Islands Trust

Local Planning Services Review Report

November 2007

To go fast, go alone;

To go far, go with others

African expression

Effective: 26 November 2007

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Executive Summary

This report is intended to provide the Islands Trust Council with an understanding of the reasons why the Local Planning Services unit is not currently providing optimal levels of service and to make recommendations that will improve service delivery. The process of improving service delivery is nothing short of a cultural change in our workplace and will require an ongoing commitment to improvements as well as some immediate structural changes to the Local Planning Services (LPS) work group. Through answering a series of questions from the Islands Trust Terms of Reference for A Focused Review of Local Planning Services this report provides a detailed analysis of the issues challenging service delivery.

Conclusions

The conclusions reached in this report are;

- All three Regional Planning Managers have been very courageously covering off 3, and at times 4, Island Planner responsibilities to the detriment of service to the assigned LTCs and the management of their regions. (This is the major oversight of the Stantec report and the reason for Stantec's comment that the LPS unit is "management heavy" when in fact it is "planner light");

- Bylaw enforcement was not well managed due to confusion about lines of responsibility, not well coordinated across the Islands Trust Area and not utilized for its inherent skills and knowledge in the coordination of litigation matters. (The Stantec Report did not mention bylaw enforcement nor litigation);

- The Geographic Information System sub-unit was reporting to the improper Director and is now reporting directly to the DLPS to ensure full integration with land use planning service in the LPS unit and coordination through the DLPS to the Director of Trust Area Services to help advance the conservation objectives of the Trust Fund Board; and

- The recent filling of all Islands Trust senior management positions will better serve the LPS unit, and the Islands Trust in general.

- The LPS unit is not meeting the needs of the LTCs;

- The concerns received during this review are generally common across all LTCs;

- The more populous local trust areas have experienced a greater amount of Development Management workload than other less populous local trust areas with a resultant greater impact on Community Planning;

- The dominance of Development Management workloads has adversely impacted the advancement of the unique provincial mandate of the Islands Trust;

- Current service delivery does not meet acceptable standards;

- Current resource levels are not sufficient to meet the expectations of the LTCs;

- Staff workloads are not equitably distributed;

- Job descriptions are not appropriate; and

- The LPS unit does not need a major re-organization but does require determination and/or clarification of lines of responsibility.

Recommendations

The recommendations submitted in this report are;

Operational

- The LPS unit Continuous Improvement Process must be supported and sustained as a major assurance of excellent service delivery;

- The LPS unit organizational structure be based upon improving service delivery through optimization of a Regional Team approach in three regional offices with an internal mix of geographic and functional assignment of work;

- The Thetis Island Local Trust Area should be moved to the Northern region;

- The three regional offices should remain in their current locations;

- A small LPS unit administrative office be established in Nanaimo;

- Regional offices;

    - Use appropriate performance measures to celebrate successes, identify poor service delivery and improve through applied learning;
    - Be open and operational five days a week;
    - turn off automated answering machines during normal working hours;
    - dedicate more resources to optimize web sites through more frequent and appropriate postings; and
    - allocate laptop computers and personal digital assistants (i. e; Blackberries) to appropriate staff.

- Island Planners work within their assigned Local Trust Areas one day a week, or as determined;

- Appropriate performance measurements be established in the LPS unit t o ensure ongoing service delivery improvements, acknowledgement and celebration of successes and to facilitate an appropriate allocation of resources and costs in the future;

- Development application fees be reviewed after performance measurements for Development Management are in place for an appropriate period of time; and

- Trust Area wide planning projects be managed through appropriately funded and resourced internal working groups with an appropriate mix and number of skilled staff members under the guidance of an assigned RPM, possibly with external service provider assistance, and reporting to the Trust Council through the LPC.

Structural

- The LPS unit organizational structure have five sub-units consisting of the Northern, Central, Southern, GIS and Compliance;

- The LPS unit staffing be augmented as follows;

    - Northern region;
        - two Island Planners;\
        - a full time Office Assistant; and
        - one half of an Office Assistant (in conjunction with the Compliance sub-unit);

    - Central region;
        - one Assistant Planner; and
        - a full time Office Assistant

    - Southern region:
        - one Assistant Planner

  - GIS sub-unit; no staffing increase; and

  - Compliance sub-unit; one half of an Office Assistant (in conjunction with the Northern region).

- Annual operating funds equivalent to half of a GIS Technician salary be allocated for additional GIS work;

- Annual operating funds equivalent to half of a staff ecologist salary be allocated for scientific specialty support in the LPS unit, while leaving the existing staff ecologist position dedicated to the Trust Area Services unit;

Implementation

Many of the above noted recommendations do not require additional funds or human resources to implement and will commence upon approval of this report. However, the implementation of recommended staff increases will require additional funds and as such must be integrated into the annual budgeting process of the Islands Trust. The report details four sequential levels of implementation to allow this integration and clearly communicate the cost and benefits of the approval of each level. The report recommends implementation of levels 1 and 2 in fiscal year 2008/2009 and levels 3 and 4 in fiscal year 2009/2010. The levels are summarized as follows;

Level 1 ($92,630 total increase cost)

1.1 Southern Region – Assistant Planner ($52,630)
Service Improvement: an enhanced inquiry & application processing service and an increased workload capacity for Southern Region Island Planners

1.2 Trust Area – Environmental Science Services ($40,000)
Service Improvement: an enhanced environmental expertise to advance the Islands Trust object

<u>Level 2 ($268,000 total incremental cost)</u>

2.1 Northern Region – Island Planner ($67,151)
Service Improvement: a dedicated Gambier Island LTA Island Planner and increased RPM capacity to oversee and enhance quality of service.

2.2 Central Region – full time Planning Clerk ($11,766)
Service Improvement: an increased administrative support to legislative proceedings;

2.3 Northern and Central Regions – full time Office Assistants ($68,796)
Service Improvement: a greater quality of administrative support to two thirds of LPS Staff members and an increased workload capacity for Northern and Central Region Island Planners.

2.4 Trust Area and Northern Region – new Office Assistant ($36,855)
Service Improvement: a greater quality of administrative support to Northern Region, an increased capacity for Northern Region Island Planners and
Administrative support for the better management of bylaw enforcement through providing inquiry service, record keeping and internal reporting.

2.5 Trust Area – Co-operative Student ($10,000)
Service Improvement: an increased workload capacity at the graduate student level and the establishment of an Islands Trust profile among graduate students in order to facilitate future staff recruitment.

<u>Level 3 ($67,151 total incremental cost)</u>

3.1 Northern Region – Island Planner ($67, 151)
Service Improvement: a dedicated Denman Island LTA and Hornby Island LTA Island Planner and an increased RPM capacity to oversea and enhance quality of service.

<u>Level 4 ($55,693 total incremental cost)</u>

4.1 Central Region – Assistant Planner ($55,693)
Service Improvement: an enhanced inquiry & application processing service and an increased workload capacity for Southern Region Island Planners.

Introduction

The Islands Trust Area

The Trust Area covers the islands and waters between the British Columbia mainland and southern Vancouver Island, including Howe Sound and as far north as Comox. This is a unique and special place composed of 13 major islands and more than 450 smaller islands covering approximately 5200 square kilometres. The beauty, tranquility, and unique natural environment of the islands in the Strait of Georgia and Howe Sound have given the area national recognition. The islands support strong communities characterized by a mix of lifestyles, livelihoods and individuals. Island residents bring unique skills, viewpoints and sense of place together to sustain a tradition of community involvement.

Our Council

The Islands Trust Council is made up of the 26 locally elected officials of the Trust Area who are responsible for land use decisions in their island communities. Our Council has a unique mandate from the province to protect the environment and amenities of the islands. It meets quarterly to make decisions about overall policy, staff resources and budget. Our current Council was elected for a 3-year term during BC Local General Elections in November 2005. The current term will end in December 2008.

Our Priorities

Our Council has established the following strategic priorities;

Part 1 Sustainable Environment

We can create a legacy for the future by protecting our natural environment:

- We will identify areas in greatest need of protection and use the information to protect these areas through covenants, acquisitions and other tools.
- We will consider regulatory tools to protect the most sensitive environments.
- We will find ways to encourage environmental sustainability and stewardship through education and incentives.

Part 2 Healthy Communities

Our island communities need effective and efficient government services:

- We will foster healthy, complete and livable island communities
- We will manage growth in the Trust Area in a manner that respects our provincial mandate and the wishes of island communities.
- We work to strengthen citizen participation in local government.

Part 3 Excellence in Governance

We will strive for excellence in governing the Islands Trust Area:

- We will provide leadership in seeking sustainable and fair forms of political representation for the Islands Trust Area.
- We will provide good value, implement fair taxes and fees and seek new and diversified funding sources to support special initiatives.
- We will strive for excellence in public service and work to attract and retain a strong and skilled workforce.

In coordination with this last priority (to strive for excellence in public service …) this report is intended to provide the Islands Trust Council with an understanding of the reasons why the Local Planning Service unit is not currently providing optimal levels of service and to make recommendations that will improve service delivery.

In December 2006 the Trust Council directed this work despite recent major managerial changes, indicating an expectation that the matter was related to systemic factors.

In any large scale review of a system one must be careful to identify and address the causes of the current situation and not be distracted by the symptoms. Unacceptable service delivery is a symptom of an inappropriately organized, resourced and managed work group. This report will identify and address these causes by responding directly to the specifics questions raised in the Islands Trust Terms of Reference for a Focused Review of the Local Planning Service Unit (issued in December 2006 and enclosed as Annex A). The Stantec Report is enclosed as Annex B with a staff summary that identifies its major recommendations and the extent of their inclusion in this report.

The process of improving service delivery is nothing short of a cultural change in our workplace. For many varied reasons the Local Planning Services (LPS) unit has evolved to what it is today. It is the result of some dramatic changes in the Islands Trust itself, which evolved from a part of the provincial government into a special purpose local government with a unique mandate. We are an organization with a history of change and each organizational change over our 34 year history has undoubtedly been well intended and appropriate or necessary given the circumstances of the time. However, the LPS unit today does not provide a level of service appropriate for the world class island land use planning organization that communities within the Islands Trust expect and deserve. This report will map out a way to improve service through changes to both organizational structure and professional development.

It is submitted that change and subsequent improvements will only be meaningful and sustained if it starts at the individual level and extends throughout the various work groups. To this end the LPS unit has embarked upon a Continuous Improvement Process as an integral part of the LPS Review. This process is the true manifestation of the necessary cultural change at the personal level. The members of the LPS unit believe that it is worthwhile to invest in their workplace and their professional development. The status of this process to date is shown at Annex C and identifies those areas in which work groups are working well, need improvement, need to provide additional services or need to re-consider some current practices. Unfortunately these meaningful improvements in individual and work group skills are not enough alone to improve service delivery in the LPS unit nor will the results be immediate. An old African expression states “To go fast, go alone. To go far, go with others”. Continuous Improvement in the LPS unit will go far and take some time due to the wide scope of improvements identified. This process is only part of the improvement of service delivery.

Managing Change

The Pacific Institute of Seattle, Washington is a world leader in preparing individuals and organizations for change processes. They have identified that effective, sustained change requires five components. The situation with respect to each of these components within the LPS unit is as follows;

1. **Vision**; The Islands Trust, and the LPS unit within it, has a clear vision as stated in the Islands Trust object; “To preserve and protect the environment and unique amenities of the Islands Trust Area …”.

2. **Skills**; The members of the LPS unit are highly skilled now and are further developing their individual and work group skills necessary to optimize service delivery through their commitment to the Continuous Improvement Process. This will be an ongoing effort and a major contributor to a successful personnel retention and attraction program.

3. **Incentives**; At a recent Islands Trust staff professional development day, Dennis Hilton of 3e Training presented the five top work motivators that retain and attract staff members within an organization;

   - Make a contribution / make a difference;
   - I belong;
   - I feel good about me;
   - Money; and
   - I love/like my work.

   It is submitted that through ongoing leadership and effective management, these motivators must be foundational to an appropriate incentive program.

The current demographics of North America will challenge every employer to attract and retain people in the coming years and the Islands Trust must invest time and effort across the entire organization to ensure we continue to get and keep the best staff possible. This initiative is beyond the scope of this report and yet may ultimately be the most critical factor in improving service delivery in the LPS unit as without staff we will undoubtedly fail to provide an adequate level of service delivery.

4. **Resources**; the remainder of this report will identify and discuss the organizational resources necessary to improve service delivery in the LPS unit; and

5. **An Action Plan**; upon final consideration of this report by the Islands Trust Council in December 2007, an Action Plan will be in place with an associated Implementation Plan composed by February 2008 and all changes implemented by September 2008.

Enclosed as Annex D is a graphic depiction of the emotional effect if any one of the above noted components of change is missing from a desired change process. It is submitted that both Trustees and staff have experienced one or more of these emotions with respect to LPS service delivery in the past. With the actions to date within the LPS unit and the proposals made herein, we will collectively achieve effective and sustained change through positively addressing each of these key components.

Background

As stated above, in December 2006 the Islands Trust Council resolved;

That the Executive Committee be authorized to proceed with Item #15 of the 2007/2008 Strategic Plan section of next year's budget, during the fourth quarter of 2006/2007 and to ensure that the report is delivered prior to the March 2007 Trust Council meeting

In response, the Trust staff contracted a review of the Local Planning Services unit to address specific issues related to the delivery of local land use planning services in the Islands Trust Area. This contractual report was received by the Trust Council in March 2007. While it made a number of useful recommendations, it did not address all the requirements of the RFP, did not acknowledge any input from the 24 individual Trustees interviewed and failed to provide the full rationale for the recommendations that were made. Therefore, this report is considered a useful input to the LPS Review but has not been taken as the comprehensive, authoritative review that was desired. At the March Trust Council meeting, Trustees raised a number of concerns and resolved the following;

That the Islands Trust Council request the Local Planning Committee and the Director of Local Planning Services to make recommendations to Trust Council at its June 2007 meeting regarding the report.

The DLPS met with 20 of the 24 Trustees served by LPS on their respective islands through May and June 2007 to garner their expectations of improved LPS service delivery and to ensure the recommendations of this report will serve each Local Trust Committee (LTC).

In June, the senior management group met for an implementation planning session for the Trust Council strategic plans. The discussions at the session were dominated by issues identified through the LPS Review. The group discussed various organizational structures, resultant benefits and laid out timelines for completion of the LPS Review. It was agreed that the best way to complete the LPS Review was to use internal resources and thereby ensure a high participation and buy-in from LPS staff. This decision has already proven to be wise in that LPS staff have embraced this review and are motivated to effect improvements. The workplace atmosphere has become much more positive, professional and engaging. The only truly sustainable change or improvements are ones that come from within and represent a frank and compassionate consideration of a diversity of options and opinions. This is happening in LPS and the momentum it creates is becoming more and more evident in everyday activities.

Since June, the Local Planning Services unit has been busy internally addressing the outstanding elements of the LPS Review through monthly Retreats with all members of LPS, weekly half-day meetings of regional office staffs and weekly LPS Management meetings. These various meeting formats and groupings of staff have facilitated a unit-wide perspective and understanding while allowing small group interaction and input at the regional office level.

Discussion

The Islands Trust Council and Local Planning Committee have received progress reports and presentations in various formats over the past six months regarding the LPS Review. For ease of communications and comparison with the LPS Review terms of reference and the Stantec Report, this final proposal will respond to the specific questions posed in the terms of reference and note similarities with, and differences from, the Stantec Report. The order of the questions from the terms of reference have been re-arranged to better communicate the history and logic leading up to the specific proposals.

