



**Islands Trust  
Corporate Services Review**

# REPORT

## Introduction

Neilson-Welch Consulting Inc. (NWCi) was hired by the Islands Trust to conduct a Corporate Services Review. The purpose of the Review was to examine and provide recommendations to deal with three challenges facing the organization:

- staff support for Trust Council
- corporate administration support for local trust committees (LTCs)
- the organization's human resources function

In examining these challenges, the consultants were asked to consider specific questions, the list of which is presented in figure 1.

This *Report* presents the consultants' findings and recommendations, and in so doing, answers the questions posed. In undertaking the Review, the consultants examined a variety of documents produced by the organization, but also spent considerable time interviewing trustees and staff. The information and perspectives obtained through the interviews were invaluable to the consultants in reaching their findings and developing their recommendations. The findings and recommendations as presented in this *Report*, however, belong to the consultants alone.

Each of the challenges is examined in its own section of the *Report*. Recommendations for dealing with the specific challenge are presented at the end of each section. All recommendations are re-produced and listed together in summary-format at the end of the *Report*.

**Figure 1  
Questions to Consider**

### Support for Trust Council

- Does Council have the corporate support required to enable it to fulfill its full scope of responsibilities?
- Are additional support services required? If so, what level of support is needed?

### Corporate Administration for LTCs

- What new assistance, if any, do LTCs require to properly administer their affairs, including their meetings? What are the particular needs of Salt Spring Island?
- If new assistance is required, what options are available? Which option is best? Which is best for Salt Spring in particular?

### Human Resources Function

- What are the human resource management and development needs of an organization like the Islands Trust? Is the Trust's administration set up properly to meet these needs?
- What changes, if any, are needed to address human resource management needs?

## Support for Trust Council

### ► Council Mandate

Section 3 of the *Islands Trust Act* presents the object of the Trust:

- *"To preserve and protect the trust area and its unique amenities and environment for the*

*benefit of the residents of the trust area and of British Columbia generally, in cooperation with municipalities, regional districts, improvement districts, other persons and organizations and the government of British Columbia."*

Section 4 of the *Act* deals with the organization of the Trust, and identifies the four bodies that are responsible for implementing the Trust's object: Trust Council, the Executive Committee, the Local Trust Committees and the Trust Fund Board. Council, under section 4, has the responsibility for establishing the general policies for carrying out the object, and the responsibility for the financial management of the Trust (other than financial management of the Trust Fund). Later in the legislation, beginning at section 8, specific requirements are imposed on Council, including the requirement to adopt a policy statement. Certain authorities are also provided, such as the authority to enter into agreements with other government agencies, the authority to assist other government agencies in their policy-making efforts, and the authority to establish procedures for local trust committees.

The object in section 3, the responsibility for establishing general policies in section 4, the requirements under section 8, and the various authorities contained throughout the *Act*, combine to help define Council's overall mandate at the Trust. This mandate, as expressed by staff and trustees, contains four roles for Council:

- *Finance* — Council sets the budget for the Trust, and oversees its financial management.
- *Policy* — Council establishes general policies to guide the Trust's various activities and actions, and those of other organizations, in ways that promote the Trust's object. Much of Council's policy-making occurs through its ongoing development of the Islands Trust Policy Statement, which Council must adopt as per section 15 of the *Act*.
- *Liaison* — Council works with other government agencies to coordinate efforts and activities that occur within the Trust Area.
- *Advocacy* — Council lobbies other government agencies on issues that are deemed

important to the protection and preservation of the Trust Area, its unique amenities (natural, social, cultural) and environment.

#### ➤ Existing Staff Support

In all of its work, Council relies on Trust staff for support. The Trust Area Services (TAS) group is the body of staff that works most closely with Council. This group consists of five positions: the Chief Administrative Officer, the Trust Area Projects Planner, the part-time Communications Specialist, the Executive Coordinator and a Secretary. Not all of these positions, however, deal exclusively with Council. The CAO, for example, is responsible for and deals with all areas of the organization. The CAO also works closely with the Executive Committee, which has duties that are not all directly related to Council work. The Communications Specialist spends most of its time on Council matters, but also assists local trust committees as needed.

In addition to TAS staff, the Trust's Director of Administrative Services and Director of Planning Services support Council's activities through their work with Council's Committees — the Financial Planning Committee and Local Planning Committee respectively.

