Islands Trust Conservancy Board
Regular Meeting Agenda

Date:	Tuesday, January 23, 2024
Time:	10:00 am
Location:	Electronic Zoom Meeting

Pages

1. CALL TO ORDER

2. APPROVAL OF AGENDA

3. RISE AND REPORT (from the November 21, 2023 in camera meeting)

The ITC Board requested staff to review the ITC Board's policies, and provide the Board with draft revisions that require engagement with First Nations, prior to approval of acquisitions of land or conservation covenants, or leases, and that applicants be required to waive confidentiality for the purpose of engagement with First Nations, at the following ITC Board meeting.

4. MINUTES/COORDINATION

4.1 Minutes of Meetings/Resolutions without Meetings

4.1.1 Approval of November 21, 2023 Regular Meeting Minutes 3 - 10

4.2 Follow-up Action List 11 - 14

5. BUSINESS

5.1 Items for Approval

5.1.1 ITC Board Attendance at the Governing in the Public Interest Conference - April 26, 2024, Vancouver - Request for Decision 15 - 18

5.1.2 ITC NAPTEP Covenant Monitoring Report 2023 – Request for Decision 19 - 32

5.1.3 ITC Budget Request - Property Management Resources - Request for Decision 33 - 102

5.2 Items for Discussion/Direction

5.2.1 ITC Mapping and Technical Needs – Briefing 103 - 117

5.2.2 Municipal Insurance Association Agreement Update – Verbal

5.2.3 ITC Plan – Minister's Response – Verbal

5.3 Correspondence - None

5.4 Updates for Information

5.4.1 Public Acquisitions Report 118 - 119
5.4.2 Public Covenants Report 120 - 124
5.4.3 Budget Report 125 - 125
5.4.4 Executive Committee Update - Verbal
5.4.5 Financial Planning Committee Update - Verbal
5.4.6 Trust Council Update - Verbal
5.4.7 Trustee Roundtable - Time Permitting

6. PUBLIC COMMENTS AND DELGATIONS

7. NEW BUSINESS

8. NEXT MEETING

The next meeting will take place on March 19, 2024 at 10:00 am in Victoria.

9. CLOSED MEETING

9.1 Motion to Close the Meeting

That the meeting be closed to the public in accordance with the Community Charter, Part 4 Division 3, section: 90 (1) (e) the acquisition, disposition or expropriation of land or improvements, if the board considers that disclosure could reasonably be expected to harm the interests of the Islands Trust Conservancy board; (k) negotiations and related discussions respecting the proposed provision of a service that are at their preliminary stages and that, in the view of the Board, could reasonably be expected to harm the interests of the Islands Trust Conservancy if they were held in public; and that staff be invited to remain in the meeting.

10. ADJOURNMENT

Islands Trust Conservancy Board

Minutes of the Regular Meeting

Date:	Tuesday, November 21, 2023
Time:	10:00 a.m.
Location:	Electronic Zoom Meeting Islands Trust Victoria Boardroom 200-1627 Fort Street, Victoria, BC
Board Members Present	Risa Smith, Chair Susan Yates, Vice Chair Charles Kahn, Trustee Lisa Gauvreau, Trustee Tobi Elliott, Trustee
Board Members Regrets	Ken Thomas, Trustee
Staff Present	Clare Frater, Director, Trust Area Services Carla Funk, A/Strategic Fund Development Specialist Corlynn Strachan, Administrative Assistant/Recorder Jemma Green, Covenant Management & Outreach Specialist Kathryn Martell, Ecosystem Protection Specialist Micaela Yawney, Communications Specialist Nuala Murphy, Property Management Specialist
Public Present	No members of the public were present as attendees.

1. CALL TO ORDER

Chair Smith called the meeting to order at 10:02 a.m. and Trustee Yates provided a land acknowledgement.

2. APPROVAL OF AGENDA

By general consent, the Islands Trust Conservancy Board approved the agenda as presented.

3. RISE AND REPORT from the October 3, 2023 IC meeting

The Islands Trust Conservancy Board reported on the following items:

- The Islands Trust Conservancy Board approved an Opportunity Fund Grant of up to $7,000 be awarded to Gabriola Land and Trails Trust from the Opportunity Fund for costs associated with placing a NAPTEP conservation covenant on a Gabriola property.

- The Islands Trust Conservancy endorsed the Operational Plan for the eradication of Fallow Deer from Sidney Island, dated September 5, 2023, subject to terms and conditions to mitigate risk of damage to Islands Trust Conservancy covenant areas.

4. MINUTES/COORDINATION

4.1 Minutes of Meetings/Resolutions without Meetings

4.1.1 Approval of the October 3, 2023 Regular Meeting Minutes

By general consent, the Islands Trust Conservancy regular meeting minutes of October 3, 2023 were adopted, as amended.

Trustee Yates requested the Elder Cedar item on the Follow-up Action List Report changed from "completed" to "in-progress". Director Frater advised she would review the items on the document and amend completion dates where required.

4.2 Follow-up Action List

Trustee Elliott questioned the status of the Islands Trust Conservancy Reconciliation Action Plan. Director Frater advised that the Conservancy does not have an individual action plan, and that Trust Council had a Reconciliation Action Plan, dated 2018-2022, that is still considered active. The Conservancy Board requested an individual action plan for the Conservancy. Director Frater will updated the target date, the item will remain on the list, and staff will make it a priority when the resources are available.

5. BUSINESS

5.1 Items for Approval

5.1.1 2024 ITC Annual Board Meeting Schedule - Request for Decision

Administrative Assistant Strachan presented the Request for Decision.

Discussion ensued on holding two in-person meetings.

ITC-2023-035
It was MOVED and SECONDED,
that the Islands Trust Conservancy Board adopt the proposed meeting dates for the 2024 calendar year, as presented.

CARRIED

ITC-2023-036
It was MOVED and SECONDED,
that the Islands Trust Conservancy Board direct staff to schedule the 2024 Islands Trust Conservancy Board meeting dates of January 23rd, May 28th, October 1st, and November 19th, 2024 as electronic meetings, and list the Victoria office board room as the public meeting location.

CARRIED

ITC-2023-037
It was MOVED and SECONDED,
that the Islands Trust Conservancy Board direct staff to schedule two in-person meetings on March 19 and July 23, 2024, as amended.

CARRIED

Trustee Elliott commented that for the ITC-EC Liaison meeting there is a list of topics to be discussed, and requested that staff provide a full report on the mapping and technical needs for the Islands Trust Conservancy in time for the first meeting with the Executive Committee. Chair Smith requested that strengths be included in the report.

ITC-2023-038
It was MOVED and SECONDED,
that the ITC Board request staff to provide a report on the status of mapping and technical needs, challenges and strengths, in time for the January 23, 2024 Board meeting.

CARRIED

5.1.2 ITC Nature Reserves Monitoring Report 2023 - Request for Decision

Property Monitoring Specialist Murphy presented the report.

Discussion ensued on:

- Burren's Acres Nature Reserve, replacement of the boundary fence
- public engagement in nature reserve monitoring, as appropriate
- communication and raising awareness of natures reserves to improve public image
- advertising nature reserve trails that are open to the public
- Board member attendance during monitoring for reporting to local trust committees and the public
- adding a section on communications to the report in future
- including the Communications Specialist in two or three monitoring visits over the next year to showcase the Conservancy and communicate initiatives
- interest in better communication on ITC initiatives
- finding better ways to collect monitoring data directly into a database and produce reporting efficiently
- ensuring consistency in S'ul-hween X'pey (Elder Cedar) Nature Reserve reporting on cutting of danger trees, 40 in one report, 45 in another

ITC-2023-039
It was MOVED and SECONDED,
that the ITC Board request staff to explore opportunities for engaging the public in nature reserve monitoring, as appropriate.

CARRIED

ITC-2023-040
It was MOVED and SECONDED,
that the Islands Trust Conservancy accept the "Islands Trust Conservancy Nature Reserve Monitoring Report 2023."

CARRIED

5.2 Items for Discussion/Direction

5.2.1 Islands Trust Conservancy Plan Approval (verbal)

Director Frater advised Ministry of Municipal Affairs staff were not available to attend the meeting. The proposed 2023-2025 Plan remains with the Minister for approval. Staff will advise once the Plan is approved, and will continue to operate under the 2018-2022 plan, particularly for any applications that were approved under the last plan. Director Frater also noted feedback results from engagement with First Nations were provided to the Minister.

5.2.2 Property Management Resources Business Case (verbal)

Director Frater advised that she has begun drafting the business case looking at human resources for property management but has not completed it due to other workload. To date, Director Frater has interviewed Conservancy staff, the former GIS Information Services Manager, and other Islands Trust staff. She is collating results and developing themes on the needs of property management.

Discussion ensued on Director Frater providing a verbal report to Trust Council, including an analysis to date, and providing a one page briefing on the status.

ITC-2023-041
It was MOVED and SECONDED,
that the ITC Board request that staff produce a one page briefing of the business case for new resources for ITC to be presented as a late item for the December 5th Trust Council, to be reviewed by the ITC Chair.

CARRIED

5.2.3 Climate Change Briefing to Trust Council - Briefing

Director Frater advised Board members that Trust Council will receive a briefing with the climate change emergency materials, produced in 2019, to support a discussion about further action regarding the climate change emergency.

Chair Smith commented that Trust Council should be made aware the Province of British Columbia has started a Disaster and Climate Risk, and Resilience Assessment (DCRRA) project with a comprehensive process to develop disaster risk protection and resilience for the whole Province. She indicated the first meetings will happen in November. Chair Smith will provide Director Frater with brief details, by email, to update Trust Council.

Trustee Elliott advised that Executive Committee meets November 22nd, the schedule is packed, and the discussion on climate change planned for the December Trust Council meeting may not happen.

Chair Smith suggested having someone from the Ministry of Environment and Climate Change Strategy come to a Trust Council meeting to provide an update on the Disaster and Climate Risk, and Resilience Assessment (DCRRA) project.

Trustee Elliott advised she attended panel at the Union of British Columbia Municipalities Convention in September that included reports from the Ministry of Forests on climate change, forest management practices, and forest fire statistics. She suggested reaching out to Ministry of Forests for further information would be helpful.

Trustee Yates initiated discussion on a previous Islands Trust 2018-2022 Council Strategic Plan project requesting the Province to increase the Natural Area Tax Exemption Program (NAPTEP) exemption from a 65% to a 100%. Director Frater noted the Province required further analysis, the project was never funded, and the advocacy did not proceed.

5.2.4 Islands Trust 50th Anniversary Activities Briefing to Trust Council

Director Frater presented the briefing as an information sharing item.

5.2.5 Eelgrass Mapping Phase II - Briefing

Director Frater provided background on the eelgrass mapping project and current status of budget requests.

Discussion ensued on funding for phase II, and that the Alliance of Canadian Land Trust has a grant if staff have time to make an application.

5.2.6 Islands Trust Conservancy Board Member Appointment to Governance Committee (verbal)

Director Frater advised that the Islands Trust Conservancy has the opportunity to provide a representative to the Governance Committee.

ITC-IC-2023-042
It was MOVED and SECONDED,
that the Islands Trust Conservancy Board appoint Trustee Gauvreau as a representative to the Governance Committee.

CARRIED

5.2.7 Koontz NAPTEP Application Fee Sponsorship Request to EC (verbal)

Director Frater advised that Executive Committee will be considering a request to sponsor a Natural Area Protection Tax Exemption Program (NAPTEP) fee and staff will report back at the next meeting.

5.3 Correspondence

None.

5.4 Updates for Information

5.4.1 Public Acquisitions Report

Received for information.

5.4.2 Public Covenants Report

Received for information.

5.4.3 Budget Report

Director Frater advised the report is not up to date. She is aware there have been some expenses associated with the Ruby Alton house to replace appliances.

Received for information.

5.4.4 Executive Committee Update (verbal)

Trustee Elliott provided comments and updates:

- It would be welcome to have Chair Smith, or another board representative, provide a report on the Natural Area Tax Exemption Program (NAPTEP) at Trust Council.
- The Executive Committee reply to Minister Kang, Ministry of Municipal Affairs, to revisit the mandate and support for the Islands Trust, is being shifted to the Governance Committee for strategic approach. Executive Committee wanted to remind the Conservancy Board that this its work one of the stronger, brighter, more visible examples of what the Islands Trust mandate is accomplishing, and part of the strategy needs to include the work the Conservancy is doing.
- Executive Committee is working on a communications strategy around housing and housing affordability.
- In the next Trust Council package, Board members may wish to look for a report to Trustees on the recent Union of B.C. Municipalities conference.
- Executive Committee is considering a different approach to Trust Council discussions on the vision statement, and engaging with First Nations.

Discussion ensued on Chair Smith including a NAPTEP presentation at Trust Council.

5.4.5 Financial Planning Committee Update (verbal)

Trustee Yates commented on the Financial Planning Committee meeting, at which both Trustee Yates and Trustee Elliott had communicated the need for additional funding for the Conservancy budget.

5.4.6 Conservancy Quarterly Report to Trust Council

Director Frater advised staff will provide the Trust Council quarterly report to the Board in future for information.

5.4.7 Trustee Roundtable (time permitting)

None.

6. PUBLIC COMMENTS AND DELGATIONS

None.

7. NEW BUSINESS

There was no new business.

8. NEXT MEETING

The next meeting will take place on January 23, 2024 at 10:00 am.

9. CLOSED MEETING

9.1 Motion to Close the Meeting

ITC-2023-043
It was MOVED and SECONDED,
that the meeting be closed to the public in accordance with the Community Charter, Part 4 Division 3, section: 90 (1) (e) the acquisition, disposition or expropriation of land or improvements, if the board considers that disclosure could reasonably be expected to harm the interests of the Islands Trust Conservancy Board; (k) negotiations and related discussions respecting the proposed provision of a service that are at their preliminary stages and that, in the view of the Board, could reasonably be expected to harm the interests of the Islands Trust Conservancy if they were held in public; and that staff be invited to remain in the meeting.

CARRIED

10. ADJOURNMENT

By general consent, the meeting adjourned at 12:00 p.m.

_____

Risa Smith, Chair

Certified Correct:

_____

Corlynn Strachan, Administrative Assistant/Recorder

DRAFT

ISLANDS TRUST CONSERVANCY

Print Date: January 15, 2024

Follow Up Action Report

Trust Conservancy Board

26-Nov-2019

	Activity	Responsibility	Dates	Status
1	Staff to: a) develop a modification agreement to allow for maintenance of the septic field in the Woodwinds NAPTEP Covenant (North Pender); and, b) allow for maintenance of the septic field in the Woodwinds NAPTEP Covenant; and, c) provide resources about alternatives to traditional septic fields to land owners contemplating septic field maintenance or replacement, and new covenants.	Jemma Green Kathryn Martell	Target: 31-Dec-2024	In Progress

06-Oct-2020

	Activity	Responsibility	Dates	Status
1	Staff to complete an ITC Reconciliation Action Plan that incorporates actions in Goal 2 of the Regional Conservation Plan.	Kate Emmings	Target: 31-Jan-2024	In Progress

25-May-2021

	Activity	Responsibility	Dates	Status
1	Staff to move forward with the Crystal Mountain Society proposal to register a Statutory Right of Way across Lot A on the upper ridge, in favour of Islands Trust Conservancy, to provide legal access to the eastern part of Lot A via the legal easement across neighbouring Lots B and C.	Kathryn Martell	Target: 31-Dec-2024	In Progress

Follow Up Action Report

Trust Conservancy Board

30-May-2023

Activity	Responsibility	Dates	Status
1 Staff to consider discussion of the Board regarding S'ul-hween X'pey (Elder Cedar) Nature Reserve and return to the Board with recommendations including a legal opinion about options related to ITC liability and risk management for property management and that staff develop communications to the Gabriola Community in conversation with trustees Yates and Elliott.	Clare Frater Kate Emmings Nuala Murphy	Target: 23-Jan-2024	In Progress
2 Staff to conduct an analysis of property management needs relative to available staff hours and return to the Board with a summary of the analysis and available options.	Clare Frater Kate Emmings	Target: 23-Jan-2024	In Progress

18-Jul-2023

Activity	Responsibility	Dates	Status
1 As directed by the Board, staff to defer the Ruby Alton Management Plan approval.	Nuala Murphy	Target: 31-Jan-2024	In Progress

21-Nov-2023

Activity	Responsibility	Dates	Status
1 Director Frater to review the Elder Cedar, ITC Reconciliation Action Plan, and other items on the Follow Up Action List report and amend completion dates where required.	Clare Frater	Target: 23-Jan-2024	Completed

Follow Up Action Report

Trust Conservancy Board

21-Nov-2023

	Activity	Responsibility	Dates	Status
2	Staff to schedule the 2024 Islands Trust Conservancy Board meeting dates of January 23rd, May 28th, October 1st, and November 19th, 2024 as electronic meetings, and list the Victoria office board room as the public meeting location.	Corlynn Strachan	Target: 31-Dec-2023	Completed
3	Staff to schedule two in-person ITC Board meetings on March 19 and July 23, 2024, as amended.	Corlynn Strachan	Target: 31-Dec-2023	Completed
4	To inform ITC-EC joint meetings, Staff to provide a report on the status of mapping and technical needs, challenges and strengths, in time for the January 23, 2024 Board meeting.	Clare Frater	Target: 23-Jan-2024	In Progress
5	Staff to explore opportunities for engaging the public in nature reserve monitoring, as appropriate.	Nuala Murphy	Target: 19-Mar-2024	In Progress
6	Staff to finalize the report for resolution ITC-2023-040, It was MOVED and SECONDED, that the Islands Trust Conservancy accept the "Islands Trust Conservancy Nature Reserve Monitoring Report 2023."	Nuala Murphy	Target: 23-Jan-2024	Completed
7	Staff to produce a one page briefing of the business case for new resources for ITC to be presented as a late item for the December 5th Trust Council, to be reviewed by the ITC Chair.	Clare Frater Risa Smith	Target: 05-Dec-2023	Completed

Follow Up Action Report

Trust Conservancy Board

21-Nov-2023

	Activity	Responsibility	Dates	Status
8	Item: 5.2.3 Climate Change Briefing to Trust Council - Briefing Chair Smith to provide Director Frater with brief details on the Disaster and Climate Risk, and Resilience Assessment (DCRRA) project by email, to update Trust Council. (Update: Grants Manager sent e-mail about funding opportunity to trustees on January 9, 2024).	Clare Frater Risa Smith	Target: 31-Dec-2023	In Progress
9	Item: 5.2.6 ITC Board Member Appointment to Governance Committee Staff to add Trustee Gauvreau to the Committee meeting invites for resolution **ITC-IC-2023-042 - It was MOVED and SECONDED,** that the Islands Trust Conservancy Board appoint Trustee Gauvreau as a representative to the Governance Committee.	Corlynn Strachan Robert Barlow	Target: 15-Jan-2024	Completed

ISLANDS TRUST CONSERVANCY

REQUEST FOR DECISION

To:	ITC Board	**For the Meeting of:**	January 23, 2024
From:	Staff	**Date Prepared:**	January 11, 2024

SUBJECT: Board Attendance at the Governing in the Public Interest Conference on April 26, 2024

RECOMMENDATION: That the Islands Trust Conservancy Board member(s) _____attend the Governing in the Public Interest Conference on April 26, 2024 in Vancouver.

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1 **PURPOSE:** To seek Islands Trust Conservancy (ITC) Board direction about which board member(s) should be funded by Islands Trust Conservancy to attend the Governing in the Public Interest Conference on April 26, 2024 in Vancouver.

BACKGROUND:
On December 7, 2023, ITC staff sent out an email to ITC board members inviting expressions of interest to attend the Governing in the Public Interest Conference. By the January 23rd meeting deadline, Board chair Risa Smith expressed an interest in attending.

The Governing in the Public Interest Conference event will provide an opportunity for board members across the public sector to connect, exchange knowledge, and build collaborative relationships with peers, experts, and decision-makers. The program is scheduled to commence at 9:00 am and concludes at 4:30 pm, followed by a networking social with Cabinet Ministers.

Four seats per organization are being allocated on a first-come-first-served basis until they reach full capacity. They are prioritizing the seats for provincially appointed board members. Should there be additional members interested in attending, there will be the option to register on a waitlist. Attendance is free of charge, but travel costs are not included.

The “Save the date” email containing notification of the conference was sent to board members on December 7, 2023.

An email containing the registration link and a feedback/suggestions survey was sent to board members on January 9, 2024. The survey to provide agenda ideas can be filed out anonymously before January 31, 2024.

2 IMPLICATIONS OF RECOMMENDATION

ORGANIZATIONAL: Attendance at this conference is an opportunity for board members to learn from the speakers and to meet others who could be partners in preserving and protecting the Islands Trust Area.

FINANCIAL: There is no registration cost to attend the conference, but travel and accommodation costs are not included. Breakfast, lunch, and light snacks at the networking social are provided.

Accommodation costs in April 2024 are approximately $209/night for nearby Coast Coal Harbour Hotel by APA, Vancouver. The ITC has proposed a Board training and conference budget of $1,600 for 2024/25. Registration started on January 9, 2024 and is open on a first-come-first-serve basis.

POLICY: None.

IMPLEMENTATION/COMMUNICATIONS: Staff will assist the selected board member(s) with conference registration and travel planning.

FIRST NATIONS: None.

CLIMATE CHANGE: None.

OTHER: None.

3 **RELEVANT POLICY(S):**
1.3 Islands Trust Conservancy Board Roles and Responsibilities

4 **ATTACHMENT(S):**
- Governing in the Public Interest Conference - Save the Date Email
- Governing in the Public Interest Conference - Registration Link Email

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RESPONSE OPTIONS

Recommendation: That the Islands Trust Conservancy Board member(s) _____attend the Governing in the Public Interest Conference on April 26, 2024 in Vancouver.

Alternatives:
1) That the Islands Trust Conservancy fund up to $_____ per board member to attend the Governing in the Public Interest Conference on April 26, 2024.
2) That the Islands Trust Conservancy decline to fund board members to attend the Governing in the Public Interest Conference on April 26, 2024.

Prepared By: Corlynn Strachan, Administrative Assistant, Islands Trust Conservancy

Reviewed By: Clare Frater, Director, Trust Area Services / January 14, 2024

From: Governing in the Public Interest FIN:EX <GoverninginthePublicInterest1@gov.bc.ca>
Sent: Thursday, December 7, 2023 2:29 PM
Subject: Save-the-Date: Governing in the Public Interest Training Conference April 2024

Dear Board Member,

We are excited to announce that the Governing in the Public Interest conference will be returning on **Friday, April 26th 2024** in person at the Vancouver Convention Centre. This event will provide an opportunity for board members across the public sector to connect, exchange knowledge, and build collaborative relationships with peers, experts, and decision-makers.

The program is scheduled to commence at 9:00 am and concludes at 4:30 pm followed by a networking social with Cabinet Ministers.

Four seats per organization are being allocated on a first-come-first-served basis until we reach full capacity. **An email containing the registration link will be sent out to all board members in January. Please discuss your interest with your board chair or board secretary to ensure that there is only a maximum of 4 provincially appointed members nominated per organization. Any additional members will have the option to register for the waitlist**. Attendance is free of charge, but please note that travel costs are not included.

We would also like to invite you to help us build the agenda by sharing your feedback and suggestions regarding workshop and plenary topics. We want to ensure that the content aligns with your expectations and provides a meaningful experience for all. The survey can be filled out anonymously and we ask that you complete it before January 31st.

Please click here to fill out the survey.

If you have any questions, please feel free to reach out to us at governinginthepublicinterest@gov.bc.ca.

Thank you for your continued dedication to your organization. We look forward to the opportunity to connect with you in the Spring.

Best Regards,

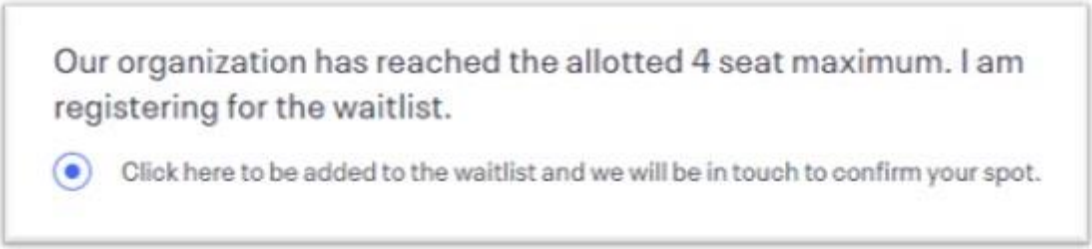
Mary Sue Maloughney, Associate Deputy Minister of the Crown Agencies Secretariat
Vanessa Geary, Executive Lead of the Crown Agencies and Board Resourcing Office

From: Governing in the Public Interest Training FIN:EX <governinginthepublicinterest@gov.bc.ca>
Sent: Tuesday, January 9, 2024 10:31 AM
Subject: REGISTRATION NOW OPEN – Governing in the Public Interest Conference 2024
Importance: High

Registration is now open for the **Governing in the Public Interest Conference!**

If you have been nominated by your organization to attend, **click here to register.**

To sign up for the waitlist, please register with the link above and indicate that you are signing up for the waitlist by checking the waitlist option in the form (see example below). If there are seats available, we will confirm your spot via e-mail by February 29th.



If you would like to help us build the conference content, there is still time to share your suggestions and feedback regarding workshop and plenary topics. **Click here to fill out the survey** until January 31st.

If you have any questions or require assistance, please reach out to us at governinginthepublicinterest@gov.bc.ca

ISLANDS TRUST CONSERVANCY

REQUEST FOR DECISION

To:	ITC Board	**For the Meeting of:**	January 23, 2024
From:	Jemma Green, Covenant Management and Outreach Specialist	**Date Prepared:**	January 9, 2024

SUBJECT: Islands Trust Conservancy NAPTEP Monitoring Report 2023

RECOMMENDATION: That the Islands Trust Conservancy accept the *Islands Trust Conservancy NAPTEP Covenant Monitoring Report 2023* and direct staff to address violations and ecological concerns as identified in the report.

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1 **PURPOSE:** To review the Islands Trust Conservancy Natural Area Protection Tax Exemption Program (NAPTEP) Covenant Monitoring Report for 2023.

2 **BACKGROUND:** Islands Trust Conservancy (ITC) NAPTEP covenants are monitored annually to ensure compliance with the Natural Area Protection Tax Exemption Program, assess the overall ecological health of the sites, identify any new management issues that should be addressed by the covenant holder(s) or landholder, and identify and respond to any violations of the terms of the covenant agreement. The *Islands Trust Conservancy NAPTEP Covenant Monitoring Report 2023* provides the monitoring results for Islands Trust Conservancy's 27 NAPTEP covenants. The results summary for each NAPTEP covenant includes a statement of good standing or non-compliance; a brief description of any violations (breach or trespass), if any; a summary of management concerns; and any updates on ITC's restoration and enhancement projects. Recommendations for responding to violations or management concerns are provided as applicable.

The majority of NAPTEP covenants were in compliance with the Program with no violations of any kind observed in 2023. However, minor breaches occurred in the Richardson and Westbourne NAPTEP covenants and long-standing trespass issues involving neighbours and/or the public persisted in four NAPTEP covenants: McRae on Gabriola, and Frog Haven, Polden, and My Whim on Salt Spring. With the exception of McRae, the ecological impacts of these violations are currently minor, and in all cases trespass damage did not intensify in 2023. The Covenant Management & Outreach Specialist will work with the landholders and covenant co-holders to address breaches and discourage trespass.