Delivery of Land Use Planning Services

1. **What are the most pressing concerns with respect to the unit and the services it provides to LTCs?**

   The following improvements are desired by Trustees:

   - stronger fielding of mandate;
   - we must lead the way on environment;
   - delivery of promised services;
   - more proactive planning;
   - adopt a more comprehensive planning approach;

- an entirely different method of service delivery;
- local service / local presence;
- deliver as much service as possible on islands;
- centralization is not necessarily more efficient;
- fear of bureaucratization of the Islands Trust;
- benefit for a planner to be part of both current and long term planning;
- LTC priorities must be set by LTCs, not others;
- achievability of LTC work programs;
- need work plan to advance much faster;
- process applications more timely;
- more good staff;
- support a professional staff that can fully implement direction & not require Trustees to “row”;
- re-focus on Island Planners as primary service providers;
- strong Island Planners;
- must address affordable housing for staff;
- fill and augment staffing;
- increased bylaw enforcement resources;
- improved bylaw enforcement process;
- create development approval information bylaw;
- planners need to ask for admin support more often; and
- more LTC administrative support/presence.

The following concerns and comments were received from the LPS unit staff:

- came to serve the mandate
- came for job security, pay and pension
- affordability is tough
- stay because of hope that things will improve
- development applications are robbing resources for advancement of mandate
- lack of direction and action from management
- enjoys working with people
- hope for leadership & mentorship
- lack of support from Victoria
- occasional sense of accomplishment
- feels disconnected from larger organization
- not enough time to do work
- this job is fun (travel & lifestyle)
- perception of job loss thru LPS review
- concerned with direction directly from Trustees to staff, rather than through LTCs

After six months at the Islands Trust, the DLPS comments and concerns are:

- we have great staff and Trustees;
- the proceedings of Local Trust Committees (LTCs) are well served administratively and legislatively;
- LPS unit has a minimal presence on all but two islands and thereby provides very limited local access and public profile;
- LTC initiated advocacy is advanced on an ad hoc basis without procedure nor assigned resources;
- lack of quantification of time and resources required to complete assigned work;
- lack of management capacity due to managers acting as Island Planners;
- historic lack of departmental direction;

- failure to reflect the Islands Trust object in all aspects of work, despite universal support of the object by staff members;
- allocation of stretched human resources to Development Management applications (what we do for others) primarily and Community Planning (what we do to advance the Islands Trust object, mainly through OCPs and LUBs) as a default for any remaining staff time;
- failure to follow and optimize Islands Trust policies and procedures;
- administrative inefficiencies due to repetition of work at 12 LTCs instead of standardized procedures as possible with Section 11 of the Islands Trust Act;
- no organized advancement of a body of knowledge and learning about Community Planning; and
- lack of site visits and general knowledge of islands by staff members, other then through Development Management applications.

2. Is the unit meeting the needs of the LTCs? If not, are problems a function of geography, staffing levels relative to workload, unrealistic expectations or demands on the part of all or specific LTCs, poor understanding of mandate, poor communications, the specific approaches in the unit to management, existing procedures and processes, working relationships, job descriptions, other?

The LPS unit is not meeting the needs of the LTCs as indicated by the Trustee comments noted above. The primary problem that affects many aspects of service delivery is our failure to quantify our assigned work and professionally advise the LTCs and applicants on the subsequent achievability of work plans. This makes it difficult to advise applicants as to when their request will be considered by the LTC. LPS staff receive work from LTCs and do not currently estimate the time and resources necessary to complete the work. Thus they do not provide meaningful feedback to the LTC about their ability to achieve the requested work program. This manifests in a lack of accountability which denies the LPS unit the opportunity to measure performance and improve or celebrate their performance.

In an absence of accountability, staffing levels can not be reviewed in any appropriate context and thus are left unchanged despite rising workloads. Policies and procedures are not improved as poor service delivery has little consequence and improved service delivery has little reward. Staff and Trustees become frustrated with unrealistic personal expectations that can not be knowingly revised, and the morale of staff and Trustees suffers as seemingly the simplest piece of work must queue up for staff time in a perennially long and undefined waiting line. The quintessential comment from a Trustee regarding service delivery in the LPS unit is “It’s good work … once I get it”.

Without doubt, throughout the Islands Trust Area the preponderance of LPS staff time is spent on Development Management applications at the expense of Community Planning projects and LTC work programs. A breakout of staff time spent on Development Management applications and Community Planning projects in 2006 /2007 in the Islands Trust Area (less Bowen Island) is enclosed as Annex E. In total 10,607 regional staff hours were spent on applications while only 3899 staff hours were spent on OCPs, LUBs and LTC work programs. OCPs and LUBs should be an equal, if not dominant, portion of the work done in the LPS unit. Currently comparatively few staff resources are being spent on the advancement of the Islands Trust object and Policy Statement through proactive planning. This is where the Islands Trust should, and must, be different from other local governments in British Columbia and the rest of Canada. The Islands Trust must deliberately determine the level of resources necessary to ensure achievement of our unique mandate through Community Planning projects and not allow Development Management applications to distract us from our collective responsibility. Therefore the allocation of resources solely, or at least primarily, to Community Planning, must be a key component in any new organizational structure and management approach.

3. Do the concerns extend throughout the Islands Trust Area, or are they focused on certain LTCs?

The concerns received during this review are generally common across all LTCs and confirm that the unacceptable service delivery review in the LPS unit is a systemic problem. The concerns manifest differently in different Local Trust Areas (LTA) depending upon the level of development activity and thus the need for service from the LPS unit. Some of the LTAs have relatively low development activity levels currently while others are considerably busier.

4. Are there specific concerns related to the more populous local trust areas that differ significantly from less populous local trust areas?

The concerns of more populous of LTAs are not different from other LTAs but are more severe due to development pressures associated with greater population. Previously, LTA s with few development applications could receive better Community Planning service as the dedicated planners for those areas were not required to split their limited time as much between applications and Community Planning. The dedication of planners to an LTA, regardless of the workload at the time, has been lessening through the professional, but ad hoc, cooperation of the Regional Planning Managers. This action must not only be encouraged but enshrined in any new organizational structure and management approach.

5. Are planning services provided in a way that recognizes the unique provincial mandate of the Islands Trust?

As noted above, the unique mandate of the Islands Trust is not being well served because the vehicle of that service, Community Planning, is only receiving the staff time left after Development Management applications have been fully served. When Development Management applications are being poorly served, as is the case in many LTAs, one must expect that Community Planning is suffering greatly. One saving grace is the dedication of staff resources for OCP and LUB Reviews, albeit currently without the benefit of design and quantification of the specific work to be done. This centrally coordinated allocation of resources (the 5 year OCP/LUB Review Program funded annually and reviewed quarterly by the Islands Trust Council) is the way all Community Planning must be managed throughout the Islands Trust Area. We must determine, designate and direct the appropriate amount of resources for Community Planning first and then determine the resource we wish to provide for Development Management. If the LPS unit can not be resourced to serve all demands to an optimal level, Development Management should be where the adverse impact is felt.

With respect to whether the professional expertise exists to advance the mandate, it does exist but is largely latent. We have staff with the experience, knowledge and interest to ensure that the environment and unique amenities of the Islands Trust Area are preserved and protected but we have not facilitated the circumstances for them to demonstrate their abilities. The Islands Trust must, and can, be a world class land use planning organization through the proactive advancement of sustainability, site adaptive planning and small community/rural living preservation. However, before we can advance our mandate to world class performance we must put our house in order. The Continuous Improvement Process and organizational proposals made in this report will put that house in order.

6. Does service delivery meet current standards regarding customer service? If not, what standards are appropriate and how can delivery be changed to meet these standards?

With respect to service delivery for Development Management applications we are usually judged by the length of time to process an application to the point of consideration by an LTC and much less by the length of time it is considered by the LTC. In light of this, the LPS unit staff have completed a compilation of historical customer service timings for all types of Development Management applications over the past six years with timing from application to LTC consideration and LTC consideration to approval or denial. This report will only focus upon the timing from application to LTC consideration. The compilation is enclosed as Annex F and any conclusions drawn from it must be made cautiously as every application is unique.

However, when comparing the most recently completed year of 2006 to the previous five years a general trend of lengthening processing timings can be seen and even where recent improvements have occurred, the length of time required is unacceptable.

The hidden cost of lengthy Development Management applications processing is the availability of staff time for Community Planning. Given a fixed size of staff, the quicker an application is processed the more time will be available for Community Planning. With respect to what is an acceptable level of service, it is submitted that **completed** Development Management applications should be considered by LTCs within 60 days. This timing is within "industry standards" for local governments in British Columbia and a resolve to meet this standard will go a very long way to addressing the negative perception of service delivery by customers. By monitoring the application timings and adjusting staff assignments, LPS management will be indirectly ensuring that Community Planning does not become secondary to Development Management again. The remainder of this report will address options in order to meet this suggested standard.

7. In what other ways could services be delivered?

The Terms of Reference for this report limited the area of study to the LPS unit and thus it is assumed that the current political decision making structure of the Islands Trust Council and its Committees will remain without change. Of prime importance to the LPS unit are the 12 LTCs and improvements to service delivery will be made in this context. Even though the alternatives to the current LTC structure will not be discussed, it is submitted that this structure is actually one of the great strengths of the Islands Trust as it truly ensures responsible (and responsive) local government.

This aspect is what strongly differentiates the Islands Trust from regional districts in British Columbia, where even the most straightforward local issue in an electoral area must ultimately be considered by the regional district board. Therefore what may be seen by some as an inherent inefficiency in having 12 autonomous decision making bodies instead of one board, is a logistical inconvenience that must be safeguarded from any future well meaning, but unthinking, effort to economize through altering the current LTC structure.

The Islands Trust, like the vast majority of other local governments in British Columbia, have in-house planning staff because of the value in having intimate knowledge of the jurisdiction, an ongoing professional relationship with elected officials, residents and other staff and a thorough knowledge of the policies, procedures and practices within the organization. The other alternative is to contract for service and this is done by some Local Governments due to an inability to retain a staff for lack of workload, funding or both.

With 12 LTCs and 24 Trustees served by the LPS unit there is no doubt that an in-house staff, to include managers, land use planners and special knowledge administrative support personnel is the appropriate choice. Having said this, there are a number of ways to organize and employ an in-house staff.

The Island Planner is the primary service provider in the LPS unit and as such is the primary reason for the employment of the remainder of the LPS unit staff. The professional relationship between an Island Planner and the members of an LTC is pivotal to the effective provision of advice and receipt of direction, the key role of any public servant dealing directly with elected officials. Therefore any improvements or changes to the LPS unit must be done with the goal of optimizing this professional relationship and interface.

It is submitted that there are three major, but not mutually exclusive, options for organizing in-house staff in the LPS unit;

a. Organize by Planning Team or Regional Team:

   i. Planning Teams: Under this option, the basic organizational component would be the Planning Area, which is one major or two smaller island groups that are the primary, and predominant, responsibility of a Planning Team for Community Planning and Development Management.

A Planning Team would consist of an Island Planner and an Assistant Island Planner, with the Island Planner reporting to the Regional Planning Manager (RPM) directly. With a Planning Team providing dedicated service to its assigned LTCs, flexibility to adjust to transient workloads in the region or elsewhere in the Trust Area may be less effective. The current method of operation within the LPS unit indicates that 7 Planning Areas for convenience of staff assignments as follows;

- Denman and Hornby Islands LTAs;
- Gambier Island LTA;
- Gabriola and Lasqueti Islands LTAs;
- Salt Spring and Thetis Islands LTAs;
- North and South Pender Islands LTAs;
- Mayne Island LTA; and
- Galiano and Saturna Islands LTAs.

and thus 7 Planning Teams, totaling 14 planners, would be required in the LPS unit. The remainder of personnel in the LPS unit would either directly or indirectly serve the Planning Teams and report to the Regional Planning Manager;

ii. Regional Teams: A regional office option promotes maximum flexibility within a region to optimally respond to long term, short term and unforeseen priorities while maintaining a responsiveness to the LTCs within the region.

Although there would still be Island Planners with a primary focus on one or more island groups, the remainder of LPS staff, to include Assistant Planners, would be serving the region as a whole and available to apply their skills with short notice wherever appropriate. With the Regional Team option, all regional staff members would report directly to the Regional Planning Manager.

b. Located by Local Trust Area, centrally or regional;

i. Locate by Local Trust Area: Although full time location in a Local Trust Area would maximize local presence of planners and access by residents this approach denies flexibility to handle fluctuating workloads even within a region. Location by LTA also lacks the advantages of co-location with colleagues for mentorship, supervision, administrative support and professional development with peer;

ii. Locate all staff centrally: This approach would ease centralized coordination, it would increase travel to islands, and minimize our profile with Islanders. It might allow the number of RPMs to reduce from 3 to 2 to supervise planning staff alone but this would in turn create the need for an additional manager to lead the amalgamated administrative support staff. Centrally locating all LPS staff members would not increase productivity or effectiveness as a grouping of 30 staff members would require supervision and organization that would replicate the current regional offices structure;

iii. Locate staff in 3 regional offices: This approach strikes a logical balance between the other two alternatives noted above. Regional offices re-inforce the advantages of a Regional Team approach, establish an appropriate but minimal ratio of managers to employees, provide a local profile and minimizes travel to the Local Trust Areas by all staff members. Since the LPS unit is currently configured in three regional offices this would obviously be the most cost effective to implement.

c. Assigned to work geographically or functionally;

   i. Assigned to work geographically: This approach would dedicate an Island Planner or Planning Team to one or two Local Trust Areas with the same advantages and disadvantages noted in the analysis of the Planning Team approach above;

   ii. Assigned to work functionally: Working functionally would only serve a regionally or centrally located office and would provide skills or services required in each Local Trust Area but not dependent upon an intimate knowledge of the Local Trust Area. Working functionally is appropriate for administrative support staff since the 12 LTCs served are very similar in their demands and Assistant Planners to answer inquiries throughout a region easily and quickly provide support to any Island Planner.

For reason of operational effectiveness, the sense of team that currently exists in regional offices, cost savings and the progress to date on the LPS Continuous Improvement Process, it is proposed that the LPS organizational structure be based upon improving service delivery through optimization of a Regional Team approach in three regional offices with an internal mix of geographic and functional assignment of work at the discretion of the RPMs.

A major reason for a Regional Office approach compared to a Planning Team approach is to allow a more horizontal organization with all regional office staff reporting directly to the RPMs. This subtle but important change would allow the RPMs the flexibility to quickly and independently manage dynamic regional requirements without having to seek a major organizational change or approval of staff re-assignment. It would also retain the individual skills and expertise of the RPMs to apply to any complicated or challenging files. The RPMs will have approximately 20% of their time used towards specific land use planning files.

Additionally, the regional office approach would still allow sharing of expertise between regional offices to advance a common body of knowledge throughout the Trust Area. This is a model to last for the coming years of yet unforeseen challenges rather than the structure previously proposed at the September 2007 Trust Council meeting that would respond to current demands alone.

Another positive reason for this change in approach is that each of the three regions are different, and will undoubtedly continue to be so as the three RPMs will use their staff members' unique skills and interests to best serve the region. This is borne out through the following proposed regional office assignments;

- Northern Region: Island Planners will be assigned on a geographic basis with Assistant Planners working functionally on all regional inquiries and minor applications and Administrative Support staff working functionally on regional and LTC matters;

- Central Region: An Island Planner will be dedicated to Salt Spring Island long term planning with three Assistant Planners working functionally on all regional inquiries and minor applications and Administrative Support staff working functionally on regional and LTC matters; and

- Southern Region: Two Island Planners will be assigned on a geographic basis, an individual "Island Planner" will be responsible for all regional long term planning, one Assistant Planner will handle all regional inquiries and minor applications and Administrative Support staff will work functionally on regional and LTC matters.

In the consideration of a regional office / Regional Team approach it was determined that the Thetis Island LTC would be better served in a region other than the Central region and thereby increase the staff capacity in the Central region. The Northern region was considered the best region because;

- the LTA is north of the Malahat and relates more to central Vancouver Island than Victoria and perhaps even Salt Spring Island;
- the LTA is not part of the Capital Regional District, as are the remainder of the Southern region LTAs;
- Thetis Island residents do not use ferries based out of Swartz Bay;
- Residents have a stronger Vancouver Island/rural connection;
- Residents usually do their shopping, banking and health care errands between Duncan an Nanaimo, so visiting the Northern office, whether on Gabriola or in Nanaimo, would be within normal travel patterns.