#### ➤ Assessment

The level of staff resources dedicated to Council is not sufficient to support Council in all that it wishes to do. To understand this finding, it is necessary to explore two issues: the demands of Council (and its committees) on the organization, and staff's capacity to meet the demands.

Overall, Council's demands are considerable. In general terms, they can be broken down into four sets of items:

- *Required Work Items* — There are a number of items that the *Islands Trust Act* requires Council to do every year. For example, Council must adopt an annual budget for the Trust, and must file an annual report to the Minister of Community Services. Other requirements under the *Act*, such as the requirement to adopt the Policy Statement and the requirement to appoint officers, are not

necessarily ongoing items that require attention on an annual basis (but see next point).

- *Council Commitments* — Council has committed itself to a number of important ongoing tasks, most of which fall under the heading "Trust Area Programs" on Council's meeting agendas. One such task addresses the need for regularly reviewing and updating the Trust Policy Statement. The Policy Statement is core to the purpose of the Islands Trust, and to that of Trust Council in particular. The key sections of the Statement outline "Trust Council's vision for the future of the Trust Area", and guides the land use planning efforts of local trust committees in the areas of ecosystem preservation and protection, stewardship of resources and development of sustainable communities. The Statement also sets out to influence other agencies whose policies and actions affect the Trust Area.

Another ongoing task concerns the various inter-agency agreements that the Trust has with provincial ministries, regional districts and others. These agreements require regular monitoring and updating in order to remain relevant and effective. A third ongoing task concerns legislative monitoring. Council needs staff to be monitoring provincial legislation regularly in order to identify changes that may impact the Trust Area.

- *Council Priorities* — In addition to its legislative requirements and ongoing commitments, Council establishes priorities towards which it wishes to direct the organization's resources. In March 2006, Council held a strategic planning workshop to identify three broad areas of priority for the current term. One of these areas is titled "Excellence in Governance", under which Council has established a 13-member Governance Task Force with staff support to oversee a major review of several fundamental governance-related issues in the Trust, including the size of local trust committees in key local trust areas, and the make-up of Council itself.
- *Advocacy Work* — Advocacy work is promoted by the organization (trustees and

staff) as an important part of Council's mandate. The current Council, since the beginning of its term one year ago, has become involved in a number of different issues, including: BC Ferries service fee and fuel tax surcharge, tourism planning, sustainable aquaculture, private well network (water quality), Kyoto protocol, off-shore drilling and community housing.

Under the current structure, staff does not have the capacity to provide the support necessary to properly handle all of Council's demands. The TAS group consists of five positions but only three of these positions — CAO, Projects Planner and Communications Specialist — provide the policy-level support needed to deal with much of the Council's workload. And of these three, only the Projects Planner is dedicated full-time to Council needs. The Communications Specialist is a part-time (0.5 FTE) position, and the CAO has important responsibilities that extend beyond Council. The Directors of Administrative Services and Planning Services are responsible for dealing with certain Council demands (and those of its committees); these positions, however, have considerable responsibilities elsewhere, and are therefore limited in the level of support they can provide to Council.

The insufficiency of staff resources relative to Council's demands has certain consequences for the Trust, many of which are already being realized. The first is that not all of Council's demands are being met. Council's commitment to its Policy Statement stands out in this regard. At its June 2006 meeting, Council requested its Executive Committee to provide recommendations with respect to reviewing and amending the Policy Statement. At the following meeting, in September 2006, the Executive Committee recommended that Council not proceed with any amendments because of resource constraints and the need to direct staff to other initiatives.

A second and related consequence is that the items which are receiving attention are not being addressed to anyone's satisfaction. There is a clear and almost unanimous perception on the part of trustees and staff interviewed that the organization's work on many items — in particular its advocacy and liaison work — is less than stellar, simply because of the lack of resources

available to do the kind of work that the organization wishes to do and is capable of doing. Put simply, the resources that are available to handle the variety of Council's demands are spread too thinly to achieve the desired results.

Concerns with the work being produced, and with the demands that are being put aside, are resulting in widespread frustration and a decline in morale on the part of trustees and staff. Most continue to believe that Council is relevant to the citizens of the Trust Area, and is *capable* of making a difference. Few are convinced, however, that Council will *succeed* in making much a difference until resources and demands are brought into alignment.

### ➤ **Managing Demand**

The simplest solution would be to increase the level of staff resources available to support Council. And, to be sure, additional staff may indeed be part of the answer. An increase in the number of staff, however, will not on its own solve the problem in any sustainable way. What is more important to an actual solution is a change in the level of Council's demand for resources.