New and ongoing management concerns summarized in this report will also be assessed, prioritized, and addressed as the property management budget permits. In most NAPTEP covenants, invasive species are a major or minor ecological concern. Other less common concerns relate to beach debris, signage needs, wildfire risk, and the need for riparian area/wetland restoration or enhancement. A covenant agreement under NAPTEP authorizes ITC to "protect, preserve, and conserve" as well as to "maintain, enhance, rehabilitate, and restore" the land and amenities, and this is reflected in the recommendations provided in this report.

3 IMPLICATIONS OF RECOMMENDATION

ORGANIZATIONAL: This monitoring report helps set priorities for NAPTEP covenant management and landholder stewardship, and identifies the actions needed to resolve violations.

FINANCIAL: The property management budget is allocated each year depending on available funds and the work that is most needed, balanced between all ITC protected areas.

POLICY: None.

IMPLEMENTATION/COMMUNICATIONS: Staff will continue to address the recommendations in the report as part of the regular work plan.

FIRST NATIONS: Where ITC undertakes any restoration work, it will check the archaeological sites database for archaeological sites prior to soil disturbance. ITC will also request that landowners have known archaeological sites assessed prior to disturbing soil for restoration, trail building or other activities. More generally, the monitoring report can be used to help identify local or regional land stewardship issues of mutual interest when working with First Nations. Staff will follow the draft *Islands Trust Cultural Protocol for Chance Finds and Ancestral Remains* as required and will require landowners to do so when working in covenant areas.

CLIMATE CHANGE: The property monitoring report provides staff with the most current information on the state of the land, which helps to contextualize information about climate change, allows for site-specific predictions of changes to the land, and supports development of mitigation and adaptation strategies.

OTHER: None.

4 RELEVANT POLICY(S):

ITC 2.5 Natural Area Protection Tax Exemption Covenants
ITC 2.8 Covenant Enforcement Policy

5 ATTACHMENT(S): Islands Trust Conservancy NAPTEP Covenant Monitoring Report 2023

RESPONSE OPTIONS

Recommendation: That the Islands Trust Conservancy Board accept the *Islands Trust Conservancy NAPTEP Covenant Monitoring Report 2023* and direct staff to address violations and ecological concerns as identified in the report.

Alternative: That the Islands Trust Conservancy Board accept the *Islands Trust Conservancy NAPTEP Covenant Monitoring Report 2023* as amended and direct staff to address violations and ecological concerns as identified in the report.

Prepared By: Jemma Green, Covenant Management & Outreach Specialist

Reviewed By/Date: Clare Frater, Director, Trust Area Services/January 10, 2023

Islands Trust Conservancy
NAPTEP Covenant Monitoring Report 2023

A sea of sword ferns in the new Livingstone Forest NAPTEP Covenant, Lasqueti Island (spot the happy covenant donor!).

Prepared By:
Jemma Green, Covenant Management & Outreach Specialist
Islands Trust Conservancy
January 9, 2024

Executive Summary

The Islands Trust Conservancy (ITC) is responsible for annually monitoring the Natural Area Protection Tax Exemption Program (NAPTEP) covenants on which it holds an interest. This ensures that the natural values on which the covenant is based continue to be protected and that any violations of the covenant agreement are remedied as soon as possible. Annual compliance monitoring involves contacting the landholder and the covenant co-holder to advise of and coordinate the monitoring visit; walking the land along established monitoring routes, including along accessible property boundaries and any trails; filling out a site monitoring form that takes into account the standard land use restrictions under a conservation covenant; taking repeat photos at established monitoring stations; documenting any ecological, compliance, and trespass concerns; and providing a final report with management recommendations, which can be followed up on by ITC staff, co-covenant holders, and covenant owners as resources permit.

This document contains a summary of the final reports from monitoring inspections of Islands Trust Conservancy's 27 NAPTEP covenants. Livingstone Forest NAPTEP Covenant, registered in summer 2022, was monitored for the first time in 2023. All monitoring was completed by Islands Trust Conservancy staff between May and August, with one exception.[1]

The majority of NAPTEP covenants were in compliance with the Program with no violations of any kind observed in 2023. However, minor breaches occurred in the Richardson and Westbourne NAPTEP covenants and long-standing trespass issues involving neighbours and/or the public persisted in four NAPTEP covenants: McRae on Gabriola, and Frog Haven, Polden, and My Whim on Salt Spring. With the exception of McRae, the ecological impacts of these violations are currently minor, and in all cases trespass damage did not intensify in 2023. The Covenant Management & Outreach Specialist will work with the landholders and covenant co-holders to address breaches and discourage trespass.

During annual monitoring visits, ITC staff contributed to the stewardship of NAPTEP covenant lands whenever possible: ITC staff collected two 42-gallon bags of litter from beaches in Little D'Arcy Island NAPTEP Covenant, dedicated nine person-hours to Scotch broom removal across Leader, Wallace Point, and King Lot 16 NAPTEP covenants, and spent two person-hours on gorse removal in Wennanec NAPTEP Covenant. In all other NAPTEP covenants, invasive species removal and litter collection were carried out opportunistically and as time permitted.

New and ongoing ecological and other management concerns identified in this report will be assessed, prioritized, and addressed as the property management budget permits.

[1] Owl's Call NAPTEP Covenant on Salt Spring Island was monitored by a registered professional biologist contracted by the owner, in compliance with the annual monitoring requirements of that covenant agreement.

Gabriola Island

Bachmann NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with members of Gabriola Land & Trails Trust and the landholder on July 7, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Invasive species are an ongoing management concern for this covenant, which is surrounded on two sides by busy roads. Infestations of Himalayan blackberry, Scotch broom, Tansy ragwort, and thistles encroach into the covenant area from bordering road allowances. English holly, Daphne, and English ivy are a secondary management concern.

Recommendation: Support the landholders and/or the covenant co-holder to manage invasive species and replant treated areas with suitable native species, budget permitting.

McRae NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with a brief meeting with the landholder on July 7, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program; however, trespass damage by the public is an ongoing concern.

The landholder has regularly observed parked cars and pedestrians straying beyond the shoulder of South Road, causing damage to the covenant area; for example, dangerous goods trucks using the edge of the covenant area as a pullout while waiting for their ferry. The monitors suggested installing signs along South Road and adding concrete barriers as deterrents for trucks.

The fragile, shallow-soil ecosystem in the "mossy meadow" continues to be degraded as pedestrians and cyclists stray from the authorized trail and unauthorized trails are worn in. The Gabriola Historical and Museum Society (the new landholder) recently established a management partnership with the Gabriola Land & Trails Trust (GaLTT), who developed and installed free-standing welcome and interpretive signage to educate visitors about the covenant's donors, the trail route, and the sensitive nature of the covenant area.

Of secondary management concern are scattered Daphne and English holly in forested areas, and thistle in exposed areas, all of which are currently in the early stages of invasion.

Recommendation: (1) To confine impacts and allow for recovery of sensitive vegetation, propose additional measures to better delineate the authorized trail and close off unauthorized trails, such as low-impact rope barriers or markers. (2) Work with the covenant owner and their management partner to monitor and control invasive species. (3) Provide standard ITC covenant signs for along South Road.

Galiano Island

Barrineau NAPTEP Covenant was monitored by Jemma Green and Eve Ruth on August 1, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Westbourne NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with Galiano Conservancy Association (GCA) staff on August 2, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Trespass-related litter was less of a problem this year than in previous years, but the monitors did observe multiple small piles of ash- or lime-like powder dumped just inside the covenant boundary close to the house.

Acting on the previous year's management recommendations, in March 2023 the covenant holders began working together to manage English holly, which is in the early stages of invasion in this covenant area. GCA staff spent 1.5 days removing English holly from four treatment sites totaling 377 m^2. During the monitoring survey, the covenant holders revisited these sites to determine whether follow-up work would be needed, and they also flagged any holly plants that were previously overlooked. It is estimated that another half-day of work by the GCA this fiscal would keep the holly under control.

Recommendations: (1) Remind the landholder that dumping of foreign materials is a restricted activity under the covenant and should be discontinued. (2) Contract GCA to remove holly over the winter.

Hornby Island

Myra Powers NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with the landholder on the July 6, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program. The covenant area is carefully stewarded by the landholder. No management concerns were identified.

Little D'Arcy Island

Little D'Arcy NAPTEP Covenant was monitored by Jemma Green and Eve Ruth on August 8, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

There are a number of ongoing management concerns for this island. The first is deterioration of the fine netting that once fenced the boundaries of the excluded areas and protected the gardens and wildflowers from deer. In most areas, this netting has slackened or dropped to the ground completely, becoming overgrown with vegetation and posing a threat of entanglement to the island's wildlife and even people. The landholders have already removed some of the netting, and have committed to removing the rest over time.

A second concern is invasive species, specifically large thistle infestations on the tombolo and in other coastal areas, and the threat of English ivy encroaching from an excluded area. This year, when ITC staff were unable to visit the island before the thistle bloom due to low tides preventing access, the landholders took on the invasive species control themselves, removing seven large bags of thistle (Figure 1).

Figure 1 *Thistle removed by owners of Little D'Arcy Island NAPTEP Covenant at ITC staff's suggestion.*

Finally, a considerable amount of Styrofoam, plastic and other ocean debris accumulates on the beaches around the island every year. As in previous years, the monitors collected any debris that could be carried out (two 42-L garbage bags; Figure 2).

Figure 2 *Beach cleanup in Little D'Arcy Island NAPTEP Covenant.*

Recommendation: Continue to work with the landholders to coordinate (1) thistle removal (timed to coincide with bud or bloom) and (2) beach cleanup work parties. (3) Offer to assist with netting removal, time and resources permitting. (4) Alert the landholders to the problem of English ivy and encourage them to remove it or keep it under control.

North Pender Island

Garry Oaks NAPTEP Covenant was monitored by Jemma Green and Eve Ruth on May 8, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

The primary management concern for this covenant is invasive species, particularly Scotch broom, which was managed by the late owner but risks re-establishing. The monitors noted that invasive species like Scotch broom and Himalayan blackberry were present but there are no significant infestations at this time. The monitors pulled or cut any invasive plants they came across.

Recommendation: Continue to monitor for invasive species and, when needed, coordinate staff work parties with Pender Island Conservancy Association (PICA). Care should be taken when undertaking work in this covenant due to sensitive species-at-risk habitat.

King Lot A NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with PICA staff on June 9, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Invasive species like foxglove, Daphne, and Scotch broom are present but there are no significant infestations at this time; however, significant patches of Himalayan and cutleaf blackberry and Scotch broom are present on the neighbouring King Lot 16 Covenant, which threaten the integrity of this red-listed Douglas-fir/Arbutus woodland.

Recommendation: Support a PICA-led volunteer work party to control Scotch broom and other invasive species.

King Lot 16 NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with PICA staff on June 13, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Of primary management concern are the large patches of mature Scotch broom, which threaten the integrity of this red-listed Douglas-fir/Arbutus woodland. Of secondary management concern is Himalayan blackberry encroachment from the road allowance. Following the monitoring survey, ITC and PICA staff held a productive 3-hour work party to address the worst infestation of Scotch broom.

Recommendation: Support further work parties to control Scotch broom and other invasive species.

Nighthawk Hill NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with PICA staff on May 9, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program and no management concerns were identified.

Oscar's Landing (King Lot 12) NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with PICA staff on May 9, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

The monitors replaced the faded sign along the road boundary, and did some light invasive species removal along the water where common groundsel and daffodils are starting to invade. Yard waste continues to be dumped just over the southern boundary, presumably by the neighbours.

Recommendation: (1) Install additional signage at the southwest corner to deter further yard waste dumping. (2) Work with the landholder's gardener to identify and manage invasive species.

Steil's Woods NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with a PICA board member on May 9, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Over the past few years, the covenant holders have noted a buildup of branches, sticks, and leaning dead trees in the covenant area as it slopes south from the house. This exceptional build up of fine and ladder fuels could be due to a combination of factors, including decades of fire suppression, windfall from recent severe storms, tree dieback due to climate change, and the more normal, background impacts of pests, disease, and competition for light.

An ongoing management concern is the proliferation of invasive reed canary grass around Gardom Pond, facilitated by the lowering of water levels with the decommissioning of the dam by the Capital Regional District (CRD) in 2019. CRD contractors completed a restoration plan in early 2023, with implementation to begin in fall 2023.

Another ongoing management concern is the near-complete absence of understory vegetation in the forested areas of this covenant.

Recommendation: (1) Encourage the landholders to consult with Pender Island Fire Rescue for their expert advice on wildfire risk mitigation. Once the land is assessed by a qualified professional, work together with the landholders and PICA to develop a plan that both addresses recommendations and enhances ecosystem health. (2) Continue to encourage and support the Capital Regional District in following their *Gardom Pond Dam Decommissioning Environmental Management Plan* by controlling reed canary grass and revegetating with native species. (3) Resources permitting, in tandem with wildfire risk management, work with the landholders and PICA to restore the forest understory by planting shade-tolerant trees, native shrubs and herbs in deer exclosures.

Wallace Point NAPTEP Covenant was monitored by Jemma Green and Eve Ruth on May 9, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Invasive species are the primary management concern for this covenant, including Scotch broom, rose campion, and thistles in the rocky, shallow-soil areas on Wallace Point, and patches of Aaron's beard/St John's wort in the residential area but creeping closer to the covenant boundary. The monitors spent an hour following their survey to cut Scotch broom (while it was in bloom) and pull rose campion (Figure 3).

Figure 3 *Broom control in Wallace Point NAPTEP Covenant, North Pender.*

A secondary management concern is the washed up litter along the shoreline of Wallace Point (e.g., Styrofoam, rope, plastics).

Recommendation: Support the landholder with (1) invasive species management and (2) shoreline cleanups.

Woodpecker Forest NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with the landholder on May 8, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program. The covenant area is carefully stewarded by the landholders. No management concerns were identified.

Woodwinds NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with PICA staff on June 13, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Ongoing management concerns include abundant Daphne in forested areas, several large Himalayan blackberry infestations, Scotch broom on rocky bluffs, and a large patch of thistle on the septic field. Himalayan blackberry and Scotch broom infestations are now being managed by the new landholders.

The landholders are also beginning to disperse the piles of woody debris around the septic field, which they inherited (intruding trees were cleared to replace the septic field in 2019).

Recommendation: (1) Support the landholders with invasive species removal work parties; prioritize removal of Scotch broom and Daphne, and control of Himalayan blackberry. (2) Contact the neighbour to encourage and coordinate broom control near the covenant boundary.

Salt Spring Island

Arthur Lineham NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with a Salt Spring Island Conservancy (SSIC) volunteer on May 18, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program and no management concerns were identified.

Frog Haven NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with a SSIC volunteer and the landholder on May 11, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

The monitors noted that the landholders remain concerned about pond shrinkage and habitat loss. A related management concern is the dense infestation of exotic water violet (*Hottonia palustris*) in the pond, which appears to be negatively impacting habitat quality. In September 2021, the landholders and covenant holders trialled two removal methods to inform further management of this plant. While the treatment areas remained partly or completely clear through the 2022 growing season, the monitors noted that this plant was re-establishing in 2023.

Another management concern is the need to reassess and address a trespass issue with neighbours to the east, which has evolved over time but which has been ongoing and unresolved since before the covenant was first monitored in 2009. The trespass began with trash dumping prior to 2009, and in 2013, a dirt driveway was established with a switchback extending over the covenant boundary. In 2015, ITC attempted to support the landholder in resolving these violations by contacting the neighbours by mail, but never received a reply.

Recommendation: Work with the covenant owners and co-covenant holder to (1) continue careful control of water violet, with in-pond activities confined to late summer/early fall (after amphibians have completed metamorphosis), and (2) explore long-term solutions for mitigating the loss of aquatic habitat in the covenant area. (3) Focus the 2024 monitoring survey on assessing the state of the trespass along the east boundary of the covenant area. If deemed necessary, work with the landholders to have the east boundary professionally resurveyed to confirm the extent of the trespass, information with which the parties can approach the neighbour, along with options for a resolution (e.g. remove trash and fence off area to restore; formally establish an easement; etc.).

Leader NAPTEP Covenant was monitored by Jemma Green and Eve Ruth on May 16, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Ongoing management concerns include old wood piles near the driveway, which pose a fire hazard, and infestations of English holly below the driveway and Scotch broom on the bluffs. This year the monitors also noted that a garden in one of the exclusion areas is being overtaken by Canada thistle, which is starting to encroach into the surrounding covenant area. Throughout the monitoring visit, Eve Ruth worked on Scotch broom control.

Recommendations: (1) Ask the landholders not to add windfall to the existing wood piles (which are too close to the driveway) or store lumber in the covenant area. (2) Collaborate with the landholders and covenant co-holder to develop an English holly management strategy, resources permitting. (3) Encourage the landholders to control thistle by mowing in late spring or early summer before it flowers, and to continue to manage Scotch broom.

Moss Mountain NAPTEP Covenant was monitored by Jemma Green and Eve Ruth on May 17, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Due to the large size, difficult terrain, and remoteness of this property, not all areas can be monitored in one visit. This year, the monitors focussed on the highest-elevation portions of the covenant area, including the northeast and east boundaries. It was noted that a trail in the neighbouring Mill Farm Regional Park draws very close to the covenant area boundary.

Recommendation: To prevent accidental trespass by hikers or their dogs, install a simple sign that indicates the property boundary and the land's conservation status.

My Whim NAPTEP Covenant was monitored by Jemma Green and Eve Ruth on May 15, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Acting on last year's monitoring report recommendations, the monitors replace the existing covenant sign, which was damaged, and installed two additional signs where unauthorized footpaths have developed, to discourage trespass.

Ongoing invasive species concerns include extensive infestations of reed canary grass and Himalayan and cutleaf blackberry on the pond margins, which may impede access by the red-listed Western Painted Turtle; Scotch broom scattered in upland areas; and blackberry and broom encroachment from the adjacent road allowance.

Recommendation: (1) Monitor for evidence of further trespass via authorized and unauthorized footpaths. (2) Seek permission from landholders to continue invasive species management.

Old Divide NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with the landholder on May 18, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program. The covenant area is carefully stewarded by the landholder. No management concerns were identified.

Owl's Call NAPTEP Covenant was monitored by Kathleen Reimer, RPBio on November 29, 2023 at the request of the landholder and as allowed by this covenant agreement. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

A significant amount of rock and gravel had been deposited in Fulford Creek during the extreme flooding events that occurred in fall 2021, which blocked the channel where it runs through the Covenant Area, and cut off a pond from its source of year-round water. This year's report indicates that the pond remains cut off from the stream. Ms. Reimer writes, "The trickle from the nearby [stream] previously ensured that there was some water in the pond year-round. The pond used to support red legged frogs, and these are now considered a Species at Risk. Other wildlife species in the area also need to have a summer water supply." She recommends that "The erodible materials…should be carefully removed so the pond can be restored and reconnected to the stream."

Recommendation: (1) Follow up with Ms. Reimer for further advice towards restoring connectivity between pond and stream. (2) Encourage development of a stream channel restoration plan and assist with implementation as resources permit.

Polden NAPTEP Covenant was monitored by Jemma Green and Eve Ruth with the landholder on May 11, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Invasive species concerns include Scotch broom infestations in ridgetop clearings and English holly infestations in the forest at the south end, which are being diligently managed by the landholder. Another management concern is trespass by neighbours using unauthorized trails through the south end of the property.

Recommendation: (1) Support the landholder with invasive species management, as resources permit. (2) Focus the 2024 monitoring survey on the south boundary of the covenant area, where risk of trespass is greatest.

Richardson NAPTEP Covenant was monitored by Jemma Green and Eve Ruth on May 16, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program, apart from a pile of manure spilling over into the covenant area from the residential area. Old litter around the residential area and along the road and trail continues to be a management concern; however, the landholder has made efforts to assist with cleanup since 2022.

The monitors met with the landholder during their visit to discuss the discrepancy in one of the corners of the residential area, where a fencepost appears to have been replaced 1-2 metres inside the covenant area (this was first noted in 2021). Since there is evidence to indicate the this fencepost may never have agreed with the surveyed covenant boundary, the parties agreed that the paddock fence could remain where it was until it needs repair, at which point the landholder should consult with the covenant holders to assist with adjustments. (It should be noted that the covenant co-holder, Salt Spring Island Conservancy, was not present and may not agree with this decision.)

Ongoing invasive species concerns for this covenant include a Himalayan blackberry infestation next to the dug pond, a thistle infestation encroaching out of the residential area, scattered English holly, and bamboo planted near the covenant boundary. The monitors pulled invasive species opportunistically during this year's monitoring visit but much remains.

Recommendations: (1) Remind the landholder to be mindful of keeping manure, litter, and other "foreign materials" out of the covenant area. (2) Encourage the landholder to mow the thistle infestations within the exclusion area, ideally when plants are at the bud stage. (3) Assist with Himalayan blackberry control, as resources permit.

Walter Bay NAPTEP Covenant was monitored by Jemma Green and Eve Ruth on May 11, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

In 2022, there was some concern over three mature bigleaf maples having been cut along the southwest property/covenant boundary. The landholder subsequently spoke with their neighbour about exercising caution around the covenant area. This boundary was surveyed again this year and no evidence of further tree cutting was found.

Invasive species concerns include English holly throughout the forest; English ivy above the shore and along the riparian area; and thistles and English hawthorn in the field area.

Recommendations: (1) With support from the landholder, commission an archeological survey before proceeding with invasive species control in riparian and coastal areas. (2) Continue to manage English holly and other invasive species in inland forested areas, resources permitting.

Wennanec NAPTEP Covenant was monitored by Jemma Green and Eve Ruth on May 17, 2023. The covenant was found to be in compliance with the Natural Area Protection Tax Exemption Program.

Invasive species concerns include English holly scattered throughout the forest and persistent infestations of gorse, Scotch broom, and thistles in the northeast corner of the covenant area, all of which the landholder is attempting to manage. The monitors opportunistically removed gorse and Scotch broom during their survey.

Recommendation: Support the landholder with gorse, Scotch broom and English holly management.

ISLANDS TRUST CONSERVANCY

REQUEST FOR DECISION

To:	ITC Board	**For the Meeting of:**	January 23, 2024
From:	Staff	**Date Prepared:**	January 17, 2024

SUBJECT: Budget Request – Protected Area Management Resources

RECOMMENDATION: That the Islands Trust Conservancy Board recommend to the Islands Trust Council that the 2024-2025 budget include funding for:

- a permanent Protected Areas Manager and
- selection and implementation of a protected area management database.

1 PURPOSE: To provide a recommendation to the Islands Trust Conservancy (ITC) Board regarding potential budget requests for staff and land management resources for ITC nature reserves and covenants, to provide a Business Solution Options document that provides information requested by the ITC Board, and to proactively provide two draft business cases for ITC Board consideration for forwarding to Financial Planning Committee.

BACKGROUND:

In keeping with its Minister-approved 5-Year Plan (currently expired) and the draft 3-year 2023-2025 plan (before Minister) and the 2018-2027 Regional Conservation Plan goals and objectives, the Islands Trust Conservancy (ITC) continues to increase the amount of land that it manages. The management of that land is becoming increasingly complex.

The Islands Trust Conservancy (ITC) currently manages 1,383 ha of ecologically significant land as nature reserves or conservation covenants, and promotes land stewardship through outreach and collaboration with others.

The ITC's protected area management program includes two full-time positions dedicated to protected area management and a seasonal co-op student, with the ITC Manager providing oversight and assisting with difficult issues. The program is supplemented by a temporary Species at Risk Coordinator position that manages the species at risk contribution funding. In March 2020, Trust Council approved a full-time, permanent Covenant Management and Outreach Specialist to replace contract property monitors and add needed capacity to manage landowner relations. Prior to that, the last ITC staff increase for protected area management was in 2009/10, adding the position of Property Management Specialist. Protected area management needs are becoming more complex, with the recognition of the need for more First Nations engagement, more need to protect species at risk, and evolving impacts of climate change on the landscape. The use of two positions to manage ITC lands and covenants is no longer sufficient in light of increasing demands related to First Nations engagement and the Climate Change Emergency, and because the ITC Manager has insufficient time available to assist with difficult issues. In addition, while the number of protected areas to be managed increases year over year, the software to manage information about protected areas has continued to be inadequate.

Following analysis of options, as laid out in the attached Business Solutions Options document, staff are recommending that the Board request a permanent Protected Areas Manager and funding for selection and implementation of a protected area management database.

2 IMPLICATIONS OF RECOMMENDATION

ORGANIZATIONAL: The addition of the Protected Areas Manager will increase organizational capacity, particularly in areas of outreach, First Nations relationship development, and climate change planning. It will also reduce the number of direct reports to the ITC Manager and reduce the number of issues escalating to the ITC Manager, but it will create a need for more administrative support.

Selection and implementation of protected area management software will require about 240 hours of staff time in 2024/25 but will result in saved time staff into the future.

FINANCIAL: The cost of the Protected Areas Manager position is anticipated to be $104,667 in the first year and $123,918 per year after that. The costs to select, customize and implement property software is $20,000, with ongoing software costs estimated at $7,000 per year.

POLICY: None. The Protected Areas Manager position will add needed capacity to draft amendments to policies related to protected area management and will meet the requirements for the practice of biology on ITC managed lands as required by the *Professional Governance Act* and recently implemented *Applied Biologists Regulation*.

IMPLEMENTATION/COMMUNICATIONS: Staff will provide approved ITC business case(s) to the Director of Administrative Services and the Director of Trust Area Services for inclusion in the budget process (recognizing that due to staff vacancies and illnesses this request is being provided late in the process – staff had added a placeholder amount of $95,800 to the budget). The ITC Financial Planning Committee representative will be given the opportunity to speak to the ITC budget at a Financial Planning Committee meeting. The Financial Planning Committee will make a recommendation to Trust Council regarding budget submissions. Staff will provide ITC trustees with the Financial Planning Committee recommendation. ITC trustees may speak to the ITC budget at Trust Council.

FIRST NATIONS: A new Protected Areas Manager and a new database will support more and improved engagement with First Nations.

CLIMATE CHANGE: A new Protected Areas Manager and a new database will support climate adaptation work, including wildfire prevention analysis.

OTHER: None.

3 RELEVANT POLICY(S):

1.6 Annual Budget Submissions Policy
Islands Trust, 6.3.i Budget Process Policy

4 ATTACHMENT(S):

- Islands Trust Conservancy Protected Areas Management Business Solution Options
- Budget Funding Requests
  - Business Case: ITC Protected Areas Manager position
  - Business Case: ITC Protected area management software

RESPONSE OPTIONS

Recommendation: That the Islands Trust Conservancy Board recommend to the Islands Trust Council that the 2024-2025 budget include funding for:

- a permanent Protected Areas Manager and
- selection and implementation of a protected area management database.

Alternatives:

Alternatives are considered in the attached business solutions options document, and associated business cases.

Prepared By: Clare Frater, Director, Trust Area Services/January 15, 2024

Reviewed By/Date:

ISLANDS TRUST CONSERVANCY

Islands Trust Conservancy
Protected Area Management Capacity

Business Solution Options Document

Author:	Clare Frater, Director, Trust Area Services, Islands Trust with support from Islands Trust Conservancy staff

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1.0 Executive Summary

1.1 Business Problem and Opportunity

The Islands Trust Conservancy (ITC) Board has proposed a three-year plan to the Minister, has an adopted regional conservation plan and property management strategy, and currently manages 113 properties. ITC takes on approximately three new properties each year as nature reserves or conservation covenants.

The ITC Board has identified that needs related to management of ITC protected areas continue to grow yet the staff hours available have not grown. The ITC Board has requested "staff to conduct an analysis of protected area management needs relative to available staff hours and return to the ITC Board with a summary of the analysis and available options."