Similarly, the existing arrangement of the executive Committee Islands LTA remaining in the Southern region will balance workloads between offices and facilitate efficient use of the Executive Committee's time in the Victoria offices.

8. Are planning services provided in the most cost-effective way possible?

As part of the research for writing this report, seven different LTC meetings were observed and it can be stated without reservation that the level of service at the LTC meetings is very high and as cost effective as possible within a provincial government compensation schedule. However, LTC meetings are at most one day a month and it is the remaining majority of the month that generates the greatest costs and potential cost-effectiveness. The rationale for three regional offices within the LPS unit has been presented above and will be taken as the platform for consideration of cost effectiveness.

When service delivery is at an unacceptable level it is a difficult time to decisively address cost-effectiveness. However, with respect to the regional office internal operations, the LPS unit has the opportunity to be very cost-effective while providing improved service to customers through the existing extensive use of telephones, emails and web sites by all of our customers. We have relatively few "walk-in" customers to our offices but through the LPS Continuous Improvement Process we will continue to improve service through;

- having all regional offices open and operational five days a week;
- automated telephone answering services turned off during normal working hours to ensure personal service;
- dedicating more resources to optimize web sites through more frequent and appropriate postings;
- the allocation of laptop computers and personal digital assistants (i.e.; Blackberries) to appropriate staff; and
- the use of appropriate performance measures to celebrate successes, identify poor service delivery and improve through applied learning.

With respect to the provision of services external to the regional offices, it is submitted that a key component of improved service delivery is to have Island Planners work within their assigned Local Trust Areas one day a week to provide local access to them, enhance the local presence of the Islands Trust and ensure a greater familiarity with the island communities they serve. A secondary outcome of this initiative is the reduction of the importance of the location of regional offices for local Trustees, residents and "on island" applicants due to the weekly island visits. This would reduce the need for "walk-in" services even more and free regional office administrative staff to better serve the LTCs. Given the weekly island visit objective, cost-effectiveness largely becomes an issue of whether the regional offices are in the right location as a base of operations for Island Planners. This will be further discussed in response to Question # 16.

The proposed reporting structure in the LPS unit would be quite flat, or horizontal, in that five positions will report to the DLPS and 6 to 8 positions will report directly to the RPMs in the regional offices. This managerial span of responsibility is within a normally accepted range, with 8 being an absolute maximum. Therefore there is an appropriate and not excessive number of managers. For the Compliance and GIS Teams, their service specialties lead to their small size of 3 and 2 respectively.

Like every work group they require responsible leadership and this will be achieved through supervisory positions of Coordinators. Therefore the LPS unit will be appropriately and cost-effectively staffed for management and supervisory responsibilities.

With the transferring of the Thetis Island Local Trust Area to the Northern region, the Central region will only consist of Salt Spring Island and thereby make this region much more cost effective due to the elimination of a need to travel off the island. Office re-location on Salt Spring Island has not been considered in this report as re-location anywhere in the Ganges area would not greatly influence service delivery and re-location to an area outside of Ganges would result in a degradation of service delivery as it is the commercial hub of Salt Spring Island.

Annex I provide a financial analysis of the cost and cost effectiveness of two office location options in the Northern region and three office location options in the Southern region. The conclusions from this analysis are;

- the Southern region office should remain in Victoria;
- the Northern region office should remain on Gabriola Island; and
- a small LPS unit administrative office should be established in Nanaimo for;
    - the Compliance team;
    - part time use by Island Planners to allow travel directly to regional islands and thereby saving travel costs that would be incurred if they started on Gabriola Island (this will be further discussed under Question # 16);
    - to provide a more easily accessible regional information center; and
    - enhance the Islands Trust profile in the Northern region.

9. Are current resource levels sufficient for meeting the expectations of the LTCs (and are the expectations considered reasonable)?

The current resource levels are not sufficient for meeting the expectations of the LTCs. As stated in the Introduction, with the lack of quantification of the time and resources required to complete assigned work and the resulting imprecise expectation of service delivery by all concerned, it would be a massive coincidence if current resource levels were sufficient to meet the expectations of the LTCs.

This report identifies improvements through the LPS Continuous Improvement Process and resource level adjustments through structural changes that are expected to increase operational effectiveness sufficiently to provide a reasonable level of service to LTC. Upon implementation of the proposed changes, LTCs will begin to have improved service and relevant feedback and only then will they be able to have accurate expectations.

10. Are staff workloads equitably distributed?

No. Each regional office needs additional staff as proposed but upon allocation of these additional resources and the cultural changes underway, the staff workloads will be equitable between regional offices. The proposed structure is intended to ensure sufficient resources in each region for anticipated long term workloads and yet remain flexible within the regions to re-allocate resources in light of fluctuating and transient workloads.

11. Are job descriptions appropriate?

The proposed organizational structure will require minor modification and clarification of all job descriptions as follows;

- The RPMs job descriptions will focus on the management of the Regional Team members and the professional mentorship of planners;

- Island Planners and Assistant Planners will remain as professionals without direct subordinates and start to work under the parameters of their newly re-categorized positions within the Provincial public service. This new categorization provides a greater flexibility for working hours within each two week period but without eligibility for overtime until working more than 10 hours in any single day. This will facilitate a very attractive flexibility in days of work while reducing or possibly eliminating overtime while traveling to islands; and

- Administrative staff job descriptions will be modified to reflect support to the above noted changes and to establish office administrative management responsibilities.

12. How should the unit be re-organized (if re-organization is concluded to be necessary) to best address the most important issues identified through the review?

The LPS unit does not need a major re-organization for the reasons noted in the previous sections of this report. However, several important adjustments are required as follows;

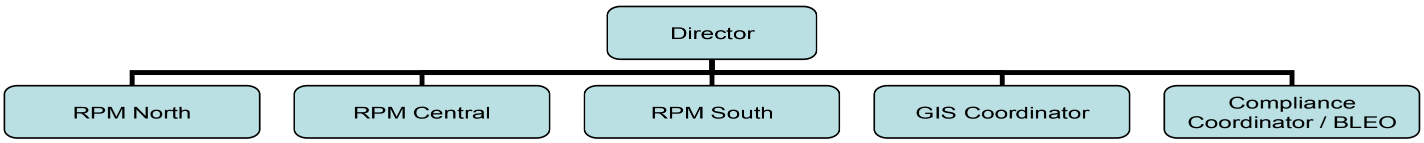
- The RPMs will be responsible to manage the people and all operations of the three regional offices and not act as Island Planners, as two, and arguably all three, are presently doing due to a lack of Island Planners. The RPMs will become able to properly supervise and mentor the planning staff and will remain the senior land use planner in their regions. RPMs will also be able to focus on major issues in their regions, be more available to Trustees for resolution of problems and contribute to the advancement of Islands Trust strategic objectives;

- The Geographic Information System sub-unit has already been moved to the LPS unit from the Islands Trust Finance and Administration unit and will report directly to DLPS as recommended in the Stantec Report. The GIS sub-unit will operate as detailed in Annex H; and

- The most significant structural change is the formation of a Compliance sub-unit in place of the previous arrangement of three part-time Bylaw Enforcement Officers theoretically reporting to the DLPS but in actuality working for RPMs within individual regions.

  The Compliance sub-unit will consist of a Coordinator who will be responsible to coordinate all aspects of bylaw enforcement and litigation while acting as one of the two, full-time bylaw enforcement officers across the entire Trust Area. The Compliance sub-unit will operate as detailed in Annex I.

Proposed LPS Structure



13. **How can an appropriate amount of time and resources be dedicated to community planning exercises as well as responses to development applications?**

One Island Planner in each of two regional offices will be dedicated to Community Planning while in the third regional office each of the three Island Planners will be geographically assigned. They will manage both Community Planning and Development Management work.

Through retention of regional offices and establishment of centralized resource coordination, there will be a greater assurance of high quality service to Community Planning throughout the Trust Area. Underutilized island or regional resources can, and will, be assigned to higher priority work elsewhere in the Trust Area. This has been happening in the recent past in an ad hoc manner and through a deliberate centralized coordination of all resources this approach will be optimized.

14. **Does the unit require additional staff to properly deliver planning services? If so, what type of staff should be added and where should they be situated?**

This report has a single, dominant theme: given the right number of the right people in the right positions with the right resources, we will be a world class organization. Annex F detailed Development Management application timelines from 2001 to 2006 and the response to Question #6 above identified a desired service delivery standard for Development Management applications to be considered by an LTC within 60 days of a **completed** application. As also noted previously, with a set number of staff the improvement of Development Management application processing timings will free time for more Community Planning. So we must ask, what is the appropriate level of staffing to improve Development Management application processing timings and thereby improve Community Planning?

Annex E shows the split in staff time between Development Management and Community Planning in fiscal year 2006/2007. Although it is dangerous to take a strategic viewpoint from the information of a single year, one fact is clear and dramatic, the LPS unit spent the vast majority of its land use planning resources on Development Management (10,400 hours) rather than Community Planning (4,000). This situation might be acceptable in other Local Government jurisdictions where development is encouraged and Development Management is the mainstay of a planning department. This should not be the case in the Islands Trust.

As a land conservation trust with the powers of local government land use planning available to advance its objectives (in addition to a legislative responsibility to advocate and a Trust Fund Board to directly facilitate land conservation), the Islands Trust must first and foremost be a proactive, self determinant planning organization. We can not achieve our objectives through opportunities brought to us in the form of development applications. We must proactively know our islands better than anyone else and intimately understand their environments and unique amenities. The vehicle for this is Community Planning.

Nowhere else in our country does a combined population of approximately 25,000 people have 15 Official Community Plans that are considered and approved by 12 autonomous political bodies. We have an inherently heavy administrative workload in service to the great advantage that the Islands Trust political structure has: truly local and responsible government with an environmental focus. In addition our requirements for development must be more stringent than other Local Governments because we serve a higher ideal; to preserve and protect the environment and unique amenities of the Islands Trust Area. We must expect that creation and consideration of our Community Planning products is longer and more involved than those of other Local Governments. We must lead the way in sustainable planning as it is the only way to properly serve our extraordinary mandate.

Yet we must be efficient and effective in the delivery of our services. Our greatest challenge is how do we improve our day to day Development Management service and yet more effectively advance strategic objectives through Community Planning. The answer is, as David Chilton the author of the Wealthy Barber financial advice book advocates that we pay ourselves first. We dedicate resources to ensure that Community Planning is professional, appropriate and ready to guide any strategic objectives or Development Management application.

If we have excellent Community Planning, Development Management will improve because applicants will have a clear sense of our expectations and whether their plans fit on our islands. It is inherently more efficient to vet applications against a clear Community Plan than to process an application with an uncertain chance of approval in a poorly defined community context. If potential applicants can knowingly assess their chances of gaining an approval or not, all parties will benefit.

Therefore as a function of extensive discussion, information gathering and analysis, the following assessments of the five sub-units of the LPS unit are submitted;

- Northern region; The Northern office has been traditionally understaffed. Currently it has one Island Planner, an RPM covering two Island Planner assignments as well as management of the region, two planning assistants, two full time administrative staff and one part time administrative staff. The Northern region LTCs have been well served legislatively due to the professional, but unsustainable, commitment of staff and have not been able to effectively advance strategic objectives.

  This region requires two new Island Planners to cover two long standing but unmanned Island Planner assignments and a full time office assistant (up from a .3 position) to ensure five day a week office operations and adequate administrative support.

  A new office assistant position, to be shared half time with the Compliance sub-unit, is necessary to assist with the existing heavy legislative workload and the augmented legislative and administrative workload associated with the Thetis Island LTA moving to the Northern region. It is therefore proposed that the Northern office should be increased as follows;

    - Two Island Planners;
    - A full time Office Assistant; and
    - Half of an Office Assistant shared with the Compliance sub-unit.

- Central region; The Central Region has a dedicated RPM (as a hands-on Planner), an Island Planner, two assistant planners and 2 full-time and one part time administrative staff.

The legislative backlog and service delivery have improved in general in the past six months. The current OCP review, even with a consultant, has challenged the advancement of any other strategic initiatives. The transferring of the Thetis Island Local Trust Area to the Northern region will increase the staff capacity for the Central region and eliminate any need for off island travel.

Although this region is the most populous with 10,000 residents, a single Island Planner is appropriate since it is proposed that the region only consists of a single island, Salt Spring. However, the Development Management workload is excessive and requires an additional Assistant Planner to effectively process the applications and a full time office assistant to support this heavy workload. Therefore, it is proposed that the Central office should be increased as follows;

- An additional Assistant Planner; and
- A full time Office Assistant;

- Southern region; The quality of local planning provided to the Southern Region has been relatively good with 3 Island Planners for 3 Island Planning assignments, a dedicated Regional Planning Manager and 2 full-time administrative support staff.
  The addition of a planning assistant would allow for the Island Planners to focus more time on the advancement of strategic initiatives, a traditional short coming in the region.

  It is proposed that the Southern office should be increased by an additional Assistant Planner.

- GIS team; The two person GIS team has recently been moved from the Administrative Services unit to the LPS unit for more direct service coordination while continuing to also serve the Trust Area Services unit. The need for more and better mapping is indicative of an increasing professional use of this resource and will continue to increase through higher quality Community Planning projects and additional planners on staff. Annex H further details the GIS sub-unit.

It is proposed that the GIS team expand to include the funding equivalent of a half time GIS Technician and out source this service for the next two to three years. At the end of this time period a further assessment will be done as to whether the workload justifies the permanent hiring of an employee.

- Compliance team; for the past several years 3 part-time, regionally-assigned bylaw enforcement officers have provided good service but coverage has been incomplete and individual workloads have been very sporadic.
  Very recently 2 officers have become full-time and are jointly managing the Trust Area except for Salt Spring Island, where the third officer is dedicated until retirement in January. Annex I further details the Compliance sub-unit.

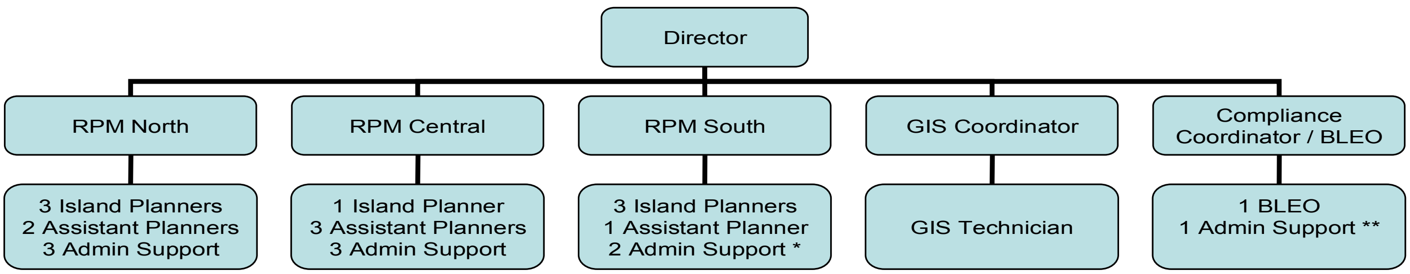
The bylaw enforcement workload is manageable with the new arrangement of two full time Bylaw Enforcement Officers and will ensure five day a week coverage and the ability to field two people on a specific island when appropriate. However the coordination of litigation matters, the provision of strategic compliance advice and monitoring of applicant post-approval requirements has been unacceptable.

It is proposed to;

- confirm two full time bylaw enforcement officers, with one filling the new Compliance Coordinator position; and
- add a half time Office Assistant (shared with the Northern region) to provide;

- administrative support for bylaw enforcement documentation;
- litigation coordination support;
- effective distribution of time sensitive Compliance information to trustees and staff, in coordination with the Trust Areas Services Communications Specialists; and
- a full time contact person for easy and effective referral for compliance inquiries.

Proposed LPS Staffing



Notes: * does not include the Office Assistant in the Victoria Office

** shared position with Northern Region office

Annex J provides the specific type and location of additional LPS staff required to improve service delivery. The annex indicates the current staffing and four additional levels for ease of consideration by the Trust Council. Level 4 within the annex indicates the full extent of human resources proposed by this report. The other levels represent a possible phased implementation towards an eventual full implementation at Level 4. The following breakout of the recommended staffing increases relates the annual salary and service outcomes associated with each level.