Every organization — every person for that matter — faces the same fundamental challenge: a finite amount of resources to deal with an almost infinite amount of demand. This challenge is often defined using the term "scarcity". Some organizations attempt to deal with scarcity through supply — that is, by increasing the supply of resources available. Sooner or later, however, every organization realizes that the challenge cannot be addressed through supply alone. Ultimately, demand for resources must be managed.

Trust Council appears to have trouble managing its demand. The minutes of Council meetings, supported by the interviews with trustees, reveal that despite repeated cautions by the CAO Council continues to take on activities that translate into new demands for staff resources. Many of the new activities relate to the advocacy work that Council undertakes on behalf of the Trust Area.<sup>1</sup> The

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<sup>1</sup> Several of the issues are introduced by trustees under the "new business" section of the meeting agenda, which,

easiest course of action for Council would be to decide to not take on such activities, and to focus the organization's resources on meeting its other demands. Such a decision, however, is not expected for a number of reasons:

- trustees consider the advocacy part of Council's mandate to be quite important to the overall purpose of the Islands Trust
- trustees feel passionate about the issues that come before Council, and feel genuinely compelled to get involved and defend the Trust Area
- advocacy work tends to be more exciting to (and thus more attractive) than some of Council's other tasks
- there is a sense that under the present provincial government, Council's involvement on key items is more important than under previous governments with which Council might have been more naturally aligned
- trustees feel that the citizens of the Trust Area expect Council to get involved in every issue that may affect life on the Islands; and trustees feel considerable pressure to meet citizen expectations using existing resources (many trustees feel that to say "no" is politically unacceptable, despite the recognized impact on the organization's resources)

This *Report* makes no comment on the relevance or importance of the issues in which Council has become involved over the past year. The choice of causes to advocate is a political decision that can only be made by Council. Specific issues aside, however, it is suggested that Council needs to be more disciplined in deciding how to use its scarce resources. Council must accept that while everything may be important to the Trust Area, not everything can be done. Council must establish a focus then stick to it.

The establishment of a focus is achieved through open and structured discussion involving Council as a whole. Council, it is suggested, should consider holding a one-day workshop dedicated

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arguably, is not the place to consider items that, if endorsed, have real impacts on resources.

entirely to the need for focus. The workshop should be structured to help participants explore and develop consensus around a number of items, including the:

- role and responsibility of Council in the Trust
- roles and responsibilities of individual members of Council and of staff serving Council
- activities and tasks that Council must undertake, and to which Council must direct sufficient resources
- resource constraints that limit Council's scope of discretionary activities, and that trustees and staff need to respect
- specific (discretionary) priority items that Council wishes to pursue within its recognized resource constraints
- criteria that Council will respect in determining whether to take on new tasks, particularly those tasks relating to advocacy work
- development of a sustainable work program that provides room for advocacy projects that will arise over the course of the term

Two words would set the stage for the workshop: scarcity (of resources), and discipline (in using resources).

In March 2006, Council participated in a strategic planning workshop to consider priorities for the organization as a whole. The (draft) Strategic Plan that emerged from the effort is very comprehensive and very ambitious. It places high expectations on staff and trustees who, it is suggested, will feel compelled to proceed on all items, including the many that are identified as needing new resources in order to complete.

The ambitious nature of the (draft) Plan reflects the passion of the trustees and their genuine desire to make a difference. It also reflects a lack of willingness to accept that the organization has finite resources and limited ability to acquire the additional resources that would be required to make the (draft) Plan a reality. For this reason, it is suggested that the current (draft) Plan not be used as the starting point in any workshop dedicated to establishing a focus for Council. Council's focus, it is suggested, needs to be sharper than that which is articulated in the (draft) Plan.

Establishing a clear focus for Council will not be easy. Certain activities, which will be important to

individual trustees or Council as a whole, will need to be abandoned. Sticking with the focus, once established, will also not be easy. The Chair will need to be strict in keeping trustees within the parameters of Council's stated focus. The CAO will need to continue to caution Council about the scarcity of resources and the potential impacts of specific decisions. Council may wish to strengthen its *Meeting Procedures Bylaw* to limit the amount and type of new business that can be introduced in meetings. The Policy Statement could be strengthened to require Council to attend to certain tasks (e.g., updating the Policy Statement) before taking on new tasks. Finally, trustees have a role to playing in holding themselves and each other accountable to Council's stated focus.