1.2 Options Considered

Option 1: Fund new permanent Protected Areas Manager position

Option 2: Fund contract advice on protected area management policy issues

Option 3: Fund protected area management technology improvements

Option 4: No change to budget or staffing

Option 5: Reduce protected area management or monitoring activities and cease acquisition of new protected areas

1.3 Recommended Decision

Option 1: Fund new permanent Protected Areas Manager position

Option 3: Fund protected area management technology improvements

2.0 Introduction

2.1 Background

The mission of Islands Trust Conservancy (ITC) is to protect special places by encouraging, undertaking, and assisting in voluntary conservation initiatives within the Islands Trust Area. ITC currently monitors and manages 34 nature reserves and 79 conservation covenants covering 706 ha and 677 ha respectively for a total of 1,383 ha. ITC increases its protected areas by approximately three per year. Management of protected areas is becoming increasingly complex due to impacts of climate change; increased issues associated with invasive species, degraded ecosystems, and species at risk stewardship; commitments to engagement of First Nations in management activities; increases in the number of new landholders and new neighbours; and increasing recreation in nature reserves. ITC capacity is not keeping pace with the increases in protected area management needs.

2.1.1 Legislative and Policy Background

The *Islands Trust Act* sets out in Section 41(1) that "For the purpose of carrying out the object of the trust, the Islands Trust Conservancy must,

> (a) subject to the regulations, administer the trust fund **and manage** [emphasis added] the property of the trust fund,
> (b) prepare a trust fund plan in accordance with section 44,
> (c) file an annual report in accordance with section 46, and
> (d) carry out any other duties that the minister or Lieutenant Governor in Council, by order, directs."

The ITC Five-Year Plan, approved by the Minister of Municipal Affairs and Housing in January 2018, establishes that the organization will work towards the eight goals and objectives, including the following that are relevant to protected area management:

1. Increase funding available for protected area management and restoration of its protected lands.
2. Establish and deepen relationships with First Nations and work towards building trust by funding opportunities to collaborate with First Nations to integrate Traditional

Ecological Knowledge into management planning, reconnect youth with island ecosystems and other mutually beneficial initiatives.

3. Prevent further loss of the rare and fragile ecosystems of the Islands Trust Area.

The ITC Board submitted a new Three-Year Plan for Ministerial consideration on December 15, 2022, but has yet to receive approval. This approval is expected after January 17, 2024.

The ITC Board has adopted a Property Management Strategy (2017) that guides its protected area management program. The Strategy's purpose is "to devise a framework to support decision-making regarding protected area management activities on Islands Trust Conservancy owned and covenanted lands with the goal of maintaining or increasing the ecological integrity of the protected area." The conclusion to the Property Management Strategy includes the following:

> "Ensuring species and ecological communities at risk thrive within ITC protected areas at current or improved population levels and/or distributions requires we
>
> - know where these species are
> - put an ecological monitoring program into place to assess change over time and
> - implement adaptive management." [paraphrased]

It concludes by noting that "as work begins on these new objectives a better idea of the budgets associated with them will be determined."

ITC also has policies that guide protected area management:

ITC Policy 2.3 Acquisition and Management of Land states that the ITC Board will prepare and approve a management plan for each property it acquires as a nature reserve. The management plan will provide details on the scope and extent of the threats found on the protected area and provide recommendations for how best to address them. The ITC Board will approve a management plan for its properties within one year of acquisition, and will update each management plan approximately every 10 years. ITC Policy 2.3 also states that the ITC will monitor all nature reserves annually, and assess for potential management problems such as trespass, misuse or overuse, vandalism, safety hazards or other concerns or activities as listed in

the management plan. The ITC will take action to address any problems identified, as budgets permit.

ITC Policy 2.4 Conservation Covenants states that each property covenanted by the Islands Trust Conservancy will be visited and monitored annually by either ITC staff or an ITC contractor. The monitoring is done to ensure compliance with the conservation covenant.

ITC staff[1] monitor nature reserves and conservation covenants annually to:

- assess the character and key features of the sites,
- evaluate the effectiveness of the management program,
- identify any new issues that need to be addressed by ITC and/or the covenant holders, and
- identify and respond to any trespass that may lead to breaches to the terms of the conservation covenant.

Annual compliance monitoring involves contacting the landholder/partners to coordinate the monitoring visit; walking the land along established monitoring routes, including along accessible property boundaries and any trails; filling out a site monitoring form that takes into account the standard land use restrictions under a conservation covenant; taking repeat photos at established monitoring stations; documenting any ecological, compliance, and trespass concerns; and providing a final report with management recommendations, which can be followed up on by ITC, covenant co-holders/partners, and landholders as appropriate and as resources permit.

Protected area management generally includes the following activities: invasive species removal, native plant and habitat restoration, exclosure fence installation and maintenance, species or habitat assessments, trail construction and maintenance, signage construction and maintenance, bat and bird box installation and maintenance, dog waste bag removal services, hazard assessments, and, as necessary and guided by policy, mitigation of hazards. In addition, staff respond to trespasses such as unauthorized tree cutting by neighbours or the Ministry of Transportation and Infrastructure and garbage dumping. These management activities are generally delivered under contract. The Property Management Specialist also conveys and

[1] The Horton Bayviary Nature Reserve on Mayne Island is the only nature reserve not monitored by staff. It is monitored by the Mayne Island Conservancy Society.

advises the ITC Board on requests from scientists to undertake research in ITC nature reserves. (See Appendix 1 for details of position duties).

Previous Board efforts to put constraints on new property securement and to manage work include:

- In 2014, the ITC adopted policy that placed more stringent requirements on assessment of conservation proposals, including a minimum size.
- In early 2018, the ITC further refined its strategy for securing conservation lands by adopting a Securement Strategy.
- In January 2022, in an effort to focus work and achieve manageable workloads for staff the Board passed the following motion concerning its work program:

  ITC-2022-002
  It was MOVED and SECONDED,
  that the Islands Trust Conservancy Board direct staff to:

  1) Focus work for the 2022/23 fiscal year on:
     - the Climate Change Project;
     - land management and targeted outreach components of the Species at Risk Program;
     - development of a Reconciliation Action Plan; and
     - administrative needs, including: policy updates, review of staff roles/structure/training, maintenance and updates to internal databases, review of the new website and technology used in the field; and

  2) Delay the following work items until the 2023/24 fiscal year:

  revision of property management plans;
     - monitoring of lands that are protected by other conservation agencies (i.e. parks and nature reserves) or that are considered at low risk of covenant breach or trespass;
     - outreach and communications that generate new conservation proposals;
     - work on conservation proposals for lands not considered a very high priority for conservation, including those under 8 ha in size; and,
     - placing of covenants on ITC Nature Reserves.

- In March 2023, the ITC Board continued its efforts to focus work and achieve manageable workloads for staff:

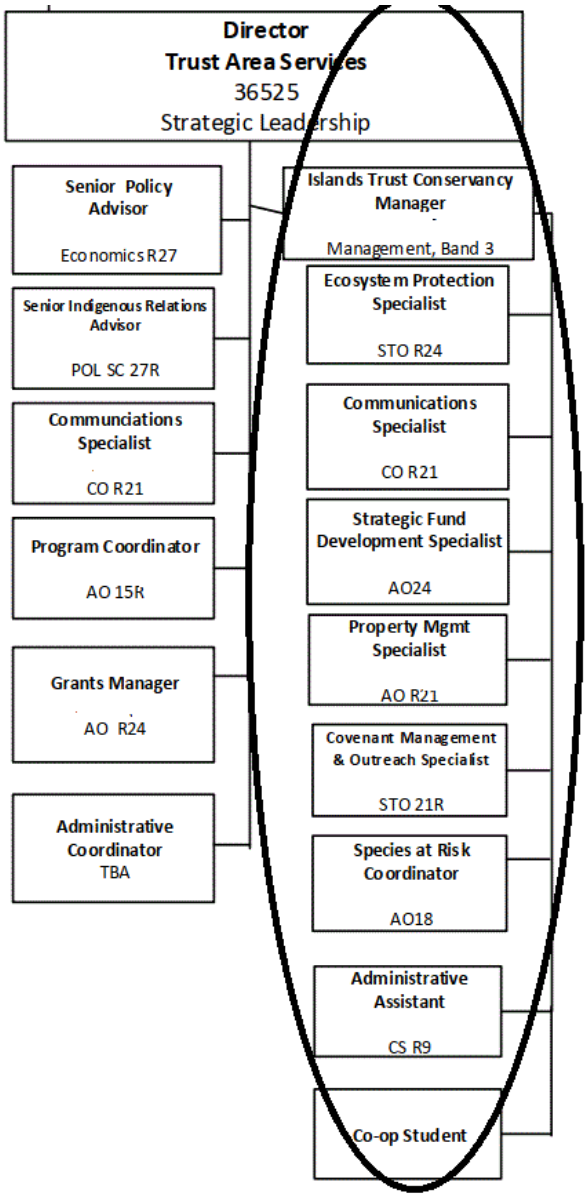
ITC-2023-009
It was MOVED and SECONDED,
that the Islands Trust Conservancy Board direct staff to:

1) Focus work for the 2023/24 fiscal year on:
    - Land management, land securement and targeted outreach components of the Species at Risk Program;
    - First Nations engagement associated with development of the ITC Plan;
    - Administrative needs, including: policy updates, maintenance and updates to internal databases (land management and contact management), job description reviews for selected staff, review of the new website and technology used in the field; and
    - Working on proposals for conservation lands that are high priority; and

2) Delay the following work items until the 2024/25 fiscal year:
    - The Climate Change Project;
    - Revision of property management plans;
    - Development of a Reconciliation Action Plan;
    - Monitoring of lands that are protected by other conservation agencies (i.e. parks and nature reserves) or that are considered at low risk of covenant breach or trespass;
    - Outreach and communications that generate new conservation proposals; and
    - Placing of covenants on ITC Nature Reserves.

2.1.2 Staffing Levels

Islands Trust Conservancy (ITC) has nine staff positions or 7.87 full time equivalent (FTE) staff positions. The Property Management Specialist, Covenant Management & Outreach Specialist, and Conservation & GIS Technician (summer co-op student, 100% grant funded) positions are dedicated to protected area management while the other positions in the organization offer support while undertaking other duties. The ITC has program funding and, through its budget, contributes proportionally to the Islands Trust's administrative, information services, finance and human resources services.



Current ITC staff:

1. Manager
2. Ecosystem Protection Specialist (Classification level 24 (Planner 2 equivalent))
3. Communications Specialist
4. Property Management Specialist (Classification level 21 (Planner 1 equivalent))
5. Covenant Management and Outreach Specialist (position created in 2019 upon the retirement of longstanding contract monitors) (Classification level 21 (Planner 1 equivalent))
6. Strategic Fund Development Specialist
7. Species at Risk Coordinator
8. Administrative Assistant
9. Coop Student (seasonal)

Current staffing for ITC is shown in Figure 1 and protected area management staff levels from 2007 to present are shown in Figure 2. Protected area management until 2011 was done by the Ecosystem Protection Specialist. In 2011, protected area management was removed from the Ecosystem Protection Specialist role.

Figure 1. Organization Chart for Islands Trust Conservancy.

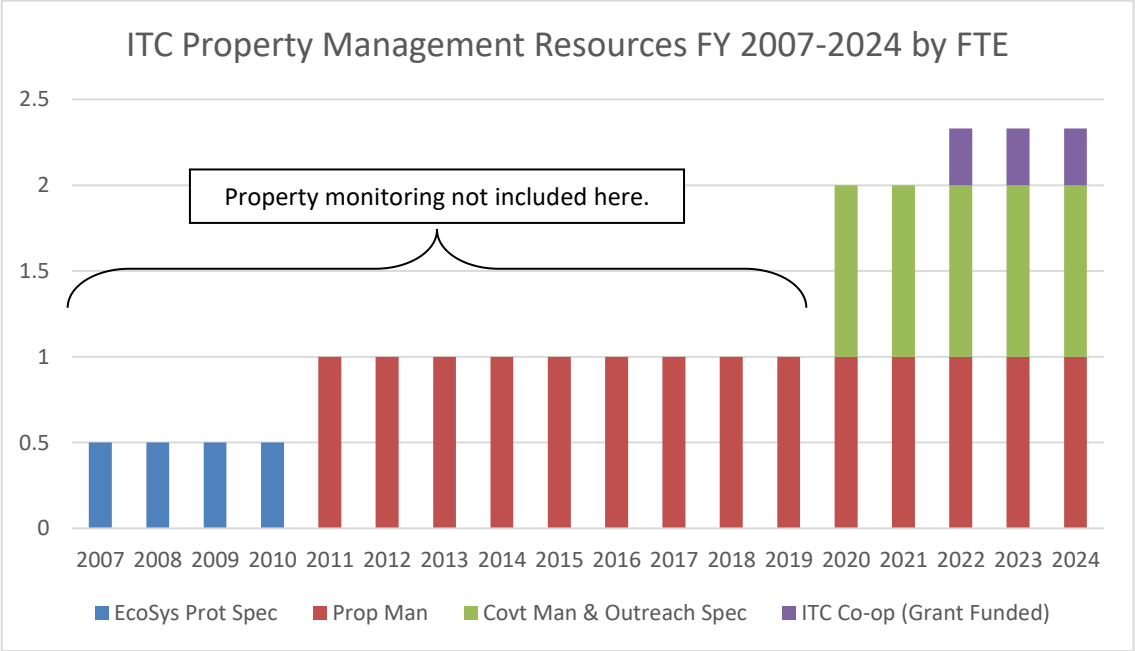


Figure 2. Islands Trust Conservancy (ITC) protected area management staff levels since 2007. This chart does not reflect that in 2019 ITC discontinued a long-standing part-time covenant monitoring contract that represented about 0.3 FTE.

Over the last ten years, ITC's budget has been close to ten percent of the Islands Trust budget, excluding grant income. With grant income, ITC's budget has been between 12-13% of the Islands Trust budget (Figure 3, below).

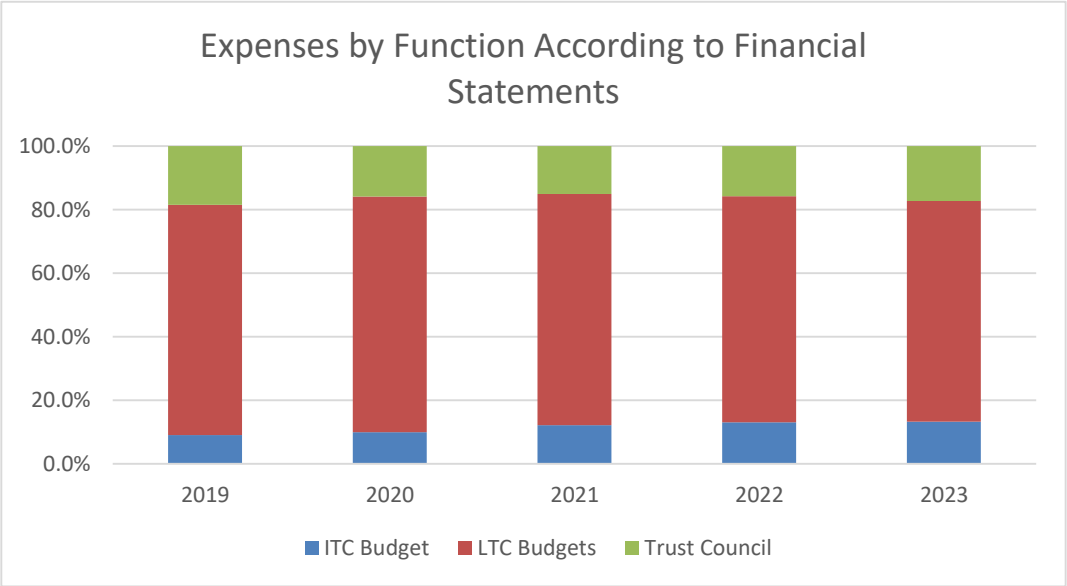


Figure 3. Expenses by function according to Islands Trust Financial Statements (includes ITC's Species at Risk Program funds from Environment and Climate Change Canada).

ITC property management budgets (Figure 4) have doubled in the last ten years. Increases seen between 2020 and 2024 are partly due to grant funding from Environment and Climate Change Canada and additional budget for more complex protected area management needs, such as First Nations engagement. The Board has requested $166,140 for 2024/25.

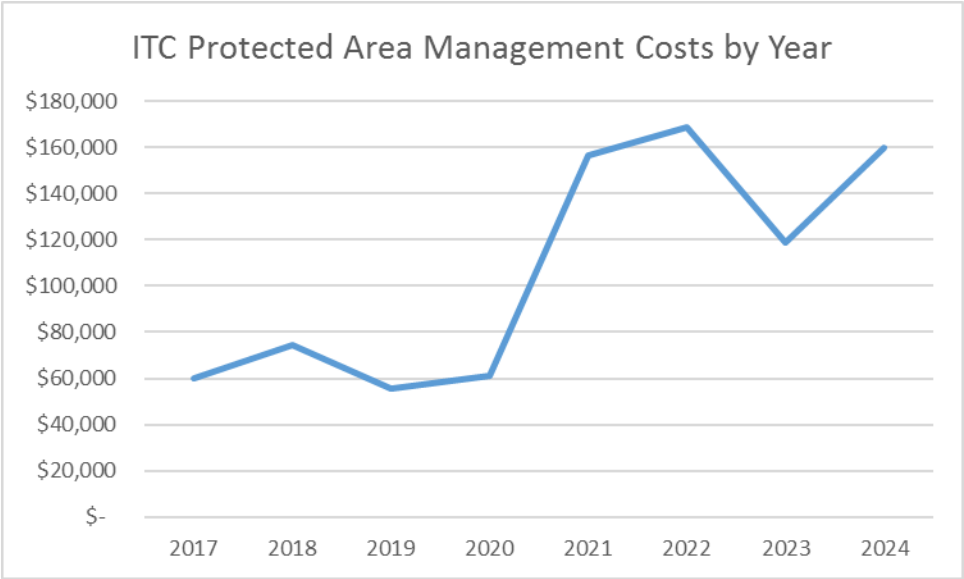


Figure 4. Islands Trust Conservancy Protected Area Management Costs by Year (2024 is budget, while other years are actuals). In 2023, property management budget was reallocated to salaries to assist with protected area GIS work.

2.1.3 Number and Size of Properties

The number and size of ITC protected areas has increased steadily since the establishment of ITC (see figures 5 and 6 for increase since 2003). This increase in protected areas is in accordance with ITC Plans, which are required by the *Islands Trust Act*, approved by the Minister of Municipal Affairs and have been reviewed by Trust Council. It is important to note that management effort is not directly correlated to size as some properties have trails, regular public use, specific hazards or features that require special effort, issues with trepass/breaches, are water-access only, etc.

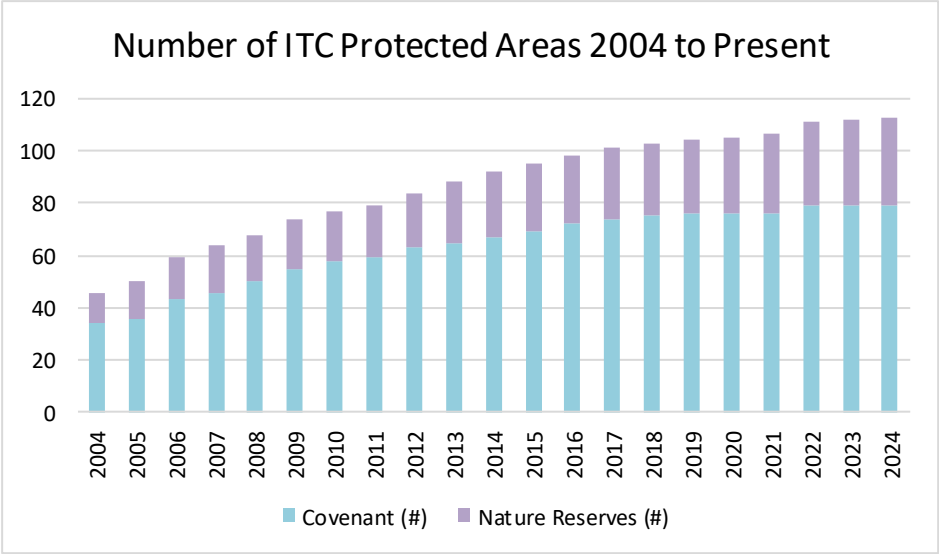


Figure 3. Number of Islands Trust Conservancy protected areas by fiscal year since 2004.

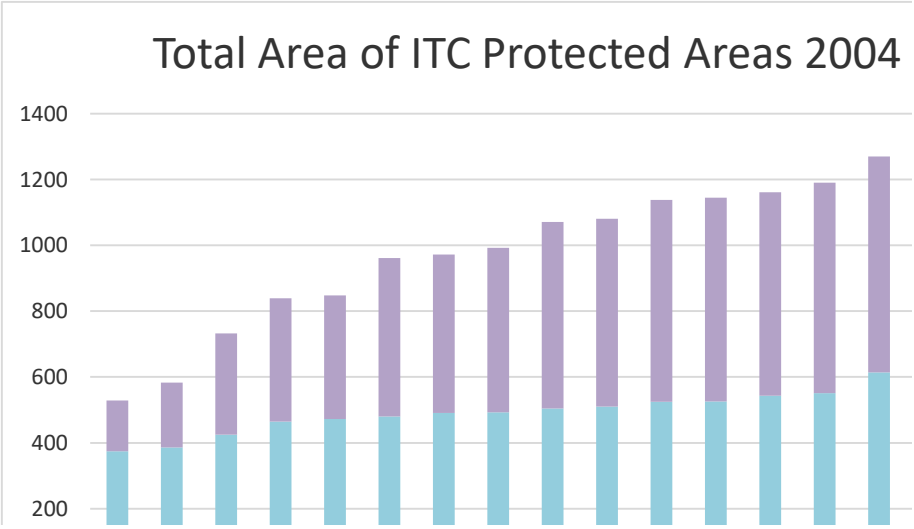


Figure 4. Hectares of Islands Trust Conservancy protected area by fiscal year since 2004.

2.1.4 Financial Resources for Protected Area Management

Protected area management costs are primarily funded through Trust Council. To develop annual budget requests, staff use a formula that takes into account the following factors for each new protected area, with base cost estimates established in 2020 and reevaluated on an annual basis to account for inflation. The 2024/25 budget formula for new protected areas is as follows:

Average Annual Cost	Nature Reserve	Covenant
Management Plan Renewal	$640	
Recreation Management	$430	
Habitat Restoration	$720	$720
Signage	$70	$70
Species/Ecosystem Inventory and Surveys	$270	$270
First Nations engagement and cultural site management	$360	$180
TOTAL	**$2,490**	**$1,240**

Additional costs as determined by protected area:

Cost Item	Description
Travel	Water taxi requirements or added days requiring additional ferry fares or overnight stays.
Special Items	Dependent on special needs of the site. For example, dog waste collection or an increase in recreational management needs for a well-used site.
Special Start Up Costs	ITC works hard to pay for expenses associated with land securement but may in some instances require additional budget for costs anticipated to be in excess of its current budget. For example, the above property management budget anticipates signage and management planning needs for one new nature reserve each year. If the ITC were to take on multiple nature reserves in a given year, it may need to request additional budget.

Since 2020/21, Islands Trust Conservancy has received a contribution from Environment and Climate Change Canada for its Species at Risk Program. Portions of this contribution are allocated to protected area management activities specific to protection of species at risk. These activities are generally coordinated by the Species at Risk Program Coordinator, supplemental to core protected area management work, and delivered via single- or multi-year

contracts with qualified professionals, due to the new reserved practice legislation for professional biologists. The Species at Risk Program Coordinator and/or protected area management staff have provided assistance to contractors in the field for SAR Program projects, when possible and cost-effective.

In May 2022 the Board passed the following resolution:

> **ITC-2022-026**
> **It was MOVED and SECONDED,**
> that the Islands Trust Conservancy Board direct staff to draft and sign an amended contribution agreement with Environment and Climate Change Canada (ECCC), extending the existing Species at Risk Program funding until March 31, 2026, including a budget increase for the 2022/23 fiscal year of $25,000 and the addition of $220,000/ year in funding for the next three fiscal years (2023/24 through 2025/26).

The grant-funded Species at Risk Program generates additional work for the Property Management Specialist and the Covenant Management and Outreach Specialist who, as site specialists, must coordinate with the SAR Program Coordinator when work is being planned and implemented in the protected areas they manage. Additional work is required of these positions to maintain the Program whenever the Coordinator position is vacant. For some projects that are now in their 4th year, maintenance and monitoring are being coordinated and/or conducted by the Covenant Management & Outreach Specialist. The impact of the Species at Risk Program on the work program of the Property Management Specialist and the Covenant Management and Outreach Specialist is estimated at about 10-15% of their time. As a balance, the Species at Risk Program also fully funds the co-op student position, which saves the Property Management Specialist and the Covenant Management and Outreach Specialist time by performing many of their clerical duties related to monitoring (and provides a second person in the field, for safety purposes).

<u>Available staff hours</u>

The Property Management Specialist has about 1,285 hours available annually for core work while the Covenant Management and Outreach Specialist has about 1,360. A coop student contributes about 420 hours to support monitoring, GIS mapping, and administrative support. While the ITC Manager's workload is currently over allocated, the Manager allocates about 10 hours a week to supporting protected area management.

For the Property Management Specialist, with 34 nature reserves, including one with an older house and caretakers, this provides for approximately 38 hours per nature reserve for management planning, property management, monitoring (including travel) and associated follow-up and reporting to the Board, policy research and issues management.

For the Covenant Monitoring and Outreach Specialist, with 79 conservation covenants, there are 17 hours per covenant per year for monitoring (including travel), associated follow-up and reporting to the Board, landowner contact and education, ecological restoration, invasives species removal, and issues management.

The Conservation & GIS Technician (co-op student) position (approx. 420 hours hours) is important for safety due to the remote nature of the fieldwork, and has become crucial to the PMS and CMOS for completion of clerical duties such as data entry, monitoring form transcription, monitoring photo management, and as of 2022, mapping of monitoring routes and other mapping projects. The assistance provided by the co-op student ensures that monitoring reporting for the year is completed before next monitoring year begins. This is an important position for the protected area management program as there has been no new resources for ITC administration resources (1 FTE Administrative Assistant position) since the 1990's.

In 2023/24 for the first time since protected area management was removed from the position in 2010, the Ecosystem Protection Specialist contributed staff hours for protected area management. The new Applied Biologist Regulation requires that a member of the College of Applied Biology conducts or supervises any applied biology work. The Ecosystem Protection Specialist is currently the only ITC staff member who meets this qualification, and provided the required professional oversight for protected area management work where the contractor does not yet meet the requirement. In 2023/24, providing this oversight for four nature reserves required approximately 35 hours.

The Islands Trust Conservancy Manager provides oversight of the program including financial management, strategic planning, staff hiring/supervision, contract/procurement processes/approvals, support for policy/enforcement issues, support for engagement with First Nations, reviewing reports to the Board, etc. This takes at approximately 10 hours a week. Due to heavy workload demands in recent years, the Manager has been unable to take on policy

analysis/development work related to protected area management. In addition to supporting the ITC Board and undertaking financial management, complex land negotiations, issues management, engagement with First Nations, participation in inter-governmental working groups, liaison with the Province's Board Resourcing Office, orientation of new Islands Trust staff to the ITC's work, and drafting of referral responses, policies and procedures, the Manager oversees functions such as conservation planning, corporate/workload planning, land/covenant acquisitions, First Nations engagement, communication, strategic fund development and donation management, administration, and program delivery. Recently, the ITC Manager has experienced burnout and health issues, primarily due to workload, and has required medical leave to regain health equilibrium.