<u>Level 1 ($92,630 total increase cost)</u>

1.3 Southern Region – Assistant Planner ($52,630)
Service Improvement: an enhanced inquiry & application processing service and an increased workload capacity for Southern Region Island Planners

1.4 Trust Area – Environmental Science Services ($40,000)
Service Improvement: an enhanced environmental expertise to advance the Islands Trust object

<u>Level 2 ($268,000 total incremental cost)</u>

2.1 Northern Region – Island Planner ($67,151)
Service Improvement: a dedicated Gambier Island LTA Island Planner and increased RPM capacity to oversee and enhance quality of service.

2.2 Central Region – full time Planning Clerk ($11,766)
Service Improvement: an increased administrative support to legislative proceedings;

2.3 Northern and Central Regions – full time Office Assistants ($68,796)
Service Improvement: a greater quality of administrative support to two thirds of LPS Staff members and an increased workload capacity for Northern and Central Region Island Planners.

2.4 Trust Area and Northern Region – new Office Assistant ($36,855)
Service Improvement: a greater quality of administrative support to Northern Region, an increased capacity for Northern Region Island Planners and
Administrative support for the better management of bylaw enforcement through providing inquiry service, record keeping and internal reporting.

2.5 Trust Area – Co-operative Student ($10,000)
Service Improvement: an increased workload capacity at the graduate student level and the establishment of an Islands Trust profile among graduate students in order to facilitate future staff recruitment.

<u>Level 3 ($67,151 total incremental cost)</u>

3.1 Northern Region – Island Planner ($67, 151)
Service Improvement: a dedicated Denman Island LTA and Hornby Island LTA Island Planner and an increased RPM capacity to oversea and enhance quality of service.

<u>Level 4 ($55,693 total incremental cost)</u>

4.1 Central Region – Assistant Planner ($55,693)
Service Improvement: an enhanced inquiry & application processing service and an increased workload capacity for Southern Region Island Planners.

Annex K is the draft OCP/LUB implementation schedule for fiscal year 2008/2009 with additional columns indicating the impact of funding (or not funding) the levels detailed in Annex J. In the name of sensible budget management, it is recommended that the Trust Council consider approval of the proposed new staffing structure and fund implementation of Levels 1 and 2 in fiscal year 2008/2009 and Levels 3 and 4 in fiscal year 2009/2010. This phasing would allow an annual tax increase over the next two budget years within the general parameters recommended to the Trust Council by the Financial Planning Committee.

15. Given occasional needs for specialized knowledge, what is the most effective way to acquire specialized skills in the planning unit?

It is submitted that specialized knowledge will be both internally developed and, when necessary, externally sourced. Internal development will be through a deliberate professional development plan for both the LPS unit and the individuals within it. Through organized external training, internal working group participation, in-house presentations by colleagues and guests, participation in regional projects and, at sometime in the future, professional exchanges the LPS unit staff will be and remain a world class professional group. At those times when skills and knowledge are not resident in the staff, external scientific service providers will be contracted.

These services will be used to further develop staff as well as serve the specific project at hand. We have an excellent staff with a pragmatic, conservationist mind set that only needs an opportunity to flourish.

With an eye to developing future staff members and enhancing the professional image of the Islands Trust in general, two annual co-operative student positions are proposed. These students will be at various academic levels dependant upon the specific project or responsibilities to be assigned and will benefit LTCs and/or regions directly through the completion of their work. In the case of senior students, unforeseen special projects may be addressed without disrupting previously planned staff work plans.

16. Given (fluctuating) workloads and the inherent geographical challenges, are planners located where they should be in order to meet the needs of the 12 LTCs that receive services?

Through the quantification of work received, regional coordination and departmental oversight of all LPS files and projects individual, regional and departmental workloads will be known, resourced and professionally completed. Through the existing highly effective use of electronic medium and the recently instituted weekly regional office team coordination meetings, weekly departmental planning sessions, monthly departmental professional development sessions (and an LPS management team that will be more available to guide staff with the proposed staff increases), the LPS unit is already managing fluctuating workloads and the geographical challenges well and will continue to improve. The major remaining obstacle in this system is the lack of sufficient staff to actually complete the work.

As stated previously, Island Planners are the primary service providers in the LPS unit. It is strongly proposed that Island Planners must visit their assigned islands on an appropriate frequency to complete site visits, be more conveniently accessible, have an “on island” presence and become familiar with their island in general rather than just through development applications. However one must then ask how often is appropriate. Annex L is a matrix analysis comparing numbers of days on island per week against the Trustee desires and staff comments noted above in question #1. The matrix assigns a -1 score for an adverse impact, a 0 score for no impact and a +1 score for a positive impact. The result is that 1 or 2 days a week both scored the highest point value and therefore in the name of economy, it is recommended that Island Planners visit their assigned islands one day per week.

Annex G, as previously discussed provides the rationale for Island Planner locations.

17. How do the services provided to the individual LTCs relate to the LTCs’ financial contributions? Is the relationship between these two factors important? If so, how can the factors be brought into alignment?

Without proper time tracking information it is very difficult to properly allocate cost to the LTCs for LPS services. Unfortunately over the past two years the LPS unit time tracking system has largely captured inputs rather than the more relevant outcomes of our work.

This will be addressed in the coming year to create a more useful set of information. The results of this initiative will then integrate with the work of the Governance Task Force Financial Sub-Committee and their efforts to appropriately allocate the cost of services to LTCs.

In the interim, enclosed as Annex F, is a breakout of the cost of Development Management applications and Community Planning projects by region and island for fiscal year 2006/2007. This information confirms that Development Management is the dominant LPS staff activity and a degree of insight can be taken as to how much of these resources each LTC has drawn in the past year. It must be cautioned that since some application processes span two budget years the Development Management staff hours noted in Annex F, do not correspond directly with the applications revenues received in fiscal year 2006/2007.

18. Are the fees charged for development applications and reviews appropriate? What are the pros and cons of recovering partial costs of application review? If fees should be changed, what levels are more appropriate?

The full cost of the proposed changes made in this report have been included in the Islands Trust fiscal year 2008/2009 budget and initial review has determined that development application fees do not need to be increased to sustain the additional costs incurred by the recommendations of this report.

However, it is submitted that upon the revision of the current time tracking system within the LPS unit, true cost histories can be developed for each type of application processed and discussion should ensue regarding what fee levels would be appropriate. Unfortunately at present the estimated average costs used to determine current application fees cannot be improved upon until the time tracking system is revised and is used for an appropriate amount of time. It is submitted that this would be an appropriate project for the Local Planning Committee.

19. How should the unit manage requests from Trust Council to undertake area-wide planning projects?

Trust Area wide planning projects should be managed through appropriately funded and resourced internal working groups with an appropriate mix and number of skilled staff members under the guidance of an assigned RPM, possibly with external service provider assistance, and reporting to the Trust Council through the LPC. This would continue to develop internal skills and appropriately engage staff members in Trust wide matters. It would also instill a sense of belonging to the larger organization and providing a diversity and scale of work otherwise not available at the regional level that will be professionally satisfying. This could be a major attraction and retention matter for all levels of planners and administrative support staff.

20. What is the most appropriate and equitable way for the local planning unit to access support from other parts of the Islands Trust organization?

With the recent filling of the Director of Trust Areas Services position and therein the completion of the Islands Trust senior management team, this question is important but premature. As with any new team, our leader, the CAO, is assessing individual professional strengths and skills, as well as corporate goals and objectives, and will determine responsibilities and service delivery methods. As part of this process, the question of how the LPS unit should draw support can be answered.

<u>Conclusions:</u> The following conclusions regarding why LPS unit service delivery is unacceptable have been drawn;

- All three RPMs have been very courageously covering off 3, and at times 4, Island Planner responsibilities to the detriment of service to the assigned LTCs and the management of their regions. (This is the major oversight of the Stantec report and the reason for Stantec's comment that the LPS unit is "management heavy" when in fact it is "planner light");

- Bylaw enforcement was not well managed due to confusion about lines of responsibility, not well coordinated across the Islands Trust Area and not utilized for its inherent skills and knowledge in the coordination of litigation matters. (The Stantec Report did not mention bylaw enforcement nor litigation);

- The GIS sub-unit was reporting to the improper Director and is now reporting directly to the DLPS to ensure full integration with land use planning service in the LPS unit and coordination through the DLPS to the Director of Trust Area Services to help advance the conservation objectives of the Trust Fund Board; and

- The recent filling of all Islands Trust senior management positions will better serve the LPS unit, and the Islands Trust in general.

- The LPS unit is not meeting the needs of the LTCs;

- The concerns received during this review are generally common across all LTCs;

- The more populous local trust areas have experienced a greater amount of Development Management workload than other less populous local trust areas with a resultant greater impact on Community Planning;

- The dominance of Development Management workloads has adversely impacted the advancement of the unique provincial mandate of the Islands Trust;

- Current service delivery does not meet acceptable standards;

- Current resource levels are not sufficient to meet the expectations of the LTCs;

- Staff workloads are not equitably distributed;

- Job descriptions are not appropriate; and

- The LPS unit does not need a major re-organization but does require determination and/or clarification of lines of responsibility.

Recommendations: It is recommended that:

a. The LPS unit Continuous Improvement Process must be supported and sustained as a major assurance of excellent service delivery;

b. The LPS unit organizational structure be based upon improving service delivery through optimization of a Regional Team approach in three regional offices with an internal mix of geographic and functional assignment of work;

c. The Thetis Island Local Trust Area should be moved to the Northern region;

d. The three regional offices should remain in their current locations;

e. A small LPS unit administrative office be established in Nanaimo;

f. Regional offices;

    i. Use appropriate performance measures to celebrate successes, identify poor service delivery and improve through applied learning.
    ii. Be open and operational five days a week;
    iii. turn off automated answering machines during normal working hours
    iv. dedicate more resources to optimize web sites through more frequent and appropriate postings; and
    v. allocate laptop computers and personal digital assistants (i. e; Blackberries) to appropriate staff.

g. Island Planners work within their assigned Local Trust Areas one day a week, or as determined;

h. The LPS unit organizational structure have five sub-units consisting of the Northern, Central, Southern, GIS and Compliance;

i. The LPS unit staffing be augmented as follows;

    i. Northern region;

        1. two Island Planners;
        2. a full time Office Assistant; and
        3. one half of an Office Assistant (in conjunction with the Compliance sub-unit);

    ii. Central region;

        1. one Assistant Planner; and
        2. a full time Office Assistant.

    iii. Southern region:

        1. one Assistant Planner

    iv. GIS sub-unit; no staffing increase; and

    v. Compliance sub-unit;

        1. one half of an Office Assistant (in conjunction with the Northern region).

j. Annual operating funds equivalent to half of a GIS Technician salary be allocated for additional GIS work;

k. Annual operating funds equivalent to half of a staff ecologist salary be allocated for scientific specialty support in the LPS unit, while leaving the existing staff ecologist position dedicated to the Trust Area Services unit;

l. Appropriate performance measurements be established in the LPS unit t o ensure ongoing service delivery improvements, acknowledgement and celebration of successes and to facilitate an appropriate allocation of resources and costs in the future;

m. Development application fees be reviewed after performance measurements for Development Management are in place for an appropriate period of time; and

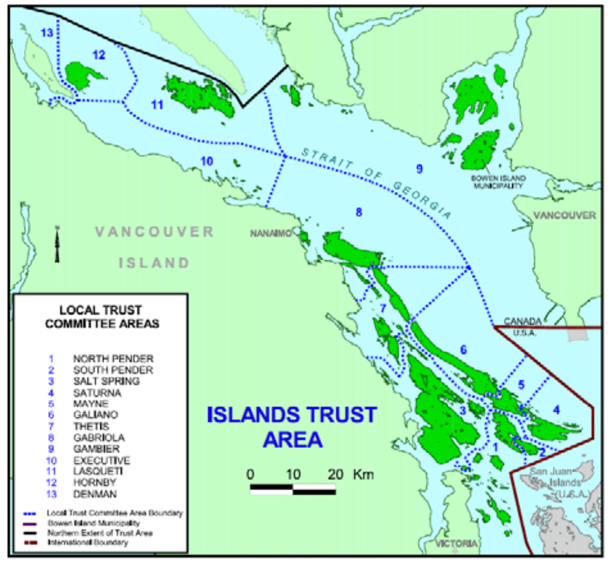
n. Trust Area wide planning projects be managed through appropriately funded and resourced internal working groups with an appropriate mix and number of skilled staff members under the guidance of an assigned RPM, possibly with external service provider assistance, and reporting to the Trust Council through the LPC.

Annex A

Islands Trust Terms of Reference for a Focused Review of Local Planning Services

4. Requirements

4.1 The Islands Trust



The Islands Trust is a federation of local governments with a provincial mandate to preserve and protect the environment and unique amenities of the Trust Area. The Trust Area is comprised of the islands and waters between the BC Mainland and southern Vancouver Island, including Howe Sound and as far north as Comox. The Area contains 13 major islands and more than 450 smaller islands, and has a total population of 25,000. The *Islands Trust Act* sets out the object of the Trust:

> *"To preserve and protect the trust area and its unique amenities and environment for the benefit of the residents of the trust area and of British Columbia generally, in cooperation with municipalities, regional districts, improvement districts, other persons and organizations and the government of British Columbia."*

Within the broader Islands Trust Area there are 12 local trust areas. Each local trust area has its own local trust committee made up of two locally-elected trustees and an appointed chair. The chair is an elected trustee from a separate local trust area, who has also been elected by fellow trustees to sit on the Islands Trust Executive Committee. Each local trust committee is an incorporated, special purpose planning authority with statutory responsibility for regulating the development and use of land within its local trust area. The Islands Trust Act gives local trust committees similar powers for land use planning as are available to regional districts pursuant to Part 26 of the *Local Government Act*.

The 24 trustees from local trust areas are joined by two elected officials from the Bowen Island Municipal Council to form the Islands Trust Council (total of 26 members). The Council is an incorporated, collective decision-making body. It is responsible for establishing the general policies required to carry out the object of the Trust, and for adopting the organization's annual budget, which includes a budget for operations of the local trust committees.

The Islands Trust is subject to the *Public Services Act* and, with the exception of excluded management positions, staff are members of the BCGEU. The Islands Trust's planning services are currently aligned as three teams, which deliver services from three offices located in Victoria, and on Salt Spring and Gabriola islands.

4.2 Local Planning Services Review

Local Planning Services is by far the largest staff unit in the Islands Trust — and for good reason, given that land-use planning is the principal service delivered by the organization.

The Islands Trust wishes to undertake a review of the way it delivers local land use planning services to local trust areas and to examine specific issues that have been raised by trustees, staff and constituents. There are two main parts to the review

4.3 Delivery of Land Use Planning Services

A number of questions have been raised with respect to the unit and how it delivers its planning services. Some of the questions to be addressed in the review are indicated below:

- What are the most pressing concerns with respect to the unit and the services it provides to LTCs?
- Are planning services provided in the most cost-effective way possible?
- Are planning services provided in a way that recognizes the unique provincial mandate of the Islands Trust?