### ➤ Increasing Supply

Discipline on the part of Council to establish its focus and better manage its demands on the organization's resources will significantly help to revolve the demands/resources mismatch. It will not, however, be sufficient to solve the problem. Additional policy- and project-level TAS resources, it is suggested, are required, even to handle the reduced set of demands that would emerge under Council's new focus.

One of the major reasons behind the need for additional policy- and project-level TAS staff concerns the availability of the CAO. As the Trust's Chief Administrative Officer, the CAO is ultimately responsible for the administration of all services and all activities in the organization. Fulfilling this responsibility requires the CAO to spend a considerable amount of time interacting with Directors and staff. The geographic nature of the administration (i.e., three separate offices) makes the job both more difficult and more important.<sup>2</sup> The CAO must also spend considerable time working directly with the Chair and the Executive Committee on the day-to-day business of the Trust. Much of the Committee's time is spent on Trust Council work; but the Committee does have some responsibilities that extend beyond Trust Council.

In all, the CAO position is limited in the amount of

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<sup>2</sup> The need for the CAO to spend more time than at present in the satellite offices is addressed later in the Human Resources section of the of the *Report*.

time it can dedicate directly to working on Trust Council projects and activities. To be sure, the CAO position should direct some time to Council projects; just not as much as the position has been expected to direct over the past year. The rest of the organization needs more of the CAO's time.

Another reason behind the need for additional high-level TAS staff concerns the level of effort involved in doing Council work. A constant theme that emerged from the interviews with trustees and staff was the notion that whatever Council decides to do it must do well. As noted earlier, the present situation, in which resources are spread too thinly across too many demands, is generating less-than-stellar results, which in turn is contributing to a sense of frustration and a decline in morale.

Council's work is important and requires a considerable level of attention and time to do well. Consider updates to the Policy Statement. Each proposed amendment requires a certain amount of research, policy analysis, discussion, liaison with other bodies and stakeholder consultation. The Council's governance work similarly requires much thought, discussion, assessment and consultation. Even with the involvement of outside consultants, the governance work will be taxing on staff.

Council's advocacy work, done properly, is also taxing on the organization. In order to make a difference on causes that Council adopts, the organization must be willing and able to invest appropriate levels of time and energy. The time and energy required will vary, of course, depending on the issue and on Council's level of interest. Even a resolution that calls for a simple letter, however, generates a not insignificant amount of work for staff. The topic must be researched, positions must be clearly articulated, the decision-making criteria of the recipient body must be understood, and questions must be anticipated. Then, after the letter, some degree of follow-up is usually required. Resolutions that lead to position papers or media campaigns generate even more work.

Over the past year, Council has attempted to reduce the impact of its advocacy work on staff by assigning the "legwork" to individual trustees. This practice is problematic. Trustees are elected to make policy and decisions for the Trust Area,

not to do the work of staff on specific files. They are responsible for the bigger picture, not for conducting detailed research into key issues. Different trustees will, because of their backgrounds, have valuable input to give on certain items. The place to give that input, however, is at the Council table where collective decisions are made, and directions to staff are given, on how to proceed on the item.

The practice also, it must be noted, results in false economies for the organization. Everything that leaves the Trust on letterhead or with the Trust logo must meet high standards related to content, presentation and style. Recipients of Trust letters and position papers must be impressed with the quality of the reasoning and presentation if Council expects to be able to have any influence over the decisions taken by other bodies. If Trust staff are unable to meet these standards, then staff can and should be replaced. The same course of action cannot be applied to trustees who take on the work. When trustees are unable to meet expected standards, staff must take the trustees' product and re-do it, often spending more time and energy than would have been involved if staff had taken on the work at the outset. To be sure, certain trustees will be very capable and may, therefore, help the organization conserve its resources. But not all trustees will be; and staff cannot be expected to accept the involvement of only certain trustees and not others.

Finally, when trustees take-on work that would normally be done by staff, the organization loses the opportunity to build its in-house capacity for doing similar types of work in the future.

It is recommended that additional TAS staff be hired. Specifically, it is recommended that the organization re-establish the position of Director of Trust Areas Services, using the same position description that was in place before the position was eliminated. It is further recommended that additional communications resources be made available to supplement the existing part-time Communications Specialist position. These two changes will result in an adequate level of support for Trust Council. The changes will not, however, provide enough support for Council to make additional demands, or even to do as much as it currently wishes to do. If Council wishes to retain its existing level of demand, Council will need to

provide extra resources, over and above those recommended here. Alternatively, Council will need to reduce its demand for resources (i.e., establish its narrower focus) in addition to re-establishing the Director of Trust Area Services position, and in addition to providing new communications resources.

