



**UNION OF BRITISH COLUMBIA MUNICIPALITIES
REGIONAL DISTRICT ISSUES & NON-LEGISLATIVE SOLUTIONS
WORKING GROUP 1**

REPORT & ACTION PLAN

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INTRODUCTION

Background:

In early 2004, the UBCM Executive approved a project aimed at pursuing non-legislative solutions to key regional district issues identified by UBCM members. Multi-party working groups were proposed to consider the issues, and to develop strategies to address them. One such group – Working Group 1 – was created specifically to develop an *Action Plan* designed to:

- improve the general understanding of regional districts in BC's system of local government
- address concerns related to the accountability and roles of regional district directors

Report:

This *Report* documents the efforts undertaken by the Working Group to develop its *Action Plan*.

Three full-day discussion sessions comprised the core of the Working Group's program. The sessions were held in May, June and July at the UBCM offices in Richmond. Each session included all members of the Working Group, and was facilitated by the Group's consultant. The sessions are reviewed separately, and in considerable detail, in the first three chapters of this *Report*.

Chapter 4 presents the *Action Plan* itself. The *Plan*, complete with its key feature, the *Tool Kit*, may be reviewed in conjunction with the full *Report*, or as a separate, stand-alone document.

Working Group Members:

Working Group 1 consisted of seventeen elected and appointed officials, including:

- Chair Susan Gimse (Squamish-Lillooet RD)
- Chair Ted Armstrong (Cariboo RD)
- Chair Marvin Hunt (Greater Vancouver RD)
- Chair Jim Abram (Comox-Strathcona RD)
- Chair Karen Goodings (Peace River RD)
- Mayor Allison Habkirk (District of Central Saanich)
- Mayor Randal Macnair (City of Fernie)
- Jennifer Bridarolli (City of Merritt)
- Rod Drennan (District of Spallumcheem)
- Douglas Holmes (Sunshine Coast RD)
- Gerry Kingston (Fraser Valley RD)
- Tom MacDonald (LGMA/GFOA)
- Richard Taylor (UBCM)
- Alison McNeil (UBCM)
- Brenda Gibson (MCAWS)
- Lois-Leah Goodwin (MCAWS)
- Deidre Wilson (MCAWS)

Taken together, the members of Working Group 1 represented a cross-section of the local government community in British Columbia. Allan Neilson-Welch, a BC-based local government consultant, served as the Working Group's support person and facilitator.

MCAWS:

Working Group 1 benefited greatly from the support of the Ministry of Community, Aboriginal & Women's Services (MCAWS). The Ministry made available key staff members to sit on the Working Group, and cost-shared, with UBCM, the Working Group's efforts.

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MAY SESSION

Introduction:

The Working Group's first discussion session took place on May 11, 2004. The purpose of first gathering was threefold:

- to review the Working Group's mandate, which, as noted, was to develop an *Action Plan* aimed at improving the general understanding of regional districts, and addressing concerns related to the accountability and roles of regional district directors
- to establish a common understanding, among Working Group members, of the purposes and roles of regional districts in BC's system of local government
- to establish a common understanding, among Working Groups members, of the key concerns surrounding the roles and accountability of directors

Efforts to establish a common understanding among Working Group members, both with respect to the purposes of regional districts and the concerns surrounding the roles of directors, were considered important at the outset of the exercise. Before the Group could develop an *Action Plan* aimed at improving the general understanding of regional districts, and addressing concerns related to the roles of directors, Group members would themselves need to agree on the basic purposes of regional districts and the roles of directors. It was not assumed, going into the session, that all members shared the same perspectives on these points.

The Session:

In preparation for the May 11 session, Working

Group members were provided with useful background readings, including Robert Bish's 1999 *Regional District Review*, and a 2003 paper titled "The Role and Responsibilities of Regional Directors", written by Lorena Staples. Group members were also provided with an agenda that posed specific questions intended to prompt discussion. A list of such questions included:

- What are the purposes of Regional Districts?
- What are some common challenges facing Regional Districts?
- What is the role of the Regional District Director?
- How does the role differ for Electoral Area Directors and Municipal Directors?
- Whose interests is a Director expected to promote?
- Is a Municipal Director accountable to his or her Council?
- What is the role of the Regional District Chair?