  How can an appropriate amount of time and resources be dedicated to community planning exercises as well as responses to development applications?
- Are the fees charged for development applications and reviews appropriate? What are the pros and cons of recovering partial costs of application review. If fees should be changed, what levels are more appropriate?
- Does service delivery meet current standards regarding customer service? If not, what standards are appropriate and how can delivery be changed to meet these standards?
- Are staff workloads equitably distributed? Are job descriptions appropriate?
- In what other ways could services be delivered?
- Are current resource levels sufficient for meeting the expectations of the LTCs (and are the expectations considered reasonable)?
- Does the unit require additional staff to properly deliver planning services? If so, what type of staff should be added and where should they be situated?
- Do the concerns extend throughout the Islands Trust Area, or are they focused on certain LTCs?
- Are there specific concerns related to the more populous local trust areas that differ significantly from less populous local trust areas?
- Is the unit meeting the needs of the LTCs? If not, are problems a function of geography (i.e., location of staff), staffing levels relative to workload, unrealistic expectations or demands on the part of all or specific LTCs, poor understanding of mandate, poor communication, the specific approaches in the unit to management, existing procedures and processes, working relationships, job descriptions, other?
- Given (fluctuating) workloads and the inherent geographical challenges, are planners located where they should be in order to meet the needs of the 12 LTCs that receive the services?
- How do the services provided to the individual LTCs relate to the LTCs' financial contributions? Is the relationship between these two factors important? If so, how can the factors be brought into alignment with one another?
- Given occasional needs for specialized knowledge, what is the most effective way to acquire specialized skills in the planning unit?
- How should the unit manage requests from Trust Council to undertake area-wide planning projects?
- What is the most appropriate and equitable way for the local planning unit to access support from other parts of the Islands Trust organization?

- How should the unit be reorganized (if reorganization is concluded to be necessary) to best address the most important issues identified through the review?

4.4 Administrative Support to LTCs

High growth, increased public scrutiny of planning decisions, and recent changes to applicable local government legislation have forced LTCs to pay greater attention to the way in which they conduct business and make decisions. Process and procedure are more important in the current planning environment than they might have been in past years.

Traditionally, LTCs have relied on the Islands Trust's planning staff to assist in running monthly meetings and administering affairs. Not all planning staff, however, have the knowledge of, or training in, corporate administration to properly advise LTC members on such matters, or to ensure that all necessary processes and procedures are followed. As well, not all planning staff have the time required to provide the extra support.

There may be a need for decision-makers to consider whether additional corporate administration support for LTCs is required, and if so, how to best provide such support. This issue may be particularly relevant in more populous local trust areas where the scale and scope of activities may require special attention. A customized approach may be required to address concerns where activities of a LTC are particularly complex.

Annex B

Local Planning Services Review Report by Stantec Consulting Ltd – March 2007

Enclosed within is the Local Planning Services Review of March 2007 by Stantec Consulting for reference. It is submitted that the major recommendations from the Stantec report are as follows. Items in bold have been adopted into the staff report (albeit with some major variations on implementation), items in italics are being addressed through the LPS Continuous Improvement Process and the remainder have not been accepted by the staff report.;

1. **functional re-organization (current planning and policy planning);**
2. geographic re-organization (consolidate in a central office with a phased withdrawal from the Gulf Islands offices);
3. Section structure – **pushing decision making lower** and pooling administrative support;
4. **GIS in LPS unit**;
5. no increase in planning staff;
6. **annual goal setting and performance evaluation for staff;**
7. **focus on core planning responsibility;**
8. **use technology more effectively**;
9. **develop strong group of technical planning assistants;**
10. **increase specialist expertise;**
11. **improve planning process – current and policy planning;**
12. **system for setting work program priorities for success;**
13. **system for balancing workloads between LTCs;**
14. **setting appropriate fee levels;**
15. *establish a higher standard for application requirements;*
16. *consistency of processing applications throughout Islands Trust;*
17. delegation of minor applications to staff (i.e.; Development Permits); and
18. ***Improve Administrative Support to LTCs.***

2007 Mar 23

ISLANDS TRUST

LOCAL PLANNING SERVICES REVIEW

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Stantec

1. Introduction

The Islands Trust's Local Planning Services (LPS) is responsible for the delivery of local planning services to twelve Local Trust Committees. These services are delivered to a large geographic area that includes about 25,366 people. The planning unit has grown and evolved since the Islands Trust was established in 1974. The planning unit is now primarily organized on a geographic basis and operates through three offices: Gabriola, Salt Spring, and Victoria.

There have been concerns about the effectiveness of LPS from a variety of perspectives. The Islands Trust engaged Stantec to provide an independent, third party review. The *Terms of Reference* for the assignment also suggested numerous specific issues that have been raised by trustees, staff, and external interests.

While the geography and governance structure of the Islands Trust complicates how planning is done in the Islands Trust, the planning function could be better organized and managed to more effectively respond to its unique challenges and to clarify its role in providing planning service to the Local Trust Committees.

2. Process

The consultant reviewed the legislative framework, reviewed some of the planning documents (the Policy Statement, various OCPs and land use bylaws), and interviewed almost all of the Trustees, the Chief Administrative Officer, the planning staff, other members of the administrative unit, and staff from the Islands Trust Fund. Some outside stakeholders (such as landowners, applicants, lawyers, former employees, and consultants) were interviewed.

We also looked at other background material such as application statistics and other management reviews, including a staff survey from 2005. Concurrently with this review of LPS, Stantec reviewed four specific applications that led to a better understanding of processes of the Islands Trust.

We'd like to thank all those who contributed helpful commentary and suggestions.

3. Objective

A more effective planning regime should allow the Islands Trust to not only meet its day to day responsibilities for development review and customer service, but should also allow the Islands Trust to meet its overall mandate to preserve and protect through more effective community planning. These are inter-connected: one commentator said that building an effective process for dealing with development applications will engender more community support of the overall planning initiatives of the Islands Trust. One is used to implement the other.

If 'political' decisions are made (such as having an office in a certain location to provide a presence) as opposed to decisions to increase effectiveness, and this sometimes is a valid choice for an organization, it should be recognized as such.

4. Findings

To get to a more effective planning regime, significant change is required in how LPS is organized and managed. This includes a cultural shift and also requires a different approach at the political level.

The current situation has evolved over time for a variety of personnel and political reasons, but it is out opinion that it is clearly is not in the best interests of the overall organization.

The recommendations that follow are the consultant's independent opinion. It is believed that if the recommendations area implemented, LPS will become a more effective organization.

5. Recommended Changes

5.1 Agent of change

A new Director has been recently hired and will start soon. He should view his role as being a champion of change. The new Director's priority should be to work with the Chief Administrative Officer to implement these recommendations. Most of these recommendations are part of the administration's ongoing management function.

The Director is to provide the strategic leadership and management for LPS as it evolves into a more effective organization.

5.2 Functional reorganization

While the varied difficulties with the planning unit have diverse causes, the most significant improvement can be made through structural reorganization from the current geographic organization into two sections based on function:

- **a current planning section** that deals primarily with the day to day planning, mostly development applications and enforcement; and

- **a policy planning section** that focuses on the longer range planning, such as OCPs, land use bylaws, and other similar major projects.

This will provide a more consistent approach throughout the whole planning area, more flexibility in the delivery of services, higher levels of efficiency with a focus on specific tasks, the application of several professional perspectives to each local trust area, better supervision and balancing workloads between staff, dedicating them to the jobs they do best.

This has proven to be an effective model in many planning agencies. The local trust areas would lose their 'island planner' who does everything for them, but it is our opinion that the benefits far outweigh the costs.

If, for example, a planning team focused on preparing community plans, it should be able to develop state of the art practice, rather than relearning both the process and content of OCPs independently each time for each of the local trust areas. Similarly, a planning team focused on the development applications and enforcement should be able develop processes that can be consistently provided across all areas of the Islands Trust.

However, we must be mindful that good policy is built on an understanding of local conditions and how approvals are implemented. As a result, the Director must ensure there is strategic coordination between the sections. While the two sections have focused tasks, they will benefit from working together. Over time there could be staff movement between the sections. A concern has been raised that some planners might not prefer a career in current planning. While this may be true for some, the majority of planners in most planning agencies work in current planning. This work can be challenging and enjoyed by many. The issue arises, particularly, when you have senior planners spending their time writing development variance permits for minor setback issues. Recommendation 5.10 promotes the development of a strong technical group to focus on those types of applications.

The two planning managers would have to coordinate which planners (current or policy) would best attend specific meetings depending on the nature of issues to be discussed. Planners from each section could brief the other so they could meaningfully discuss the files with the local trust committees if attendance is required. Also, see 5.9 for replacing meetings with technology.

Reorganization includes relocating the mapping function into the LPS.

The Director, in this new structure, would have 3 functions reporting to him – the senior person in current planning, the senior person in long range, plus GIS/mapping.

5.3 Geographic reorganization

The geographic dispersal of planners appears to have been established to serve functional reasons (for example, a larger need on Salt Spring) or political reasons (a northern presence in the Trust Area, etc.), but it is not serving the overall organization well and is making it difficult particularly for staff recruitment, particularly considering the availability of affordable housing in some locations.

The bulk of planning staff would be situated primarily in a central office. The northern office should be relocated from Gabriola Island to Nanaimo and converted from a ‘full service’ office to more of a ‘store front’ or satellite office with a smaller staff complement, focusing primarily on the development application side. This will provide somewhat easier access to staff for residents of the northern islands, but it is primarily intended to be able to recruit and retain staff.

A reasonably strong on-site presence, focusing solely on Salt Spring is desirable given its significant population, development pressures, and the complexities that come with size.

This degree of centralization allows more planners and support staff to work in the same office. This will prove more effective, especially with other resources such as mapping and administration being just 'down the hall.'

Consideration should be given to having some staff hold storefront sessions on some of the more distant islands on some periodic basis.

5.4 Section Structure

There needs to be an effort to push some decision-making lower in the structure. With the development of consistent processes, more expeditious decisions could be made on simpler applications.

Job descriptions will have to be redone to reflect the new organizational structure, but should retain the flexibility in responsibilities to work on both current planning and policy planning. What's important are the allocation of duties and reporting structure – and this must be well-defined.

Administration and support staff could operate in a pool for each section.

5.5 GIS/Mapping organizational relocation

The geographic information system and mapping function is now within the administrative section. It makes more sense for this staff to be included within the planning unit. This will allow better coordination between them and their primary mapping customers. This should allow for better evaluation of performance by users who understand the work.

5.6 Staffing levels

We are not recommending any increase in planner staff levels in LPS (although strengthening the trust area services group is also seen as important in relieving the planners from the time they spend on the advocacy role). It appears that there is sufficient staff to fulfill the planning mandate, provided it becomes more effective over time and the planners are relieved from much of the administrative support they provide to the local trust committees. Effectiveness can be improved in numerous ways, as discussed in some of the other recommendations.

The organization has nine planners (Planner II's, Island Planners, Regional Planning Managers, and the Director) for 23,000 people which, per capita, is higher than other planning agencies that we are aware of. We also note the uniqueness of the Islands Trust circumstances in terms of geography, but this is not much different than some of the larger regional districts.

5.7 A different management culture

Recently, the planning unit has started to track time spent on various tasks. While this will help balance workloads between staff and to understand the changing needs of different local trust area, it provides an additional benefit of being able to determine performance levels. We note in the recent staff survey, planning staff had little idea of how they were being evaluated. This was a major concern. A formal system of yearly goal setting and performance evaluation should be instituted that has staff performance in synch with organizational goals. This system also provides feedback so people understand expectations and the organizations perception of them. Not getting feedback was a major concern identified in a relatively recent staff survey (by Gallup).

The culture must take on a new perspective of nurturing career growth by providing for professional development. Mentoring, day-to-day feedback and recognition, and effective communication are often more informal but should become a key part of the ongoing management culture.

Over time, we recommend that there could be some opportunity to shift somewhat between the two functional areas to allow for variety in staff activity and challenges.

5.8 Focus on the core responsibility

There has been a common saying in management literature about 'sticking to the knitting.' In other words, the planning staff should focus on their core planning function and not be caught up in the other side of the mandate – the 'advocacy role.' The current geographic function results in planners in some offices spending too much of their time doing their own administrative support.

We understand rationale for the Local Trust Committees to pursue the advocacy role but, if it is a legitimate role, it should be resourced separately from the planning function. The CAO and Director should take responsibility to ensure that planning attention is maintained for the planning function. Related to this, we note the recommendations of the Corporate Services Review is consistent with this view by suggesting the need to manage demand and to increase resources in Trust Area Services.

5.9 Use technology more effectively

Serious effort should be given to providing alternatives to travel where possible. Suggestions in this regard are to use technology, such as net meetings and video conferencing, to maximize the time planners spend planning. Losing some in-person contact would be more than overcome in carbon savings, put the Islands Trust in more of an environment-friendly leadership role, and be able to draw on additional staff resources at meetings. We suggest one of the local trust areas be treated as a pilot project to test the possibilities.

There is a need to be more effective with digital document handling. This came up time and time again.

5.10 Develop a solid technical group

Current Planning: One part of process improvement is developing more efficient, and consistent, ways to expedite the consideration of development applications, response to public inquiries, and bylaw enforcement. There seems to be consensus that the process often takes too long – some applications sit for months before getting any attention. There is variation in how applications are handled in different areas and this hinders the ability to shift staff around to easily meet demand.

5.11 Including specialist expertise

Most of the current planning staff would fit into the category of generalists. There are several ways to include specialist expertise in an organization. Most important is that future hiring and training should be aimed at hiring planners with a specialty, interest, and aptitude for different types of planning or getting 'generalists with a specialty.' First in this regard, would be to increase the environmental expertise, as the current method of relying on the Trust Fund environmental specialist is not completely satisfactory. If one planner–generalist was shifted to trust areas, this would leave a position to be filled with more environmental expertise.

Other methods are to hire consultants for specialized, particularly on one time projects (such as, for example, developing an affordable housing policy, etc.), use the professional sign-off of specialist consultants engaged by development applicants, or partner with other agencies where possible.

5.12 Advancing the mandate

The object of the Islands Trust, as defined in the *Islands Trust Act*, is *to preserve and protect the trust area and its unique amenities and environment for the benefit of the residents of the trust area and of British Columbia generally, in cooperation with municipalities, regional districts, improvement districts, other persons and organizations and the government of British Columbia.*

It appears that most people understand the mandate, but there are not many people that feel that the Islands Trust is doing anything different of better than other typical BC municipalities in protecting and preserving the environment. The Islands Trust has the same planning tools as regional districts.

This should get a higher priority and attention by working it in as a key element in its current and long range planning – from recruitment through processes. As LPS is functionally reorganized and other effective planning systems get put in place, there should be more time for addressing the specific elements of this key mandate and to get the Islands Trust into a leading edge position.

5.13 Process improvement

While we recognize that each island is unique, a chief complaint is the lack of consistency between the processes particularly between offices, but also from island to island. Staff needs to determine the best way of doing things and institute these systems across the local trust areas.
Given that significant portions of the workload are dealing with minor development permits, it might be wise to have a shift over time in staffing to develop a strong group of planning assistants (with technical planning training). This staff level should include those that service 'the front counter' on inquiries (Salt Spring, with its higher population proximate to the office, has higher demands in this area), keeping the planners planning. This might come at the expense of what some refer to as a slightly top heavy planning organization and keep 'the planners planning.'

The leader of the current planning group, working with the Director, should be tasked with establishing an appropriate, consistent review process. This should focus on balancing review with shorter time frames and more certainty of process. The *Land Use Planning Applications Processing Audit Assessment Report* identifies the issues and identifies areas for improvement. The author of that report noted that *staff demonstrated their ongoing commitment to seeking improvements to issues that detract from the provision of effective and efficient land use planning application processing services within the context of the Islands Trust mandate.* We support the second phase of this process as a key driver for improving the process. Issues to resolve include better customer service, communication and information provision, predictability and consistency, bylaw and regulatory limitations, application tracking systems, and project management. As one example, there seems to be an inordinate number of DVPs required – this usually means the bylaws need fixing.

Long Range Planning. Process improvement should also be applied to more focused and shorter time frames for preparing OCPs, for example. We heard many times that scheduled OCP reviews take far too long and, as a consequence, other OCPs get significantly delayed.

A more standard and expeditious process should be developed and fine-tuned for each new OCP update as required. With a model for each OCP for each local trust area to be updated every five years and limiting the time frame to about 18 months, this means starting four OCP reviews every year and a half. Discipline to the time frame will allow all islands to have their basic planning tools kept current. The leader of the long range planning group should be tasked with establishing an appropriate planning process for both updates and broader reviews and for looking at ways to advance the mandate.