### ► Recommendations

The *Report* makes the following recommendations dealing with support for Trust Council:

- *THAT the CAO seek the authority to hold a one-day workshop dedicated entirely to the establishment of a new Council focus that will enable Council to reduce and better manage its demands on the organization's resources.*
- *THAT the CAO seek the authority to re-create and fill of the Director of Trust Area Services position.*
- *THAT the CAO seek the authority to make available additional communications resources to supplement the existing part-time Communications Specialist position.*

### Corporate Administration Support for LTCs

NWCI was asked to examine the possible need for additional corporate administration support to the LTCs, particularly the Salt Spring Island LTC. The specific type of support the consultants were asked to consider relates to the provision of advice by staff on legislative processes and procedures that LTCs must follow in official LTC meetings. This type of advice would typically be given by a "Clerk" in a municipal council meeting, or by a "Secretary" in a regional district board meeting.

### ► Existing Support

The present approach to guiding all LTCs through their official meetings relies heavily on two key players: the Chair of the LTC, and the planner assigned to the LTC.

The Chairs of the LTCs are all members of the Executive Committee. Through the Executive

Committee, Chairs receive training on the legal requirements for running meetings. They learn, for example, how motions must be made, how discussion must occur, the proper format for resolutions, how bylaws must receive readings, and so forth. They also learn about the proper process for handling public hearings.

The planners assigned to the LTCs are usually the chief staff person at the meeting (and in many cases the only staff member present). The planners are well-versed in the requirements surrounding planning matters, such as permit applications, bylaw amendments and public hearings. The planners are, in general, adequately versed in the general procedural requirements for running meetings.

### ► Assessment

In general, there are no significant concerns with the provision of procedural and process advice at LTC meetings. Trustees have considerable confidence in the demonstrated ability of Chairs to run the meetings, and in the advice provided (when required) by the planners present. Planners, too, feel quite confident in the Chairs and in their own understanding of procedural and process requirements. Overall, the existing situation appears to be effective. Mistakes are, of course, made from time to time, as they are in every local government organization, including larger governments with corporate administration staff present at each meeting. There is no evidence, however, of persistent, systemic problems resulting from advice provided on the running of meetings.

Where concerns do arise is with the corporate administration functions that occur before and after the meetings. Specific concerns that emerged during interviews with trustees and staff, and from a review of materials, relate to the need for:

- meeting agendas to be prepared and distributed with full materials suitably-well in advance of meetings
- meeting agendas to be manageable in terms of size
- minutes to be accurate
- consistency throughout the Trust in the style and standards used for minute-taking
- clarity in the roles and responsibilities that

should be assigned to planners and planning coordinators (deputy secretaries) in preparing agendas, processing bylaw amendments and handling other key duties

- consistency throughout the Trust (i.e., across offices) in roles and responsibilities of planners and planning coordinators
- better communication within offices around agenda preparation, meeting preparation and meeting follow-up
- improvements, as well as consistency among the offices, in the handling and storing of planning files

It should be noted that not all of these concerns are pressing at the moment — there has, for example, been improvements made to the distribution of meeting agendas (i.e., well ahead of meetings) in the Salt Spring office, where the specific concern was raised. In addition, not all of the concerns are relevant in every office. Few concerns, for example, were identified specifically for the Victoria office. The concerns and overall level of stress that they cause are greatest in the Salt Spring Island office, but are also relevant to the Northern office on Gabriola.

#### ► **Planning Services Review**

The Salt Spring Island office is presently working with a consultant to review the processes it uses in dealing with development applications, including proposed bylaw amendments. In addition, it is understood that the CAO plans to undertake a broader Planning Services Review. Among other items, this Review is intended to consider:

- the possible need to re-organize the local offices to better provide planning services
- the roles and responsibilities of key players in the planning service, including the Director of Planning Services, the Regional Planning Managers, Island Planners, other Planners and the Planning Coordinators, in making the service work
- the level of resources necessary to provide the desired level of planning services (current planning and long-term) throughout the Trust

Changes to the organization and work processes of the planning service or individual offices (e.g., Salt

Spring) may be required to address the corporate administration concerns raised earlier. Changes should not be determined, however, independent of the process review underway now, or (especially) independent of the broader Planning Services Review that is anticipated.<sup>3</sup>