➤ Understanding of Regional Districts

In its discussions on these and other questions, the Working Group identified and considered a number of themes related to the general understanding of regional districts. For example, the Group discussed:

- the view that while all regional districts exist to serve three key purposes, the emphasis of each regional district differs based on circumstances within the region
- the view that regional districts exist not as separate governments, but as federations of jurisdictions, and as providers of local, sub-regional and regional services
- the important role played by regional districts

in providing local governance (in addition to services) to unincorporated areas

- the importance of properly-conducted regional service reviews to address, in a proactive way, conflicts that arise amongst jurisdictions involved in inter-jurisdictional service arrangements through regional districts
- the frustrations – and the sources of these frustrations – expressed by various stakeholders towards regional districts

➤ **Roles & Accountability of Directors**

The key issues and concerns broadly related to the roles and accountability of directors were identified and debated by the Group as follows:

- the view that directors should recognize the greater good of the region, in addition to the interests of their individual jurisdictions, when participating in decision-making at the regional board table
- the apparent unwillingness of some municipal directors to make decisions independent of the councils and their councils' positions
- the importance of directors to recognizing their responsibilities to the regional district corporation
- the challenge of keeping directors interested in matters that appear to not affect their individual jurisdictions
- the challenges of keeping council members, who are not directors, interested in regional district affairs and regional issues
- the reporting relationship between directors and regional district staff, particularly CAOs
- the challenge for the regional district Chair to be both the leader of the board, and an advocate for his or her own jurisdiction's interests
- the challenges facing electoral area directors in receiving recognition by developers, provincial government officials and others

Discussion Papers:

In the weeks following the Group's first session, the consultant wrote two discussion papers. The first paper documented the discussions around the themes identified by the Group related to the general understanding of regional districts. The paper also challenged key perspectives that emerged during the May 11 discussion on themes. Perspectives were challenged in an effort to promote – and, indeed, provoke – a full debate on the key features of regional districts. A full debate, it was expected, would better enable the Group to refine its own understanding of the regional district model.

The second paper reported on the key issues and concerns identified by the Group related to the roles and accountability of directors. The second paper, like the first, challenged certain perspectives put forward by the Group.

Both papers included suggestions for the Group to consider in developing its *Action Plan*. Both papers were distributed to Group members for review in anticipation of the Group's second discussion session in June.

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JUNE SESSION

Introduction:

Working Group 1 held its second full-day discussion session on June 21, 2004. The purpose of the second session was twofold: to critically review the two discussion papers written by the consultant following the Group's first session, and to outline the Group's recommended *Action Plan*.

General Understanding of Regional Districts:

The first discussion paper, as noted previously, reported on and challenged the Group's themes and perspectives related to the general understanding of regional districts. Through its review of the first paper, the Group reached some important conclusions on the role of regional districts in BC's system of local government. The points below present these conclusions.

➤ Regional Districts as Federations

Regional districts do not constitute a separate, second tier of local government in British Columbia. Regional districts exist, instead, as federations of individual jurisdictions. With few exceptions (e.g., solid waste management planning), regional districts act only in response to the expressed needs, interests and instructions of their constituent municipalities and electoral areas. Regional districts have authority to speak on behalf of the regional community only to the extent that they are given such authority by all jurisdictions that comprise the region.

➤ Highly Flexible Model

Regional districts are designed to serve three purposes:

- they provide local governance and local services to unincorporated areas of BC
- they provide the political and administrative frameworks necessary for individual jurisdictions to collaborate in the provision of important sub-regional services
- they provide key legislated and non-mandated services on a regional basis

The relative emphasis that individual regional districts place on each of these purposes varies depending on the wishes of the region's constituent jurisdictions. In certain regional districts, the local governance and servicing role for electoral areas will be the predominant role. In other regions, sub-regional service provision will be most important. In still others, the regional service provision role will be the primary purpose.

The relative importance of the various purposes is not typically static. Changing demographic, economic, political, social and structural conditions within a region can lead to changes in the importance and role of the regional district. Over time, a regional district's emphasis may switch, in response to its members wishes, from providing basic services to electoral areas, to providing joint services to sub-regional groupings or the entire regional community.