5.14 Setting priorities

Juggling priorities is a challenge, especially when resources are stretched; there are so many clients (12 local trust areas) demanding attention; and there are competing functions of long range planning, development application processing, and advocacy support. While each local trust area seems to have its ‘top three’ list, thee is not an organized forum to look at setting priorities from the perspective of the overall organization. At best, it seems to be handled on an ad hoc basis by staff.

Clearly, a system should be in place for discussion, then following through on a work program that balances the needs of the local trust committees.

A long-range plan for completing major projects, including timelines, should be developed within the overall context and have the endorsement at the broad political level. It is a plan for planning and is essential to success. It’s not just setting the priorities; it is necessary to complete them. This requires discipline not only of the staff, but of the Trustees as well.

5.15 Balancing resources between local trust areas

The local trust areas vary greatly by population, from Salt Spring's 9,780 to 236 for South Pender. Growth rates the last five years show considerable variation – from a 2% decrease for Lasqueti to 48% increase for South Pender. The northern office, over the five year period to 2005 averaged 107 applications per year, the southern office had 75/year, and the central office had 63/year.

The following table shows the percentage of amount of time allocated by the planners for each of the local trust areas as compared to the local trust area population and the growth rate over the last five years. While this is just a two month sample from October/November, it does show some points of interest. In general, there is relative consistency between the allocations of time compared to the percentage of population of each local trust area. Areas with lower growth rates received a lower proportion of time than their population proportion and vice versa. However, these are not the only indicators to consider. For example, the complexity of use or the potential need for more committees for larger areas also has a bearing.

	Population	Actual Growth	Assigned Hours	% of time	% Population	Growth Rate
Denman	1095	79	277	5.5%	5.0%	7.8%
Gabriola	4050	528	415	8.2%	18.4%	15.0%
Galiano	1258	187	510	10.1%	5.7%	17.5%
Gambier	313	67	244	4.8%	1.4%	27.2%
Hornby	1074	108	193	3.8%	4.9%	11.2%
Lasqueti	359	-8	45	0.9%	1.6%	-2.2%
Mayne	1112	232	441	8.7%	5.1%	26.4%
North Pender	1996	220	529	10.4%	9.1%	12.4%
Saturna	359	40	208	4.1%	1.6%	12.5%
Salt Spring	9780	399	1954	38.6%	44.4%	4.3%
South Pender	236	77	126	2.5%	1.1%	48.4%
Thetis	372	23	124	2.4%	1.7%	6.6%

In terms of the allocation of resources between local trust areas, "big picture thinking" must be applied to the priority setting process noted above. There needs to be a base level for smaller islands in terms of application processing and maintaining the basics of an OCP and land use bylaws. It is acknowledged by most that the Islands Trust is a federation and there are trade-offs needed to ensure minimum service levels to ensure the overall integrity of the Islands Trust.

There also needs to be recognition that the larger islands need a level of service that recognizes the additional complexities that come from higher degrees of development and more participants in the process. This is particularly true for Salt Spring, which has a significant portion of the Trust Area population. Once again, this will be easier to 'nail down' after the functional reorganization and time spent can be determined with more accuracy over a longer time frame – however, an overall program schedule should be prepared and updated annually for major community planning projects. Having one unit focused on development applications will make it much easier to ensure an equitable distribution of attention on applications by local trust areas.

It should also be easier to adjust the workload between islands when levels of applications and project requirements fluctuate. LPS should continue to track efforts by task and by local trust area, and adjust workloads as required. Workload is a better indication of the effort required by local trust areas rather than relying on population or revenues.

In addition, situations will arise in the short or medium term that require more attention on one island or another. This is to be expected, but several people we have talked to suggest there at some areas that continue to absorb staff time because of an inability to come to grips with issues.

However, an overall program prepared through discussions of staff and the Local Trust Committees should be endorsed by the overall Trust Council, rather than planning staff trying to juggle the competing priorities of the different local trust committees. While staff are key participants in the discussion and formulation of a priority list, it should not be up to staff to set priorities. There needs to be discipline in sticking to priorities.

5.16 Setting appropriate fee levels

While there are some staunch supporters of a system of fees whereby revenues cover the costs of processing applications, there are other perspectives to consider. Fees that are too high discourage applications and people may just not bother making applications, thereby causing other issues, such as bylaw enforcement.

A strong case could be made that there is an overall public benefit in addressing development applications, so there should be some degree of public subsidization of the review process. Given the geographic spread of the islands, actual costs of considering applications are higher than other municipalities because of required site visits and meetings with the local trust committees. With a typical yearly intake of fees of about $170,000, it appears that the level of subsidization is quite high and there is some room to increase, provided it is met with higher levels of customer service.

The tracking of staff time should continue to determine true costs, and then this should be addressed in the future when more long-term information is available.

5.17 Setting the application bar

There is a need, in the re-engineering of the development application review process, to define appropriate submission requirements for the islands. Incomplete applications, as one example, create additional headaches.

5.18 Developing Consistency

Many people through the interview process have complained about the lack of consistency in the organization – applications are treated differently in different areas. Planning processes are redesigned for each local trust area. Words are defined in different ways. Some issues are addressed on an island by island basis, rather than resolved by an overall consistent approach.

Developing consistency throughout the organization is a valid objective. If the best practice is adopted throughout the organization, there should be considerable savings in efficiency with improvements to the quality of work. Consistency in things like definitions would go a considerable way in providing more flexibility in moving staff from project to project and island to island. It would make bylaw enforcement more standard and, therefore, more effective.

Given the structure of the Islands Trust, there are many OCPs and many land use bylaws. There is considerable variation between these documents. Considerable effort should go into developing more consistency of key components.

5.19 Delegation

Where possible, there should be some delegation to staff for minor development permits, etc. Dealing with the minor permits in a more expeditious manner would lighten the load of both the planning staff and the Local Trust Committees. This should be closely looked at in redesigning the development application review processes.

5.20 Administrative support for Local Trust Committees

The planning unit provides a degree of administrative support to the local trust committees. This function is typically done by a City Clerk's function in a normal municipality. City clerk's offices normally provide the administrative support (process, agendas, minutes, arrangements, bylaws, etc.) that local councils require to function. This is not normally a responsibility of the planning agency.

Options are to give the planning unit additional administrative resources to fulfill this function for the local trust committees or provide a corporate resource in the administrative unit.

5.21 Communication

It is important that, once a general decision is made about implementation of these recommendations, all staff are informed about the new general direction, the rationale for it, and the understanding that it may take on the order of two years to implement some of the changes. We note that there will be differences in staff acceptance of change, but we have the sense that, overall, staff wants the organization to improve.

Also, it is important that as the organization evolves, that staff are kept engaged and informed.

5.22 Governance

The existing structure of governance for the Islands Trust is, of course, one of the issues that create complexity for planning in the area. From the perspective of LPS, there would be benefits from a more streamlined governance structure. This recommendation is likely outside our scope, but we note that this is one consideration that influences how effective LPS can be.

If advocacy work is to be done, it should be properly resourced.

We think that the recommendations in this report, which concentrate on management issues, should proceed regardless of the outcome of the current governance study.

6. Budget Implications

Detailed planning and implementation of the recommendations of the report will require funding over the length of a transition period, which could be two or three years. Funding may be required for such things as:

potential staffing changes, whether or not that involves either of Local Planning Services or the Trust Area Services

detailed planning to determine exact locations of staff members and the reporting structure

change management to assist staff in understanding and embracing the organizational changes

writing new job descriptions and developing performance plans for revised positions

implementation of a staff career development evaluation and planning process

reengineering the processes to develop more consistency across the various Local Trust Areas

possible staff relocation costs

additional technology to increase capabilities in net and video meetings

office relocation costs and increased space for centralized staff

The specific amount can not yet be determined, but we suggest it wise for the budget to include funds that can be used for “organizational implementation” to accommodate the decisions the Islands Trust ultimately wishes to implement. The intent, of course, is to improve the effectiveness of the local planning services group in a cost-effective manner and to be successful in meeting the mandate.

7. Implementation

As noted earlier, implementation of these recommendations fall primarily to the incoming Director, working in consultation with the Chief Administrative Officer.

We would suggest that the Islands Trust Council endorse the general intent of this report and then senior management (primarily the Chief Administrative Officer and the Director) can start to implement the changes in a comprehensive manner.

The following table outlines overall responsibility (who is most accountable for ensuring it gets done) and practical responsibility (who initiates and completes) for each of the recommendations. It also indicates a sense of the priority and suggested time frame for completion of the task. Some are noted as ongoing.

	Recommendation	Overall Responsibility	Practical Responsibility	Priority	Time Frame
	Agent of change	CAO	Director	High	Immediate
	Functional reorganization	CAO	Director	High	3 months
	Geographic reorganization	CAO	Director	Medium	1-2 years
	Section Structure	Director	Managers	Medium	6 months
	GIS/Mapping organizational relocation	CAO	Director	Medium	3 months
	Staffing levels	CAO	Director	Medium	3 months
	A different management culture	CAO	Director	High	Ongoing
	Focus on the core responsibility	CAO	Director	High	Ongoing
	Use technology more effectively	Director	Managers	Medium	Pilot project 6 months
	Develop a solid technical group	Director	Managers	Medium	Ongoing
	Including specialist expertise	Director	Managers	Medium	Ongoing
	Advancing the mandate	Council	CAO	High	Ongoing
a	Current Planning Process Improvement	Director	Current Manager	High	9 months
b	Long Range Planning Process Improvement	Director	Policy Manager	High	9 months
	Setting priorities	Executive Committee	Director	High	Annual cycle
	Balancing resources between local trust areas	Director	Managers	High	Ongoing
	Setting appropriate fee levels	Director	Managers	Low	1 year
	Setting the application bar	Director	Managers	Medium	1 year
	Developing Consistency	Director	Managers	High	Ongoing
	Delegation	CAO	Director	Low	Ongoing
	Administrative support for Local Trust Committees	CAO		Medium	Ongoing
	Communication	CAO	Director	High	Ongoing

Annex C

LPS Continuous Improvement Process and Objectives

WHO	DAY-TO-DAY TASKS	DO WELL	NEEDS IMPROV'T	TASKS SHOULD BE DOING (BUT DON'T)	TASKS SHOULD NOT BE DOING (BUT DO)
RPM					
	Supervision of planners		✓	Work requested by CAO via DLPS	Non-planning community issues
	Supervision of administrators (LPS)		✓	Strategic planning	Supervision of by-law enforcement
	HR professional development		✓	More customer service	HR budgets, training, performance
	Trustee liaison	✓		Team building	Liaison with executive committee
	Staff mentoring	✓		Visioning	Letter writing for LTC/executive com.
	Work program management		✓	Public Education	Contract management
	Assisting director with LPS	✓			Default staff back-up
	Contract management	✓			IT support
	Staff recruitment		✓		Office management
	Agency Liaison		✓		Administration functions
	Trust Council policy implementation		✓		FN Liaison
	LPC support (bottom up)		✓		Consultation (media, public, interest groups)
	Keeping current on common law		✓		Work requested by CAO
	TAS, BE, TFE, GIS involvement		✓		Front line rep for IT
	Project management		✓		Orientation for Trustees
	Attend meetings (LTC, TC, etc.)	✓			Time collection management
	Facilitators of LPS	✓			
	Current Planning		✓		
	Policy Planning		✓		

WHO	DAY-TO-DAY TASKS	DO WELL	NEEDS IMPROV'T	TASKS SHOULD BE DOING (BUT DON'T)	TASKS SHOULD NOT BE DOING (BUT DO)
PLANNERS					
	Communication and work -			Look-up legal opinions	Time collection
	between Planner 1 and Is. Planner		✓	Policy development	IT support
	between Planner 1 and RPM		✓	Long-term mentoring	Responding to real-estate and appraisers
	with team	✓		Sharing knowledge btn planners	Filing
					Avoiding the pursuit of planning tools/issues in fear/anticipation of negative reaction fro or public
	with all staff	✓		Public outreach	
	with public	✓		Standardizing procedures and doc.	
	with Trustees		✓	Advocacy with other agencies	
	with other local governments	✓	✓	Social planning and community dev't	

	with provincial government	✓		Transportation planning	
	with federal government	✓		Work with Staff ecologist (PAN)	
	with First Nations		✓	Research new tools to pursue mandate	
	with APC and advisory bodies	✓		Office greening program	
	Processing applications	✓	✓		
	TAPIS updating and organizing	✓	✓		
	Processing referrals	✓			
	Personal development training	✓			
	Team training		✓		
	General enquiries	✓			
	Amending bylaws	✓			
	Base bylaws		✓		
	OCP review		✓		
	Administration duties	✓			
	Site visits	✓			
	Policy development		✓		
	Managing backlog	✓	✓		
	Removing backlog		✓		
	LPS mapping support with -				
	TAPIS	✓			
	OCP and LUB mapping	✓	✓		
	special data (base and ecosystem mapping)	✓			
	general enquiries and title searches		✓		

WHO	DAY-TO-DAY TASKS	DO WELL	NEEDS IMPROV'T	TASKS SHOULD BE DOING (BUT DON'T)	TASKS SHOULD NOT BE DOING (BUT DO)
PLANNING CLERK	Statutory Process:	✓			Putting materials for public hearing in binders
* Deputy Secretary * Commissioner for oaths * FOI Coordinator (time consuming job)	Bylaws				Organize public notification for permit process
	Permits				Mail and delivery of permits
	Covenants				
	RWMs				
	Public Hearings				
	BOV				
	Notices				
	Bylaws	✓			
	Draft				
	Track readings				
	updating docs				

	manage bylaw database				
	certification				
	safe keeping and storage				
	research				
	legislative updates				
	copies to various agencies				
	trustees				
	public				
	Public Hearings	✓			
	Organize				
	book venue				
	minute taker				
	notification				
	advertising				
	track correspondence				
	referrals				
	maintain legislative process				
	Permits	✓			
	Draft Notices				
	prepare packages				
	advertising notices where req'd				
	TUP				
	liaise with mapping				
	track correspondence				
	LTC agenda				
	certify and issue permit to applicant				
	register with LTO				
	B/F expiry date				
	manage TAPIS entries				
	close file				
	Research	✓			
	Office resource	✓			
	Backup to planning staff	✓			
	Public enquiries/counter	✓			

WHO	DAY-TO-DAY TASKS	DO WELL	NEEDS IMPROV'T	TASKS SHOULD BE DOING (BUT DON'T)	TASKS SHOULD NOT BE DOING (BUT DO)
ADMINISTRATORS				Weekly meetings with BE, Planners, and management	Time collection
	Covenant Tracking		✓	Acknowledge all public correspondence	Responding to some public enquiries
	Bylaw files management		✓	Better system for public correspondence	Back up tapes