2.2 Business Problem and Opportunity

There are insufficient staff hours available to manage properties to the standard expected by the Board (i.e., timely identification and addressing of trespass or covenant violations) while also doing due diligence to:

- respond to an increase in the number and complexity of ecological concerns (e.g., climate change impacts, species at risk);
- address human dimensions of conservation (e.g. First Nations engagement, addressing wildfire risks to communities); and
- accommodate new regulatory requirements (e.g. Applied Biologist Regulation)

There is also a lack of a senior policy advisor position with Islands Trust Conservancy to undertake the policy work expected by the Board and Trust Council to address topics such as wildfire prevention, risk management, climate change impacts.

Furthermore, software and mapping limitations hamper informed management for protected areas.

There is an opportunity to address both issues through additional funding.

2.3 Business Solution Options Approach

The Director of Trust Area Services researched and developed this document. The approach to developing the business solution options included the following elements:

- Review of background documentation including ITC policy, historic staffing levels and budgets;
- Interviews with the Property Management Specialist, Covenant Management and Outreach Specialist, the Ecosystem Protection Specialist, the Administrative Assistant, the former Species at Risk Coordinator, the former Information Services Manager, and the Geographic Information System Analyst. (The Islands Trust Conservancy Manager was on leave and unavailable for an interview).
- Discussions with Islands Trust CAO and Director, Local Planning Services
- High-level research on key themes for protected area management/monitoring
- Review of Canadian Land Trust Standards and Practices and the International Union for the Conservation of Nature (IUCN) Guidelines for Management of Protected Areas
    - The Director of Trust Area Services did not have time available to undertake a scan of the management practices of other similar agencies or to undertake a benchmarking exercise to compare staffing levels for protected area management. Benchmarking is expected to be challenging because of the Islands Trust Conservancy has some unique circumstances not experienced by many other conservancies including:
        - High interface with other properties which increases chance of trespass
        - Travel to islands via ferry and water taxi leads to increased staff time/cost
        - Properties are generally smaller so more cost per monitoring visit
        - Protected area management of nature reserves is typically delivered primarily via local conservancies via contract

2.4 Current Situation

On May 30, 2023, following a consideration of a Request for Decision budget document that noted "ITC continues to grow its network of protected areas and is nearing the limit of property management staff capacity" the Islands Trust Conservancy Board passed the following resolution to develop a budget proposal for the 2024-2025 budget process:

> **ITC-2023-019**
> **It was MOVED and SECONDED,**
> that the Islands Trust Conservancy Board direct staff to conduct an analysis of property management needs relative to available staff hours and return to the Board with a summary of the analysis and available options.

In October 2023, the the Islands Trust Conservancy Board passed the following resolutions:

> **ITC-2023-030**
> **It was MOVED and SECONDED,**
> that the Islands Trust Conservancy Board indicate to Financial Planning Committee and the Islands Trust Council that it is supportive of increased staff capacity for Geographical Information Systems (GIS) in the Trust Council budget as low GIS capacity is impacting the work of the Islands Trust Conservancy.
>
> **ITC-2023-031**
> **It was MOVED and SECONDED,**
> that the Islands Trust Conservancy (ITC) Board indicate to Financial Planning Committee that it is preparing a business case for increased ITC capacity due to growth of ITC managed conservation areas.

2.4.1 Overview

Currently, the ITC manages 113 properties (79 covenants and 34 Nature Reserves). Typically, ITC is in active negotiation with applicants on five to ten conservation proposals at any given time and closes three negotiations a year. At the time of writing, the ITC is negotiating on four conservation covenants and two nature reserves, after already closing three negotiations in 2023 (one nature reserve and two covenants).

- In 2014, the ITC adopted policy that placed more stringent requirements on assessment of conservation proposals, including a minimum size.
- In early 2018, the ITC further refined its criteria for securing conservation lands by adopting a Securement Strategy.

The Manager typically handles ITC administration as well as nature reserve acquisitions proposals and negotiations, as well as engagement with First Nations on the Islands Trust Conservancy Plan, while the Ecosystem Protection Specialist handles conservation covenant proposals and negotiations, including First Nations engagement related to specific securement projects, and conservation planning. In recent years, the Ecosystem Protection Specialist has taken over land acquisition work due to the Manager's workload.

The Property Management Specialist oversees the development of management plans for all ITC-owned properties and implements the recommendations of these plans as budget permits. Responsibilities include assessing properties for risk to ecological health and human safety, identifying and implementing management activities including habitat restoration and property infrastructure needs (such as signage and trail maintenance), working with partners to manage ITC-owned properties, and negotiating contracts for annual property monitoring and management activities. In recent years, the Property Management Specialist has also been involved in First Nations engagement meetings.

The Covenant Management and Outreach Specialist ensures that ITC's conservation covenants are monitored and managed to preserve the health of their ecosystems and other protected features and is responsible for compliance monitoring, including following up on issues of breach and trespass. The Covenant Management and Outreach Specialist also works with covenant landowners to raise awareness of protected features, resolve conflicts between other land uses and ecological conservation, implement species at risk management and restore ecological systems as needed and permitted under the covenant agreements. In addition, the Covenant Management and Outreach Specialist undertakes outreach and landowner contact activities to raise awareness of land protection options.

The Communications Specialist supports communications initiatives related to protected area management.

The Administrative Assistant supports the team with administrative duties. Over the last two years, ITC has hired a contractor to help alleviate overloads to the Administrative Assistant's workload, due, in part, to increased protected area management activity. Additional contract support has been requested again for 2024/25.

The ITC Manager's workload is beyond full-time hours. It is challenging for the Manager to manage a staff of eight direct reports, who span a range of specialties, and also deliver on projects such as engagement with First Nations on the Islands Trust Conservancy Plan, and corporate planning work.

2.4.2 Current Business Issues

This section describes business issues related to protected area management/monitoring as well as fundraising.

Protected area management/monitoring

The ITC has reached or exceeded the capacity of staff to manage and monitor properties, and respond to breaches and trespasses while also working towards strategic goals and objectives set out in the Five/Three-Year Plan and Regional Conservation Plan (listed above) and addressing emerging issues.

Prior to 2020, ITC property budgets increased at the request of the ITC Board without reference to an increase in number of properties or hectares of protected area or inflation. This approach led to underfunding of protected area management activities which the ITC Board addressed by successfully requesting a substantial increase to the property management budget in 2019/20. A result of the chronic underfunding there was a backlog of management activities to address, which staff are still working on.

As set out in the *Occupiers Liability Act*, ITC has a responsibility to mitigate against the serious risks which the ITC knows have caused or could cause serious injuries to visitors and to take reasonable care to ensure the safety of persons using its lands.

The ITC Board has a commitment to managing its lands in such a way that ecological integrity is maintained or improved over time. Ideally, this includes actively engaging in ecological management such as invasive species removal, species at risk protection, preventing or mitigating recreation damage, and addressing historic disturbances of the land. At this time, the ITC's core protected area management programs meet basic requirements of land care. The core program does not include regular ecological monitoring to determine if the ecological values protected are being sustained, there is no routine monitoring of species at risk, trail maintenance is limited to addressing serious hazards, there is limited invasive species removal,

and no systematic tracking or mapping of management concerns. In recent years, through the Species at Risk program, there has been targeted efforts to monitor and restore species at risk and their habitat and this funding has helped to increase conservation values on ITC managed lands.

The Board has also committed to monitoring its conservation covenants annually to ensure compliance and to monitoring its nature reserves annually for safety and trespass. The ITC Board has responsibilities to Environment and Climate Change Canada where it is the recipient of a conservation property that is an ecological gift. ITC currently cares for twenty-seven ecological gifts, eighteen as covenants and nine as nature reserves. Any evidence of breach or trespass must be documented thoroughly and be addressed.

The complexity of protected area management is expected to increase in coming years.

Emerging trends

There are a number of emerging trends that are leading to additional work demands on protected area management staff, and by extension, the ITC Manager, and at times, the Director of Trust Area Services.

- Climate change adaptation
    - In 2020, following receipt of a climate projections report, the Board approved a project charter for a climate change project with the objective of conducting analyses of climate change vulnerabilities and potential management recommendations for a pilot set of nature reserves. The project included the following activities:
        - Build relationships to develop First Nations engagement and involvement
        - Consultations with applied ecologists and protected areas managers with other agencies, including hiring consultants
        - Conduct vulnerability assessment and identify potential adaptive management actions on pilot suite of ITC properties
        - Develop communications plan and/or appropriate materials related to this project, subject to communications capacity

  - In November 2021, the Board approved an updated Project Charter with revised timelines, and in March 2023, the Board put this work on hold in favour of other work for the Ecosystem Protection Specialist (see resolution on pages 7-8).
  - In January 2022, the Board approved pausing new acquisitions and postponing the Regional Conservation Plan progress report in order to allocate of more of the Ecosystem Protection Specialist's time to the climate change project. However, due to the number of existing land negotiations underway, in practice, little extra time became available. Due to this capacity constraint, there was limited progress on the climate change impacts project over this time. Preliminary analysis was conducted for one pilot nature reserve and in early 2023, ITC hired a consultant to compile an annotated list of relevant data sets for these analyses.
  - In March 2023, the Board paused work on the Climate Change Project until at least 2024/2025.

- Wildfire risk mitigation (related to climate change adaptation)
  - Recent wildfire activity in British Columbia has generated questions and interest in ITC taking actions to assess and manage nature reserves for wildfire, and respond to requests from property owners to address wildfire risk in their covenanted areas. This project requires significant staff time to liaise with other provincial agencies regarding best practices, methodologies, costs, resource needs, timing, safety considerations, liability of acting vs not acting, etc.
- Risk management
  - There is a desire for more policy development related to public safety risk management and mitigation measures (e.g. policy, signage, non-slip surface installation, tree cutting). This project requires time for research and policy development. In May 2023, the Board directed staff to consider discussion of the Board regarding danger tree management in S'ul-hween X'pey (Elder Cedar) Nature Reserve and return to the Board with recommendations including a legal opinion about options for liability and public safety risk management in protected areas.

- New and expanding invasive species infestation management
    - The number and the extent of invasive species in ITC protected areas is large and continuously growing. All of ITC's protected areas are impacted in some way by invasive species. Before covenant monitoring was brought in house in 2019, there was little capacity for monitoring and managing invasive species in covenant lands. Failing to address an infestation early can mean that the costs increase exponentially, and that natural and/or cultural features of a protected area become at risk of degradation. Staff are increasingly finding that some covenant landowners and management group volunteers are less interested or able to take on invasive species removal due to age, and that new covenant landholders lack experience/knowledge/interest/time for invasive species removal.
- First Nations engagement
    - There is a need to more deeply involve First Nations in approval processes for new properties, management planning and management activities. The commitment to engage First Nations in management planning and management activities and to facilitate access to island ecosystems and cultural sites is expected to require additional staff and financial resources. Planning, implementing and monitoring engagement processes requires significant staff time, and requires flexibility in work program delivery. It also requires that staff develop the knowledge and competencies needed. The issues that arise in First Nations engagement related to protected area management frequently also require time from the ITC Manager, the Senior Indigenous Relations Specialist and the Director of Trust Area Services.
- Lack of biologist position in Planning Services
    - Planners regularly ask ITC staff questions related to conservation biology to inform their land use planning work. In December 2023, Trust Council approved a funding application to Environment and Climate Change Canada for a temporary biologist for Planning Services that would start in Fall, 2024 and continue until March 2026. If the application is successful, this position is

expected to provide temporary relief. It is worth noting that the regular act of saying "We don't have time to help" and explaining why takes time.

- Procurement challenges
    - Procurement for protected area management contractors became more complicated in 2023 when the new provincial Applied Biologists Regulation took effect. It is now taking staff more time to identify contractors and there is a lack of qualified bidders for some projects. This is resulting in more time than previously needed for routine protected area management work as there is a need to find Registered Professional Biologists to undertake or oversee work.
- Change in property owners and neighbours and a downward trend in volunteer availability
    - As shown through Census data there has been significant growth in population and also a significant change of land ownership in the last five years. This has resulted in new covenant landowners and new neighbours for protected areas. Staff are noting that new residents may not have knowledge about protected areas and may not have the same conservation ethic of previous residents. Most covenant violations in the last five years have involved new owners or new neighbours. This is resulting in the need for more education, and a greater risk of compliance issues encountered during annual monitoring visits,
    - The protected area management program relies heavily on island volunteers, many of whom are in their mid-sixties and seventies or older. Some island conservancies are experiencing difficulties recruiting new volunteers so ITC cannot plan to rely on the same level of islander volunteer effort into the future and needs to plan on more contractor or staff effort.
- A federal Species at Risk grant, which is funding new projects in ITC protected areas
    - The Species at Risk grant has added to the volume of work for the ITC team. While the Species at Risk Coordinator takes on the vast majority of the grant management and contracting there are impacts on the work programs of the Property Management Specialist, the Covenant Monitoring and Outreach Specialist and the Manager (as noted above).

- Technology challenges
  - With an increase in the number of protected areas and the number of issues and management actions per protected area, the information technology tools used by staff are increasingly proving insufficient and problematic. There are four main areas that require improvement:
    - Protected areas management information.
      ITC is without a protected area management database. Staff are using the ill-suited *TAPIS Info* application of Planning Services along with rudimentary tools such as Word and Excel to store and manage information for protected areas. Technological solutions are needed to support information analysis, project planning, and reporting. Information Services staff have advised ITC staff that ITC will need to migrate to an off-the shelf database product at some point as *TAPIS Info* is not a long-term solution to ITC's key functional need for supporting ongoing protected area data tracking. The current software approach results in an inefficient use of staff time, hampers quality corporate and long-term financial planning, and is negatively affecting staff morale.
    - Electronic data collection in the field.
      Field staff are now equipped with iPads that function as a GPS and are loaded with ESRI's *Field Maps* software. *Field Maps* has the ability to significantly increase efficiency and effectiveness of data collection for both ITC staff and contractors but the software has only been partially implemented. As a result, ITC staff continue to rely on paper forms to record monitoring information, which is inefficient and presents risks for recording errors that could result in:
      - a Court ruling that the information presented for a trespass/ enforcement matter to be insufficient; and,
      - Safety concerns in Nature Reserves not being accurately located or tracked.

- Insufficient GIS staff time
    - The Islands Trust is facing challenges due to the overwhelming demand for GIS services and limited GIS staff resources and support, which is resulting in overload of the Islands Trust GIS Technician, and challenges collecting electronic data in the field. There is insufficient GIS staff time to store, organize and display externally- and internally-generated (information gathered from contractors and staff during management planning, baseline report development Species at Risk surveys and monitoring mapping). Access to mapping hardware and software[2] and data storage is restricted to members of the Information Services department: ITC staff cannot directly access, view, quality control, map, or analyse data. With the transition to digital field data collection, ITC staff are able to view data they collect on properties but have very limited ability to manipulate or analyse this information. With limits to capacity in the Information Services department, and restrictions on access, ITC staff have frequently faced challenges with their ability to view and analyse their data in a timely manner. These challenges with technology are hampering informed decision making, wasting staff and contractor time, and contributing to stress for staff. This is mentioned as it has contributed to challenges delivering protected area management services but it is not addressed below in options as it is the subject of a business case for a new 1.0 FTE GIS Coordinator position (see ITC attachment to the business case for list of specific needs).
    - In 2022, ITC introduced GIS responsibilities for its summer co-op student, and this allowed for training in, and limited access to, Islands Trust's mapping hardware and software by this temporary ITC team member. While the co-op student was able to address ITC's day-to-day mapping needs, their term was too short to address long-standing issues. (To address this situation temporarily, Species at Risk Program funding was reallocated to a temporary GIS Technician position for December 2023-March 2024 to assist with the backlog of ITC mapping work).

[2] Computers with the necessary software and power to run the mapping programs, and also the associated licenses for individual staff.

3.0 Discussion of Options

The following options have been considered and are discussed in more detail below.

Option 1: Fund new permanent Protected Areas Manager position.

Option 2: Fund contract advice on protected area management policy issues

Option 3: Fund protected area management technology improvements

Option 4: No change to budget or staffing.

Option 5: Reduce protected area management or monitoring activities and cease acquisition of new protected areas

3.1 Option 1

Fund new permanent Protected Areas Manager position. This position would report to the ITC Manager and supervise the Property Management Specialist, Covenant Management and Outreach Specialist, Species at Risk Program Coordinator and the Conservation & GIS Technician (Co-op Student). This position would take on protected area management policy analysis related to risk management and climate change adaptation including wildfire prevention, would support First Nations engagement related to protected area management, and would coordinate process and technology improvements. The position would also be a Registered Professional Biologist able to supervise and approve projects as required. A SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats) has been performed on this option as follows:

Strengths	Weaknesses
• More policy analysis capacity for protected area management issues • Will support improved planning of protected area management activities • Will free up the oversubscribed ITC Manager for other duties • Will alleviate staff stress	• Increased cost

• Provides an additional Registered Professional Biologist (RPBio) on the ITC staff for protected area management	
Opportunities	**Threats**
• Provides increased support and focus on working with First Nations • Provides more flexibility for doing small projects in house that require RPBio. supervision	

3.1.1 Proposed Implementation Plan

A Protected Areas Manager job description would be developed and posted with an expected hire date in June, 2024.

3.1.2 Cost Estimates

Option 1 will require approximately $104,667 for the 2024/2025 fiscal year. This includes $96,255 for salary for 10 months and funding for training, travel, cell phone, College of Applied Biology fees and purchase of a new computer. It does not include funding for administrative or equipment costs. The position is expected to cost $123,918 in 2025/26 for salary for 12 months and funding for training, travel, and cell phone.

3.1.3 Risks

The following risks have been identified with this option:

Risks	Potential Mitigation Strategy
Provincial classification of the new position may take a long time	Staff will submit the job description well in advance of expected start date

3.2 Option 2

Fund contract advice on protected area management policy issues. This would involve procuring an external contractor to undertake research and policy analysis on protected area management issues.

A SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats) has been performed on this option as follows:

Strengths	**Weaknesses**
• Less sense of permanent cost relative to hiring new staff position • Supports the PMS and CMOS by providing important information needed to advise land management decisions • Adds needed resource	• Cost of contracts likely to be similar to a staff position, with less integration with the ITC team • Addresses research and policy analysis components but not implementation • Doesn't solve the issue of the Manager having too many direct reports • Procurement process is time-consuming.
Opportunities	**Threats**
• Different knowledge, perspectives and expertise gained when specialists are contracted to advise on specific land management issues	• The appropriate contractors may not be available or affordable, resulting in further delays to addressing management issues. • The ITC Manager may be unable to manage a contractor(s) as well as existing staff reports.

	• An ongoing contract might be seen as a pseudo-staff position and may result in a BCGEU grievance.

3.2.2 Proposed Implementation Plan

ITC staff would prepare a Request for Proposal seeking services for a protected area management advisor. For efficiency, staff will likely seek the services through one agency for up to five years, but practicalities may require multiple service providers. Services requested would include:

- Land/project management database sourcing
- Climate change adaptation expertise
- Wildfire risk mitigation advice
- Risk management advice

3.2.3 Cost Estimates

Option 2 will require approximately $56,000-84,000 for the 2024/25 fiscal year. This assumes a contractor rate of $100-150/hour for 16 weeks (140 hours).

3.2.4 Risks

The following risks have been identified with this option:

Risks	Potential Mitigation Strategy
• Procurement challenges to identify individual or firm who is qualified and available to work as issues arise	• Advertise RFP via BC Bid and use networks to promote the opportunity
• The bids for hourly rates may come in higher than estimated	• No mitigation strategy as depends on marketplace.

• Issuing of the required RFP(s) and contract management is not manageable within existing staff resources	• Staff will provide advice to the ITC Board regarding which work items to delay to accommodate contract management

3.3 Option 3

This option includes funding protected area management technology improvements for 2024/25. This would include a needs assessment with staff, research into software options that meet needs and integrate with existing software (e.g. ArcGIS), procurement and purchase of new protected area management software, software integration, data input, development of a user manual, and staff training.

A SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats) has been performed on this option as follows:

Strengths	**Weaknesses**
• Improved accessibility, organization, analysis, and reporting of protected area management information • Supports effective, strategic and transparent decision-making • Supports long-term budget planning • Reduces risk of errors/oversights • Increased efficiency of workflows and project management efficacy will improve staff morale and reduced wasted time trying to	• Increased cost (but reduced costs in terms of staff time)

locate, organize, or extract information	
Opportunities	**Threats**
• Allows the organization to generate reports about protected area management topics (e.g. how many properties are over a certain size, how much shoreline area is protected, how many properties have a certain species at risk) to support communications • Supports project planning and tracking	• If a new Protected Areas Manager position is not introduced, the Manager may be unable to act as project manager and manage a contractor as well as existing staff reports. • If there is a lack of appropriate off-the-shelf software available, staff will need to reassess approach

3.3.2 Proposed Implementation Plan

The roll-out of the recommended solution, which involves procuring a contractor and selecting and implementing a software solution will be executed in a phased approach to ensure smooth implementation and minimal disruptions. The specific features of the roll-out are as follows:

Phase 1: Project Planning and Preparation

- Define project scope, objectives, and deliverables
- Appoint a project team and project manager
- Procurement process to select contractor
- Initiate contract negotiations with the selected vendor

Phase 2: Needs Assessment/software research process

- Contractor to conduct needs assessment interviews with select staff and Board members
- Contractor to research available software
- Recommendation and selection

Phase 3: System Configuration and Customization/Data Migration

- Contractor to work with the vendor to configure new software to meet the organization's specific needs
- Migrate data into the new software with contractor support
- Update data to ensure that data for each property is complete

- Conduct thorough testing to ensure the module functions as intended
- Contractor to develop user manual

Phase 4: Training and User Acceptance Testing

- Provide comprehensive training to staff members and stakeholders on using the new software effectively
- Conduct user acceptance testing to validate the system's functionality and address any issues before the full deployment

Phase 5: Full System Deployment

- Roll out the new software to all relevant staff and report to Board
- Monitor the system's performance and address any additional feedback or issues

Phase 7: Post-Implementation Support and Optimization

- Provide ongoing support to users and address any post-implementation issues
- Continuously optimize the system based on user feedback and evolving needs

3.3.3 Cost Estimates

Option 3 will require$20,000 for the 2024/25 fiscal year.

3.3.4 Risks

The following risks have been identified with this option:

Risks	Potential Mitigation Strategy
• Unavailability of Information Systems staff to assist with the project	• Consult with Information Systems Manager early to plan the project and adjust project as required to accommodate other planned initiatives.
• Management of procurement processes and contracts is not feasible with existing ITC staff resources	• Staff will provide advice to the ITC Board regarding which work items to delay to accommodate contract management
• It may be challenging to identify a	• Staff will involve BC Bid staff to

Risks	Potential Mitigation Strategy
contractor to assist with needs assessment, software research and selection, data migration, and staff training (including user manual) in the specialized area of protected area management for conservation areas.	seek advice on procurement in this area. Staff will also reach out to the broader land trust movement to ask for recommendations. ITC staff will also ensure that Information Systems staff are involved in the process to ensure ongoing support needs are considered.
• No off-the-shelf software is available to meet ITC needs	• None. Staff will consider options and return to the ITC Board for discussion of next steps
• Data migration, system compatibility and potential software bugs/glitches pose technical challenges to implementing the new software	• Conduct comprehensive pilot testing of the integrated system with a selected group of staff to identify and address technical challenges.
• Ensuring that staff members are adequately trained and comfortable using the new integrated system is essential. Resistance to change or lack of proper training can lead to inefficiencies and reduced productivity during the initial stages of implementation.	• Develop a comprehensive training program to educate staff members on using the new integrated system effectively. Providing ongoing training and support will aid in the system's smooth adoption.
• With external software handling sensitive landowner and protected area management data, there is an	• Implement robust data security protocols, such as encryption, and

Risks	Potential Mitigation Strategy
increased risk of data breaches, unauthorized access, or potential privacy violations. Protecting confidential information and ensuring robust data security measures become critical.	access controls.
• Software projects can be subject to unexpected costs, such as additional customization or third-party integration requirements. Budget overruns could strain the financial resources allocated for the initiative.	• Define a clear project scope, undertake needs assessment process prior to software selection, and have contingency plans in place for potential cost overruns or delays. Regular monitoring and reporting of project progress can help identify any deviations from the plan and take corrective action.

3.4 Option 4

This option proposes no changes to budget or staffing: status quo

A SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats) has been performed on this option as follows:

Strengths	Weaknesses
• No new costs	• Continued lack of staff capacity to deal with overarching issues and increasing protected area management responsibilities • Risk of continued staff burnout and declining morale

Opportunities	Threats
•	• Declining ecological health of protected areas • Threats to visitor and community safety from property hazards and wildfire, respectively, will go unaddressed • Potential for exposure to litigation that may be avoidable with a better systems in place

3.4.2 Proposed Implementation Plan

Status quo resourcing does not permit staff to meet the requests of the Board; if this option is selected, staff will encourage the Board to also consider Option 5 in order to free up resources.

3.4.3 Cost Estimates

No new costs. However, continuing to operate in an under-resourced manner risks the costs associated with staff leaves or staff turnover, and risks possible increased legal and enforcement costs in future.

3.4.4 Risks

The following risks have been identified with this option:

Risks	Potential Mitigation Strategy
• Work towards ITC goals and objectives may face increasing capacity limitations and staff may increasingly recommend against new properties/projects.	• Board and staff to stay focused on strategic priorities and plan for capacity increases in future years.

Risks	Potential Mitigation Strategy
• Damage to ITC reputation	• Effective communication to partners and the public regarding ITC resource limitations and what ITC is doing to address limitations
• Potential exposure to litigation if ITC is not able to address safety issues in nature reserves	• Board and staff prioritize policy and actions re risk management of public safety in nature reserves over ecological values
• Inability to appropriately document trespass in protected areas and covenant area breaches, resulting in an inability to hold offenders responsible and negligent maintenance of our obligations under the Ecological Gifts Program (Income Tax Act)	• Cease to take on new protected areas and focus existing resources on current protected areas

3.5 Option 5

This option includes reducing protected areas management and/or monitoring activities and ceasing acquisition of new protected areas. This would involve:

- providing options to the ITC Board about reducing the annual monitoring of covenants and nature reserves, and associated implications and risks and
- recommending the Board engage with the Minister for amendment of the Ministerial-approved ITC Plan.

Where covenants are co-held the ITC Board could ask the co-covenant holder if they can take on monitoring. Board could also explore adding or expanding protected area

management contracts with local conservancies. Alternatively, the Board could choose to monitor covenants bi-annually instead of annually, or to not monitor covenants on lands held by other conservation agencies. (The Board has already taken steps in the direction in March 2023, when it directed staff to focus work for the 2023/24 fiscal year on certain special and administrative projects and, to achieve this, delay work on other items, including monitoring of covenant lands owned by other conservation agencies (i.e. parks and nature reserves) or that are otherwise considered low risk of covenant breach or trespass. As a result, ten covenants owned by other conservation agencies were not monitored by ITC in 2023.)

A SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats) has been performed on this option as follows:

Strengths	**Weaknesses**
• Would reduce staff workload to a more manageable level, allowing more time for priority (vs. routine) activities	• Uncertainly about the ability of partners to take over the work (see note above about aging/reduced volunteer base). • Less regular or thorough monitoring may delay or prevent enforcement of trespasses and timely management of invasive species (leading to more expense in removal). • May lead to reduced donor confidence in ITC's commitment to stewardship of land/covenant donations.
Opportunities	**Threats**
• Increased partnership with	• Damage to ITC reputation and

conservation partners	donation levels if ITC is not managing protected areas to a high standard and if ITC ceases to take on new protected areas • Lack of knowledge or capacity from partners to undertake the work.

