OHG's position with

¹ City of Penticton Economic Profile 2015

respect to investors and donors; (3) increase vocal support for Okanagan Hockey Group Ltd. among political, business, and community leaders; and, (4) increase financial gifts and attract more donors to OHG.

Without unduly limiting the approach nor scope of project investigations, it is expected that the effort will deliver on the following:

- ① Provide management and staff of the Okanagan Hockey Group Ltd. with actionable information and analysis required for advancing the profile and influence of the organization with key stakeholders and other centers of influence/interest;
- ② Measure the net economic change accruing to the City of Penticton that results from spending attributed to OHG facilities and operations;
- ③ Provide recommendations for what econometrics to track in the future in order to undertake a more comprehensive longitudinal study.

Of course Okanagan Hockey Group Ltd. does not operate in isolation of other businesses and enterprises within the city and region (South Okanagan) nor is its sphere of impact limited by political boundaries. It should therefore be noted in advance that this project does not involve a direct identification nor evaluation of other impacts other than those specified above; nor an articulation and evaluation of economic impacts accruing in regions outside of the South Okanagan.

2.2

APPROACH

This is a sequential economic impact assessment. As such the approach chosen for this investigation is consistent with that of the earlier effort (2010) to ensure the analysis remains valid.

In respect to ascertaining direct fiscal impacts data was derived from a review of the 2016/2016 financial statements of the Okanagan Hockey Group Ltd. and supplemented through discussions with key corporate officers and staff.

Simultaneously, extensive primary data was gathered through various administered and on-line surveys encompassing the inputs of parents of players and players attending the Academy. Responses of parents of players attending the Academy totaled: 46 (33% response rate); and responses from parents of players attending the Okanagan Hockey School totaled: 251 (14.3% response rate).

In order to better assess the indirect/induced impacts of the Okanagan Hockey Group Ltd. Lochaven Management Consultants undertook a series of one-on-one interviews with suppliers, representatives of various corporate strategic alliances, school district officials, and representatives of the City of Penticton's economic development function. The surveys noted above were also utilized to gain a more comprehensive qualitative and quantitative insight into potential indirect/induced and tertiary impacts.

Extensive secondary research was conducted to ensure the full range of typical economic impacts were properly articulated and to ensure that those less tangible but equally important socio-economic impacts were also properly captured.

The result of investigations is an assessment that traces Okanagan Hockey Group Ltd. generated spending - direct, indirect/induced, and the tertiary implications of this spending- through the economies of the City of Penticton and the Okanagan-Similkameen Region.

2.3

CLARIFICATION OF TECHNICAL TERMS AND CONCEPTS

With any assessment of this nature it is important to clarify from the very beginning certain terms and

methodological processes. The following are of particular note:

Impact and impact assessment is generally accepted to be the systematic analysis of lasting or significant change –positive or negative, intended or not –brought about by an action or a series of actions.

Impact analysis is a rules-based and transparent approach to impact assessment providing insight into quantitative and qualitative benefits and costs accruing from a particular project or program or activity.

Economic Impacts generally encompass estimates of: (1) business output (or sales volume); (2) value added (or gross regional product); (3) wealth (including property values); (4) personal income (including wages); and/or (5) jobs. Economic impacts are different from the valuation of individual user benefits and they are also different from broader social impacts, i.e. quality of life factors - though these may impact an area's level of economic activity.

Economic impact analysis is predicated on the concept of the multiplier effect. The multiplier effect reflects the fact that each dollar of direct spending or new job supports further spending and job creation in the area because businesses are interdependent and purchase goods and services from one another. In reality, while indirect and induced impacts do always occur, the net impact on the total level of economic activity in an area may or may not be increased by multiplier effects. If all that happens is that resources are shifted away from some other use to serve (indirect and induced) needs created by the new project or program or policy, then there are likely to be no net multiplier effects associated with total impact.

A multiplier is a measure of the local economic context and its level of connectivity. The more local firms and residents are interconnected, and trading goods and services with each other, the longer a

dollar is likely to cycle through the region, and the higher the multiplier.

Social impact assessment includes the processes of analyzing, monitoring and managing the intended and unintended social consequences (quality of life), both positive and negative, of planned interventions and any social change processes invoked by those interventions.

Causality lies at the heart of any impact assessment. It refers to the strict relation between cause and effect where cause is that action which produces an effect or effects. In the case of Okanagan Hockey Group Ltd. new jobs created might be the effect. In terms of direct impacts on economic variables causality is relatively straightforward. But in terms of indirect or induced impacts (the downstream impacts) these impacts become less certain taking into account multipliers, leakage, displacement and substitution effects. Further, because economies do not operate in a vacuum, causation is especially difficult to track and even more so when applied to social indicators.

Additionality, while less rigorous on the one hand is more informative on the other. Additionality seeks to identify, articulate and assess the proportion of impacts that will occur as a consequence of the activity or series of activities. In the narrative that follows we have considered utilization of a combination of both measures.