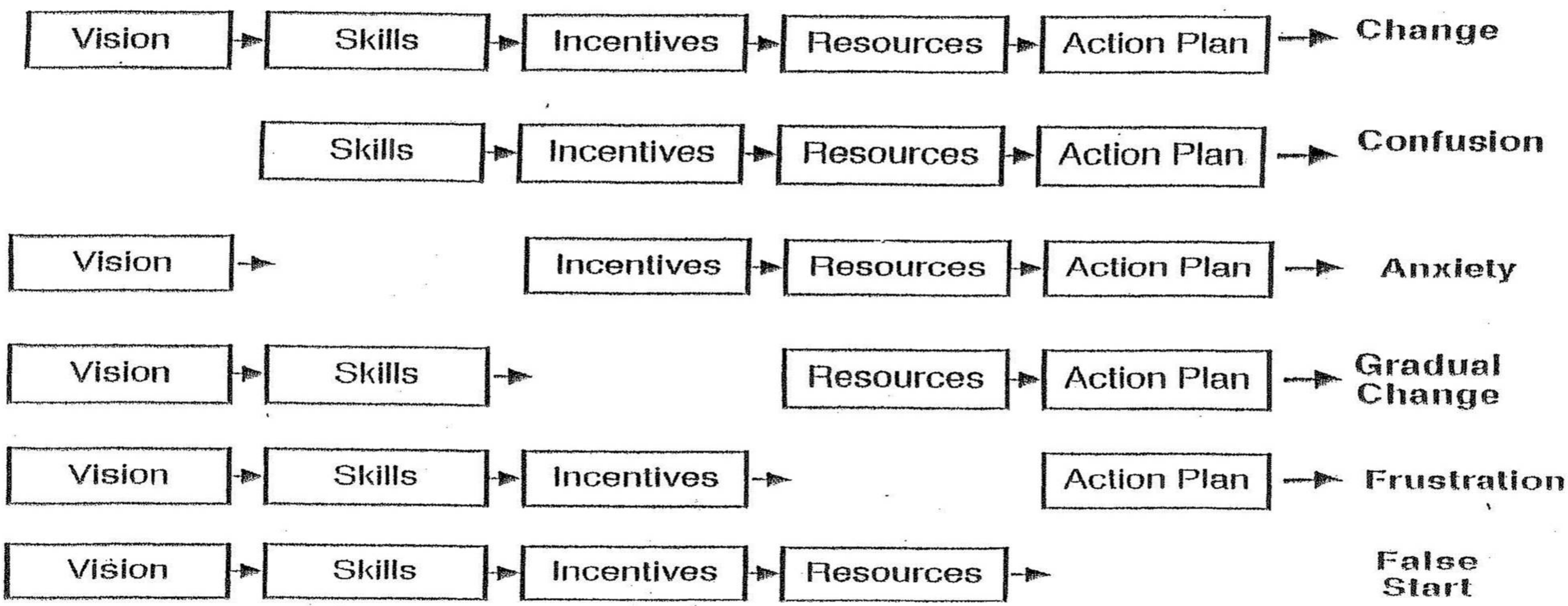
	Library and maps		✓	Night deposit	Review draft LTC minutes
	Creating more efficient systems and procedures		✓	Covenant Tracking	
	Creating more user friendly systems and procedures		✓		
	Being public friendly		✓		
	Legislative knowledge		✓		
	Emails		✓		
	Planner resource (materials, research, etc)		✓		
	More integration of systems		✓		
	Educate Public		✓		
	Being kept well informed		✓		
	Public correspondence	✓			
	Determine path: planner, trustees, bylaw, LTC				
	Acknowledge public correspondence		✓		
	Administration				
	filing		✓		
	petty cash	✓			
	mail processing (incl. fax and email)	✓			
	bank deposits		✓		
	map ordering	✓			
	ordering supplies	✓			
	equipment management (phones, copier, etc)	✓			
	Trustee correspondence management	✓			
	Ferry Ticket management	✓			
	Prep for LTC and other meetings	✓			
	Organize minute takers				
	book facility				
	arrange advertising				
	liaise with planners				
	prepare material: agenda pkgs.x 7/island				
	Post LTC and other meetings	✓			
	FUAL updates				
	update meeting database				
	Extract minutes to files				
	Post minutes to website				
	Set up Advisory committee meetings * Big job	✓			
	Monitor membership				
	confirm Quorum				
	prepare packages and expedite				
	Public enquiries/counter				

	Providing resource info		✓		
	Answering questions	✓	✓		
	Referral to other agencies	✓			
	Planner referral	✓			
	Providing applications and guidelines	✓			
	More resource material for public		✓		
	Process Applications				
	Reviewing for completeness (fees, title search, plans)	✓			
	covenant review		✓		
	FU w/ applicant incl. fee requirements	✓			
	Opening File	✓			
	Entering in TAPIS	✓			
	Provide file to planner and CC Trustees	✓			

WHO	DAY-TO-DAY TASKS	DO WELL	NEEDS IMPROV'T	TASKS SHOULD BE DOING (BUT DON'T)	TASKS SHOULD NOT BE DOING (BUT DO)
BYLAW ENFORCEMENT	Investigate	✓		Better management of litigation	Political concerns
	Respond to complaints		✓	Standardize procedures	Clerical work
	Write reports	✓		Review proposed bylaws	Answer general inquiries
	Recommend legal action	✓		Attend LTC mtgs when a BE issue is on agenda	Travel for political satisfaction
	Manage litigation		✓	Manage issues important to enforcement	Take direction from RPMs
	Develop enforcement policy		✓	Represent bylaw enforcement perspective	Investigate frivolous complaints
	Interpret bylaws	✓		Manage legal cases	SOL referrals
	Research	✓		Manage politically charged issues	BP referrals
	Liaise with others organizations	✓		Follow up with complainants	
				Follow up on DPs, DVPs, etc.	
				Integrate preserve and protect mandate into BE work	

Annex D

Key Components of a Successful Change Process



Annex E

Staff Time and Funds Spent on Development Management Applications and Community Planning Projects in Fiscal Year 2006/2007

2006/07
Combined Development Management Costs and Hours by Island Planners/RPMs and Planning Support Staff
Information from Time Collection & Financial Statements

	DIRECT HOURS	Salary & Benefit COST $	Total Application & Permit Revenue	Revenue as % of Cost
DE	629	$25,290	$12,850	51
GB	1,087	$44,965	$17,740	39
GL	914	$37,034	$23,200	63
GM	624	$25,020	$19,550	78
HO	459	$18,074	$4,120	23
LA	135	$5,339	$4,200	79
MA	388	$18,544	$6,872	37
NP	855	$37,431	$21,500	57
SS	4,685	$181,970	$65,020	36
SA	180	$7,802	$4,500	58
SP	309	$13,210	$3,950	30
TH	342	$13,215	$1,650	12
TOTALS	10,607	$427,894	$185,152	43%

2006/07
Combined Community Planning Costs and Hours by Island Planners/RPM's and Support
Information from Time Collection & Financial Statements

	DIRECT HOURS	Salary & Benefit COST $	$ Spent for other OCP/LUB activities (eg. Meetings)
DE	18	$756	$606
GB	385	$16,097	$2,111
GL	477	$19,885	$125
GM	54	$2,284	$0
HO	30	$1,270	$635
LA	37	$1,546	$124
MA	446	$21,287	$4,274
NP	372	$16,445	$5,919
SS	1,723	$66,160	$26,154
SA	200	$9,224	$0
SP	116	$4,819	$0
TH	39	$1,226	$114
TOTALS	3,899	$161,001	$40,062

Results from Individual Planning Offices

Northern Region

Development Management Hours & Cost
Planners

Community Planning Hours & Cost
Planners

	Hours	$	
DE	462.0	$	19,852
GB	917.1	$	39,408
GL	4.5	$	193
GM	424.6	$	18,245
HO	299.3	$	12,860
LA	91.7	$	3,941
NP	2.5	$	107
TOTALS	2,201.7		94,607.1

	Hours	$	
DE	15.5	$	666
GB	341.1	$	14,655
GL	-	$	-
GM	44.4	$	1,908
HO	29.0	$	1,245
LA	26.5	$	1,141
NP	-	$	-
TOTALS	456.5		19,614.8

Development Management Hours & Cost Support

	Hours	$	
DE	157.0	$	5,108
GB	138.7	$	4,513
GM	169.0	$	5,498
HO	160.2	$	5,214
LA	32.4	$	1,055
NP	14.0	$	456
TOTALS	671.3		21,844.2

Community Planning Hours & Cost Support

	Hours	$	
DE	2.8	$	90
GB	44.3	$	1,442
GM	6.3	$	205
HO	0.8	$	26
LA	7.3	$	238
NP	-	$	-
TOTALS	61.5		2,001.3

Central Region

Development Management Hours & Cost Planners

	Hours	$	
SP	36.5	$	1,530
SS	3,029.7	$	126,969
TH	256.4	$	10,747
TOTALS	3,322.7		139,245.3

Community Planning Hours & Cost Planners

	Hours	$	
SP	82.5	$	3,457
SS	1,243.1	$	52,097
TH	8.8	$	369
TOTALS	1,334.4		55,922.9

Development Management Hours & Cost Support

	Hours	$	
SP	5.0	$	142
SS	1,196.2	$	34,015

Community Planning Hours & Cost Support

	Hours	$	
SP	2.5	$	71
SS	457.8	$	13,019

TH	83.8	$	2,384
TOTALS	1,285.0		36,541.9

TH	30.2	$	858
TOTALS	490.5		13,947.2

Southern Region

Development Management Hours & Cost Planners

	Hours	$	
DE	1.0	$	48
GB	7.3	$	347
GL	543.3	$	25,985
GM	20.2	$	965
LA	0.5	$	24
MA	387.7	$	18,544
NP	659.6	$	31,550
SA	135.9	$	6,498
SP	198.5	$	9,493
SS	406.1	$	19,424
TH	1.8	$	84
TOTALS	2,361.7		112,961.0

Community Planning Hours & Cost Planners

	Hours	$	
DE	-	$	-
GB	-	$	-
GL	315.9	$	15,107
GM	3.6	$	171
LA	3.5	$	167
MA	442.9	$	21,183
NP	297.3	$	14,218
SA	181.6	$	8,688
SP	19.8	$	945
SS	21.1	$	1,011
TH	-	$	-
TOTALS	1,285.6		61,490.7

Development Management Hours & Cost Support

	Hours	$	
DE	9.5	$	282
GB	23.5	$	697
GL	365.8	$	10,856
GM	10.5	$	312
LA	10.8	$	319
MA	-	$	-
NP	179.2	$	5,319
SA	43.9	$	1,303
SP	68.9	$	2,044
SS	52.6	$	1,562
TOTALS	764.6		22,694.4

Community Planning Hours & Cost Support

	Hours	$	
DE	-	$	-
GB	-	$	-
GL	161.0	$	4,778
GM	-	$	-
LA	-	$	-
MA	3.5	$	104
NP	75.0	$	2,227
SA	18.1	$	537
SP	11.6	$	345
SS	1.1	$	34
TOTALS	270.4		8,023.9

Annex F

Development Management Application Timelines
From 2001 to 2006

Time to Process Applications - Southern Office

Application Type	2001	2002	2003	2004 (Average Number of Days)	2005	2006	Ranking of 2006
ALR							
application to consideration	10	72	34	24	45	45	4th out of 6
consideration to approval	124	80	47	23	47	34	
Total	134	152	81	47	92	79	
BOV							
application to consideration	0	139	22	45	63	48	3rd out of 5
consideration to approval	0	64	3	8	27	19	
Total	0	203	25	53	90	67	
DP							
application to consideration	204	791	60	75	44	169	4th out of 6
consideration to approval	5	18	243	34	61	62	
Total	209	809	303	109	105	231	
DVP							
application to consideration	31	47	17	31	52	36	4th out of 6
consideration to approval	12	17	21	8	28	44	
Total	43	64	38	39	80	80	
FLR							
application to consideration	0	3	9	21	0	6	2nd out of 4
consideration to approval	0	2	26	14	0	42	
Total	0	5	35	35	0	48	

Application Type	Average Number of Days						
	2001	2002	2003	2004	2005	2006	
RZ (applications only)							
application to consideration	374	203	234	307	181	303	4th out of 6
consideration to approval	1	29	26	24	1	10	
Total	375	232	260	331	182	313	
SUB							
application to consideration	466	296	296	197	220	171	1st out of 6
consideration to approval	48	29	29	23	15	81	
Total	514	325	325	220	235	252	
TUP							
application to consideration	0	0	0	635	51	83	2nd out of 3
consideration to approval	0	0	0	1	2	4	
Total	0	0	0	636	53	87	

Time to Process Applications - Northern Office

Application Type	2001	2002	2003	2004	2005	2006	Ranking of 2006
				Average Number of Days			
ALR							
application to consideration	106	54	46.5	34	41	75	5th out of 6
consideration to approval	3.5	0	0	0	0	11	
Total	109	54	46.5	34	41	86	
BOV							
application to consideration	0	0	0	0	0	113	not applicable
consideration to approval	0	0	0	0	0	0	
Total	0	0	0	0	0	113	
DP							
application to consideration	67	38	43	54	168	110	5th out of 6
consideration to approval	0	0	0	20	73	97	
Total	67	38	43	74	241	207	
DVP							
application to consideration	70	55	48	108	75	94	5th out of 6
consideration to approval	0	17	24	25	0	10	
Total	70	72	72	133	75	104	
FLR							
application to consideration							not applicable
consideration to approval							
Total							

Application Type	2001	2002	2003	2004	2005	2006
				Average Number of Days		

RZ (applications only)							
application to consideration	49	0	43	109	69	139	5th out of 5
consideration to approval	321	0	159	168	0	?	
Total	370	0	201	277	69	139	
SUB							
application to consideration	64	24	33	37	65	72	6th out of 6
consideration to approval	291	167	135	111	159	177	
Total	355	191	168	148	223	249	
TUP							
application to consideration	14	0	35	46.5	20	118	5th out of 5
consideration to approval	319	0	0	34.5	0	3	
Total	333	0	35	81	20	121	
SUP							
application to consideration	12	9	10	8	17	24	6th out of 6
consideration to approval	14	6	6	6	6	3	
Total	26	21	17	15	23	27	

Time to Process Applications - Central Office

Application Type	2001	2002	2003	Average Number of Days 2004	2005	2006	Ranking of 2006
ALR							
application to consideration	130	78	341	56	71	**102**	4th out of 6
consideration to approval	148	182	197	32	15	**69**	
Total	278	260	538	88	85	**171**	
BOV							
application to consideration	0	0	0	0	0	**106**	not applicable
consideration to approval	0	0	0	0	0	**0**	
Total	0	0	0	0	0	**106**	
DP							
application to consideration	36	42	71	34	130	**65**	4th out of 6
consideration to approval	14	2	100	16	7	**19**	
Total	50	44	171	50	137	**84**	
DVP							
application to consideration	32	22	57	37		**95**	5th out of 5
consideration to approval	8	7	110	18		**7**	
Total	40	29	167	55		**102**	
FLR							
application to consideration	6						not applicable
consideration to approval							
Total							

Application Type	2001	2002	2003	Average Number of Days 2004	2005	2006

RZ (applications only)							
application to consideration	n/a	78	105	63	63	**85**	4th out of 5
consideration to approval	n/a	196	374	178	675	**In process**	
Total		274	479	241	738	**85**	
SUB							
application to consideration							not applicable
consideration to approval							
Total	172	282	312	227	212	**126**	
TUP							
application to consideration	90	21	52	14	0	**78**	4th out of 5
consideration to approval	0	263	0	0	0	**39**	
Total	90	284	52	14	0	**116**	
HAP							
application to consideration	0	0	0	44	95	**0**	not applicable
consideration to approval	0	0	0	91	6	**0**	
Total	0	0	0	135	101	**0**	

Annex G

Office Location Comparisons

Office Location Comparisons for a Planner Day on Each Island

Office on Gabriola Island

Travel to:	Depart (AM)	Travel Time (hours)	Time on Island (hours)	Return (PM)	Regular Hours Worked (hours)	Regular Hours Cost ($)	Overtime (hours)	Overtime Cost ($)	Total Cost ($)	Cost / hour on Island ($)
Gabriola	7:30	0	10	5:30	10	453.50	0	0	453.50	45.35
Gambier*	6:30	7	5	6:30	10	453.50	2	136.04	589.54	117.91
Lasqueti	7:00	7.5	5	7:30	10	453.50	2.5	170.05	623.55	124.71
Thetis	7:00	5	5.5	5:30	10	453.50	0.5	34.01	487.51	88.64
Denman	7:00	5.5	5	5:30	10	453.50	0.5	34.01	487.51	97.50
Hornby	7:00	7	4.5	6:30	10	453.50	1.5	102.03	555.53	123.45
TOTAL		32	**35**		60	2721.00	7	476.14	3197.14	597.56

Office In Nanaimo

Travel to:	Depart (AM)	Travel Time (hours)	Time on Island (hours)	Return (PM)	Regular Hours Worked (hours)	Regular Hours Cost ($)	Overtime (hours)	Overtime Cost ($)	Total Cost ($)	Cost / hour on Island ($)
Gabriola	7:00	1	9	5:00	10	453.50	0	0.00	453.50	50.39
Gambier	7:45	4	5	4:45	9	408.15	0	0.00	408.15	81.63
Lasqueti	8:45	4.5	6	6:00	10	453.50	0.5	34.01	487.51	81.25
Thetis	8:00	2	7	5:00	9	408.15	0	0.00	408.15	58.31
Denman	8:00	2.5	7	5:30	9.5	430.83	0	0.00	430.83	61.55
Hornby	8:00	4	5.5	5:30	9.5	430.83	0	0.00	430.83	78.33
TOTAL		18	**39.5**		57	2584.95	0	**34.01**	**2618.96**	**411.46**

Notes:

* **Gambier** - assumes seaplane from Nanaimo Harbour to Sechelt, rental car to Langdale and Stormaway ferry and/or water taxi to/from Keats or Gamber. Reality, visits may be more appropriate in Gibsons. Seaplane schedule dependant on daylight and changes throughout the year.