#### ► **Recommendations**

As noted, there are no significant concerns specifically with the provision of procedural and process advice at LTC meetings. The following recommendation deals with the broader corporate administration functions that occur around the meetings:

- *THAT the CAO consider changes to the corporate administration functions in the offices only in conjunction with other changes to planning services, and only as recommended through the anticipated Planning Services Review.*

#### **Human Resources Function**

##### ► **Existing Function**

The formal human resources function is divided at present between two parties: the BC Public Services Agency (BCPSA), and the Islands Trust's own Administrative Services Department. BCPSA handles the following functions on contract to the Trust:

- the negotiation and administration of the collective agreement
- the administration of employee benefits
- the classification of positions, and the development of associated remuneration scales
- the development of dispute resolution and appeal processes
- the provision of an Employee Performance and Development Plan (EPDP) process
- the provision of employee training programs in a variety of areas, including management

<sup>3</sup> It should be noted that the desire for a full review of how planning services are organized and delivered in all offices emerged strongly from the interviews with trustees. Among trustees, there is much praise for the efforts and abilities of planning staff in the organization. There is also much concern, however, with how the service is organized, resourced and delivered.

- skills, leadership, team building, labour relations, occupational health and safety
- the posting of vacancies
- the provision of advice to managers on matters such as dealing with employee performance, resolving disputes, the development of customized policies and procedures, recruitment and selection of employees, interpretation of employment-related legislation and regulations (including collective agreement)

The Director of Administrative Services is formally responsible for all other human resources activities, including:

- the coordination and management of recruitment, selection and orientation processes (in accordance with the Public Service Act and B.C. Government policies and procedures)
- the management of employee training and staff in-service training programs
- the supervision of the Trust's Leave Management function
- efforts to ensure adherence to personnel policies and procedures
- the development of revisions to personnel policies and procedures
- the management and supervision of payroll and benefit administration (in accordance with B.C. Government policies and procedures)

The Director is supported by an Administrative Services Coordinator. This position:

- assists in all recruitment efforts
- fields inquiries from employees regarding collective agreement and benefits
- maintains the organization's personnel files
- develops and maintains a training database for all employees

Managers and supervisors throughout the organization are responsible, in practice, for certain elements of human resources management, at least as it applies to the employees who report to them. Resolving conflicts, managing performance, conducting performance reviews, and dealing with requests related to work hours and vacation are all functions handled by managers.

## ➤ Assessment

The Review of the human resources function did

identify some specific needs in terms of tools, policies and processes that the organization may wish to address. For example:

- the existing *Employee Orientation Handbook* could be re-worked to provide a better introduction to, and overview of, the Islands Trust — how it is organized, its celebrated history and strong purpose (the current edition lacks any of this information, and fails to inspire)
- employees would benefit from a customized dispute resolution process that supplements the existing informal process of speaking to a direct supervisor, and the more formal (and serious) process of filing a grievance
- the organization will need to give serious thought to options for providing some form of housing assistance to existing and prospective employees, particularly in the Salt Spring office (governments in many high-cost centres are facing the same need; many are beginning to explore options)

By far, however, the most pressing human resource management needs in the organization concern the feelings of frustration and growing sense of stress that are evident among staff, particularly those who are situated outside of the Victoria headquarters.<sup>4</sup> The feelings of frustration and growing stress are caused by two factors: a perception among staff that they are not fully valued by the organization; and the intense pace and amount of work that exist throughout the Trust, most particularly in the Salt Spring office.

Concerns around sense of value to the organization can be traced to:

- the lack of regular (indeed, the lack of any) formal performance reviews for most employees, using either the EPDP process provided by BCPSA, or some alternative
- the lack of informal review sessions for managers to provide feedback to employees, and for employees to provide input to managers

<sup>4</sup> The results of the recently-conducted Gallup Survey corroborate this finding, as does (to a lesser extent) the 2005 Communications Review.

- a perception that the senior management team is too isolated from the line managers and staff, and a related concern that key decisions made and directions set by the senior team are not communicated to the organization or understood by the organization
- the lack of "performance planning" efforts though which employees, with the involvement of managers, are helped to assess their strengths and weaknesses, identify their professional goals, and development training and development strategies for achieving the goals
- the perception that opportunities (both for advancement and within current positions) are limited

The intense pace and amount of work — in the Salt Spring office in particular, but not only on Salt Spring — generate stress, as heavy workloads tend to do in any organization. At the Trust, however, the stress is exacerbated by the focus on current (reactive) planning in the offices. Development activity in many of the local trust areas (Salt Spring Island again being the prime example) has been heavy for some time, and promises to remain heavy for the foreseeable future. The desire to keep pace with development applications compels planners to spend essentially all of their time dealing with applications.