2.4

METHODOLOGICAL CONSIDERATIONS & LIMITATIONS

As with any economic impact assessment, extensive care and due diligence is an essential foundation, yet inevitably there are certain limitations inherent to the methodology of investigation and the assumptions made. Collectively we contend that these limitations do not preclude the veracity nor value of the

observations made below nor the conclusions drawn within this report. As much as possible we have endeavored to ensure the effects of any shortcomings in either our methodology or our research have been minimized. Nonetheless it is important for the reader of this document to be aware of them.

While we are confident that the analyses undertaken and the observations made throughout this report, are germane, realistic and supportable; the limitations detailed below, are intended to assure the reader of the report that we have duly adjusted our observations and conclusions accordingly.

- ① Within the surveys we (Lochaven Management Consultants Ltd.) asked individuals to estimate a variety of expenditures they have incurred and to classify these expenditures within certain categories chosen for them. There are inherent biases in the survey protocols by pre-identifying expenditure categories (i.e., exclusion); there is an inherent possibility of miss-categorization where categories seem to overlap and specific definitions are not provided; and there is an inherent over/under reporting of expenditures that might occur when there is a reliance on individual memories and best guesses. It is difficult to determine the scope and depth of error arising pursuant to these survey deficiencies. That being said, it should be pointed out that substantial value also accrues from a better understanding of the likely order of magnitude of the impacts as from a delineation of specific amounts per se and we have endeavored to confine our comments and observations accordingly.
- ② The tenor of this assignment is premised on capturing positive economic benefits or impacts. Clearly there might also be negative impacts. These negative impacts might be social, economic and/or political. They could include displacement, crowding out, substitution, leakage or other concerns. Unfortunately in many cases these impacts

are difficult at best to disaggregate and measure (i.e. how many visitors that have come to a hockey tournament in Penticton have crowded out other potential visitors because of a lack of available hotel rooms) though we acknowledge that they likely exist and should be part and parcel of a broader exercise. That being said, one would be hard pressed to develop a case where these ignored disbenefits or modifiers, where they might exist, would be anything but inconsequential to the overall assessment.

- ③ Some parts of the economic impact assessment employ the use of multipliers. Multipliers are inherently fraught with controversy because of difficulties associated with their exact measurement and relevance to the task at hand. As much as possible we have taken a conservative approach so as to err on the side of being overly cautious and thereby protecting the veracity of our overall observations and conclusions.
- ④ Our investigations purposely do not comprehensively address environmental nor social externalities arising pursuant to the operation of the Okanagan Hockey Group Ltd. ; though arguably there are some significant social externalities such as "role modeling" that are positive influences on the social behavior of other young citizens within the community. Thus while some of these less tangible impacts are explored our more focused attention is on the primary theme of economic impacts.
- ⑤ Our investigations look at a single point in time and it is not only conceivable that changes will have occurred between the start of the study investigation and the preparation of this report, but quite likely. As such, certain observations and conclusions presented herein may be less/more relevant than when initially posed.

Notwithstanding the collective importance of these

assumptions, limitations and other methodological considerations, we contend that the findings noted throughout the report are germane and supportable.

2.5

THE CONSULTANTS – LOCHAVEN MANAGEMENT CONSULTANTS LTD.

In June 2016 Lochaven Management Consultants Ltd. (LMC) was contracted by Okanagan Hockey Group Ltd. (OHG) to conduct an economic impact assessment of the organization and its operations. Given Lochaven Management Consultants Ltd. had conducted an economic impact assessment for OHG in 2010, it was logical for LMC to assess further impacts post-2010 utilizing the same methodological approach.

By way of background, Lochaven Management Consultants Ltd. was established in 1987. Since inception the company has built a global reputation for excellence, and is internationally recognized, for its work in private sector development. Within this field the company has a diverse clientele that broadly includes a range of public and private sector interests; numerous communities and regions worldwide; provincial, national and foreign governments; large NGO's (Federation of Canadian Municipalities); multinational companies; international organizations such as the Organization for Economic Cooperation and Development (OECD); and, multilateral development organizations such as the World Bank, the International Finance Corporation, the United Nations, and the Multilateral Investment Guarantee Agency. The geographical breadth of successful assignments extends to efforts in Canada, United States, the Russian Federation, Ukraine, China, Colombia, Panama, Indonesia, Czech Republic, Slovakia, Poland, France and Hungary.

This economic impact assessment was undertaken by two senior consultants from within the firm: Mr. George Treller, MA (Economics) and Mr. Wayne Robert, MBA. Both individuals have broad and

substantive expertise and experience in undertaking similar economic analyses. They also have significant experience in the region, the City, and pursuant to work they completed on behalf of OHG in 2010, they have substantive familiarity with the operations and activities of the Okanagan Hockey Group Ltd.



AN OVERVIEW OF THE OKANAGAN HOCKEY GROUP LTD.

SECTION 3

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THE OKANAGAN HOCKEY GROUP (OHG) IS A SIGNIFICANT REGIONAL ENTERPRISE WITHIN THE CITY OF PENTICTON. THROUGHOUT ITS 53-YEAR HISTORY OF SUCCESSFUL OPERATION IT HAS EARNED AN ENVIABLE NATIONAL AND INTERNATIONAL REPUTATION AS A PREEMINENT HOCKEY DEVELOPMENT ORGANIZATION. OPERATIONALLY OHG HAS GROWN INTO A MULTIDIMENSIONAL, MULTIUNIT ORGANIZATION WITH AN EMPHASIS ON EXCELLENCE.