** **Lasqueti** - Lasqueti ferry limited service - does not operate every day.

Assumes planner will start and end from office location.

Findings:

Nanaimo is the cheaper location for traveling to the islands ($2618.96 for each services of weekly visits), is the more cost effective location for maximizing planning time on the islands ($411.46/hour in total) and would generate annual overtime costs of $1,632.48 ($34.01 by 48 working weeks = $1,632.48)

Analysis:

assuming that as little as 4.5 hours on an island during a planning visit is acceptable and therefore cost effectiveness is not a primary concern, and that overtime paid is the only incremental cost, then **moving the northern office from Gabriola to Nanaimo would generate annual overtime savings of $ 21,222.24** (($476.14 - $34.01) by 48 working weeks = $21,222.24) if planners live on Gabriola.

However Island Planners will make the vast majority of island visits and if those planners lived in the Nanaimo area and went directly to islands for their weekly visits there would be no financial difference between the two office locations.
Fully equipped office space can be rented for up to three people in Nanaimo for $10,000 annually and allow a choice of work sites between Gabriola and Nanaimo, as well as providing a more regionally convenient and higher profile Islands Trust office.
The administrative office could also be the base of operations for the Compliance sub-unit and the one person dedicated to being present each work day could be the proposed additional administrative support staff member shared between Compliance and the Northern office.

Conclusion:

It is recommended that the northern office remain on Gabriola and that an office space service in Nanaimo be used to allow Island Planners to work 2 days a week on Gabriola Island, two days a week in Nanaimo and one day a week on their assigned island

Office Location Comparisons for a Planner Day on Each Island in the Southern Region

Office on North Pender Island

Travel to:	Depart (AM)	Travel Time (hours)	Time on Island (hours)	Return (PM)	Regular Hours Worked (hours)	Regular Hours Cost ($)	Overtime (hours)	Overtime Cost ($)	Total Cost ($)	Cost / hour on Island(s) ($)
Mayne	6:35	3.25	10.25	7:00	10	453.50	3.5	238.07	691.57	67.47
Galiano	6:35	3.5	10	7:00	10	453.50	3.5	238.07	691.57	69.16
Saturna	7:00	5	7	7:00	10	453.50	2	136.04	589.54	84.22
North Pender	7:30	0	10	5:30	10	453.50	0	0	453.50	45.35
South Pender	7:30	0	10	5:30	10	453.50	0	0	453.50	45.35
TOTALS		11.75	47.25		50	2267.50	9	612.18	2879.68	**311.55**

Office In Sidney

Travel to:	Depart (AM)	Travel Time (hours)	Time on Island (hours)	Return (PM)	Regular Hours Worked (hours)	Regular Hours Cost ($)	Overtime (hours)	Overtime Cost ($)	Total Cost ($)	Cost / hour on Island ($)
Mayne	8:00	4.4	6.6	6:40	10	453.50	1	68.02	521.52	79.02
Galiano	9:50	3.5	6.5	8:00	10	453.50	0	0.00	453.50	69.77
Saturna	8:00	4.8	6.2	6:40	10	453.50	1	68.02	521.52	84.12
North Pender	7:35	3	9.5	8:00	10	453.50	2.5	170.05	623.55	65.64
South Pender	7:35	3	9.5	8:00	10	453.50	2.5	170.05	623.55	65.64
TOTALS		18.7	38.3		50	2267.50	7	**476.14**	**2743.64**	364.18

Office In Victoria

Travel to:	Depart (AM)	Travel Time (hours)	Time on Island (hours)	Return (PM)	Regular Hours Worked (hours)	Regular Hours Cost ($)	Overtime (hours)	Overtime Cost ($)	Total Cost ($)	Cost / hour on Island ($)
Mayne	8:00	5.9	6.6	6:40	10	453.50	2.5	170.05	623.55	94.48
Galiano	9:20	4	6.5	8:00	10	453.50	0.5	34.01	487.51	75.00
Saturna	8:00	4.3	6.2	6:40	10	453.50	0.5	34.01	487.51	78.63
North Pender	7:35	3	9.5	8:00	10	453.50	2.5	170.05	623.55	65.64
South Pender	7:35	3	9.5	8:00	10	453.50	2.5	170.05	623.55	65.64
TOTALS		20.2	38.3		50	2267.50	8.5	578.17	2845.67	379.38

Findings:

Sidney is marginally the cheapest location for traveling to the islands ($2743.64 for each series of weekly visits) and would generate annual overtime costs of $22,854.72 ($476.14 by 48 working weeks = $ 22854.72)

North Pender is the most cost effective location for maximizing planning time on the islands ($311.55/hour in total)
Victoria is the second cheapest location for traveling to the islands and the least cost effective location for maximizing planning time on the islands

Analysis:
assuming that as little as 6.2 hours on an island during a planning visit is acceptable and therefore cost effectiveness is not a primary concern, and that overtime paid is the only incremental cost, then **moving the southern office from Victoria to Sidney would generate annual overtime savings of $ 4897.44** (($578.17 - $476.14) by 48 working weeks = $4897.44)
Moving from Victoria to North Pender would actually cost more due to higher annual overtime payments of $1632.48
(($612.18 - $578.17) by 48 working weeks = $1632.48)

Conclusion:

There is no financial savings in moving the southern office from Victoria to North Pender, and only a nominal savings in moving to Sidney.

It is recommended that the southern office remain in Victoria.

Geographic Information Systems Sub-unit

Mapping continues to play a crucial role in LPS activities, but while the day to day needs are being met, many opportunities exist within Mapping, to improve and expand upon existing services. The challenge, as is often the case, is finding the available staff time to pursue these improvements. Mapping is proposing additional funding equivalent to ½ a Technician, which would free up a sufficient amount of resources to afford further exploration, development and implementation of the proposed improvements. The following is a list of the key items that are most relevant, and immediately applicable to the Mapping group.

- Update spatial data storage and management methods and approach
- Update and Improve existing TAPIS application user interface, and expand staff training opportunities
- Expand cadastral realignment efforts
- Explore and apply for additional infrastructure and project funding (i.e.; geoconnections and ICIS Civic Spatial funding)
- Develop and Implement a publicly accessible Islands Trust information portal
- Develop and maintain GIS operations manual

In an ideal, and very much simplified Mapping\GIS Group, baring any and all budget and staffing limitations, a GIS Technician would be responsible for the maintenance of core GIS data products, such as updating the Islands Trust Cadastral dataset when new subdivision plans receive final approval, and the production of core map products. A GIS Analyst would then perform geospatial analysis for various mapping projects, with direction from Local Planning Services and the GIS Coordinator, and work with the Technician in the development and production of core and project related map products. In addition to providing direction and support to the GIS Analyst and Technician, the GIS Coordinator would coordinate the development and maintenance of GIS documentation (ie GIS Operations Manual) which would form the foundation of the organizations GIS institutional knowledge, and strategically plan for the ongoing development and maintenance of the Islands Trust GIS (i.e.; Staffing and training, GIS Desktop, Server and Web Applications etc...).
Although the above description is grossly oversimplified, it does serve to demonstrate the challenge facing the Islands Trust GIS. Without a GIS Analyst, the GIS Coordinator and Technician assume these responsibilities, which ultimately take the Coordinator's focus away from strategic planning and development. This loss of focus has allowed Islands Trust GIS business and technology practices to become dated and in need of updating. With this additional funding, the GIS coordinator will be able to select the appropriate resource (i.e. Co-op Student, Intern, or Contractor), thereby freeing up additional time for strategic planning and the pursuit of the above mentioned improvements and opportunities.

Annex I

Compliance Sub-unit

Introduction

As part of the general LPS review the bylaw enforcement program has also been subject to scrutiny. This examination was prompted by comments from many Trustees who suggested that the Islands Trust required "more" enforcement. Staff believes that the desire for more enforcement is actually a desire for better managed enforcement and the following recommendations are designed to satisfy that desire.

Discussion

Administrative: The compliance and bylaw enforcement unit will consist of;

- a full-time compliance coordinator who also acts as a bylaw enforcement officer;
- A second full-time bylaw enforcement officer; and
- half the time of an office assistant.

There will be a main office for bylaw enforcement from which the work will be coordinated and administrative functions such as file keeping will be done. The BLEOs will have access to a work station in each of the three regional offices. However, the officers will be properly equipped so that they are in constant contact with an administrative assistant and they will be expected to be often working in the various Local Trust Areas.

Inquiries: Contact with the public, staff and other agencies will be managed by having a dedicated Islands Trust Bylaw enforcement phone number and email address. Persons contacting the Trust from these sources will be automatically forwarded to the compliance administrative assistant. The administrative assistant will pass information to officers in the field through a variety of electronic means. This will enable bylaw enforcement officers to quickly respond to enquires and thus eliminate a source of frustration with the present service.

Enforcement: The "new" bylaw enforcement division will be staffed with two full time bylaw enforcement officers. This will have several important improvements in service for the Trust Area. First it will mean that there will always be at least one bylaw enforcement officer available. The officers will work out of the same office but be generally responsible for a geographic area. When necessary, officers will work together as a team on important and large projects. They will also rely on each other, as they are not able to do so now, for support and specific officer expertise will be able to be applied where ever it is necessary.

Advice: The compliance coordinator will develop and advise on strategic and tactical bylaw enforcement strategies to the Director of Local Planning Services and to the Local Trust Committees and Executive Committee. The goal of this initiative is to ensure the most effective use of enforcement resources and prevent duplication of effort in different Local Trust Areas. It will also ensure that enforcement is carried on in a consistent manner from area to area.

To ensure that the bylaw enforcement perspective is included in LPS unit operations, the coordinator will also attend and participate in LPS management meetings. Bylaw enforcement officers will attend LTC meeting when necessary to advise on bylaw enforcement issues and strategies. The bylaw enforcement coordinator will review and provide advice on enforceability of new Trust Bylaws. Advice to the public will be available from bylaw enforcement officers and the administrative assistant during all working hours.

Litigation Coordination: The compliance coordinator will co-ordinate and be responsible to the Director of Local Planning Services for all aspects of litigation in the Islands Trust. This will mean that in all legal matters the coordinator is the appointed "go to" person. This will eliminate the potential for confusion.

The Director will maintain managerial responsibility for litigation. The Local Trust Committees will direct litigation undertaken on their behalf and the Executive committee will manage litigation strategically to ensure that the Islands Trust mandate is effectively met within budget parameters.

Monitoring: The compliance unit will also develop the ability to monitor for compliance development permit and development variance permits issued by the Islands Trust. This monitoring function will also include checking on development permit areas and possibly covenant requirements for the Trust Fund Board.

Recommendations

The over all goal is to develop an enforcement program which is visible, effective, and purposeful. The primary recommendation is that the Islands Trust shift from a dedicated regional bylaw enforcement approach to a Trust Area wide approach where bylaw enforcement officers are field orientated and supported by a dedicated administrative resource person.

Annex J

Proposed LPS Staffing Increases

SEE SEPARATE ATTACHMENT

Annex K

Draft OCP/LUB Implementation Schedule for Fiscal Year 2008/2009
with Impact of Implementation of Increased Staffing

This OCP budget assumes LPS Staffing Level #2 is approved and new projects (highlighted) don't start until January 2009.

ISLAND	LOCATION CODE	DESCRIPTION	NOTES	BUDGET
Denman	615	OCP/LUB		10,000
DeCourcey	620	OCP/LUB		2,500
Gabriola	620			
Galiano	625	OCP	Mapping requirement $35,000	38,750
Gambier	630	Comprehensive Planning	Mapping requirement $35,000 - **special levy for Gambier if not funded in Islands Trust budget**	38,750
Gambier Associated	630	OCP/LUB		15,000
Hornby	635			
Lasqueti	640			
Mayne	645	OCP/LUB		10,000
North Pender	650	OCP/LUB		8,000
Salt Spring	655	OCP/LUB		50,000
Saturna	660			
South Pender	665			
Thetis	670			
Other				
Miscellaneous Projects	590			15,000
Total OCP/LUB				**188,000**

Annex L

Analysis of How Many Days per Week Island Planners Should Visit Their Assigned Islands

LPS Renewal Matrix

	Trustee & Staff Parameters	Proposal - Island Planners on Islands					
		0 days/ week	1 day/ week	2 days/ week	3 days/ week	4 days/ week	5 days/ week
	Trustees						
T1	we must lead the way on environment						
T2	use telecommunications between staff, not at LTCs						
T3	important to have local presence and access	-1	1	1	1	1	1
T4	LTC priorities must be set by LTC, not others						
T5	planners should be part of current & long term planning						
T6	must address affordable housing for staff	0	1	1	-1	-1	-1
T7	clear the backlog						
T8	affordable housing (residents)						
T9	wrap up STVR initiatives						
T10	analysis of water supplies						
T11	shoreline set-backs & aesthetics						
T12	need work plan to advance much faster						
T13	re-focus on Island Planners as primary service provider	0	1	1	0	-1	-1
T14	lack of bylaw enforcement resources						
T15	keep OCPs on schedule						
T16	fill and augment staff	-1	1	1	0	0	-1
T17	soil removal bylaw						
T18	development approval information bylaw						

T19	delivery of promised services						
T20	improved bylaw enforcement process						
T21	need more good staff	-1	1	1	0	0	-1
T22	achievability of LTC work programs						
T23	improve format of LTC Application Logs						
T24	(reduce) bureaucratization of Islands Trust						
T25	deliver as much service as possible on islands	-1	1	1	1	1	1
T26	get subdivision approval authority						
T27	proceed with MTI bylaws						
T28	need to complete mapping						
T29	need more proactive planning	-1	1	1	0	0	-1
T30	we must not take the path of least resistance						
T31	planners need to ask for more admin support						
T32	stronger fielding of mandate						
T33	process applications more timely	-1	1	1	-1	-1	-1
T34	advise what applications & issues are coming						
T35	keep website up to date						
T36	need staff biologist						
T37	need LTC administrative officer						
T38	adopt a more comprehensive planning approach	-1	1	1	0	0	0
T39	use communications specialists at LTC level as well						
T40	support a professional staff that can implement direction						
T41	& not require Trustees to "row" instead of "steering"						
T42	need strong Island Planners						
T43	need an entirely different method of service delivery	-1	1	1	0	0	-1
T44	local service / local presence	-1	1	1	1	1	1
	<u>Staff</u>						
S1	current and long range planning						
S2	team work	-1	1	1	0	-1	-1
S3	office location	-1	1	1	0	0	-1
S4	serving the mandate	-1	1	1	0	0	0
S5	appropriate work load						

S6	need focus	-1	1	1	0	0	0
S7	eliminate "silos" of regions						
S8	deal with customers & colleagues honestly & realistically	-1	1	1	0	-1	-1
S9	better customer service	-1	1	1	0	0	-1
S10	manage development/growth						
S11	job security, pay and pension						
S12	address staff affordability	1	1	1	0	0	0
S13	hope that things will improve						
S14	address lack of support from "Victoria"						
S15	need a sense of accomplishment more often						
S16	need to feel connected to larger organization	1	1	1	0	-1	-1
S17	need enough time to do work	1	1	1	0	-1	-1
S18	keep this job fun	-1	1	1	0	-1	-1
S19	concerns about job loss due to LPS Review						
S20	Trustees should not give direction to staff directly						
		0 days/ week	1 day/ week	2 days/ week	3 days/ week	4 days/ week	5 days/ week
	TOTALS	**-13**	**21**	**21**	**1**	**-5**	**-11**