3.5.2 Proposed Implementation Plan

Upon request of the Board staff would provide a briefing with options and implications to the Board.

3.5.3 Cost Estimates

No additional costs but would add to staff workload in the short-term to communicate the service reductions, and prepare materials for the Minister.

3.5.4 Risks

The following risks have been identified with this option:

Risks	Potential Mitigation Strategy
• Increased number of covenant violations, breaches/trespass incidents go undocumented • Nature reserve trespass incidences go undocumented, implications for covenant agreements on ITC lands • Increasing area or density of invasive species infestations, lack of rapid response to new/priority	• Explore remote (e.g. satellite or drone imagery) monitoring options (note these may add costs)

Risks	Potential Mitigation Strategy
invasive species	
• Loss of momentum in relationship-building with landholders	• Explore capacity for Communications Specialist to assist with landholder outreach • Develop a strategy to focus on high need landholders
• Loss of momentum in restoration projects, especially invasive species removal	• Develop communications to partners to explain the reduction of restoration work
• Reputation damage	• Develop communications to explain the reduction of service

4.0 Recommendation

Option 1

Rationale:

Option 1 supports the organization in meeting its core responsibilities while also supporting strategic goals and objectives as stated in the Five-Year Plan and Regional Conservation Plan.

Option 3

Rationale:

Option 3 supports improved data management, will improve staff efficiency, and support more informed work planning and ultimately more effective protected areas management.

4.2 Implementation Strategy:

The ITC Board will review the recommendations and analysis in this document and decide on a recommendation to the Financial Planning Committee. The ITC Board may request additional information from staff.

4.3 Action Plan

- Obtain approval of the Business Solutions Options Document and the seek Board selection of an option
- Obtain approval of business cases to Financial Planning Committee in support of the option(s) selected by the Board .
- Report back to the Board with feedback from the Financial Planning Committee.
- Respond to decisions as they arise by either preparing to implement new resources or to manage with existing resources.

ATTACHMENTS:

1) List of protected area management staff responsibilities

Islands Trust Conservancy
Protected Area Management Job Responsibilities

Property Management Specialist (Grid 21)

- Develop and manage an annual monitoring program
- Responsible for management of Islands Trust Conservancy lands and interests in land, including managing the monitoring and management programs, development of preparation of long-term management plans, liaison with local management groups and volunteer wardens, and maintaining records
- Negotiate and manage contracts
- Property Management Strategy development and implementation to support decision-making regarding property management activities and initiatives
- Develop and promote working relationships with First Nations, partners and stakeholders to achieve property management objectives
- Identify and evaluate public safety issues and potential risks to ecological and cultural values on properties owned or covenanted by the ITC (including risks from climate change);
- Work with GIS staff and contractors to develop mapping products to support property management and monitoring
- Engage volunteer wardens and community members in stewardship of nature reserves
- Coordinate volunteer events to undertake management tasks
- Seek opportunities to collaborate with First Nations on property management initiatives
- Assess need for ecological restoration and implement restoration plans
- Evaluation of management and restoration activities through monitoring and site visits
- Investigate violations of covenants and trespass, identify appropriate actions and provide written investigation reports with recommendations to the Island Trust Conservancy Board
- Prepare legal requests for issues related to property management
- Undertake background research and assist in the development of Islands Trust Conservancy policy and procedures relating to property management
- Allocate the property management budget by prioritizing management activities
- Assist the Manager in preparing and managing annual budget requests related to property management

Covenant Management and Outreach Specialist (Grid 21)

- Develop, manage and implement an annual monitoring program that ensures the regular inspection of all Islands Trust Conservancy covenant lands.
- Conduct site visits, field work, and property monitoring to determine covenant management needs and investigate covenant compliance and to implement required covenant management actions and covenant enforcement
- Schedule and implement management actions for Islands Trust Conservancy covenants, including managing the covenant monitoring and management programs, development

of preparation of long-term covenant management plans, liaison with co-covenant holders and landowners, and maintaining records
- Negotiate and manage contracts
- Develop, implement information systems to maintain property records
- Collaborate with First Nations on covenant management initiatives
- Develop and promote working relationships with First Nations, partners and stakeholders (e.g. conservancy organizations) to achieve covenant objectives
- Work with staff and contractors to develop mapping products (e.g. using Geographic Information System (GIS)) to support covenant management and monitoring
- Assess need for ecological restoration on ITC covenant lands, implement restoration plans as appropriate and evaluate success of management and restoration activities through monitoring and site visits
- Investigate violations of covenants and issues of trespass, identify appropriate actions provide confidential written investigation reports with recommendations to the Island Trust Conservancy Board
- Prepare requests for legal advice for issues related to covenant management and enforcement and evaluate legal advice, with guidance from the ITC Manager, to determine required actions and follow up
- Prepare and present technical information and evidence to legal counsel and attend court to provide evidence obtained during an investigation of a covenant breach
- Prepare written reports and recommendations on covenant management and enforcement and maintain detailed records
- Provide education materials and advice to Islands Trust staff, other land conservation and parks agencies, industry and the public regarding the Islands Trust Conservancy conservation covenant management practices and land protection tools, as well as the ecological and cultural values in the region.
- Assist the Manager in preparing and managing annual budget requests related to property management
- Assist the Manager in development of covenant management policies and procedures
- Plan, develop, manage and conduct public awareness and information programs, events, workshops and meetings related to conservation options and working with the Islands Trust Conservancy
- Develop, implement and evaluate landowner contact programs to inform landowners of land protection and donation opportunities, and to educate about ecological and cultural features.
- Provide reports to the Board about outreach activities.

Coop student

The student assists with the following protected area management activities:
- Review and application of management plans and conservation covenant agreements;
- Monitoring conservation covenants and nature reserves;
- Enhancing habitat for species at risk;
- Controlling invasive species;

- Liaising with conservation partners, private landowners, and First Nations;
- Collecting field notes and transcribing data;
- Supporting iNaturalist projects; and
- Processing spatial data to create and manage maps using ArcGIS.

Budget Funding Request
Short-Form Business Case

Completion of this form initiates a request to the management team, FPC, and ultimately Trust Council for allocation funding in the next fiscal year budget. The form is to be completed and submitted at the start of the decision making process. The business case forms part of the Annual Budget Process (refer to Islands Trust Council Budget Process Policy 6.3.i).

TO BE COMPLETED BY INITIATOR

Initiated by (name, title):

Clare Frater
Director, Trust Area Services

For Islands Trust Conservancy Board

Business Area:

Islands Trust Conservancy

Name of Request:
Protected Areas Manager – 1.0 FTE (Grid 27)

First Year: $104,667
Subsequent years: $123,918

This includes $96,255 for salary for 10 months and funding for training, travel, cell phone, College of Applied Biology fees and purchase of a new computer in the first year.

Budget Source (select all that apply):

☐ **Specific Project Funding** (select all that apply)
- ☐ Third Party Contractors
- ☐ Staff Travel Expense
- ☐ Staff Overtime Expense
- ☐ New Staff Member – Temporary for project
- ☐ Computer Hardware/Software

☐ **Furniture & Equipment**

☐ **Computer Hardware/Software/Supplies**

☐ **New Staff Resources** (see Staff Costing Tool)
- ☒ **Permanent**
- ☐ **Temporary**

Temp Duration: _____

☐ **Other – please describe:** _____

Date of Funding Request Submission: 01/21/2024

Funding Required for (date range): From June 2024 onwards

ISSUE/OPPORTUNITY:
The mission of Islands Trust Conservancy (ITC) is to protect special places by encouraging, undertaking, and assisting in voluntary conservation initiatives within the Islands Trust Area. ITC currently monitors and manages 34 nature reserves and 79 conservation covenants covering 706 ha and 677 ha respectively for a total of 1,383 ha. ITC increases its protected areas by approximately three per year.

Management of protected areas is becoming increasingly complex due to impacts of climate change; increased issues associated with invasive species, degraded ecosystems, and species at risk stewardship; commitments to engagement of First Nations in management activities; increases in the number of new landholders and new

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neighbours; and increasing recreation in nature reserves. ITC capacity is not keeping pace with the increases in protected area management needs. The ITC has reached or exceeded the capacity of staff to manage and monitor properties, and respond to breaches and trespasses while also working towards strategic goals and objectives set out in the Minister-approved Five-Year ITC Plan, the draft Three-Year ITC Plan (currently before the Minister of Municipal Affairs) and the Islands Trust Conservancy's Regional Conservation Plan. The ITC Board has adopted a Property Management Strategy (2017) that guides its protected area management program. Since 2014, the Board has been taking actions to put constraints on new property securement and to manage workloads carefully.

The ITC Board has a commitment to managing its lands in such a way that ecological integrity is maintained or improved over time. Ideally, this includes actively engaging in ecological management such as invasive species removal, species at risk protection, preventing or mitigating recreation damage, and addressing historic disturbances of the land. At this time, the ITC's core protected area management programs meet basic requirements of land care. The core program does not include regular ecological monitoring to determine if the ecological values protected are being sustained, there is no routine monitoring of species at risk, trail maintenance is limited to addressing serious hazards, there is limited invasive species removal, and no systematic tracking or mapping of management concerns. In recent years, through the Species at Risk program, there has been targeted efforts to monitor and restore species at risk and their habitat and this funding has helped to increase conservation values on ITC managed lands.

The ITC Board has also committed to monitoring its conservation covenants annually to ensure compliance and to monitoring its nature reserves annually for safety and trespass. The ITC Board has responsibilities to Environment and Climate Change Canada where it is the recipient of a conservation property that is an ecological gift under the *Income Tax Act*. ITC currently cares for twenty-seven ecological gifts, eighteen as covenants and nine as nature reserves. Any evidence of breach or trespass must be documented thoroughly and be addressed.

Protected area management is comprised of two main functions:

1. Protected area management which generally includes the following activities: invasive species removal, native plant and habitat restoration, exclosure fence installation and maintenance, species or habitat assessments, trail construction and maintenance, signage construction and maintenance, bat and bird box installation and maintenance, dog waste bag removal services, hazard assessments, and, as necessary and guided by policy, mitigation of hazards. In addition, staff respond to trespasses such as unauthorized tree cutting by neighbours or the Ministry of Transportation and Infrastructure and garbage dumping.

2. Annual compliance monitoring which involves contacting the landholder/partners to coordinate the monitoring visit; walking the land along established monitoring routes, including along accessible property boundaries and any trails; filling out a site monitoring form that takes into account the standard land use restrictions under a conservation covenant; taking repeat photos at established monitoring stations; documenting any ecological, compliance, and trespass concerns; and providing a final report with management recommendations, which can be followed up on by ITC, covenant co-holders/partners, and landholders as appropriate and as resources permit.

ITC has nine staff positions or 7.87 full time equivalent (FTE) staff positions (Appendix A). The Property Management Specialist, Covenant Management & Outreach Specialist, and Conservation & GIS Technician (summer co-op student, 100% grant funded) positions are dedicated to protected area management while the other positions in the organization offer support while undertaking other duties.

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Property Management Specialist:

- Develops and manages an annual monitoring program for nature reserves
- Responsible for management of Islands Trust Conservancy lands
- Conducts property monitoring to determine nature reserve management needs and investigates trespass, identifies appropriate actions and provides written investigation reports with recommendations to the Island Trust Conservancy Board
- Negotiates and manages contracts
- Develops and implements Property Management Strategy
- Identifies and evaluates public safety issues and potential risks to ecological and cultural values
- Engages volunteer wardens and community members
- Coordinate volunteer events for management tasks
- Collaborates with First Nations on property management initiatives
- Assesses need for ecological restoration, implements restoration plans and evaluates
- Evaluates management and restoration activities through monitoring and site visits

Covenant Management & Outreach Specialist:

- Develops and manages an annual monitoring program for covenants
- Conducts property monitoring to determine covenant management needs and investigates covenant compliance, investigates violations of covenants and issues of trespass, identifies appropriate actions and provides confidential written investigation reports with recommendations to the Island Trust Conservancy Board
- Implements required covenant management actions
- Collaborates with First Nations on covenant management initiatives
- Assesses need for ecological restoration, implements restoration plans and evaluates
- Prepares and presents technical information and evidence to legal counsel and attends court to provide evidence obtained during an investigation of a covenant breach
- Provides education materials and advice to the public, Islands Trust staff and other agencies regarding the Islands Trust Conservancy conservation covenant management practices and land protection tools, as well as the ecological and cultural values in the region.
- Plan, develops, manages and conducts public awareness and information programs, events, workshops and meetings related to conservation options
- Develop, implement and evaluate landowner contact programs to inform landowners of land protection and donation opportunities, and to educate about ecological and cultural features.

Cop-op Student

The student assists with the following protected area management activities:

- Review and application of management plans and conservation covenant agreements;
- Monitoring conservation covenants and nature reserves;
- Enhancing habitat for species at risk;
- Controlling invasive species;
- Liaising with conservation partners, private landowners, and First Nations;
- Collecting field notes and transcribing data;
- Supporting iNaturalist projects; and
- Processing spatial data to create and manage maps using ArcGIS.

Islands Trust Conservancy Manager

The ITC Manager provides oversight of the program including financial management, strategic planning, staff hiring/supervision, contract/procurement processes/approvals, support for policy/enforcement issues, support for engagement with First Nations, reviewing reports to the Board, etc. This takes at approximately 10 hours a

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week. Due to heavy workload demands in recent years, the Manager has been unable to take on policy analysis/development work related to protected area management. In addition to supporting the ITC Board and undertaking financial management, complex land negotiations, issues management, engagement with First Nations, participation in inter-governmental working groups, liaison with the Province's Board Resourcing Office, orientation of new Islands Trust staff to the ITC's work, and drafting of referral responses, policies and procedures, the ITC Manager oversees functions such as conservation planning, corporate/workload planning, land/covenant acquisitions, First Nations engagement, communication, strategic fund development and donation management, administration, and program delivery. The ITC Manager's workload is beyond full-time hours. It is challenging for the ITC Manager to manage a staff of eight direct reports, who span a range of specialties, and also deliver on projects such as engagement with First Nations on the Islands Trust Conservancy Plan, and corporate planning work. Recently, the ITC Manager has experienced burnout and health issues, primarily due to workload, and has required medical leave to regain health equilibrium.

There are insufficient staff hours available to manage properties to the standard expected by the Board (i.e., timely identification and addressing of trespass or covenant violations) while also doing due diligence to:

- respond to an increase in the number and complexity of ecological concerns (e.g., climate change impacts, species at risk);
- address human dimensions of conservation (e.g. First Nations engagement, addressing wildfire risks to communities); and
- accommodate new regulatory requirements (e.g. Applied Biologists Regulation)

There is also a lack of a senior policy advisor position with ITC to undertake the policy work expected by the ITC Board and Trust Council to address topics such as wildfire prevention, risk management, climate change impacts.

How We Got Here:

The following is a list of key contributing factors to the challenges faced by the ITC regarding protected area management.

Growth in Properties Requirement Monitoring and Management

The number and size of ITC protected areas has increased steadily since the establishment of ITC (see below for increase since 2004). This increase in protected areas is in accordance with ITC Plans, which are required by the *Islands Trust Act*, approved by the Minister of Municipal Affairs and have been reviewed by Trust Council. It is important to note that management effort is not directly correlated to size as some properties have trails, regular public use, specific hazards or features that require special effort, issues with trepass/breaches, are water-access only, etc.

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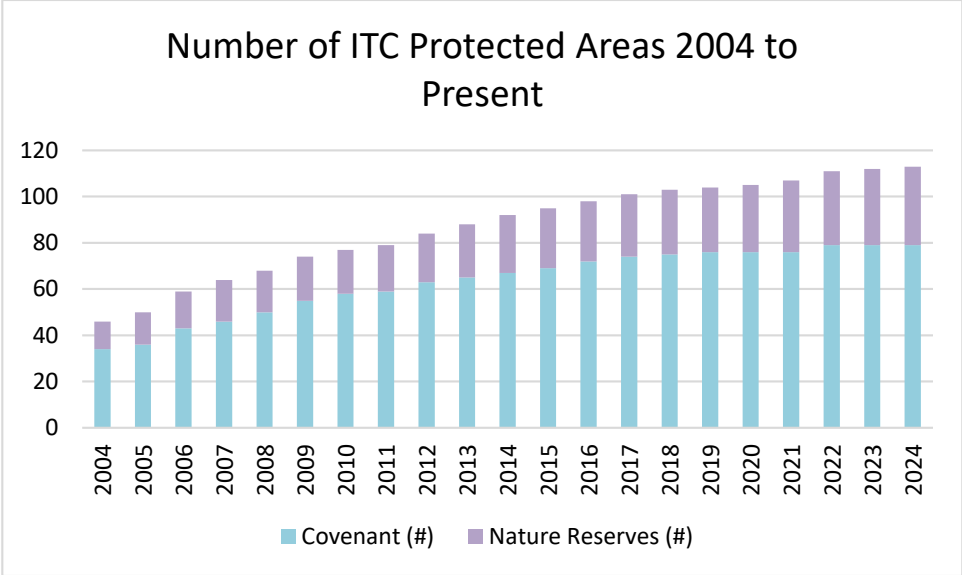

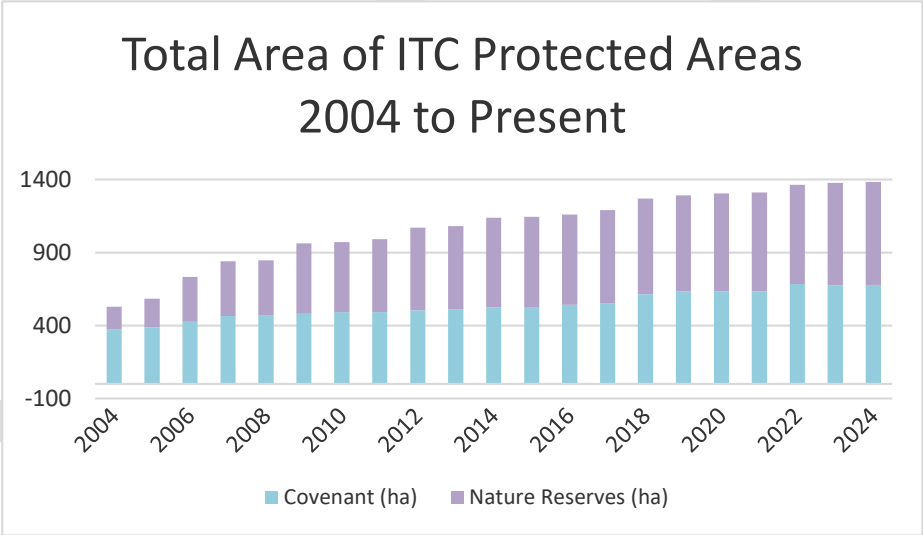

Prior Underfunding of Protected Area Management Activities
Prior to 2020, ITC property budgets increased at the request of the ITC Board without reference to an increase in number of properties or hectares of protected area or inflation. This approach led to underfunding of protected area management activities which the ITC Board addressed by successfully requesting a substantial increase to the property management budget in 2019/20. A result of the chronic underfunding there was a backlog of management activities to address, which staff are still working on.

Need for studies and actions related to climate change adaptation

- Desire to understand how protected areas will be impacted by climate change including:
  - Sea level rise
  - Changes in hydrology (i.e. freshwater inputs, levels and flows, seasonal drought)
  - Species ranges and migration and new invasive species
  - Increase/change in pests and disease
- Desire to understand wildfire risks and potential risk mitigation

Need for expansion to property management activities

- Desire for more policy development related to public safety risk management and mitigation measures (e.g. policy, signage, non-slip surface installation, tree cutting).
- New and expanding invasive species/pest infestation management needs
- Desire to more deeply involve First Nations in approval processes for new properties, management planning and management activities.
- Lack of biologist position in Planning Services (addressed by Trust Council in Dec 2023 via grant application)
- Increased procurement needs due to new provincial Applied Biologists Regulation
- Change in property owners and neighbours and a downward trend in volunteer availability
- A federal Species at Risk grant, which is funding new projects in ITC protected areas and has added to the volume of work for the ITC team.
- Insufficient GIS staff time (see details in GIS Coordinator business case)

Proposed Solution:

To address these challenges and ensure the effective delivery of protected area management services, the proposal is to add a new Protected Areas Manager position to address the service shortfall. This business case is being advanced by the Islands Trust Conservancy Board following a review of a Business Solution Options document on January 23, 2024 providing context and options for protected area management issues.

The Protected Areas Manager would report to the ITC Manager and supervise the Property Management Specialist, Covenant Management and Outreach Specialist, Species at Risk Program Coordinator and the Conservation & GIS Technician (summer co-op student). This position would take on protected area management policy analysis related to risk management and climate change adaptation including wildfire risk mitigation, would support First Nations engagement related to protected area management, and would coordinate process and technology improvements. The position would also be a Registered Professional Biologist able to supervise and approve projects as required.

PROJECTED RESULTS/DELIVERABLES:

Adding resourcing to the ITC team in the form of a Protected Areas Manager, Grid 27 level (equivalent to Islands Planner/Senior Policy Advisor) will result in the following benefits:

Reduced Risk of Burnout: An additional FTE will address the identified issue of insufficient staff hours available for the work requested and the burden it has placed on the staff.

More policy analysis capacity: A Protected Areas Manager could take on analysis and implementation planning for protected area management issues to address topics such as climate change and risk management.

Improved planning and coordinator of protected area management activities: The position would have responsibility for overall planning and coordination of management and enforcement activities.

Will free up the oversubscribed ITC Manager for other duties: This position would reduce the number of direct reports by 2 FTE and a co-op student. The Manager currently allocates about 10 hours a week to supporting protected area management.

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Adds Registered Professional Biologist (RPBio) sign off to the team

Provides an additional RPBio on the ITC staff for protected area management. Currently, the Ecosystem Protection Specialist is the only ITC staff member who meets this qualification.

Improved work environment: Introducing a Protected Areas Manager position will add needed stratification to the ITC team, fill a current policy analysis hole, and provide needed project management capacity.

RISK ASSESSMENT:

Hiring a new Protected Areas Manager to support the ITC team and Board comes with minimal risk to the organization. The main risk lies in not adequately addressing the growing demands and complexities of protected area management. Potential risks associated with hiring include challenges typically associated with recruitment, such as difficulties in finding or retaining suitable candidates.

Overall, while there are some inherent risks associated with the recruitment, the potential benefits of hiring a Protected Areas Manager outweigh these risks. Adequate measures can be taken to mitigate these risks and ensure the successful integration of the new role into the ITC team.

ALTERNATIVES CONSIDERED:

Alternative 1: Do not hire the proposed 1.0 FTE (Status Quo)
Benefits: None.

Risks: Without hiring a Protected Areas Manager the organization will face a continued lack of staff capacity to deal with overarching issues and increasing protected area management responsibilities. There is also a risk of continued staff burnout and declining morale. In addition, there is a risk that threats to visitor and community safety from property hazards and wildfire, respectively, will go unaddressed. Without new resources, or a reallocation of priorities by the ITC Board, the ITC Board will be increasingly challenged to address declining ecological health of protected areas. Without the project management capacity this position will bring to the team there is potential for exposure to litigation that may be avoidable with property management systems in place (see related business case for protected area management software). Finally, the ITC Board will likely be faced with a difficult decision regarding securement of additional conservation lands and may need to cease its nature reserve and covenant acquisitions until it has sufficient resources to manage them.

Financial implications: No immediate financial implications, however, continuing to operate in an under-resourced manner risks the costs associated with staff leaves or staff turnover, and risks possible increased future legal and enforcement costs.

Resource requirements: None - the organization will rely on existing staff and intermittent solutions, resulting in ongoing strain on resources and limited policy analysis/research capabilities for protected area management.

Alternative 2: Engage with independent contractor(s) for project-related work
Benefits: This option allows for access to specialized expertise and resources on a project-by-project basis. It provides flexibility and the ability to tap into a wider range of skills and knowledge without the long-term commitment of a permanent hire.

Risks: Risks associated with finding suitable contractors, Cost of contracts likely to be similar to a staff position, with less integration with the ITC team, and challenges in integrating external resources into the organization's work. This approach would addresses research and policy analysis for property management but not oversight

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of their components but not implementation. This approach doesn't solve the issue of the ITC Manager having too many direct reports.

Financial implications: Costs will vary depending on the scope and duration of the projects, as well as the rates charged by the independent contractors.

Resource requirements: Staff time to identify and engage with suitable contractors, manage the projects, and ensure effective collaboration and knowledge transfer.

CRITICAL SUCCESS FACTORS:

Comprehensive and accurate job description: Developing a well-drafted job description that clearly outlines the required education, skills, and qualifications is crucial for attracting suitable candidates during the hiring process. A precise job description ensures that the right talent pool is targeted, increasing the chances of finding qualified individuals who can contribute effectively to the Conservancy protected area management program.

Rigorous and well-executed hiring process: Conducting a thorough and meticulous hiring process is essential to secure high-quality staff for the Protected Areas Manager role. This process should include robust screening, interviewing, and evaluation techniques to assess candidates' suitability and compatibility with the position and organizational requirements. A well-executed hiring process enhances the likelihood of finding competent individuals who can make significant contributions.

Comprehensive orientation and on-boarding: Providing a comprehensive orientation program for the newly hired staff is crucial for enabling them to perform their duties effectively and contribute to the organization's success. Proper on-boarding ensures that new hires are equipped with the necessary knowledge, resources, and support to navigate their roles and responsibilities, increasing their ability to deliver optimal results.

Support from elected officials and management: Gaining support from Islands Trust elected officials and management is vital to secure the necessary funding and resources for the new Protected Areas Manager position. Having the backing of key decision-makers ensures the allocation of financial resources and organizational support required for the successful implementation. Without adequate support, the initiative may face financial constraints and limited resources, hampering its effectiveness and overall impact.

RECOMMENDED OPTION:

Hire a permanent Protected Areas Manager 1.0 FTE

This option provides the greatest benefit to the organization and ensures the well-being of ITC staff members. By hiring a Protected Areas Manager, the organization can access skilled resources dedicated to addressing protected area management challenges while freeing up time for theITC Manager to focus on other needed work such as First Nations engagement and corporate planning.

Benefits of this option include include:

- **Enhanced protected area management capabilities:** Hiring a permanent Protected Areas Manager allows for the development of a highly skilled protected area management team capable of meeting the organization's and the protected areas' evolving needs. This increased capacity will enable the team to tackle complex projects and deliver high-quality services to support the Islands Trust mandate.

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- **Improved job satisfaction and staff retention:** By providing the ITC team with this needed resources, job satisfaction and retention potential are enhanced. This leads to higher levels of staff engagement, motivation, and loyalty, contributing to a positive work environment.
- **Effective implementation of changes and improvements:** The Protected Areas Manager will play a crucial role in driving desired changes and improvements within the organization.

COST/BENEFIT ANALYSIS:

Quantitative Discussion:

The annual ongoing cost of hiring a permanent 1.0 FTE Protected Areas Manager is estimated at approximately $123,918, annually which includes salaries, benefits, training, and professional dues. It is important to note that costs may rise modestly each year based on potential salary increases.

Savings will be realized through the prevention of potential future staff leaves and the need for paid backfill. By providing the ITC team with appropriate work-life balance, the organization can reduce the likelihood of staff burnout and turnover. This translates to savings in terms of reduced costs for paid leave, as well as lower recruitment and training expenses associated with staff turnover. Adding this position will lead to reduced exposure to litigation that may be avoidable with a better technology systems in place (see related business case for protected area management software).