Under the corporate umbrella of the Okanagan Hockey Group Ltd. there are three distinct through interrelated business units:

- ① Okanagan Hockey Academy
- ② Okanagan Hockey School
- ③ Okanagan Hockey Europe - International Business Development, Austria/England

Located in Penticton, British Columbia, the Okanagan Group operates from its state-of-the-art facility designed to provide a unique development opportunity for each participating student-athlete. Integrated within the \$90 million South Okanagan Events Centre, the OHSTC consists of 2 NHL-size ice surfaces; private academy locker rooms; 2 athletic therapy rooms; a full-size classroom equipped with professional video editing equipment; 5000 square foot performance centre; and cutting-edge off-ice training equipment.

As well as attracting players from around the world, Okanagan Hockey Group has taken its expertise abroad to numerous countries such as the United States, England, Scotland, Germany, Switzerland, Sweden, China, United Arab Emirates, Austria and others. The Okanagan Hockey Group Ltd. also has a Hockey Academy in Austria and offices for recruitment in England.

The Okanagan Hockey Group Ltd. has grown significantly from its first summer hockey school in 1963 to becoming an international leader in hockey instruction. In Canada, Okanagan Hockey Camps currently operate from six locations, including Penticton and Kelowna, British Columbia, St. Pölten, Austria, as well as a partnership with the Edmonton Oilers. In addition to Okanagan Hockey Camps and Okanagan Hockey Academy, Okanagan Hockey Group is also in a partnership with the Western Hockey League in their WHL Combines program.[2]

Some of the most notable growth the Okanagan Hockey Group Ltd. has experienced since the last

economic impact assessment (2009-2010) is as follows:

- Okanagan Group Operations - Increased number of 25 full-time staff and 140 part-time (in 2009) to 30 full-time staff and 100 part-time (in 2016);
- Okanagan Hockey Academy - Has increased significantly in both the number of teams and types of teams. Adding an additional 3 teams one of which is female student athletes. For next year (2016-2017) and another female team (and 20 students athletes) will be added.
- Okanagan Hockey School – Increased the duration of summer camps from 6 to 8 weeks and number of athletes from 1,809 (in 2009) to 2,000 (in 2016).

Having the Okanagan Hockey Group Ltd. in the City of Penticton provides the city with an extensive and growing array of economic and non-economic benefits.



BACKGROUND – CONTEXT AND ALIGNMENT

SECTION 4



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THE FOLLOWING PAGES ATTEMPT TO PROVIDE A SENSE OF THE CONTEXT IN WHICH THE OKANAGAN HOCKEY GROUP LTD. OPERATES AND HOW ITS OPERATIONS AND ACTIVITIES ALIGN WITH THE CITY'S ECONOMIC DEVELOPMENT ASPIRATIONS, PLANS, AND EFFORTS MOVING FORWARD.

4.1

CONTEXT

The importance of context is best captured in a well-known phrase that says

“context is so important ... that without it, data is meaningless, irrelevant and even dangerous”.

And so it is in this instance as an understanding of context is central to a proper understanding of impacts on the one hand and enterprise alignment (degree of community fit) on the other. Typically, we think of context as an amalgam of relevant political, economic, social, technological, environmental and legal/regulatory factors.

Context analysis is premised on an examination of external and internal factors. External determinants (macro-environment) embrace what we commonly refer to as: opportunities and threats; while internal factors (micro-environment) embrace what we commonly refer to as strengths and weaknesses.

The essential points of context in which the Okanagan Hockey Group Ltd. operates and has impact include matters in respect to economic structure and demographic circumstance.

4.1.1 Economic Framework

Penticton was incorporated in 1909 and is the regional service and market centre for the South Okanagan. The economic base is dominated by tourism, technology, and service industries though the extent of economic diversity is still somewhat limited. The largest growth in new jobs over the past ten years has been in construction, services, and value added industries.

The labour force participation rate for the City of Penticton in 2011 was 57.3%, which is slightly above the Okanagan-Similkameen regions at 53.8%. The

unemployment rate is nearly on par in respect to Penticton and the region at 9.2% and 9.1% respectively. While more than one-fourth (27.6%) of the cities labour force relies on sales and service roles.

The average household income in Penticton in 2011 was set at \$32,703 which again is on par in respect the region, which was set at \$33,067.

Retail trade (14.56%), health care and social assistance (14.2%), construction (9.24%), accommodation and food services (8.9%), manufacturing (7.09%), educational services (6.49%), and public administration (6.3%) are the top 7 leading industries respectively.

Penticton has strategic proximity to the U.S. border, as the city is approximately 70 km North of the border. Growth for the community is moderately hindered, given it's naturally geography which binds it between the mountains on the East and two lakes; Lake Okanagan on the North and Skaha Lake to the South. Subsequently, the land to the West of the City belongs to Penticton Indian Band.

Penticton has quick and easy access to a regional airport and major highways.