The regional district model is designed to be highly flexible. Put simply, a regional district can be whatever its member jurisdictions want it to be. One Working Group member observed that the regional districts model is like putty: it can be moulded, and re-moulded, by members jurisdictions to meet different needs, and to serve different purposes.

➤ **Self-Interest**

Underlying the regional district model, with its inherent flexibility, is the principle of self-interest. Self-interest determines a jurisdiction's decision to participate in services that are provided through the regional district. With few exceptions (e.g., solid waste management planning), individual jurisdictions cannot be forced to participate in regional district services — individual jurisdictions, in general, are free to choose which services, if any, they wish to enter. Jurisdictions make their choices on the basis of self-interest. Put differently, individual jurisdictions choose to participate in regional district services when it is in their best interest to do so.

Self-interest, it should be noted, is not necessarily defined as the short-term benefit to be captured through participation. Rather, a jurisdiction's interest in a particular service may be determined by any number of considerations, including:

- the level of actual benefit, short- and long-term, that a jurisdiction anticipates it will be able to receive
- the prospect of benefit, either present or future, that may result from a decision to participate (e.g., the expectation that participation in one service will secure the participation of other jurisdictions in other service ventures — the *quid pro quo* argument)

A jurisdiction may decide that its own interests would be furthered by the development of a strong regional community, which may be achieved by the jurisdiction's willingness to participate in new regional services. The decision to participate may, to be sure, involve a significant degree of compromise, and may not yield benefits that are immediate and readily apparent. The decision would, however, be based on the jurisdiction's own determination of its interest.

➤ **Borrowed Power**

The concept of borrowed power, like the concept of self-interest, is a fundamental principle of the regional district model. As suggested earlier, regional districts derive their power and legitimacy from their member jurisdictions (except in the case

of provincially-imposed service mandates). Regional districts have the authority to take action, and to speak on behalf of their members, only to the extent that they are given such authority by their members. Regional districts, to be sure, can become strong. But they can only become as strong as their member jurisdictions wish them to be.

The notion of regional interest is important to this discussion. In BC's regional districts, the interest of the broader regional community — to the extent that this interest can be defined — is a direct reflection of the interests of the individual jurisdictions that comprise the region. Because regional districts can only act using borrowed power, a stated regional interest can only exist when all jurisdictions of the region agree that it exists.

In all, the development of a strong region, with defined regional interests and important regional services, depends entirely on the willingness of the region's constituent jurisdictions. In some cases, the merits of establishing a strong region will be compelling. The challenge for proponents of strong regions is to present the merits of such a move.

➤ **Service Reviews**

In 2000, the *Local Government Act* changed to provide municipalities and electoral areas the authority to initiate formal reviews of the arrangements governing regional services. The legislation was also changed to allow jurisdictions to withdraw from (most) services, following unsatisfactory reviews.

The rationale for the service review and service withdrawal provisions is sound. Over time, changes to local demographics, economic conditions, interests and aspirations occur, and tend to put pressure on the arrangements that are in place to govern shared services. Regular service reviews provide much-needed opportunities to re-structure arrangements to accommodate changing conditions. The ability to withdraw from a service provides the much-needed assurance that, in the event an agreement cannot be satisfactorily amended, jurisdictions may exit an untenable situation.

It is worth noting that the legislative provisions for service review and service withdrawal are entirely consistent with the principle of self-interest outlined earlier. An individual jurisdiction's interest in a particular service will depend, to a significant degree, on the terms of participation in the service. Over time, as conditions change, the original terms of participation may become problematic, and may place the jurisdiction in an inequitable position vis-à-vis other participants. In such a situation, the principle of self-interest would require change to the service arrangement. If change to the arrangement were not possible, the jurisdiction's self-interest would require withdrawal.