Qualitative Discussion:

Hiring a Protected Areas Manager brings qualitative benefits to the organization. Staff members with a proper work-life balance are more engaged, productive, and invested in their work. They exhibit higher levels of job satisfaction and are more likely to collaborate effectively with others, contributing to overall organizational success. Additionally, reduced turnover resulting from improved work-life balance leads to lower costs for the organization in terms of lost working hours and recruitment and training expenses. Hiring this position will also help ITC uphold the mandate to preserve and protect the Islands Trust Area.

PURCHASING PROCEDURE:

Since the hiring of staff does not fall under the procurement of goods or services, a procurement process is not applicable. Instead, a hiring process will be conducted following standard Public Service Agency (PSA) practices. This process includes drafting a job description, working with PSA to classify the position, posting the job externally, collecting and reviewing resumes, conducting skill testing, interviews, reference and criminal record checks, issuing offer letters, and providing comprehensive on-boarding and training for the new staff member. These steps ensure a thorough and compliant hiring process in accordance with established procedures.

PROPOSED IMPLEMENTATION STRATEGY:

The job description will be drafted and sent to PSA in mid-March 2024, following budget approval. The job opportunity will be posted in early May, with screenings and interviews taking place in early June 2024. The anticipated start date for the new hire is in June 2024. Comprehensive training for the new staff member will be conducted over a period of 2-3 months, ensuring they are fully equipped to fulfil their role. The true benefits of the hiring, are expected to be realized beginning in fall of 2024, with project results starting in 2025.

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STAFF RESOURCING:

Pre-hiring activities:
Islands Trust Conservancy Manager: Develop job description, including finalizing job classification. Hiring process duties: identifying suitable candidates, screening resumes, preparing and scoring screening tests, conducting interviews, conducting reference checks, and making job offer. Estimated time: 60 hours.
Employee Services Coordinator: Administer job posting, collect resumes, administer written assessments, schedule interviews, prepare offer letters, and file for criminal record checks. Total time: 5 hours.
Interview Panellists (Islands Trust Conservancy Manager + 2 others): Conduct interviews and participate in post-interview discussions. Estimated time: 2 hours per interviewee per panellist.

Post-hiring activities:
Islands Trust Conservancy Manager: Oversee and conduct training and orientation with new staff for a period of 2-3 months.
Employee Services Coordinator: Process new hire paperwork, schedule and deliver basic new hire orientation and onboarding sessions. Total time: 15 hours.
Others across the organization: Provided orientation to other departments and relevant processes over the course of 1 week.

CHANGE MANAGEMENT/COMMUNICATIONS/COLLABORATION:

The business case has been provided to the Trust management team for their information. In the event that the position receives approval, appropriate internal communications will be conducted to inform staff about the upcoming hiring process. The competition will be advertised both internally within the organization and externally on platforms such as the BC Public Service Agency job site and other relevant job portals, following standard hiring procedures. This approach ensures transparency and provides equal opportunities for potential candidates.

Clare Frater, Director, Trust Area Services	January 19, 2024
Initiator Name, Title	Date
Islands Trust Conservancy Board	January 23, 2024
Reviewed by Department Lead: Name, Title	Date

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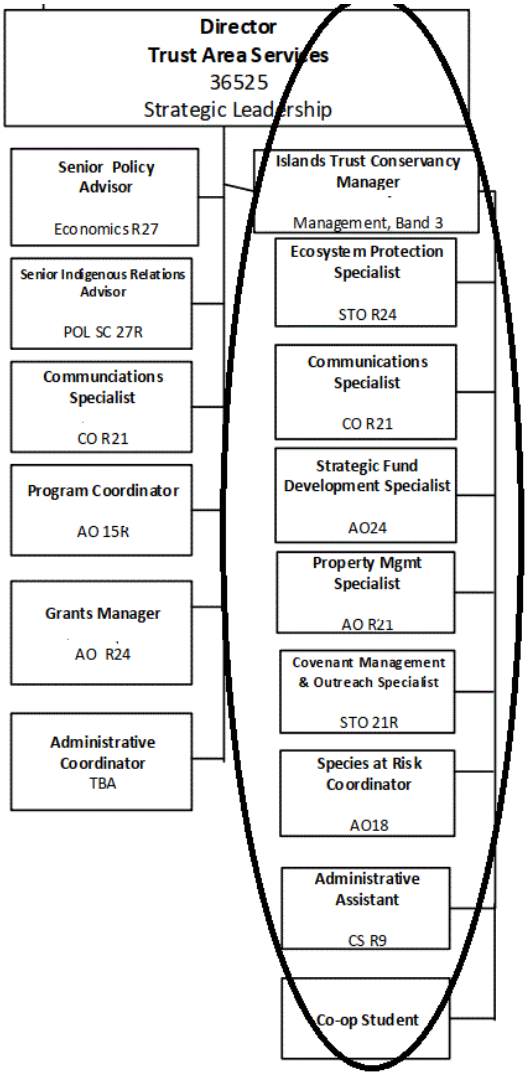
Appendix A: Organization Chart for Islands Trust Conservancy



Current ITC staff:

1. Manager
2. Ecosystem Protection Specialist (Classification level 24 (Planner 2 equivalent))
3. Communications Specialist
4. Property Management Specialist (Classification level 21 (Planner 1 equivalent))
5. Covenant Management and Outreach Specialist (position created in 2019 upon the retirement of longstanding contract monitors) (Classification level 21 (Planner 1 equivalent))
6. Strategic Fund Development Specialist
7. Species at Risk Coordinator
8. Administrative Assistant
9. Coop Student (seasonal)

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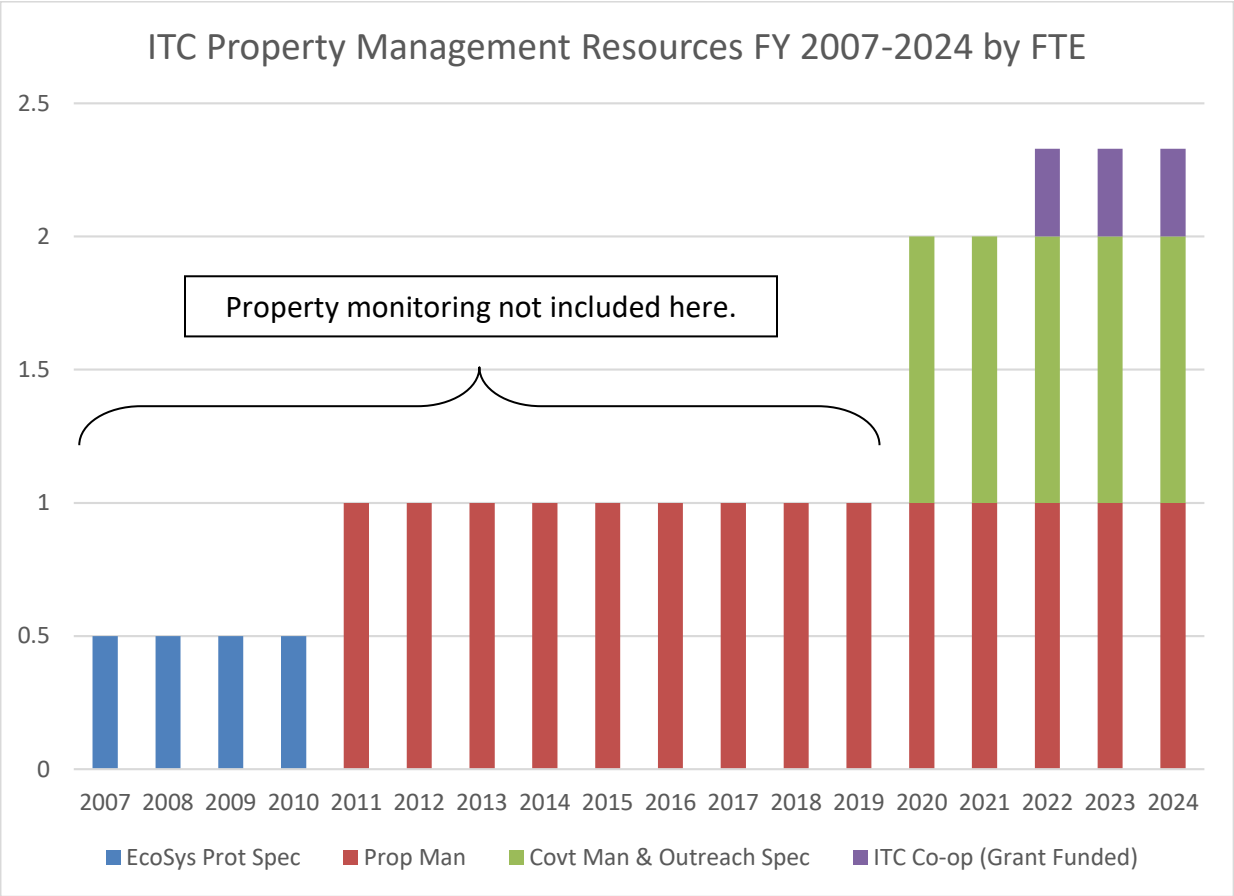
Appendix B: Protected area management staff levels since 2007



Note: Protected area management until 2011 was done by the Ecosystem Protection Specialist. In 2011, protected area management was removed from the Ecosystem Protection Specialist role. This chart does not reflect that in 2019 ITC discontinued a long-standing part-time covenant monitoring contract that represented about 0.3 FTE.

Budget Funding Request
Short-Form Business Case

Completion of this form initiates a request to the management team, FPC, and ultimately Trust Council for allocation funding in the next fiscal year budget. The form is to be completed and submitted at the start of the decision making process. The business case forms part of the Annual Budget Process (refer to Islands Trust Council Budget Process Policy 6.3.i).

TO BE COMPLETED BY INITIATOR

Initiated by (name, title): Islands Trust Conservancy Board	**Budget Source** (select all that apply): ☒ **Specific Project Funding** (select all that apply) ☒ Third Party Contractors ☐ Staff Travel Expense ☐ Staff Overtime Expense ☐ New Staff Member – Temporary for project ☐ Computer Hardware/Software ☐ **Furniture & Equipment** ☒ **Computer Hardware/Software/Supplies** ☐ **New Staff Resources** (see Staff Costing Tool) ☐ **Permanent** ☐ **Temporary** Temp Duration: _____ ☐ **Other – please describe:** _____
Business Area: Islands Trust Conservancy	
Name of Request: Protected Area Management Software **$20,000**	
Date of Funding Request Submission: 1/23/2024	**Funding Required for (date range):** April 1, 2024 to March 31, 2025. In addition, an estimated additional $7,000 per year for annual license fees for software.

ISSUE/OPPORTUNITY:

The Islands Trust Conservancy is experiencing a growth in the number of properties and the complexity of protected area management and other issues, but staff do not have adequate software to manage information about protected areas and associated management action. This proposal is to hire a contractor to assist the Islands Trust with selecting and implementing new software, and for software licencing costs. The Islands Trust Conservancy Board, following a review of a Business Solution Options document on January 23, 2024, is advancing this business case providing context and options for protected area management issues.

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No dedicated protected area management software
As a cost-efficient approach, Islands Trust Conservancy (ITC) staff have been trying to use Islands Trust's existing mapping database, *TAPIS Info*, to store, organize, and run reports on protected area management information, even though the structure and functionality of this software is cumbersome for this purpose. The software offers limited ability to record and track such basic information as landholder turnover on a covenanted property or to link management concerns or breaches to properties, and cannot generate any type of report about ITC's nature reserves or covenants without laboriously reviewing each individual file to compile information. This approach is an inefficient use of staff time, hampers quality corporate and long-term financial planning, and is negatively affecting staff morale.

In addition, Information Services staff have advised ITC staff that ITC will need to migrate to an off-the shelf database product at some point as *TAPIS Info* is not a long-term solution to ITC's key functional need for supporting ongoing property data tracking.

PROJECTED RESULTS/DELIVERABLES:

The projected results and deliverables resulting from a transition to a new protected area management database from the legacy *TAPIS Info* include:

Enhanced Protected Area Management System
The implementation of modern protected area management software will result in an enhanced protected area management program for the Islands Trust Conservancy. The new system will offer improved functionalities and capabilities, addressing the limitations of the current *TAPIS Info* application.

Expanded Reporting Capacity
New software will offer expanded reporting capabilities, allowing for more comprehensive data analysis and generating valuable insights from the available information. This will support evidence-based decision-making, and reduce wasted staff time.

Improved Efficiency and Productivity
Dedicated protected area management software will lead to improved efficiency and productivity.

Long-term Sustainability
New protected area management software will position the Islands Trust Conservancy for long-term sustainability in managing properties and covenants, and will help the Board and staff make informed decisions into the future.

RISK ASSESSMENT:

Risks	Impact	Mitigation
Unavailability of Information Systems staff Unavailability of Information Systems staff to assist with the project	**High** Medium Low	ITC staff will consult with Information Systems Manager early to plan the project and adjust project as required to accommodate other planned initiatives.
Lack of staff for procurement/contract management	**High** Medium Low	ITC staff will provide advice to the ITC Board regarding which work items to delay to accommodate contract management

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Management of procurement processes and contracts is not feasible with existing ITC staff resources		
Procurement Challenges It may be challenging to identify a contractor to assist with needs assessment, software research and selection, data migration, and staff training (including user manual) in the specialized area of protected area management for conservation areas.	**High** Medium Low	**External expertise** Staff will involve BC Bid staff to seek advice on procurement in this area. Staff will also reach out to the broader land trust movement to ask for recommendations. ITC staff will also ensure that Information Systems staff are involved in the process to ensure ongoing support needs are considered.
No off-the-shelf software options No off-the-shelf software is available to meet ITC needs	**High** Medium Low	**Delay other work** ITC staff will consider options and return to the ITC Board for discussion of next steps
Technical Challenges Implementing a new software system, can pose technical challenges during the transition phase. Data migration, system compatibility, and potential software bugs or glitches may arise, impacting the smooth functioning of the integrated system.	**High** Medium Low	**Pilot Testing and User Feedback** Conduct comprehensive pilot testing of the integrated system with a selected group of staff to identify and address technical challenges. Gathering user feedback during this phase will help refine the system before full deployment.
Staff Training and Adoption Ensuring that staff members are adequately trained and comfortable using the new integrated system is essential. Resistance to change or lack of proper training can lead to inefficiencies and reduced productivity during the initial stages of implementation.	High Medium **Low**	**Comprehensive Training Program** Develop a comprehensive training program to educate staff members on using the new integrated system effectively. Providing ongoing training and support will aid in the system's smooth adoption.
Data Security and Privacy With external software handling sensitive landowner and protected area management data, there is an increased risk of data breaches, unauthorized access, or potential privacy violations. Protecting confidential information and ensuring robust data security measures become critical.	High Medium **Low**	**Data Security Measures** Implement robust data security protocols, such as encryption, and access controls.
Cost Overruns: Software projects can be subject to unexpected costs, such as additional customization or third-party	High Medium **Low**	**Clear Project Scope and Contingency Planning** Define a clear project scope, undertake needs assessment process prior to software selection, and have contingency plans in place for potential cost overruns or delays. Regular

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integration requirements. Budget overruns could strain the financial resources allocated for the initiative.		monitoring and reporting of project progress can help identify any deviations from the plan and take corrective action.

ALTERNATIVES CONSIDERED:

Option 1: Status Quo (Do Nothing)

Benefits: No immediate financial investment required, and minimal disruption to current operations.
Risks: Continued use of the outdated, inefficient systems that present with its limitations and inefficiencies. Inability to effectively track enforcement of covenant breaches and trespasses in nature reserves which may result in inability to enforce covenants and take legal action against trespass.
Financial Implications: No direct financial costs, but potential missed opportunities for improvement and staff time savings.
Resource Requirements: No additional resources required.
Other Implications: Hindered achievement of strategic objectives related to ITC protected area management strategy and staff efficiency.

Option 2: Internal process to select software (no contracted support)

Benefits: Lower initial financial investment.
Risks: Lack of staff time to implement resulting in project delay/non-completion. Lack of staff expertise in software selection and implementation. A staff-led approach to selecting new software to recommend has been the de-facto approach for a number of years and has not resulted in success.
Financial Implications: Savings of $15,000 in proposed project budget.
Resource Requirements: 200 hours of ITC Manager time. Given that the ITC Manager's time is already over-allocated, and the Manager is required to lead engagement with First Nations on the next ITC Plan in 2024/25, this is not feasible. If a new Protected Areas Manager position is created, this position could take on the project, but would be a need to balance with a backlog of other priority Board projects waiting to be addressed. It is also unknown if this person would have the required technical knowledge for data migration.

In addition, 200 hours of ITC Manager time to participate in needs assessment and training, 70 hours from both the ITC Property Management Specialist and ITC Covenant Management and Outreach Specialist would be required to participate in needs assessment, data migration, testing and training. Approximately 5-10 hours for the Information Systems team to be responsible for system security and network access, and advising on compatibility of new software with current software. Additional time may be required for data migration.

Other Implications: Risk of inadequate process leading to selected software that may not fully address long-term needs, risking inadequate technology for future growth and challenges.

Option 3: Contracted software selection and implementation support and purchase of protected area management licence

Benefits: Dedicated resource for needs assessment, software selection, data migration and training/ documentation as well as longer-term benefits that include staff time savings, staff stress reduction, better reporting and analysis, and long-term financial planning.
Risks: As set out above.
Financial Implications: Highest initial investment, but offers highest likelihood of project success and potential cost savings in the long run.

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Cost Summary

Software Licenses & Subscriptions – 2024 estimated	$5,000
Contracted needs assessment/software selection/data migration/training/documentation	$15,000
Total	**Approx. $20,000**

Resource Requirements: 70 hours of ITC Manager/Protected Areas Manager time to procure, let and manage contract with support from Finance and Information Systems staff and a further 20 hours to participate in needs assessment and training. 70 hours from ITC Property Management Specialist and ITC Covenant Management and Outreach Specialist to participate in needs assessment, data migration, testing and training. Approximately 5-10 hours for the Information Systems team to be responsible for system security and network access, and advising on compatibility of new software with current software. Additional time may be required for data migration.

Other Implications: Aligns with strategic objectives, providing a modern and efficient solution to address current and future ITC protected area management challenges.

CRITICAL SUCCESS FACTORS:

Contractor Procurement
A knowledgeable contractor will be essential to ensuring the correct software is identified and properly customized.

User Engagement
The active involvement and engagement of system users is critical for the successful selection and implementation of the a new software system. User input, feedback, and buy-in are essential to ensure the system meets their needs and expectations.

Data Migration and Integration
The smooth migration of data from the legacy systems to the new system and seamless integration with other systems is crucial for data accuracy and system functionality.

Comprehensive Training
Adequate training for staff members on using the new system effectively is essential to maximize its benefits and ensure a smooth transition from the old systems.

Effective Change Management
A well-structured change management strategy is necessary to address potential resistance to change and ensure a positive transition for staff.

Timely Implementation
Adhering to a realistic and achievable timeline for implementation is vital to avoid delays and cost overruns and potential disruptions to ongoing land use regulation processes.

Among the identified factors, all are considered critical to the success of this initiative.

Outcomes if critical success factors are not met:

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Ineffective Use of the New System
Without a careful selection process and user buy-in, the new system may not be used to its full potential and may not be a good fit resulting in suboptimal protected area management planning and reporting and missed opportunities for improved efficiency.

Data Inconsistencies and Inaccuracies
If data migration and integration are not executed properly, the new system may lack essential historical data, leading to data inconsistencies and hindering informed decision-making.

Reduced Efficiency
Inadequate training for staff may lead to reduced efficiency in using the new system, resulting in increased administrative burden and staff stress.

Delayed Implementation
If the initiative faces significant delays in implementation, the Islands Trust may continue to suffer from the limitations of the current systems, hindering progress towards strategic objectives.

In summary, meeting critical success factors, such as user engagement and comprehensive training is essential for the successful implementation and effective utilization of protected area management information. Failure to address these factors may lead to inefficient processes, data inconsistencies, and delayed progress, hindering the achievement of the strategic goals of the Islands Trust.

RECOMMENDED OPTION:

Recommendation: Based on the evaluation of the options, the preferred choice is:

Option 3: Contracted software selection and implementation support and protected area management licence purchase

Summary of Reasons for Choosing Option 3

Comprehensive Solution
Provides a comprehensive solution that addresses all the identified issues and limitations of the current legacy systems. By opting for contracted support with all components of software selection and implementation, there is a high likelihood of success.

Streamlined Processes
Introduction of dedicated protected area management software will streamline protected area management processes and consolidate information, leading to staff time efficiencies and better reporting to Board.

Supports Improved Corporate/Financial Planning
Consolidation of information into protected area management software will assist staff to develop future budgets and long-term financial estimates. Current systems hamper data analysis/consolidation.

Mitigating Risks
While seeking and implementing new software may pose some implementation challenges, the benefits of new software outweigh these risks. Adequate planning, staff training, and change management can mitigate potential obstacles.

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In conclusion, Option 3, which involves seeking external assistance to select and implement new protected area management software offers the optimal solution to address the identified issues and opportunities. By embracing this approach, Islands Trust Conservancy will be able to continue operations, and improve protected area management while increasing staff satisfaction and providing better information to the ITC Board and Trust Council in alignment with their strategic goals.

COST/BENEFIT ANALYSIS:

Quantitative Considerations

Financial Costs:

Cost Summary

Software in Year 1	$5,000*
Contracted needs assessment/software selection/data migration/training/documentation	$15,000
Total	**$20,000**

Maintenance and Upgrades
Ongoing costs related to system maintenance, updates, and potential upgrades should be considered. Ensuring the system remains up-to-date and compatible with future requirements is essential for long-term sustainability.

Software Maintenance **$7,000*** ($5,000 year 1)

*Software costs are based on preliminary conversations with other land trusts about software options.

Financial Benefits (Savings):

Efficiency Gains
New protected area management software will lead to staff time efficiencies. In time, the TAPIS Info system can be phased out (assuming the bylaw enforcement information moves to CityView) reducing maintenance and support costs.

Qualitative Considerations

Non-Quantifiable Costs:

Learning Curve
Staff and stakeholders may require time to adapt to the new system, which could impact productivity during the initial transition period.

Change Management
The organization will need to invest in change management efforts to address resistance to change and ensure smooth adoption of the new system.

Non-Quantifiable Benefits:

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Improved Decision-Making
New data and reporting capabilities can empower decision-makers with better insights and data-driven information for strategic and financial planning.

Transparency and Accountability
The new system can enhance transparency for the protected area management program in terms of better reporting and analysis of actions/costs, leading to increased public trust in the organization.

In summary, the quantitative considerations involve financial costs and benefits, with the initial investment being the main financial concern. On the other hand, qualitative considerations encompass non-quantifiable aspects such as the learning curve, change management efforts, and the potential for improved decision-making, and transparency.

PURCHASING PROCEDURE:

The procurement of a contractor and the new software will comply with the Procurement Policy.

PROPOSED IMPLEMENTATION STRATEGY:

The roll-out of the recommended solution, which involves procuring a contractor and selecting and implementing a software solution will be executed in a phased approach to ensure smooth implementation and minimal disruptions. The specific features of the roll-out are as follows:

Phase 1: Project Planning and Preparation

- Define project scope, objectives, and deliverables.
- Appoint a project team and project manager.
- Procurement process to select contractor
- Initiate contract negotiations with the selected vendor.

Phase 2: Needs Assessment/software research process

- Contractor to conduct needs assessment interviews with select staff and Board members
- Contractor to research available software
- Recommendation and selection

Phase 3: System Configuration and Customization/Data Migration

- Contractor to work with the vendor to configure new software to meet the organization's specific needs.
- Migrate data into the new software with contractor support
- Update data to ensure that data for each property is complete
- Conduct thorough testing to ensure the module functions as intended.
- Contractor to develop user manual

Phase 4: Training and User Acceptance Testing

- Provide comprehensive training to staff members and stakeholders on using the new software effectively.
- Conduct user acceptance testing to validate the system's functionality and address any issues before the full deployment.

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Phase 5: Full System Deployment

- Roll out the new software to all relevant staff and report to Board.
- Monitor the system's performance and address any additional feedback or issues.

Phase 7: Post-Implementation Support and Optimization

- Provide ongoing support to users and address any post-implementation issues.
- Continuously optimize the system based on user feedback and evolving needs.

Timeline and Anticipated Date of Completion

The timeline for the roll-out of the recommended solution will be dependent on the procurement of a contractor, the results of the needs assessment process, and the extent of customization required for the new software. However, based on preliminary estimates the anticipated date of completion for this initiative is approximately nine months from the project initiation. It is important to note that this timeline is subject to adjustments based on unforeseen challenges that may impact the implementation process. Close monitoring and effective project management will be critical in adhering to the timeline and achieving a successful roll-out.

STAFF RESOURCING:

Staff Resources Needed for the Initiative include:

Project Manager – ITC Manager (and/or ITC Protected Areas Manager if approved)

- The project manager will oversee the entire implementation process, including planning, coordination, and monitoring.
- Will participate in needs assessment and training.
- Hours Required: Approximately 90 hours throughout the project.

Property Management Specialist and Covenant Management and Outreach Specialists

- Will support the needs assessment and data migration.
- Will participate in needs assessment and training.
- Will participate in testing, provide feedback, and validate system improvements.
- Hours Required: Approximately 70 hours each throughout the project.

Information Systems Team (Technical Staff)

- The Information Systems team will be responsible for system security and network access, and advising on compatibility of new software with current software.
- Hours Required: Approximately 5-10 hours throughout the project. (Additional time may be required for data migration.)

Total Estimated Staff Hours: 240 hours.

Assessment of Expected Staff Hours

While the project will demand a significant amount of staff time from already fully-subscribed staff members, this is resolved somewhat if a new Protected Areas Manager position is created and filled. Ultimately, the project will result in increased staff efficiency and productivity.

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CHANGE MANAGEMENT/COMMUNICATIONS/COLLABORATION:

Concerns and Mitigation Strategies

Change Resistance
The introduction of a new system and optimized workflows may encounter resistance from staff members accustomed to the existing processes. To address this concern, there will be clear, regular communications about the project, and a comprehensive training program will be developed to build staff confidence in using the new system.

Training and Support
Adequate training and support for staff and end-users will be vital to ensure a smooth transition to the new system. A comprehensive training program will be developed as part of the service contract to equip staff with the necessary skills to utilize the database. The contractor will provide a user manual to provide ongoing support.

Communication and Collaboration Strategies

Needs Assessment Session
A Needs Assessment Session will be organized to gather input from protected area management and information services staff. These sessions will provide a platform for open dialogue, allowing staff to express their needs, concerns and suggestions, and fostering a sense of ownership in the initiative.

Regular Progress Updates
Regular progress updates will be communicated to all staff and the Board to keep them informed about the status of the implementation. This will include milestones achieved, any changes to the project plan, and upcoming activities. Transparent communication will foster trust and ensure that staff and the Board are well-informed.

Change Champions
Identifying change champions within the organization who are enthusiastic about the initiative and can advocate for its benefits will be instrumental in overcoming resistance and promoting buy-in among staff members. These champions will serve as role models and provide support during the transition. Given the current challenges, and the number of years they have persisted, it is expected that protected area management staff and Information Services staff will be enthusiastic champions and participants.

Collaborative Decision-Making
Encouraging collaborative decision-making will ensure that all perspectives are considered in the customization of the software.

Identification of Other Stakeholders

In addition to the protected area management staff, the following groups may also be involved:

Information Systems Department
The Information Services department will play a crucial role in providing advice and technical support, and assisting with data migration as needed.

Finance Department

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The Finance Department may be involved in budget and contract planning and financial approvals related to the initiative.

Leadership Team
The management team's support and buy-in will be critical for the success of the initiative.

An inclusive and well-coordinated approach to change management, communication, and collaboration will facilitate a smooth and successful implementation of long-awaited protected area management software.