The Okanagan Hockey Group Ltd. provides essential strength and diversity within the local economic base – (tourism - sport and recreation); and direct stabilization to key activities in respect to retail trade, food and accommodation services, and educational services. Its national and international profile/focus support additional economic development efforts (business, citizen and investment attraction). Further, OHG's contributions in respect to direct and indirect job creation and professional salaries address labour force issues.

4.1.2 Population and Demographics

According to BC Stats the City of Penticton has been experiencing a modest, yet stable growth over the last decade. The population of the city in 2011 was 32,877, representing a percentage change of 3.0% since 2006. Comparatively speaking, provincial growth over the same time period was about 5.0%. Furthermore, as the table below depicts, the Okanagan-Similkameen region in its entirety grew roughly 2.4%

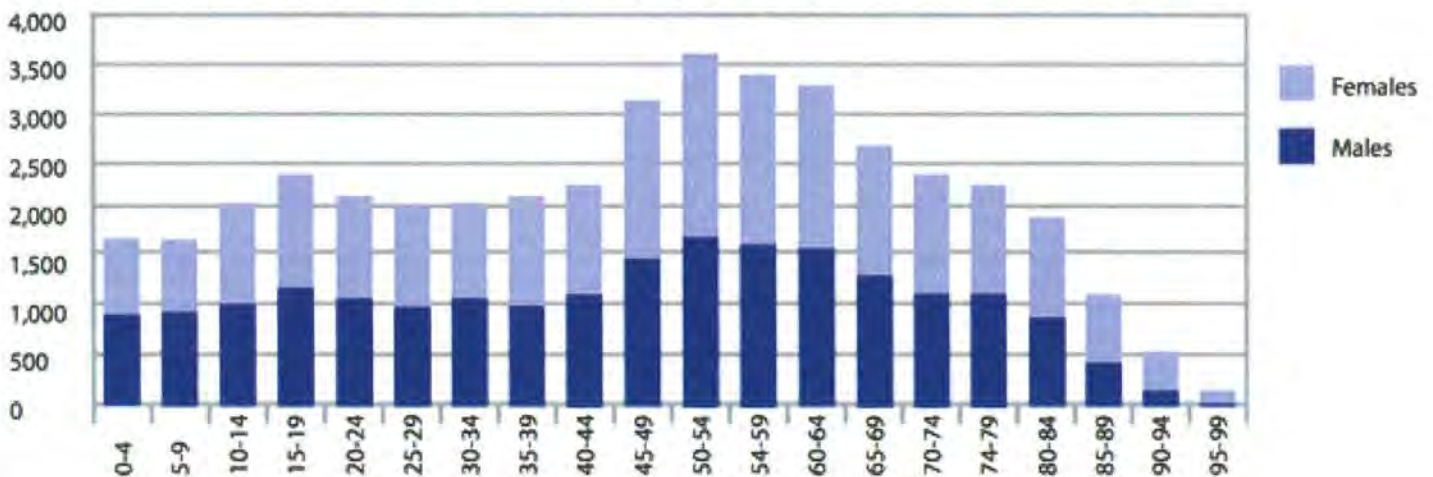
Year	Penticton		Okanagan-Similkameen		British Columbia	
	Population	% Change	Population	% Change	Population	% Change
2011	32,877	3.0%	80,742	2.4%	4,324,455	5.0%
2016	31,909		79,475		4,113,487	

In 2011, slightly over a quarter (25.8%) of the population in the City of Penticton was aged 65 and over versus 14.8% for all of Canada. The percentage of the working age population, (15-64yrs) was less the national average at 61.6% and 68.5%, respectively. In addition, the percentage of children aged 0-14 was 12.6% for the City of Penticton and 16.7% for Canada. Projected population growth over the next five years, in the absence of significant

in-migration, is expected to remain relatively disproportionate. The age cohort of those between 25-29 yrs. is projected to grow the fastest at 24% over the next 5 years; and the group that will decline the most (-19.5%) will be the 20-24 year-old range.

A visual perspective of the character of the current population within the City of Penticton, is shown below.

Penticton population by five-year age groups and sex (absolute numbers) 2011



4.2

ALIGNMENT WITH COMMUNITY GOALS AND STRATEGIES

From a local government perspective the value of enterprise activities have greater merit when the impacts of activities and operations contribute in a positive way to the community's broader development agenda, i.e. when they are in alignment with the visions and strategic priorities of the community in which they operate.

4.2.1 Community Vision and Guiding Principles

The City of Penticton “envisions a more complete community, an environmentally aware community, a socially responsible community, a community of continued economic diversity and increased economic opportunity, a community with increased transportation choice, a community which celebrates its heritage, culture and its creative and artistic makeup, and an involved community, prepared to invest their time to ensure that the vision is not lost or forgotten.”

Pursuant to its Vision, the City of Penticton has affirmed several guiding principles for community growth, as per their OCP. These guiding principles serve as an important reference point to understanding and affirming the City's development priorities and, by implication, the relative degree of fit that organizations such as the Okanagan Hockey Group Ltd. represent.

Notable guiding principles include the following:

- ① Increasing the degree of vitality and diversity in our community. In particular, a Downtown where people live as well as make a living.