The provisions for review and withdrawal are also consistent with the principle of borrowed power. In accordance with this principle, an individual jurisdiction extends to its regional district the authority to provide specific services on the jurisdiction's behalf. When participation in a specific service no longer makes sense for the jurisdiction, that jurisdiction should be able to initiate a formal review and, if necessary, exit the service. The inability to make such decisions would undermine the principle of borrowed power, as was the case prior to 2000 when changes to service arrangements were often difficult to achieve. As one Working Group member observed, the term "surrendered power" more appropriately described the pre-2000 environment.

Service reviews and withdrawals, while important, can have implications for jurisdictions that rely heavily on joint services provided through their regional districts. Changes to existing service arrangements may result in these jurisdictions having to pay more for the same services. The dissolution of some services altogether may leave the jurisdictions without the ability to meet key servicing needs. The way to address these concerns, however, is not to force other jurisdictions to remain locked into arrangements that undermine their own interests. Indeed, the notion that one jurisdiction should be compelled to remain in an unfavourable arrangement in order to protect the interests of other players is anathema to the regional district model. As conditions change, all jurisdictions need to be able to negotiate new arrangements that are equitable and in the interest of all participants. It is during the negotiation process that more dependent jurisdictions have the

opportunity to convince partner jurisdictions of the short- and long-term benefits of particular proposals, and of continued participation.

Finally, the Working Group discussed the concern that many of the service reviews that have been initiated under the new legislative provisions have not been particularly pleasant experiences. In retrospect, this occurrence is perhaps not surprising. Jurisdictions that, prior to 2000, had been unsatisfied for some time with existing service arrangements would logically be among the first to take advantage of the new provisions. Unfortunately, however, the predominance of unpleasant service reviews since 2000 has led some observers to conclude that reviews are signs of relationships "gone bad".

This perception is one that the Working Group wishes to correct. Service reviews, properly handled, are characteristic of healthy relationships. They allow all participants to gauge the fairness of existing arrangements in the face of changing conditions, and to make amendments designed to strengthen, rather than weaken, partner relations. The key to achieving success in service reviews is to conduct them regularly, preferably in accordance with a set schedule. Regular reviews enhance communication among partners and help to deal with conflicts before they become serious. One Working Group member observed that regional districts (and their member municipalities) regularly renegotiate collective agreements and other arrangements to account for changing conditions. Service arrangements should be no different.

Roles & Accountability of Regional District Directors:

The Working Group devoted half of its June 21 session to a review of the second discussion paper, which explored the series of issues and concerns, identified at the Group's May 11 session, related to the roles and accountability of regional district directors.

During its discussions, the Group quickly recognized the complex nature of the various points being explored. The Group recognized that the issues and concerns represent challenges to which there are not necessarily clear,

straightforward answers. Advice and perspectives can be offered to directors and others who face these challenges; definitive direction, however, is not always easy to provide.

The points below review the thoughts and conclusions that emerged from the Working Group's discussion.

➤ **Regional vs. Local Interests**

Should directors be expected to recognize the interests of others in the region, in addition to the interests of their own jurisdiction, when participating in regional district decision-making?

The principle of self-interest, as discussed earlier, suggests that directors should place the interests of their own jurisdiction above all others. The point was also made earlier, however, that a jurisdiction's interest is neither simplistic nor static: various considerations and changing conditions can influence a jurisdiction's view of what constitutes its own interest at any particular time. The value of regional districts is that they provide a forum in which individual jurisdictions, each with their own interests, can meet to discuss issues and attempt to further their own positions. Through discussion and persuasion, compromises can be reached to enable the larger group to initiate a shared service, or adopt a shared position, that meets everyone's needs. Through discussion and persuasion, individual jurisdictions can be convinced that shared approaches are in their own best interests.

➤ **Independence of Municipal Directors**

The legislation is clear in stating that a municipal director is appointed to the regional district's board of directors by his or her council. The legislation also states clearly that a municipal director sits on the board at the pleasure of his or her council. Does a council's unfettered ability to remove its director(s) mean that each director should be expected to "stick to the script" and not deviate from council's views?

There will be certain issues on which a municipal council holds strong views and a clear position. In debates on these issues at the regional board table,

the council should be able to expect its director(s) to present and defend the council's stated position. If the director, after listening to other views, believes that the council's position is no longer tenable or preferred, he or she should be expected to return to council to provide advice and seek direction.