The inability to keep pace with the volume of applications, despite devoting all resources to the task, leaves staff feeling more stressed and, ultimately, defeated. The sense that the offices are not organized optimally in terms of division of labour, processes and staffing levels, just adds to the stress, as staff feel that precious resources are not being used most efficiently.

Several of the trustees interviewed, including many from higher-growth areas, understand the stress on staff in the offices, and sympathize with them. Trustees know that most staff, like the trustees themselves, work in the Islands Trust because they genuinely believe in the need to protect and preserve the Trust Area, and because they want to make a difference. The ability to make a difference when focused on current (reactive) planning, however, is perceived to be low. Staff want to be proactive — they want to

plan for the community, not just review development applications. But in the current environment they feel unable to spend any time looking forward. Their sense of professionalism and duty require them to focus on the task of clearing application backlogs, which they feel have grown unacceptably large.

### ➤ **Changing the Culture**

The first change to consider concerns the role of managers and supervisors in creating a culture in which people feel valued. Human resources management is too often viewed as a box on an organization chart. The reality is that much of what is done to manage an organization's human resources is done by managers and supervisors throughout the organization. Human resources management is a basic skill that that every person in the organization who is in some way responsible for others must acquire and demonstrate.

Improving the organizational culture at the Islands Trust will require specific efforts on the part of managers and supervisors. Specifically:

- *CAO's Presence* — The CAO should consider spending more time in the Salt Spring Island and Northern offices, particularly in the immediate term, over the next several months. The CAO's very presence in these offices will help to communicate the message that staff in the offices matter, and that their concerns are being taken seriously. The incumbent CAO's easy style — a style that is universally respected throughout the organization — will only increase the positive impact of the CAO's visits.

It is impossible to overstate the value of the CAO's presence to morale in the offices. The presence of directors and managers is important too, but not nearly as important as that of the CAO. Time spent by the CAO talking to staff, soliciting their input, discussing their ideas and concerns, and explaining decisions taken for the organization, is needed.

The recommendation (noted earlier) to re-establish the Director of Trust Area Services position will help to free-up the CAO to give more personal attention to the offices.

- *Performance Review & Planning* — All managers and supervisors from the CAO down need to commit to undertaking regular and formal performance reviews, and to developing formal performance plans with persons who report directly to them. Performance reviews are time consuming, and for that reason, tend to get put aside. They should not be put aside any longer. Staff need the opportunity to hear from their supervisors, on a regular basis, what they are doing well, and what they could be doing better. Honest feedback from supervisors is critical to every staff member's peace of mind and sense of value.

Performance planning, as noted earlier, is an exercise in which a manager helps an employee identify, in essence, where he or she wants to be going in his or her current position, and/or in the broader organization. The exercise requires the employee (with the manager's input) to identify strengths and weaknesses, set goals, and put in place a training and development strategy to reach the goals.

Both performance reviews and performance plans need to be led by the managers and supervisors themselves. The exercises cannot be delegated to a centralized human resources manager. Only the managers are in a position to provide the credible feedback and input that are required in both exercises. In order to do the reviews and plans, managers will need to receive appropriate training (some more than others). Such training can be easily arranged through BCPSA (workshops are offered, for example, to teach managers how to use the EPDP).

There is some concern in the organization that the specific EPDP process developed by BCPSA is too cumbersome and is not ideal for the Islands Trust *per se*. To address this concern, the organization could engage a human resources specialist to develop a customized EPDP that also includes a proper performance planning component. What is critical is that the organization commit to both activities. If a customized process will make it easier for managers and supervisors to regularly conduct reviews and establish plans,

then the development of a customized process would be a useful investment.

- *Employee Recognition Committee* — The idea of an employee recognition committee emerged from the Gallup Survey and has been implemented. This *Report* supports the continuation of the committee. A committee is useful in sending the right message (i.e., that employees matter), but also in identifying specific ways to better recognize employee issues and achievements.

At present, the CAO is involved in the initiative as a member of the committee. The CAO's continued involvement is important. Ensuring that the broader membership of the committee is drawn from all levels and all offices of the Trust is also important.