- ② Develop an economy that capitalizes on Penticton's abundance of natural features and attributes and combines them with its rich agricultural history to create unique niche economies in agri-tourism, eco-tourism, sport-tourism, and cultural-tourism.
- ③ Enhancing publicly owned lakefront property for the benefit of both residents and visitors to our community.
- ④ Increasing the amount of urban landscaping in neighborhoods and commercial areas.
- ⑤ Continuing to preserve and enhance the small town charm, pedestrian scale and rural ambiance that characterizes Penticton.
- ⑥ A recognition of the City's special natural places and an earnest effort to protect and enhance them, such as the Esplanade, the Silt Bluffs, Skaha Climbing Cliffs, the Oxbows, Munson Mountain wildlife corridors such as Randolph's Draw, Penticton and Ellis Creeks, and the KVR Trail.
- ⑦ Increasing Penticton's social conscience.
- ⑧ Support for the adherence to principles of Sustainable Communities.
- ⑨ Continuing to provide public access to public community and recreation areas.

The Okanagan Hockey Group Ltd.'s operations naturally align with the City of Penticton's Guiding Principles and contribute to the achievement of many of the City of Penticton's strategic goals and objectives. OHG influences a number of tangible opportunities in a positive way. The successes of the Okanagan Hockey Group Ltd. have the potential to enhance the long-term health and vibrancy of the community and the region as a whole.

In terms of shared objectives between the City of Penticton and Okanagan Hockey Group Ltd. consider

the following:

- Regional partnerships and collaboration;
- Secure new revenue streams to support/enhance the delivery of other local objectives (e.g. Young Stars tournament);
- Strengthen the local economy as a whole;
- Boost community safety through the enhanced venue and facilities;
- OHG facilities is a site that offers recreational and community amenities to enhance community vibrancy and tourism goals.

4.2.2 The South Okanagan Regional Growth Strategy (RGS)

The purpose of the South Okanagan Regional Growth Strategy (RGS) is to ensure that growth and development in the South Okanagan take place in a sustainable manner and that growth management issues reach beyond the boundaries of individual local governments. In order to achieve this purpose the RGS identifies goals across a regional perspective in an effort to attain common social, economic, and environmental objectives. The key RGS directions are identified through 6 key themes with the intention of covering a broad range of issues. These themes are as follows: (1) Economy – Promote Sustainable Economic Diversification; (2) Environment – Ensure the Health of the Ecosystems; (3) Governance – Promote Inclusive and Accountable Governance; (4) Human Settlement – Carefully Direct Human Settlement; (5) Infrastructure – Maximize the Efficient Use of Existing Infrastructure; and (6) Social – Create Safe, Culturally Diverse, and Healthy Communities.

The Okanagan Hockey Group Ltd. measurably contributes to all of these core themes, i.e. OHG is a significant contributor to regional economic well-being by way of economic diversity; provision of local well-paying jobs; attracting and retaining additional young workers and families; and balancing the economic and social health of the community.

4.2.3 City of Penticton's Tourism Business Plan

The 2012-2015 Penticton & Wine Country Tourism Business Plan affirmed the importance of the sports industry sector for further tourism development. Having the OHG facilities and programs are strong resources that open up the markets and the opportunities for tourism to further capitalize on the sports industry. The Vancouver "Young Stars" tournament is a prime example of a large, high profile event that would not be possible without the Okanagan Hockey Group Ltd.

4.2.4 South Okanagan Similkameen Local Immigration Partnership

The South Okanagan Similkameen Local Immigration Partnership has as a focus to prepare a supportive environment that lays the groundwork for our communities to blend the aspirations of newcomers with the aspirations of the region. It works on the principle that all members of a community are in the business of integrating newcomers and that integration is a two-way street.

Over the past 53 years the Okanagan Hockey Group Ltd. as part of its promotional efforts globally have boasted the quality lifestyle of the City of Penticton. And through such efforts have been extremely successful in bringing athletes and by extension their families to the region. Many of these newcomers have become longer term residents of the community. The number and ethnic diversity of student athletes that are integrated into the local high school are also important contributions to regional diversity.

A photograph of an ice hockey player in a red Under Armour uniform, including a helmet and gloves, leaning forward on an ice rink. The player is holding a hockey stick and is in a ready stance. The background shows the white ice and yellow boards of the rink.

ESTIMATES OF ECONOMIC IMPACT

SECTION 5

T

HERE

THERE ARE A VARIETY OF ECONOMIC IMPACT MODELS AND APPROACHES THAT CAN BE USED WHEN IT COMES TO MEASURING THE IMPACTS OF THE ACTIVITIES AND OPERATIONS OF A SPECIFIC ENTERPRISE AS AN ECONOMIC STIMULUS. OUR APPROACH WAS LARGELY DRIVEN BY THE SPECIFIC CONTEXT IN WHICH THE OKANAGAN HOCKEY GROUP LTD OPERATES. A DETAILED SUMMARY OF IMPACTS IS PRESENTED ON THE FOLLOWING PAGES. ²

² The basis of these calculations is presented in Appendix 1.