Clare Frater, Director, Trust Area Services	January 17, 2024
Initiator Name, Title	Date
Islands Trust Conservancy Board	January 23, 2024
Reviewed by Department Lead: Name, Title	Date

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BRIEFING

To:	**Islands Trust Conservancy Board**	**For the Meeting of:**	January 23, 2024
From:	**ITC staff**	**Date Prepared:**	January 12, 2024
SUBJECT:	**Status report on mapping and technical needs, challenges and strengths**		

PURPOSE: To report on the status of Islands Trust Conservancy (ITC) mapping and technical needs, challenges, and strengths, to inform ITC-EC joint meetings.

BACKGROUND:
At its November 21, 2023 meeting, the ITC Board discussed upcoming joint meetings with the Islands Trust Executive Committee. Recognizing that geographic information systems (GIS) and other information technology (IT) are shared resources, the ITC Board passed the following resolution to assist with discussions about ITC access to GIS and IT resources:

> ***ITC-2023-038***
> ***It was MOVED and SECONDED,***
> *that the ITC Board request staff to provide a report on the status of mapping and technical needs, challenges and strengths, in time for the January 23, 2024 Board meeting.*

ITC relies on GIS and other IT resources to support its core activities, including conservation planning, property monitoring and management, development of communications products, grant reporting, and annual reporting. ITC's responsibilities are growing with increases in ITC protected areas and increasingly complex land management challenges, such as climate change impacts, species at risk protection, and First Nations engagement. This growth in responsibilities has exposed significant limitations in the mapping and technical supports available to ITC. Over the past five years, the GIS and Information Services department has been unable to meet the needs of ITC. In particular, ITC needs for in-the-field technology have not been successfully addressed and the project to migrate development application information to *CityView*, did not consider the implications for long-term ITC property management data storage.

The Islands Trust Executive Committee has been advised of the capacity shortfall in GIS and has submitted a Business Case to Trust Council for a GIS Coordinator position (see attached - note the business case includes Appendix A outlining Islands Trust Conservancy emerging GIS needs). The ITC Board indicated support for this new staff position at its October 3, 2023 meeting:

> ***ITC-2023-030***
> ***It was MOVED and SECONDED,***
> *that the Islands Trust Conservancy Board indicate to Financial Planning Committee and the Islands Trust Council that it is supportive of increased staff capacity for Geographical Information Systems (GIS) in the Trust Council budget as low GIS capacity is impacting the work of the Islands Trust Conservancy.*

Mapping and Technology Challenges

Collection and Recording of ITC Spatial Data[1]

Since 2019, when the property monitoring function was brought in house, ITC staff have worked with Information Services staff to trial and annually improve in-the-field hardware and software applications to support data collection. Field staff are now equipped with iPads that function as a GPS and are loaded with ESRI's *Field Maps* software. *Field Maps* has a customizable interface which ITC staff use to collect data in the field, with a view to using collected data to later efficiently and accurately populate monitoring and staff reports. *Field Maps* has the ability to significantly increase efficiency and effectiveness of data collection for both ITC staff and contractors (e.g. by standardizing categories, map symbols, and information collected for any given feature, by eliminating the need for paper survey forms; etc). However, for the last five years, Information Services staff have not had the capacity to fully implement *Field Maps* with ITC staff. ITC staff therefore continue to rely on paper forms to record monitoring information, which is inefficient. The current approach also risks the information being less accurate which presents two main risks:

1. If the ITC Board needs the Court to rule on a trespass/ enforcement matter, the Court may deem the information insufficient; and,
2. Safety concerns in Nature Reserves may not be accurately located or tracked.

Solution: ITC needs access to GIS Coordinator staff time to work with ESRI contractors to customize and fully implement *Field Maps* software.

ITC Access to Spatial Data

Access to mapping hardware and software[2] and data storage is restricted to members of the Information Services department: ITC staff cannot directly access, view, quality control, map, or analyse data. With the transition to digital field data collection, ITC staff are able to view data they collect on properties but have very limited ability to manipulate or analyse this information. With limits to capacity in the Information Services department, and restrictions on access, ITC staff have been frequently been hampered in their ability to view and analyse their data in a timely manner.

In 2022, ITC introduced GIS responsibilities for its summer co-op student, and this allowed for training in, and limited access to, Islands Trust's mapping hardware and software by this temporary ITC team member. While the co-op student was able to address ITC's day-to-day mapping needs, their term was too short to address long-standing issues. (To address this situation temporarily, Species at Risk Program funding was reallocated to a temporary GIS Technician position for December 2023-March 2024 to assist with the backlog of ITC mapping work).

Solution: ITC needs GIS staff time permanently allocated to ITC programs to address data access needs.

Lack of Property Management Database

ITC is without a property management database. As a cost-efficient approach, Staff once used Islands Trust's existing mapping database, *TAPIS Info*, to store, organize, and run reports on property management information, even though the structure and functionality of this database was cumbersome for this purpose.

In 2020, ITC and Information Services staff began a database improvement process. This project was later abandoned before completion due to Information Services staffing changes and reduced capacity, leaving *TAPIS Info* dysfunctional for ITC property managers/covenant monitors for several years.

[1] Spatial data is any type of data that is directly linked to a geographical location. For example, ITC's spatial data includes locations and information about invasive species, trails, covenant breaches, wildlife trees, and rare species habitat.

[2] Computers with the necessary software and power to run the mapping programs, and also the associated licenses for individual staff.

Islands Trust's new *CityView* software will replace the development application tracking functions of *TAPIS Info* and in 2024/25 Trust Council may fund transition of bylaw enforcement information out of *TAPIS Info*.

Information Services staff have advised ITC staff that ITC will need to migrate to an off-the shelf database product at some point as *TAPIS Info* is not a long-term solution to ITC's key functional need for supporting ongoing property data tracking. It will not be practical to maintain ITC's information in *TAPIS Info* as the software offers limited ability to record and track such basic information as landholder turnover on a covenanted property or to link management concerns or breaches to properties, and cannot generate any type of report about ITC's nature reserves or covenants without laboriously reviewing each individual file to compile information. This is an inefficient use of staff time, hampers quality corporate and long-term financial planning, and is negatively affecting staff morale.

ITC is also without a streamlined reporting process for property monitoring and management projects. The current process of filling paper forms in the field followed by manual transcription of paper to digital forms is time-consuming and inefficient. Monitoring photos are collected with relative ease using *Field Maps*, but the photo captioning, download, storage, and presentation processes are error-prone, time consuming and inefficient. Currently ITC and Information Services staff have not had the capacity to explore technology solutions for a paperless, streamlined, automated, and integrated reporting process.

Solution: Procure and implement new property management software appropriate to ITC's needs.

<u>Mapping and Technology Strengths</u>
Islands Trust has GIS and data storage systems in place that have served ITC well over many years. The content of these systems can be used and built upon to ensure that ITC needs are met.

Staff in IS and at ITC are keen to develop systems that work. There have been annual improvements and learning opportunities through field technology development that has occurred to date:

- Staff has invested considerable time itemizing needs and consulting staff at other land trusts about the mapping and technology systems. This information could inform a needs assessment and selection of improved tools.
- Staff have developed a system to standardise data collection by staff and contractors (e.g. defined categories and display for features on a property) and the system had undergone initial testing during current Management Plan development.
- Staff have begun liaising with ESRI to improve utility of *Field Maps*.

A further strength is that this is an opportune time to develop new and improved GIS and information technology resources:

1) As *CityView* replaces TAPIS Info, and *Nation Builder* replaces *SalsaCRM* as a contact management database, there is a need to source property management software that fills the gaps in terms of storage of property management information.
2) Executive Committee has advanced a business case for increasing capacity in mapping services by re-establishing a GIS Coordinator position.
3) ITC staff are currently preparing the next four-year Work Plan for implementing the second half of the current Regional Conservation Plan, detailing actions and priorities for 2024-2027. The on-going work planning includes addressing core technological constraints. Actions and objectives can be adjusted according to realistic timelines for addressing these limitations.
4) Now that ITC has collected five years of its own monitoring data, staff have a strong familiarity with collected data and a strong desire to visualise and analyse this data to inform securement and property management processes.
5) ITC currently has additional GIS support with the temporary GIS Technician position, funded through the ITC Species at Risk Program, and the team member in that role has experience both of ITC's fieldwork and digital technology needs and current platforms.

Mapping and Technology Needs

ITC is in need of allocated resources for the following needs:

- Creation of maps for communications and reporting
- Set-up and trouble-shooting for data collection used in field work, and processing the data collected for use in the office
- Review of new external data, and maintenance and updates of existing data, including Terrestrial Ecosystem Mapping, shoreline and marine mapping, species at risk occurrence mapping, and protected areas mapping
- Statistical information for annual reports and grant reports
- Training and support for data collection and safety devices that are used in the field

Moreover, the ITC needs process improvement, complex spatial analyses, and technology solutions, such as:

- Training and support for mapping software (e.g. *ArcPro, ArcGIS Online/Arc Portal*, etc.), so that ITC staff can attend to basic mapping needs, such as analysing spatial information, and creating maps for conservation planning, property management, and communications
- Integration of ITC-generated data into internal mapping systems for use by staff including the development of the replacement for *TAPIS Map* and *MapIT* (external version of *TAPIS Map*)
- Updates to spatial data requirements for contractors to improve the accessibility and consistency of the data generated for ITC
- Assistance with sourcing new software and hardware for property management, such as:
    - a new property management database to replace *TAPIS Info*, which will be phased out;
    - field data reporting applications; and
    - a more accurate GPS device.
- Design, training and support of in-the-field tools that assist ITC staff and contractors to more effectively and efficiently collect data, including set up of GPS data collection and associated apps, syncing of in-the-field data collection apps and internal reporting systems
- Ability to view and utilize data from external bodies (e.g. carbon storage potential and ecosystem niche shifting projections)

ATTACHMENT(S):

1. Budget Funding Request, Short-Form Business Case: GIS Coordinator – 1.0 FTE

FOLLOW-UP: Staff suggest that the ITC Board discuss the following with the Executive Committee:

1) Allocation of 40-50% of the GIS Coordinator time to conservation projects and ITC programs, including ITC staff training and tech support,
2) Inclusion of a conservation GIS skill set in the job description for the GIS Coordinator position and review of the job description by ITC staff,
3) Allocated time in 2024/25 and 2025/26 from Information Services to assist with selection and implementation of a software solution for ITC property information (should the Board vote to advance a business case for new software).

Prepared By: Jemma Green, Covenant Management & Outreach Specialist
Kathryn Martell, Ecosystem Protection Specialist
Nuala Murphy, Property Management Specialist

Reviewed By/Date: Kate Emmings, ITC Manager / January 15, 2024
Clare Frater, Director, Trust Area Services / January 15, 2024

Budget Funding Request
Short-Form Business Case

Completion of this form initiates a request to the management team, FPC, and ultimately Trust Council for allocation funding in the next fiscal year budget. The form is to be completed and submitted at the start of the decision making process. The business case forms part of the Annual Budget Process (refer to Islands Trust Council Budget Process Policy 6.3.i).

TO BE COMPLETED BY INITIATOR

Initiated by (name, title):

Mark van Bakel
Senior Technical Analyst
Information Systems

Business Area:

Administrative Services

Name of Request:
GIS Coordinator – 1.0 FTE
Salary range $ 85, 000

Budget Source (select all that apply):

☐ **Specific Project Funding** (select all that apply)
- ☐ Third Party Contractors
- ☐ Staff Travel Expense
- ☐ Staff Overtime Expense
- ☐ New Staff Member – Temporary for project
- ☐ Computer Hardware/Software

☐ **Furniture & Equipment**

☐ **Computer Hardware/Software/Supplies**

☐ **New Staff Resources** (see Staff Costing Tool)
- ☒ **Permanent**
- ☐ **Temporary**

Temp Duration: _____

☐ **Other – please describe:** _____

Date of Funding Request Submission: 6/21/2023

Funding Required for (date range): From April 2024 onwards we are requesting an additional $70,000 - $80,000 per year for annual salary.

ISSUE/OPPORTUNITY:
The Islands Trust is experiencing a growth in Geographic Information Service (GIS) needs and a corresponding reduction in GIS dedicated personnel which requires attention. Given that the Senior Technical Analyst (Information Service Manager) position has migrated to a general information services management function at a loss of approximately an .3 FTE of dedicated GIS support, the organization is left with 1.0 FTE, the Technician, to provide all GIS services. There has also been a concurrent increase in GIS service needs across the organization due to volume and complexity of land use applications, long range project mapping needs and Conservancy services. As a result GIS services are becoming overwhelmed and require additional staffing resources. This proposal is to add a new GIS Coordinator position to address the service shortfall.

The Islands Trust currently has 1 FTE functionally dedicated to the provision of GIS services at the Islands Trust, that being the GIS Technician. The Islands Trust is facing challenges due to the overwhelming demand for GIS services and limited GIS Staff resources and support, which is resulting in overload of the GIS Technician. In the absence of a dedicated GIS Coordinator, GIS Analyst or Computer Application Support Technician (CAST) support, the GIS Technician has been compelled to take on the responsibilities of the GIS Coordinator alongside their own duties, as summarized below.

GIS Technician:

- Spatial datasets edits.
- General mapping/cartographic tasks.
- Consolidation of bylaw amendments.
- Mailing list and subject property map product development.
- Maintenance of digital and hard copy map archives.
- Small scale project execution (i.e. Subdivision potential map development)
- Plotter maintenance and supplies management.
- Annual updating of ITC mapping for brochures.

GIS Coordinator:

- Implementation and administration of GIS Server and Desktop software environments.
- Design and implementation of GIS spatial databases.
- Imagery acquisition planning, quality assurance and archive data processing and implementation.
- Assist with recruitment of and provide training for ITC GIS Coop students.
- Design, development and implementation of parcel data (i.e. PMBC) maintenance strategies.
- Data alignment workflow (i.e. Zoning and Protected Areas) development.
- Management of data sharing with outside agencies and individuals.
- BC Assessment and Land Title Office data maintenance.
- GIS License and user account administration.
- Advanced GIS modelling (i.e. SQL, ESRI Model Builder, Python).
- ITC Field data collection system design strategies, implementation, and administration.
- Web map application (i.e. MapIT, Projected Places) development.
- Development and Implementation of spatial data metadata standards (i.e. source, acquisition date, methodology).
- Prioritization of day-to-day GIS activities.
- Monitoring of GIS trends and standards.

The list of GIS Coordinator and Technician duties demonstrates a wide range of responsibilities and skill sets required for effective GIS operations. The duties of a GIS Coordinator involve strategic planning, system administration, staff recruitment, and advanced GIS modelling, among others. These tasks require a higher level of expertise and a focus on system-wide management. On the other hand, the GIS Technician duties involve cartographic/mapping tasks, spatial data editing, and day-to-day operational support. Combining both roles places an excessive workload on the technician, compromising the quality and efficiency of both the coordination and technical aspects of GIS operations. There has also been a significant increase in the amount of GIS work required by:

- Planners associated with applications
- Long range projects
- Enquiries
- Islands Trust Conservancy

GIS services constitute a wide range of service requests from simple mapping requests, to OCP and land use projects to the array of Conservancy mapping needs. The volume of requests for these services has increased in recent years, both in volume and complexity. For instance, for mapping service requests, which is only one element of mapping services, the following trend has been identified:

2019 – 29 per month
2020 - 42 per month
2021 – 47 per month
2022 – 55 per month
2023 – 70 per month

This increase in volume, which only reflects a portion of GIS needs/utilization at the Islands Trust, indicates an increase in service delivery is required.

To address these challenges and ensure the effective delivery of GIS services, it is recommended that additional full time equivalent GIS resources are acquired. This would re-establish a clear division of responsibilities between a GIS administration and mapping, address volume issues, deliver proper management, effective support, and optimal utilization of resources. This role will alleviate the burden on the GIS Technician, allowing them to focus on their core responsibilities and ensuring attention to detail, timely delivery, and effective development of GIS based map products. The GIS Coordinator will further enhance quality control and assurance, improve productivity and performance, and provide essential support for the increased demand for GIS services.

How We Got Here:

The following is a list of key contributing factors to the challenges faced by GIS staff resources. These factors are further visualized in Appendix B, which illustrates the interplay between these factors and their impact on GIS resource availability.

Coop Funding Discontinued: A 2008 GIS Staff Resource Assessment recommended that the Islands Trust would benefit from 2.5 dedicated GIS staff, indicating that the existing staff required additional resources. An annual Co-op position was established as a means of addressing the 0.5 FTE shortfall, however it was discontinued in 2019..

Creation of Senior Technical Analyst (IS Manager): In response to the 2016 KMPG Information Systems Assessment Report, which highlighted the need for greater project management focus and improved oversight and management of the IS group, the position of GIS Coordinator was transformed into a newly created role under the PSA classification of Senior Technical Analyst, serving as IS management. At the time the justification for this transition was supported by a stable GIS server and software infrastructure and the availability of Senior Technical Analyst, Coop and CAST staff resources.

CAST Support: In 2019 Nigel Hughes, a two term GIS Co-op student, accepted a position as Computer Application Support Technician, while continuing to provide GIS support through to his departure in 2020. Although the position was successfully filled the recruit does not possess the same GIS experience and is therefore unavailable to provide GIS support.

Platform Upgrades: In 2018 major upgrades of the Islands Trust GIS infrastructure were began, with the replacement of ArcGIS Server with ArcGIS Portal, and ArcGIS Desktop with ArcGIS Pro. The infrastructure changes were implemented by the GIS Technician, highlighting the technician's ability to handle complex and administrative level tasks but at the expense of their primary responsibilities.

IS Project Demands: The Senior Technical Analyst's project management demands, such as the Victoria office renovation, hybrid meetings and workforce, and the Islands Trust website, have further reduced available GIS resources.

ITC Project Demands: A move to in-house property monitoring, both the monitoring of current properties and the Expansion of ITC protected areas and increased needs from other ITC programs (e.g. conservation modelling, expanding natural area datasets, introduction of a Species at Risk Program, etc.) has led to increased GIS project demands, amplifying the strain on existing GIS resources. See Appendix A for a more detailed description of emerging GIS needs.

Increased Development Applications: The 2021 peak in development applications nearly doubled the previous 10-year average, intensifying the need for robust GIS support, at a time when GIS resources were being cut (i.e. GIS Coop Funding) or refocused (i.e. IS Project Demands).

Staff Growth: Since 2008, the staff count has increased from 52 to 70 in 2023. The steady growth in staff numbers within the organization has resulted in an increased demand for IS support. Consequently, this growth has placed additional strain on available GIS resources by limiting the availability of Senior Technical Analyst GIS support.

GIS Technician Backfilling: The backfilling strategy undertaken by the GIS Technician has enabled the successful implementation of GIS infrastructure upgrades. However, it is important to acknowledge that this approach, while providing temporary relief, serves as a short-term and intermittent band-aid solution. It does not adequately address the underlying issue of limited resources nor does it offer a sustainable solution to effectively meet the growing demand for GIS services.

Demand for Higher Level Services: The increasing GIS administration requirements, coupled with growing GIS project demands, have placed a significant burden on the GIS Technician. In addition to their primary responsibilities as a GIS Technician, they are now also supporting a rising demand for higher-level GIS administrative and analyst service requests. It is evident that this dual role arrangement is not sustainable and has adverse effects on both the technician's well-being and the overall quality of GIS services provided.

PROJECTED RESULTS/DELIVERABLES:

Adding resourcing to the IS team in the form of a GIS Coordinator will result in the following benefits:

Reduced Risk of Burnout: An additional FTE will address the identified issue of overwhelming demand for GIS services and the burden it has placed on the GIS Technician.

Enhanced GIS data quality and reliability: Appointment of a dedicated GIS Coordinator will allow the GIS Technician to focus on their primary responsibilities, resulting in expanded attention to detail and better service delivery outcomes.

Streamlined GIS service requests and support: The GIS Coordinator will establish efficient workflows and systems to handle GIS service requests from staff across the organization. This will reduce response times, provide timely assistance, and ensure that GIS support is effectively provided to meet the needs of different business units.

Improved GIS project management: The GIS Coordinator will bring a project management focus to GIS initiatives, ensuring that projects are well-planned, executed, and monitored. This will result in more effective and efficient project delivery, with improved timelines, resource allocation, and stakeholder communication.

Strengthened GIS data governance and quality control: The GIS Coordinator will implement robust data governance practices, including data validation, documentation, and version control. This will ensure the integrity of GIS data, minimize errors, and improve overall data quality and consistency.

Enhanced GIS capacity: With more time, GIS staff will have the opportunity to prioritize GIS skill development, fostering a more capable GIS team. This will enable them to effectively address GIS-related challenges and provide comprehensive support for the organization's GIS needs.

Improved coordination of GIS activities: The GIS Coordinator will serve as a central point of contact for GIS-related matters, facilitating collaboration and coordination among different teams and stakeholders. This will foster efficient information sharing, promote interdisciplinary collaboration, and ensure that GIS activities align with organizational objectives.

RISK ASSESSMENT:

Hiring a new GIS Coordinator to support the GIS team comes with minimal risk to the organization. The main risk lies in not adequately addressing the growing demands for GIS services. Potential risks associated with hiring a new GIS Coordinator include challenges typically associated with recruitment, such as difficulties in finding or retaining suitable candidates.

Overall, while there are some inherent risks associated with the recruitment, the potential benefits of hiring a GIS Coordinator outweigh these risks. Adequate measures can be taken to mitigate these risks and ensure the successful integration of the new role into the GIS team and IS Group.

ALTERNATIVES CONSIDERED:

Option 1: Do not hire the proposed 1.0 FTE (Status Quo)
Benefits: None.
Risks: Without hiring a GIS Coordinator, the organization will continue to face limitations in effectively managing GIS resources and addressing GIS-related challenges. This includes insufficient support for GIS projects and services, lower quality deliverables, and missed opportunities for leveraging GIS capabilities. The organization may experience inefficiencies, reduced GIS effectiveness, and hindered decision-making.
Financial implications: No immediate financial implications, but the organization will continue to face resource limitations and potential costs associated with inadequate GIS support.
Resource requirements: None - the organization will rely on existing staff and intermittent solutions, resulting in ongoing strain on resources and limited GIS capabilities.

Option 2: Reallocate IS Coordinator resource following staff members Retirement
Benefits: Reallocating the IS Coordinator resource to GIS would result in an increase in GIS staff resources without adding an additional staff member to the IS Group. This reallocation would provide immediate support to the growing demands for GIS services and projects within the organization.
Risks: By reallocating the IS Coordinator resource to GIS, there is a potential risk of diminished IS capacity. This could result in reduced support for information systems, infrastructure maintenance, and overall IT management. The organization may need to rely more heavily on third-party contracted support, such as Blackman Support Services, which can lead to increased costs and potential challenges in maintaining consistent service levels.

Financial implications: The financial implications of this option would depend on the specific arrangements made with Blackman Support Services or any other third-party contractor. It may result in increased costs for IT support and services.
Resource requirements: None - the organization will rely on existing staff and third party contactors.

Option 4: Engage with independent contractors for project-related work
Benefits: This option allows for access to specialized expertise and resources on a project-by-project basis. It provides flexibility and the ability to tap into a wider range of skills and knowledge without the long-term commitment of a permanent hire.
Risks: Risks associated with finding suitable contractors, potential for higher hourly rates compared to hiring a permanent staff member, and challenges in integrating external resources into the organization's workflow.
Financial implications: Costs will vary depending on the scope and duration of the projects, as well as the rates charged by the independent contractors.
Resource requirements: Staff time to identify and engage with suitable contractors, manage the projects, and ensure effective collaboration and knowledge transfer.

CRITICAL SUCCESS FACTORS:

Comprehensive and accurate job description: Developing a well-drafted job description that clearly outlines the required education, skills, and qualifications is crucial for attracting suitable candidates during the hiring process. A precise job description ensures that the right talent pool is targeted, increasing the chances of finding qualified individuals who can contribute effectively to the GIS initiative.

Rigorous and well-executed hiring process: Conducting a thorough and meticulous hiring process is essential to secure high-quality staff for the GIS role. This process should include robust screening, interviewing, and evaluation techniques to assess candidates' suitability and compatibility with the position and organizational requirements. A well-executed hiring process enhances the likelihood of finding competent individuals who can make significant contributions to the GIS initiative.

Comprehensive orientation and on-boarding: Providing a comprehensive orientation program for the newly hired staff is crucial for enabling them to perform their duties effectively and contribute to the organization's success. Proper on-boarding ensures that new hires are equipped with the necessary knowledge, resources, and support to navigate their roles and responsibilities, increasing their ability to deliver optimal results in the GIS initiative.

Support from elected officials and management: Gaining support from Islands Trust elected officials and management is vital to secure the necessary funding and resources for the new GIS position. Having the backing of key decision-makers ensures the allocation of financial resources and organizational support required for the successful implementation of the GIS initiative. Without adequate support, the initiative may face financial constraints and limited resources, hampering its effectiveness and overall impact.

RECOMMENDED OPTION:

: Hire a permanent GIS Coordinator 1.0 FTE

This option provides the greatest benefit to the organization and ensures the well-being of staff members involved in GIS operations. By hiring a GIS Coordinator, the organization can access skilled resources dedicated to addressing GIS-related challenges and driving improvements within the organization.

Benefits of Option 2 include:

- **Enhanced GIS capabilities:** Hiring a permanent GIS Coordinator allows for the development of a highly skilled GIS team capable of meeting the organization's evolving GIS needs. This increased capacity will enable the team to tackle complex projects and deliver high-quality GIS services to support the Islands Trust mandate.
- **Improved job satisfaction and staff retention:** By providing the GIS Technician with a dedicated GIS Coordinator, job satisfaction and retention potential are enhanced. This leads to higher levels of staff engagement, motivation, and loyalty, contributing to a positive work environment.
- **Effective implementation of changes and improvements:** The permanent GIS Coordinator will play a crucial role in driving desired changes and improvements within the organization. With a dedicated resource focused on GIS operations, the organization can effectively implement new strategies, technologies, and processes that will benefit the organization as a whole.

COST/BENEFIT ANALYSIS:

Quantitative Discussion:

The annual ongoing cost of hiring a permanent 1.0 FTE GIS Coordinator is estimated at approximately $108,000, annually which includes salaries, benefits, training, and professional dues. It is important to note that costs may rise modestly each year based on potential salary increases.

Savings will be realized through the prevention of potential future staff leaves and the need for paid backfill. By providing the GIS Technician with appropriate work-life balance, the organization can reduce the likelihood of staff burnout and turnover. This translates to savings in terms of reduced costs for paid leave, as well as lower recruitment and training expenses associated with staff turnover.

Qualitative Discussion:

Hiring a permanent GIS Coordinator brings qualitative benefits to the organization. Staff members with a proper work-life balance are more engaged, productive, and invested in their work. They exhibit higher levels of job satisfaction and are more likely to collaborate effectively with others, contributing to overall organizational success. Additionally, reduced turnover resulting from improved work-life balance leads to lower costs for the organization in terms of lost working hours and recruitment and training expenses.

PURCHASING PROCEDURE:

Since the hiring of staff does not fall under the procurement of goods or services, a procurement process is not applicable. Instead, a hiring process will be conducted following standard Public Service Agency (PSA) practices. This process includes obtaining approval to reinstate the currently vacant position, reviewing the job description and classification, posting the job externally, collecting and reviewing resumes, conducting skill testing, interviews, reference and criminal record checks, issuing offer letters, and providing comprehensive on-boarding and training for the new staff member. These steps ensure a thorough and compliant hiring process in accordance with established procedures.