Several people in the organization have suggested the need for formal recruitment and retention strategies, and for formal succession plans. Such strategies and plans may provide some value, and may be required by the organization one day. For the present, however, they are not recommended. It is strongly suggested that the organization use its limited resources on the efforts, outlined here, aimed at building a culture in which employees feel valued. A strong culture in which people feel valued, challenged to improve themselves, and excited about the future will go a long way to dealing with concerns about recruitment, retention and succession.

Some people have also suggested the possible need for a human resources professional to be hired. This option is not supported here for a number of reasons:

- the Administrative Services Coordinator already exists to help coordinate various human resource activities, such as training programs through BCPSA, and inquiries from staff
- the changes that are most needed now must involve the managers and supervisors directly; and cannot be delegated to a centralized human resources professional
- with 40 staff, the organization is not, arguably, large enough to warrant or afford its own

human resources professional

- resources are scarce and would be better spent supporting the efforts identified earlier, as well as other initiatives (see later)

A human resources professional could be useful in developing customized policies (e.g., on housing allowances, educational leave, etc.) and processes for the Islands Trust. A professional could also be a useful resources for managers who need advice dealing with human resource issues. The need for customized policies and processes, and the desire for an in-house advisor may one day warrant the hiring of a professional. At present, however, it is not felt that such of course of action would be the most effective use of resources at the Islands Trust. Customized policies and procedures, if required, can be developed using specialists from BCPSA or consultants. Advice to managers can be provided by the Administrative Services Coordinator and, through the Coordinator, BCPSA on technical issues, and by the CAO and peers on other issues (e.g., work relationships).

#### ► **Planning Services Review**

The anticipated Planning Services Review is relevant to the sense of frustration and the growing stress in the organization. As noted earlier, it is understood that the Planning Services Review will consider, among other items:

- the possible need to re-organize the local offices to better provide planning services
- the possible need to restructure processes and procedures to better manage work
- the roles and responsibilities of key players in the planning service, including the Director of Planning Services, the Regional Planning Managers, Island Planners, other Planners and the Planning Coordinators, in making the service work
- workload issues, and the level of resources necessary to provide the desired level of planning services (current planning and long-term) throughout the Trust Area

A Review that is focused on these items should result in changes that will relieve a good part of the

stress in the various offices, or at least bring it under control. The organization's overall sense of morale and satisfaction would be expected to improve.

If necessary, after the Review, further thought could be given to the development of additional human resource management initiatives. Further thought could also be given to the need for a human resources professional, in-house (although this *Report* does not advocate the creation of such a position). For the time being, however, it is suggested that resources should be conserved for the Planning Services Review and its recommendations.

#### ► **Recommendations**

The following recommendations are made to address the most pressing human resource management needs of the Islands Trust:

- *THAT the CAO commit to spending more time, particularly in the immediate term, in the Salt Spring Island and Northern offices.*
- *THAT all managers and supervisors in the organization be instructed to regularly conduct performance reviews and regularly develop performance plans for their direct reports; and that all managers and supervisors receive the training and materials through BCPSA and, if necessary, other sources to perform these roles.*
- *THAT the CAO remain committed to, and involved in, the Employee Recognition Committee; and that the Committee continue to be comprised of representatives from every level and every office in the organization.*

#### **Summary of Recommendations**

The *Report* makes the following recommendations:

#### ► **Support for Trust Council**

- *THAT the CAO seek the authority to hold a one-day workshop dedicated entirely to the establishment of a new Council focus that will*

*enable Council to reduce and better manage its demands on the organization's resources.*

- *THAT the CAO seek the authority to re-create and fill of the Director of Trust Area Services position.*
- *THAT the CAO seek the authority to make available additional communications resources to supplement the existing part-time Communications Specialist position.*

➤ **Corporate Administration Support for LTCs**

- *THAT the CAO consider changes to the corporate administration functions in the offices only in conjunction with other changes to planning services, and only as recommended through the anticipated Planning Services Review.*

➤ **Human Resources Function**

- *THAT the CAO commit to spending more time, particularly in the immediate term, in the Salt Spring Island and Northern offices interacting with staff.*
- *THAT all managers and supervisors in the organization be instructed to regularly conduct performance reviews and regularly develop performance plans for their direct reports; and that all managers and supervisors receive the training and materials through BCPSA and, if necessary, other sources to perform these roles.*
- *THAT the CAO remain committed to, and involved in, the Employee Recognition Committee; and that the Committee continue to be comprised of representatives from every level and every office in the organization.*