DIRECT IMPACTS - THE OKANAGAN HOCKEY GROUP LTD

OHG Direct Impacts

Payroll	\$1,763,936.07
Vendors within the City of Penticton	\$2,188,357.21
Total Operational Expenditures	\$3,952,293.28

OTHER IMPACTS

OHA Parents (Who Did Not Relocate to the City of Penticton)

Host Weekend Team Impacts

Players	140
Families Moved	47
Parents from out of town	81
Average Visit Times	9.05
Average Duration of Stay	2.8
Average Party Size	2.21
# of Visitor Days	4,531.50
Average Spending / visitor/ night	\$737.59
Total OHA Visitor Spending	\$1,513,534.68

OHA Parents (Who Relocate to the City of Penticton)

Families Moved

School Year (33.3%)	15.651
Year Round (66.7%)	31.349
Average Spending/Month/Family	\$5,599.98
Total Family Spending	\$2,983,098.15

Okanagan Hockey Academy Players

OHA Student Athlete Spending Impact

OHA Student Athletes	140
Penticton Kids	12
Kids outside of Region	128
Average Spending Athlete/Month	\$539.88
Total Spending OHA Student Athletes	\$691,046.40

Visitors to the City of Penticton for OHA

Host Weekends

Out of Town Teams	31
Players	631
Entourage	947
Staff	93
Total Visitors to Region	1,671
Spending (\$42 meals & \$50 Misc. per day per person)	\$466,605.00
Number of Hotel Nights	1,355
Average Hotel Cost/Night	\$125.00
Total Hotel Expenditures	\$169,375.00
Total Expenditures as a Result of Visiting Teams	\$635,980.00

OHA Evaluation Camps

Evaluation Camps

Teams	20
Number of Players	384
Entourage	576
Staff	60
Total	1,020
Spending	\$364,140.00
# of Visitor Days	4,531.50

TOTAL DIRECT IMPACTS AS A RESULT OF OHA

Okanagan Hockey Academy Direct Economic Impacts

Total OHA Family Visitor Spending	\$1,513,534.68
Total OHA Family Moved to Penticton Spending	\$2,983,098.15
Total Spending OHA Student Athletes	\$691,046.40
Total Expenditures as a Result of Visiting Teams	\$635,980.00
Total Expenditures as a Result of Camps	\$364,140.00
Total Direct Spending as a Result of OHA	\$6,187,799.23

OKANAGAN HOCKEY SCHOOL

Okanagan Hockey School Total Direct Impacts

Athletes	1,952
# of Families	3,866
# of Out of Region Visitors	5,818
Average Dollars Spent in Community per Child	\$2,459
Total Dollars Spent (Outside of OHS Fees)	\$4,801,100

TOTAL ECONOMIC IMPACTS

Okanagan Hockey Academy Direct Economic Impacts

Direct Spending as a Result of OHA	\$6,187,799.23
Dollars Spent (Outside of OHS Fees)	\$4,801,100.16
OHG Operational Expenditures	\$3,952,293.28
Direct Impacts	\$14,941,192.67
Total of Direct, Indirect/Induced Impacts	\$18,078,843.12

OTHER IMPACTS

While the Okanagan Hockey Group Ltd has significant measurable economic impacts to the region the organizations' activities also add greater leverage and other significant impact to the local community by way of:

- Okanagan Hockey Academy students give back to their "adopted" community and are important role models as student athletes (84% of these young athletes are on the honor role at local schools). ***"OHG holds their student athletes to a very high level of academic and personal accountability... They are great role models for other students."***
- OHG increases the City of Penticton national and international marketing exposure for tourism, citizen attractions and inbound investment exposure with over the past 5 years OHG has seen players from over 20 different countries. During the 2015/2016 school year families that traveled Internationally came from a diverse array of countries such as Dubai, Japan, China, UK, Denmark, Mexico, Switzerland and Austria.
- While School District 67 is under funding protraction the increase of students as a result of OHA does not increase our School Districts budgets. However it is important to look into the future and when student numbers allocates the additional students funding protection ends and budgets from OHA will be very valuable.
- The increase of students into Pen High allows the school to offer some courses that might otherwise not due to insufficient enrollment/ interest.
- OHG professional coaches give to minor hockey through providing Penticton Minor Hockey with three free coaching sessions per team.

FINAL THOUGHTS

SECTION 6



A

AMIDST THE UNCERTAINTY OF GLOBAL ECONOMIC STABILITY IT IS IMPORTANT TO BE REMINDED THAT COMMUNITY ECONOMIC WELL-BEING IS EQUALLY AS FRAGILE AND UNCERTAIN. SEEKING A MORE CERTAIN AND PROSPEROUS FUTURE DEMANDS THAT GREATER ATTENTION BE PAID TO THE VERY SIGNIFICANT ROLE THAT THE PRIVATE SECTOR, SPECIFICALLY LOCAL BUSINESS, CAN PLAY IN ENSURING A SUSTAINABLE FUTURE.

The Okanagan Hockey Group Ltd. is a multidimensional organization providing substantive national and international profile and economic benefit to the City of Penticton and the Okanagan Similkameen Region.

