

2007 Mar 23



ISLANDS TRUST LOCAL PLANNING SERVICES REVIEW

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Project No. 116922600

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 our opinion that it is clearly 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 are 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

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.’

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 or 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.

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.

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, there 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 are 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
- office relocation costs and increased space for centralized staff
- additional technology to increase capabilities in net and video meetings

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
1	Agent of change	CAO	Director	High	Immediate
2	Functional reorganization	CAO	Director	High	3 months
3	Geographic reorganization	CAO	Director	Medium	1-2 years
4	Section Structure	Director	Managers	Medium	6 months
5	GIS/Mapping organizational relocation	CAO	Director	Medium	3 months
6	Staffing levels	CAO	Director	Medium	3 months
7	A different management culture	CAO	Director	High	Ongoing
8	Focus on the core responsibility	CAO	Director	High	Ongoing
9	Use technology more effectively	Director	Managers	Medium	Pilot project 6 months
10	Develop a solid technical group	Director	Managers	Medium	Ongoing
11	Including specialist expertise	Director	Managers	Medium	Ongoing
12	Advancing the mandate	Council	CAO	High	Ongoing
13a	Current Planning Process Improvement	Director	Current Manager	High	9 months
13b	Long Range Planning Process Improvement	Director	Policy Manager	High	9 months
14	Setting priorities	Executive Committee	Director	High	Annual cycle
15	Balancing resources between local trust areas	Director	Managers	High	Ongoing
16	Setting appropriate fee levels	Director	Managers	Low	1 year
17	Setting the application bar	Director	Managers	Medium	1 year
18	Developing Consistency	Director	Managers	High	Ongoing
19	Delegation	CAO	Director	Low	Ongoing
20	Administrative support for Local Trust Committees	CAO		Medium	Ongoing
21	Communication	CAO	Director	High	Ongoing