PROPOSED IMPLEMENTATION STRATEGY:

To ensure immediate relief from resource challenges, it is advisable to continue to support GIS Technician backfilling. This will help alleviate the workload and provide temporary support until the new staff member is hired and fully on-boarded.

The hiring process will be initiated in mid-March 2024, following budget approval, with screenings and interviews taking place in April 2024. The anticipated start date for the new hire is in May 2024. Comprehensive training for the new staff member will be conducted over a period of 2-3 months, ensuring they are fully equipped to fulfil their role. The true benefits of the hiring, including improved GIS resources, are expected to be realized by the fall of 2024.

STAFF RESOURCING:

Pre-hiring activities:
Senior Technical Analyst: Coordinated the backfilling of the GIS Technician role to ensure immediate relief from resource challenges during the hiring process. This includes identifying suitable candidates, screening resumes, conducting interviews for the backfill position, and making the necessary arrangements for the backfill. Review and update existing GIS Coordinator job description for new staff, screen applicant resumes, prepare and mark written assessments, conduct interviews, conduct reference checks, and make job offers. Estimated time: 40 hours.
Employee Services Coordinator: Administer job posting, collect resumes, administer written assessments, schedule interviews, prepare offer letters, and file for criminal record checks. Total time: 5 hours.
Interview Panellists (Senior Technical Analyst + 2 others): Conduct interviews and participate in post-interview discussions. Estimated time: 2 hours per interviewee per panellist.

Post-hiring activities:
Senior Technical Analyst: Oversee and conduct training and orientation with new staff for a period of 2-3 months.
Employee Services Coordinator: Process new hire paperwork, schedule and deliver basic new hire orientation and onboarding sessions. Total time: 15 hours.
Others across the organization: Provided orientation to other departments and relevant processes over the course of 1 week.

CHANGE MANAGEMENT/COMMUNICATIONS/COLLABORATION:

The business case has been provided to the Trust management team for their consideration and support. In the event that the position receives approval, appropriate internal communications will be conducted to inform staff about the upcoming hiring process. The competition will be advertised both internally within the organization and externally on platforms such as the BC PSA job site and other relevant job portals, following standard hiring procedures. This approach ensures transparency and provides equal opportunities for potential candidates.

Initiator Name, Title	Date
Reviewed by Department Lead: Name, Title	Date

REVIEWED BY MANAGEMENT TEAM:	
Date received:	**Accepted by Management:** ☐ **YES** ☐ **NO**

Next steps:

- If accepted by management:
  - the business case will be forwarded to FPC for review in October of each year.
  - the funding for the request will be included in Draft 1, Version 1 of the budget which is reviewed by FPC in October of each year, and the business case forwarded to FPC.
- If not accepted by management:
  - the business case will be forwarded to FPC for information in October of each year, but not included in the budget draft.

Appendix A: Islands Trust Conservancy Emerging GIS Needs

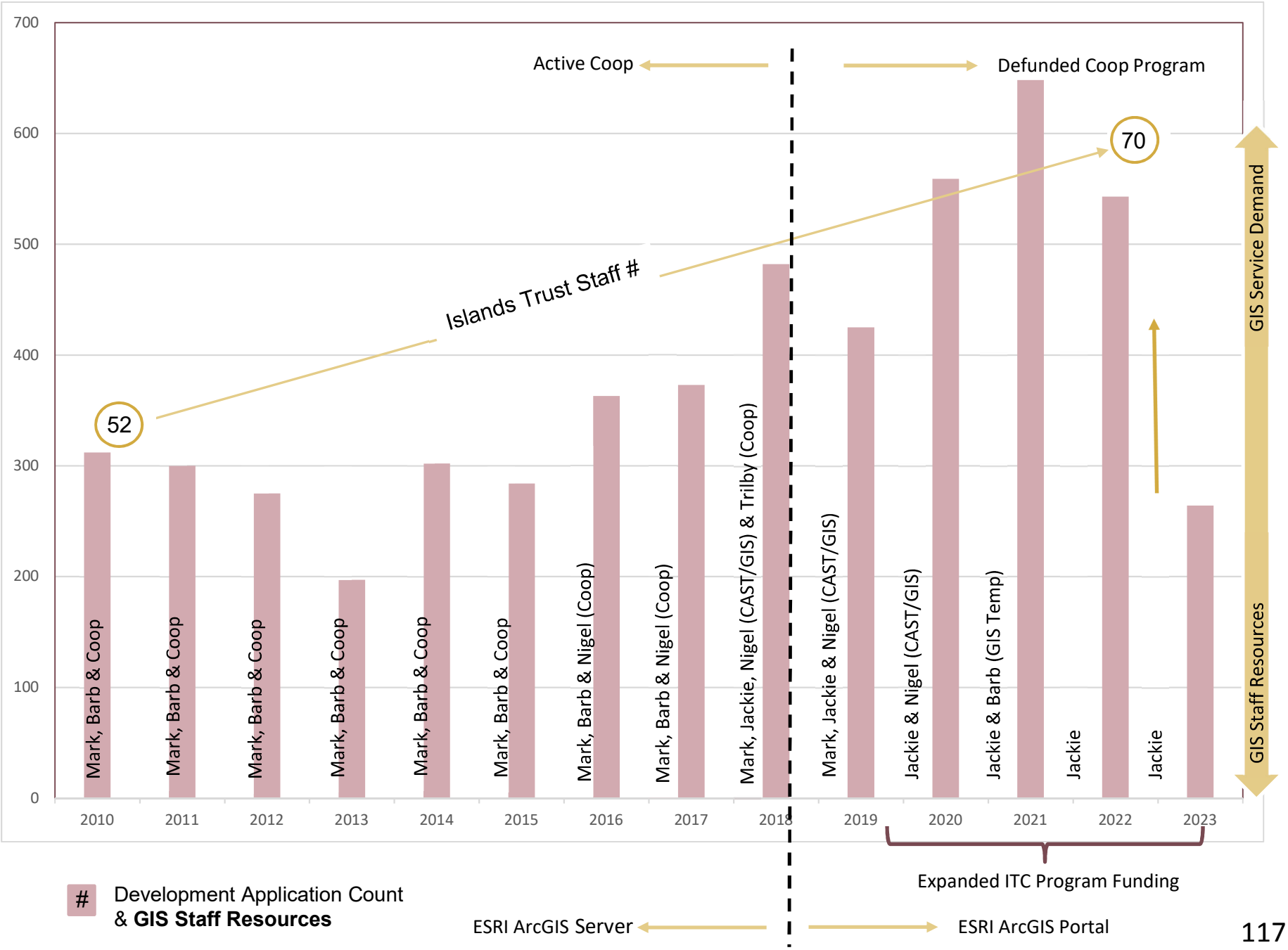
Islands Trust Conservancy (ITC) uses GIS resources to assist with conservation planning, communications products, grant reporting, annual reports and property management needs. As ITC responsibilities grow, due to increases in protected areas and expanding needs such as Climate Change, species at risk management and First Nations engagement, so have ITC's GIS needs. GIS support from Islands Trust Information Systems (IS) is integral to ITC's work and ITC increasingly leans on IS for technology solutions and day-to-day support for the following:

- Creation of mapping for communications and reporting
- review of new data and maintenance and updates of existing data, including Terrestrial Ecosystem Mapping, shoreline and marine mapping, species at risk occurrence mapping, and protected areas mapping
- Integration of Islands Trust Conservancy sourced data into internal mapping systems for use by staff (i.e. TAPIS)
- Data analysis for communications, conservation planning and property management
- Statistical information for annual reports and grant reports
- Business analysis to assist with sourcing new software and hardware for property management
- Training and support for safety devices that are used in the field
- Design, training and support of in-the-field tools that assist ITC staff and contractors to more effectively and efficiently collect data, including set up of GPS data collection and associated apps, syncing of in-the-field data collection apps and internal reporting systems
- Training and support for ArcPro, ArcGIS Online, and other mapping software, so that we can become more self-sufficient when it comes to creating maps

As ITC grows its protected areas and programs, it is clear that IS no longer has the resources to support ITCs increasing GIS needs. ITC is hopeful that solutions can be found to support service gaps that we are experiencing as the ITC work program grows.

-Kate Emmings
Manager, Islands Trust Conservancy

Appendix B: Contributing Factors to GIS Staff Resources Challenges



ISLANDS TRUST CONSERVANCY

Public Acquisitions Update
January 23, 2024

Property Name and Island	Date (yyyy/mm/dd)	Notes
PUBLICLY CONSIDERED PRIVATE LAND ACQUISITIONS		
Crystal Mountain (Galiano) 18.3 ha.	2017/11/21	ITC previously considered a conservation covenant proposal and land transfer proposal for this property.
	2017/11/21	**TFB-2017-031: It was MOVED and SECONDED,** that the Trust Fund Board accept the updated Conservation Proposal from the Crystal Mountain Society, agreeing to accept transfer of approximately 18.3 hectares of Lot 9, District Lot 90, Galiano Island, Cowichan District, Plan 31200, (PID 000-851-035) and part of Lot A, District Lots 88 and 89, Galiano Island, Cowichan District, Plan VIP68079, (PID 024-351-041), subject to: 1. The release of the rent charge and related easements on the title of Lot A and any other charges determined, through legal review, to be problematic for the Trust Fund Board; 2. Establishing legal access for the Trust Fund Board to the most eastern part of Lot A; 3. Receipt of $30,000 upon transfer of the land, with at least $15,000 to be held in a pooled Nature Reserve Management Fund, and $10,000 to $15,000 to be put towards the development of a management plan and management activities for the nature reserve; 4. Staff reaching mutual agreement with the water license holders to limit the impact of accessing and maintaining the permitted water works; 5. Agreement with the Society that the portion of the proposed Emergency Access over the nature reserve would be used only in the case of emergency; 6. Written agreement with the Society about the use and maintenance of the pagoda; 7. Installation of boundary and corner pin markers at the time of survey at the expense of the applicant (locations to be determined in consultation with ITF staff); and 8. Final approval of the Trust Fund Board of the final survey plan, transfer agreement and all other associated agreements.
	2019/07/24	Received subdivision proposal plan from the planning department.
	2020/09/08	Applicant provided a revised proposal to the Galiano Island Local Trust Committee.
	2020/12/10	File transferred to TAS Director Frater due to declared conflict of interest by ITC Manager, Kate Emmings.
	2021/01/28	ITC Staff met with applicant. An application update is anticipated for the May ITC Meeting.
	2021/05/25	Update provided to ITC Board.

Crystal Mountain (Galiano) 18.3 ha.	2021/05/25	**ITC-2021-019: It was MOVED and SECONDED,** that the Islands Trust Conservancy Board accept the updated approximate lot configuration proposed by the Crystal Mountain Society, subject to staff assessment that adjusted lot boundaries meet ITC conservation goals and policies, based upon a site visit and review of any necessary additional ecological information from the applicant. **ITC-2021-020: It was MOVED and SECONDED,** that the Islands Trust Conservancy Board accept the Crystal Mountain Society proposal to register a Statutory Right of Way across Lot A on the upper ridge, in favour of Islands Trust Conservancy, to provide legal access to the eastern part of Lot A via the legal easement across neighbouring Lots B and C. **ITC-2021-021: It was MOVED and SECONDED,** that the Islands Trust Conservancy Board express support for the Crystal Mountain Society proposal to alter the lot boundaries of Lot 9 and Lot 10, prior to land transfer to Islands Trust Conservancy, to remove the pagoda from the proposed nature reserve, subject to staff assessment that adjusted lot boundaries meet ITC conservation goals and policies, based upon a site visit and review of any necessary additional ecological information from the applicant **ITC-2021-022: It was MOVED and SECONDED,** that the Islands Trust Conservancy Board request that the Crystal Mountain Society update the Ecological Inventory report and other relevant documents to reflect the proposed boundary changes, prior to transfer of the land. **ITC-2021-023: It was MOVED and SECONDED,** that the Islands Trust Conservancy Board accept the Crystal Mountain Society proposal to register a Statutory Right of Way for emergency access on Lot A in favour of the Capital Regional District prior to subdivision, subject to Crystal Mountain Society's working with ITC staff to develop an appropriate agreement.
	2021/07/07	Staff site visit scheduled.
	2021/07/21	Follow-up staff visit to discuss lot boundary options.
	2022/02/09	Applicant and staff discuss coordinating a visit from a Cultural Knowledge Holder.
	2022/08/16	Meeting with applicant to discuss their meeting with Penelakut Elders and leadership.
	2022/11/24	Meeting with applicant's agent to discuss potential co-management relationship with Penelakut.
	2023/02/01	Applicant's agent provided update on process of fulfilling ITC Board's requirements; continuing discussion with staff about engagement with Penelakut Tribe and other Indigenous community members.
	2023/05/06	Penelakut Tribe has requested greater consultation around subdivision and bylaw. ITC work on hold.
Current Total ITC Acquisitions:		**34**

ISLANDS TRUST CONSERVANCY

PUBLIC COVENANTS UPDATE
January 23, 2024

NAPTEP COVENANTS		
28 NAPTEP Covenants on title, 3 NAPTEP covenants in progress		
Property	**Date**	**Notes**
Koontz NAPTEP Covenant Gabriola Island (~2.5 ha)	2023/02/08	Application received. Staff report and RFD in this package.
	2023/05/30	**ITC-2023-017: It was MOVED and SECONDED,** that the Islands Trust Conservancy Board approve the conservation proposal submitted by Yarrow Koontz, to place a NAPTEP covenant on approximately 2.5 ha of Gabriola Island, PID: 005-788-447, That Part of Lot 3, Section 5, Gabriola Island, Nanaimo District, Plan 6986, Lying to the North West of a Road Dedication by Plan 17829, Except those parts in Plans 21783 and 26145, to protect wetlands, maturing forest, and sensitive riparian and cliff habitats.
	2023/06/12	Staff informed applicant of Board decision.
	2023/07/07	Application referred to First Nations.
	2023/08/18	First Nations referral window ended. Only one response has been received, indicating no comments regarding this application.
	2023/09/14	Referred for information to Gabriola Island Local Trust Committee. No comments received.
	2023/09/27	Application for tax exemption approved by Trust Council (resolution number pending)
	2023/10/05	Phase II next steps correspondence sent to landholder.
	2023/10/19	Site visit to determine covenant area boundaries.
	2023/10/23	Applicant submitted request to have NAPTEP fees sponsored by EC. Staff working to add to November EC meeting
	2023/10/26	Submitted expression of interest for funding support from Ecological Gifts Program.
	2023/11/22	Executive Committee approved sponsorship of NAPTEP Application: **EC-2023-120** **It was MOVED and SECONDED**, that Executive Committee approve financial sponsorship of $450 for Natural Area Protection Tax Exemption Program (NAPTEP) application GB-NAP-2023.1 (Koontz), Gabriola Island.
	2023/12/08	Applicant requested ITC support in arranging Priority Agreement with mortgage holder. Ongoing. Further work negotiating and drafting covenant is on hold pending agreement from mortgage holder.
	2023/12/15	NAPTEP Phase I fee refund cheque mailed to applicant.
	2023/12/22	ITC staff worked with GaLLT to secure Ecological Gifts Program funding for covenant area survey; procurement process underway (contract will be directly with Environment & Climate Change Canada). Survey work planned for January.

Larmour NAPTEP Covenant Salt Spring Island (2.45 ha)	2021/10/15	Application received.
	2022/01/24	**ITC-2022-003: It was MOVED and SECONDED,** that the Islands Trust Conservancy Board approves the conservation proposal submitted by Rodney Polden, on behalf of Skye Larmour, to donate a 2.45 ha NAPTEP covenant on Salt Spring Island, over a portion of Lot 1, Section 87, South Salt Spring Island, Cowichan District, Plan VIP 27894, PID: 000-138-452, to protect mature forests, wetlands, and connectivity to other protected areas, and advise the applicant that ITC will defer this securement project until late 2022/early 2023 due to staff capacity constraints.
	2022/02/04	Staff informed applicant of Board decision.
	2023/02/09	Staff initiated discussion with ALC about providing approval for placing NAPTEP covenant on non-ALR portion of the property.
	2023/04/21	Site visit to discuss next steps and details with landowner and applicant. Staff to begin negotiating covenant as soon as capacity permits, and submit application for Trust Council approval.
	2023/06/30	Application referred to First Nations. Requested response date is August 18th, 2023.
	2023/08/18	First Nations referral window ended. Responses were received from two First Nations, one of whom indicated that they do not have any comments to provide regarding this application; and the another who requested a copy of the baseline inventory report when it is completed.
	2023/09/14	Referred for information to Salt Spring Island Local Trust Committee. No comments received.
	2023/09/27	Application for tax exemption approved by Trust Council (resolution number pending)
	2023/10/05	Phase II next steps correspondence sent to landholder.
	2023/10/30	Submitted expression of interest for funding support from Ecological Gifts Program.
	2023/11/27	Applicant submitted request to have NAPTEP fees sponsored by EC.
	2023/12/20	Executive Committee approved sponsorship of NAPTEP Application: **EC-2023-131: It was MOVED and SECONDED,** that the Executive Committee approve financial sponsorship of $450 for Natural Area Protection Tax Exemption Program (NAPTEP) application SS-NAP-2021.1 (Larmour), Salt Spring Island.
R. Leader NAPTEP Covenant Salt Spring Island (3.54 ha)	2020/06/16	Application received.
	2020/11/24	**ITC-2020-039: It was MOVED and SECONDED,** that the Islands Trust Conservancy Board approve the conservation proposal submitted by Robert Leader to place a NAPTEP covenant on approximately 5 ha on Salt Spring Island, PID: 000-395-081, LOT 2, SECTION 72, SOUTH SALT SPRING ISLAND, COWICHAN DISTRICT, PLAN 36292 Except Plan 40974

	2020/12/02	**TC-2020-112: It was MOVED and SECONDED**, that the Islands Trust Council request the Secretary issue a Natural Area Protection Tax Exemption Certificate for the covenanted portion of the property described as 'Lot 2, Section 72, South Salt Spring Island, Cowichan District, Plan 36292 Except Plan 40974, Parcel Identifier 000-395-081' subject to registration of a conservation covenant and completion of a baseline inventory report consistent with the standards developed for NAPTEP.
	2020/12/15	Referred for information to the Salt Spring Island Local Trust Committee. No comments received.
	2021/04/08	Phase II application fee received
	2021/04/12	ITC staff discussion with TLC about discharging existing covenant on the property. Ongoing.
R. Leader NAPTEP (cont.)	2021/04/26	ITC staff approves contractor to conduct baseline inventory. Work underway.
	2021/05/04	ITC staff discussion with SSIC about discharging existing covenant on the property. Ongoing.
	2021/05/11	First covenant draft sent to landowner for review.
	2021/05/14	Draft covenant sent to TLC and SSIC for their Board to review as part of their discussions about discharging the existing covenant these organizations co-hold on the property. ITC staff to participate in upcoming Board meetings of these organizations to provide invormation about NAPTEP and this proposed covenant.
	2021/05/14	Request for legal advice about impact of clause in existing covenant, restricting ability to place additional easements on the property.
	2021/05/22	Staff participate in TLC Board meeting to provide background information about NAPTEP program and discuss details of this application for a NAPTEP covenant to replace or be placed in addition to existing TLC / SSIC covenant.
	2021/05/28	Received legal counsel that the existing covenant contains no restrictions on ability to place NAPTEP covenant on the property.
	2021/06/16	Discussion with landowner about rights and restrictions in the draft covenant. Ongoing.
	2021/07/05	SSIC and TLC agree to discharge existing covenant subject to registration of NAPTEP covenant. SSIC has requested becoming co-covenant holder for NAPTEP covenant.
	2021/07/29	Landowner begins discussions with mortgage provider about granting priority to the Covenant and Rent Charge. Ongoing.
	2021/09/09	ITC received and accepted final baseline inventory report.
	2022/01/21	Staff called to discuss need to get mortgage provided to grant priority to the Covenant. Followed up with email to credit union representative.
	2022/02/21	No response from credit union, informed landowner and indicated that they will need to pursue this issue.

R. Leader NAPTEP (cont.)	2022/09/26	Staff emailed to remind landowner that NAPTEP application expires December 2nd and enquire about progress with mortgage provider. Landholder discussed issue with credit union account manager and forwarded request for ITC staff to follow-up.
	2022/09/28	Staff contacted credit union account manager via email and left phone message.
	2022/11/05	Staff left follow-up phone message for credit union account manager.
	2022/12/06	Trust Council passed the following resolution: **It was Moved by Trustee Yates and Seconded by Trustee Patrick,** That the Islands Trust Council extend the timeline for issuing the Natural Area Exemption Certificate for Natural Area Protection Tax Exemption Program application SS-NAP-2020.3 (Salt Spring Island) until December 2024.
	2023/01/01	Ongoing discussions with credit union and landowner about priority agreement.
	2023/07/28	Staff contacted applicant to discuss next steps; left phone message, no response received.

REGULAR COVENANTS

52 regular covenants on title, 0 public regular covenants in progess, 1 in-camera covenant in progress.

Property	Date	Notes
None		

ITC NATURE RESERVES WITH COVENANTS OUTSTANDING

9 ITC Nature Reserves are without covenants, 1 ITC Nature Reserve covenant in progress.

Property	Date	Notes
Fairyslipper Forest Nature Reserve Thetis Island (16.6 ha)	2018/03/20	ThINC Board approves resolution to hold a covenant on Fairyslipper Forest.
	2018/03/21	CCLT Board approves resolution to hold a covenant on Fairyslipper Forest.
	2018/04/03	TFB approves negotiation of conservation covenant in favour of ThINC and CCLT.
	2018/04/06	ITC template covenant sent to partners. Trail relocation is needed before finalizing baseline report.
	2018/10/13	Hosted Management Plan Open House on Thetis Island.
	2019/02/22	Draft management plan and baseline report sent to ThINC and CCLT staff for review.
	2019/05/21	ITC Board approves management plan with minor revisions.
	2019/06/12	ThINC Board approves revised management plan.
	2019/09/26	CCLT Board approves revised management plan. Management Plan posted to the ITC website.
	2020/02/03	Trail relocation completed by contracted trail builder, Penelakut youth and volunteer labour. A Statutory Right of Way is required from the adjacent property where the trailhead and parking area are planned.

	2020/03/19	ThINC is working with the Thetis Island Residents and Ratepayers Association to obtain a trail license over adjacent private lands for access and parking for the Fairyslipper Forest Nature Reserve.
	2020/07/14	Adjacent landowner signs Trail Licence Agreement with TIRRA (Thetis Island Residents and Ratepayers Association). Staff continues to work with owner to develop permanent legal access.
	2022/04/25	Adjacent landowner extends Trail Licence Agreement with TIRRA.
	2022/06/06	Staff discussed proposed conservation covenant with ThINC, agreement to defer. Staff will reengage with adjacent landowner to discuss more formal access arrangement.
	2022/07/27	Adjacent landowner wishes to continue with informal access agreement. Staff will continue with current access and will consider varied trail options as part of the covenant negotiations.
	2022/10/04	ITC Board rescinds resolution directing staff to negotiate a statutory right of way and related section 219 covenant with adjacent landowner.
	2023/05/30	Staff re-initiated discussion about access arrangement with adjacent landowner. Numerous efforts to set up phone call or (preferred) site visit to discuss options; unable to set meeting.
Total	**80 covenants registered**	

Islands Trust Conservancy Expenditure Tracking 2023-2024

GL	Description	Approved Budget	Islands Trust Contribution	SAR Grant	Total Available	Spent	Remaining	% Remaining	Committed Funds
50700-210	Admin. Support	$ 326,086	$ 326,086	$ -	$ 326,086	$157,568	$ 168,518	52%	*$ 168,518*
54500-210	Communications	$18,000	$11,700	$6,300	$ 18,000	$7,350	$ 10,650	59%	*$ 5,000*
56500-210	Contract Services	$2,500	$2,500		$2,500	$2,500	$ -	0%	$ -
61100-210	Board Honoraria	$ 7,000	$ 7,000		$ 7,000	$4,400	$ 2,600	37%	*$ 2,000*
61200-210	Board Meeting Expense	$ 1,425	$ 1,425		$ 1,425	$636	$ 789	55%	
61210-210	Board Training & Conferences	$ 1,600	$ 1,600		$ 1,600	$961	$ 639	40%	
61300-210	Property Management	$159,930	$102,430	$57,500	$ 159,930	$58,041	$ 101,889	64%	*$ 78,997*
61500-210	Cons Planning / Land Securement	$26,550	$9,550	$ 17,000	$26,550	$3,046	$ 23,504	89%	$ -
61600-210	Ecosystem Mapping	$ 18,000	$ 13,800	$ 4,200	$ 18,000	$0	$ 18,000	100%	$ -
63000-210	Legal	$ 20,000	$ 20,000	$ -	$ 20,000	$25,562	$ (5,562)	-28%	*$ 5,100*
67500-210	Memberships	$1,800	$1,800		$ 1,800	$630	$ 1,170	0%	*$ 691*
73001-210-8062	Project: ITC Plan First Nations Engagement	$ 10,000	$ 10,000		$ 10,000	$ -	$ 10,000	0%	$ -
75100-210	Salaries	$ 578,225	$ 448,225	$ 130,000	$ 578,225	$373,699	$ 204,526	35%	*$ 204,526*
75110-210	Benefits	$ 146,869	$ 146,869		$ 146,869	$94,795	$ 52,074	35%	*$ 52,074*
79500-210	Subscriptions	$400	$400		$ 400	$170	$ 230	58%	$ -
80300-210	Mobile Devices	$ 3,290	$ 3,290		$ 3,290	$2,012	$ 1,278	39%	*$ 753*
81300-210	Training & Conferences	$ 4,200	$ 4,200		$ 4,200	$2,383	$ 1,817	43%	*$ 1,139*
81305-210	Travel for Training (staff)	$ 2,500	$ 2,500		$ 2,500	$2,108	$ 392	16%	*$ 600*
82300-210	Travel	$ 20,000	$ 15,000	$ 5,000	$ 20,000	$23,060	$ (3,060)	-15%	$ -
		$ 1,348,375	$ 1,128,375	$ 220,000	$ 1,348,375	$758,920	$ 589,455	44%	*$ 519,399*

	Restricted Funds	Opening Balance	Revenue	Total Available	Spent	Remaining	Committed Funds
0012 8820-622	Alton Maintenance Account	$ 107,798	$ 8,706	$ 116,504	$ 6,273	$ 110,231	*$ 1,065*
	Ruby Alton Endowment Fund	$ 139,760	$ 749	$ 140,509		$ 140,509	
0012 8820-614	Opportunity Fund	$ 100,216	$ 26,347	$ 126,562	$ 12,950	$ 113,612	*$ 8,400*
0012 8940-624	Covenant Mgmt and Defence Fund	$ 118,894	$ 2,893	$ 121,787		$ 121,787	
	Property Management Fund	$ 10,936	$ 266	$ 11,202		$ 11,202	
0012 8820-681	Lasqueti Island Acq Fund	$ 30,465	$ 710	$ 31,175		$ 31,175	
	Link Island Removal Fund	$ 36,708		$ 36,708		$ 36,708	
	Western Screech Owl Project	$ 25,049	$ 759	$ 25,807	$ 11,920	$ 13,888	*$ 2,302*
	Gambier Island Acq Fund	$ 127,190	$ 2,120	$ 129,310		$ 129,310	
0012 8960-158	Morrison Waxler Legacy Fund	$ 15,081	$ 271	$ 15,353	$ 4,417	$ 10,936	
0012 8944-844	Thetis Island Acq Fund	$ 1,335	$ 32	$ 1,368		$ 1,368	
0012 8820-649	McFadden Creek	$ 21,886	$ 470	$ 22,356	$ 1,260	$ 21,096	