The Okanagan Hockey Group Ltd has built on the City of Penticton's support for sports and sports tourism and aligns closely with the development principles and priorities of the community. It provides new employment opportunities within the sporting industry; supports existing enterprises and the creation of other job opportunities within the community; provides a platform for greater economic diversity, supports efforts to attract and retain young professionals and their families; and contributes significantly to regional growth and development. Because of the increasing successes of Okanagan Hockey Group Ltd and its various business units, each year this organization generates spending in the order of \$18.01 million in the community and region. Organizationally it provides 30 full time jobs and 100 part time jobs. Clearly these impacts are substantive.

It is important to remember that this is an organization providing ongoing economic stimulus and value within the community and region. On a number of levels it is an important player in the local economy today and an important asset of the City and Region building for the future.

**BASIS OF
CALCULATIONS
– FROM THE
RESEARCH**

APPENDIX A

The following notes and tables present in detail the information collected (both primary and secondary) and analyses of each sub-unit within the Okanagan Hockey Group Ltd. This information was used to calculate the final estimates of impact.

OKANAGAN HOCKEY GROUP (ENTERPRISE)

OHG's corporate head office and facilities are located in the City of Penticton. This is headquarters for all the primary activity of all business units of the organization.

- Full time staff has increased from 25 (2010) to 30 (2016) and is projected to grow additionally to 35(2017);
- Seasonal staff in the City and region is projected to be maintained at 100 for both 2016 and 2017. An annual payroll in excess of \$1.76 million/year;
- During the 2015/2016 fiscal year OHG spent in excess of \$2.19 million on local suppliers.

OKANAGAN HOCKEY ACADEMY

Since the 2010 EIA the OHA business unit has grown significantly adding three more teams resulting in an additional 55 student athletes. The findings are broken into three subcategories (1) OHA's student athletes, (2) families associated with OHA, and (3) visiting teams.

Okanagan Hockey Academy Players Key Findings

OHA has changed in number of teams, numbers of student athletes enrolment as well as the adding female teams to their program.

	2010	2016	2017
Teams	4 teams	7 teams	8 teams
Male Student Athletes	85	120	120
Female Student Athletes	0	20	40
Total Student Athletes	85	140	160

OHA brings in student athletes from not only the region but also all over the world. Some bus in from the Central Okanagan, some families relocated while other are billeted out to supporting families within the community. The breakdown is as follows:

Description	#'s
Billeted	68
Penticton Kids	12
Kelowna Kids	13
Families Moved to City of Penticton	47
Total Student Athletes	140

OHA Player Spending patterns - The average spending per student per month per athlete is estimated to be \$540.³

OHA Player Spending Profile	Amount
Food	\$100.00
Transportation	\$33.33
Clothing/Haircuts	\$95.83
Entertainment	\$63.13
School Supplies	\$31.25
Sporting Equipment (i.e. hockey tape, skate sharpening, sticks, etc.)	\$108.33
Misc	\$108.00
Average Spending/Month	\$539.88

Okanagan Hockey Academy students give back to their “adopted” community and are important role models as student athletes (86% of kids on the honor role).

Okanagan Hockey Parent Key Findings

Through the analysis it was further identified that Parents of the OKA student athletes fall into two categories firstly, parents that relocate to the City of Penticton as a resulting of their child involvement with OHA and secondly parents that visiting the City of Penticton through the school year.

Relocated Parents

- 47 families relocated to Penticton of which 33.3% (15 families) relocated for the school year while 66.7% (32 families) spent the entire year in City of Penticton’
- Of the 47 families 11.1% had 1 member relocate, 22.2% had 2 members, 33.3% had 3 members, 22.2% had 4 members, and 11.1% had 5+ members relocate.
 - Which is an average of about 3 members relocating
- Of those family members who relocated, 14 of them where 18 or under, 1 was between 19-29, 2 between 30-39, 10 between 40-49, 7 between 50-59, 1 between 60-64, and 3 over 65+.
- This would likely suggest the majority of family members are those that are the parents of the child in the Hockey School and any other children they have with them. Further, as the chart below says that 2/3 of these
- Of those that relocated, 26.7% bought a house and 6.7% bought an apartment.
 - Furthermore, the 20% (3 respondents) that listed “other” noted in the comments that they bought an apartment a few years earlier, bought a townhouse, or built a home.

³ Proxies developed based on direct OHA player input via survey.

- Otherwise, the majority at 40% rent a house for the duration.
 - 6.7% rent an apartment
- Average monthly spending patterns for families that relocate to the City of Penticton is \$5,599.98. The breakdown of expenditures are as follows:

OHA Family Spending Profile	Amount
Restaurants	\$307
Accommodations (mortgage, rent, room charges etc)	\$1,653
Concession	\$137
Grocery/Other	\$1,810
Event Tickets (i.e. tournament passes, etc.)	\$177
Other Recreation and Entertainment (i.e. movies, casino etc)	\$151
Event Merchandise	\$44
Other Merchandise/Shopping	\$347
Car Rental	\$0
Vehicle Related Expenses (i.e. gas, parking)	\$282
Sporting Equipment (i.e. skate sharpening, sticks, hockey tape etc)	\$179
Additional expenses	\$513
Average Monthly Spending	\$5,599.98

Visiting Parents

- While there are a significant number of families that relocated to the City of Penticton there are obviously the majority of families that enroll their child into OHA and visit throughout the school year. During the 2015/2016 year student athletes came from a range of countries:

Out of Country Student Athletes

11	United States
2	Japan
2	Switzerland
1	Czech Republic
1	France

- There are 81 student athletes from outside the region whose families did not relocate to the City of Penticton;

Parents of OHA student athletes visit on average 9.05 times throughout the year;

- The family size that visits OHA student athletes is 2.21;
- Parents and family stay for an average of 2.8 days;
- The total average daily spending of the respondents was \$737.59.
- The accommodation utilized for these visitors responding at 55% was vastly through hotels. 35% of respondents listed "other" and mentioned they stayed with the billet family or friends.
- Importantly, 10% of these respondents still stated that they owned an apartment or house.

Okanagan Hockey Academy Visiting Team Key Findings

One of the most significant changes OHA since the 2010 EIA's was the movement towards the hosting of 'Host Weekends', which are by simple descriptions league tournaments. Five times per years OHA brings to the City of Penticton Host Weekends with:

Host Weekends

Out of Town Teams	31
Players	631
Entourage	947
Staff	93
Total	1,671

- 31 teams visited City of Penticton for Host Weekend events staying on Average 3 days
- An excess of 1,671 athletes/coaches/family members visited the City of Penticton
- Accounting for a minimum of 1,355 hotel nights;
- The average daily spending of the visitors is \$92.00/day. ⁴

Visitor Spending Profile

Breakfast	\$12.00
Lunch	\$15.00
Dinner	\$15.00
Misc. Spending	\$50.00
Total Spending/Visitor	\$92.00

⁴ \$92/day/visitor is felt to be very conservative and was based on the average sending experienced by the OHG Operations team.

Okanagan Hockey School Key Findings

Since the 2010 Economic Impact Assessment the OHG has made some important changes that will increase its impact into the community firstly, extended the duration of the camps from 6 weeks to 8 weeks; secondly, does no longer billet athletes using local schools but rather entered this visitor into the accommodation market; and thirdly, increased the number of all overall athletes from 1,809 (in 2009) to 2,000 (in 2016).

- 2,000 athletes attend OHS over the eight weeks of camps;
- 97.6% from outside the region (1,952 athletes);
- Average athlete were accompanied by ~3.0 family members (totaling 5,818 tourists);
- Families visit City of Penticton from wide range of communities and countries:

OHS Athletes Home

18.7%	<125 km's from Penticton
32.1%	>125 km's from Penticton
25.5%	Canada (Outside of BC)
21.9%	United States
1.8%	International

- Families that traveled from the United States came from a range of States including Idaho, California, Texas, Illinois, Utah, Arizona, Colorado, and New York
- Over the past 5 years OHS has seen players from over 20 different countries. During the 2015/2016 school year families that traveled Internationally came from a diverse array of countries such as Dubai, Japan, China, UK, Denmark, Mexico, Switzerland and Austria.
- The average spending into the City of Penticton as a result of a child attending the hockey school is \$2,459.58.
- The visitor spending profile is shown below:

Spending Profile

Restaurants	\$277.70
Accommodations (rent, room charges etc)	\$891.37
Allowance to players for spending money	\$71.66
Clothing/Haircuts	\$67.92
Groceries (Grocery store items)	\$232.54
Medical/Dental	\$2.60
Car Rental	\$79.96
Vehicle Related Expenses (i.e. gas, parking)	\$159.38
Local Transportation (i.e. taxis, buses etc)	\$3.19
Concessions	\$34.11
Event Tickets (i.e. tournament passes, etc)	\$27.31
Other Recreation and Entertainment (i.e. movies, casino etc)	\$135.64
Event Merchandise	\$57.86
Other Merchandise/Shopping	\$123.69
Sporting Equipment (i.e. skate sharpening, sticks, hockey tape etc)	\$99.95
Other	\$194.70
Total	\$2,459.58

INTERVIEWS

APPENDIX B

- ① Mr. Andy Oakes President Okanagan Hockey Group
- ② Mr. Blair Noel Vice President Okanagan Hockey Group
- ③ Ms. Kim Madsen CPA, CMA Controller Okanagan Hockey Group
- ④ Mr. Chad Douglas, City of Penticton Sports & Events Project Manager
- ⑤ Mr. Rob McLaughlin, Okanagan Hockey Group Operations
- ⑥ Mr. Blake Wesley, Okanagan Hockey Group Operations
- ⑦ Ms. Sheila Perepalkin, Sandman Hotel Group)
- ⑧ Mr. Scott Robertson, Murray GM
- ⑨ Mr. Dave Nackoney, School Advisor Pen High
- ⑩ Mr. Alan Stel, School Principal Pen High
- ⑪ Ms. Wendy Hyer, School District 67 Superintendent
- ⑫ Mr. Rylan Hernberg, Penticton Ramada
- ⑬ Ms. Barb Haynes, Penticton Lakeside Resort