On many issues that arise at the regional board table, the municipal council will not have a firm, stated position that the municipal director is expected to uphold. The director may have a sense of Council's views on the issues, and will have a general understanding of the municipality's interest to be promoted. The director will not, however, have been given strict "marching orders" from council. In these situations, the director needs to enter the regional boardroom with an open mind. As noted earlier, regional districts provide a forum for representatives of all member jurisdictions to discuss and debate perspectives, and, where mutually-agreeable, to develop shared approaches to addressing issues. The expectation that municipal directors should close their minds to arguments and information put forward by other representatives does not make sense. Indeed, if municipal directors were expected to simply present positions on every issue, there would be no need for directors at all. Councils could simply submit their positions in writing to the board.

The exact level of independence afforded a municipal director will likely vary not only by issue, but by municipality. Councils and their directors need to discuss the matter and set reasonable parameters.

➤ **Directors' Corporate Responsibilities**

All regional district directors, whether they are appointed by councils or elected by citizens, are responsible for ensuring that their regional district corporation operates smoothly. Smooth operations require directors, as a collective, to pass budgets, fill staff positions, process debt requests, hold meetings, make decisions and so forth. Smooth operations also require directors, both as individuals and as a collective, to demonstrate an interest in regional affairs, participate in debates, challenge positions and protect the interests of the corporation.

One particular corporate responsibility relates to the need for all directors to maintain confidentiality. As members of the corporate board, regional district directors are expected and required to keep in confidence all *in camera* matters discussed at the board table. The premature release of confidential information is, by definition, detrimental to the corporation's interests. (Note that the decision to apply the *Community Charter's* confidentiality provisions to regional districts means that directors who intentionally release confidential information may be held personally liable for any losses incurred by the corporation.)

► **Promoting Interest in Issues**

Many issues that come before a regional district's board of directors are issues on which only directors from stakeholder jurisdictions – i.e., jurisdictions that participate in the service being discussed – are entitled to vote. Clearly, voting directors are expected to review such issues fully, and to engage in whatever debate develops. But what about the non-voting directors? What level of interest should they show in the issues?

The argument could be made that all directors, including non-voting ones, should demonstrate genuine interest in every issue being decided, and should demonstrate appropriate diligence in challenging proposed courses of action that may be damaging to the corporation. This argument is rooted in the reality that the board as a whole is ultimately responsible, and may be held liable, for decisions that are made at the board table by service participants. The argument is supported, according to some interpretations, by the limitations in the *Local Government Act* on a board's ability to delegate decision-making authority. These limitations, which ensure that all decisions that bind the regional district corporation are taken at the board table, may suggest that all directors have a responsibility to consider and question proposed courses of action, even in cases where the directors cannot cast a vote.

These points, while interesting to some, are dismissed by most as being without merit. The increased involvement of non-stakeholder directors in discussions on stakeholder issues is widely viewed as impractical, if not illegitimate. The

need for good meeting management makes the call for increased involvement impractical. The fact that non-stakeholder directors do not represent jurisdictions that directly pay toward the services in question makes the case for increased involvement illegitimate.

In general, the legislation's voting rules that separate stakeholders from non-stakeholders should determine which directors participate in debates and discussions on stakeholder issues. There will, of course, be cases in which an issue has significant implications that extend beyond participating jurisdictions. On these issues, directors from non-stakeholder jurisdictions may have a more legitimate need to pose questions and offer input. The regional district Chair and/or CAO should identify such issues and their implications, and provide guidance to the board.

► **Streamlining Meetings**

As noted, some issues that arise at a regional board table do not involve, and are not of interest to, the entire board of directors. Such stakeholder issues, however, will be important to directors representing stakeholder jurisdictions. Efforts to address the issues will both generate and require considerable discussion among these directors.

Stakeholder discussions, while important, can be problematic when they occur at the board table. The problem, specifically, is that non-stakeholder directors, who have little interest in the matters under consideration, are required to sit through what can be lengthy exchanges. Forcing non-stakeholder directors to endure such exchanges on a regular basis may result in a general lack of interest in regional district affairs — an outcome that would not benefit the regional district.

Some regional districts have met this challenge through the greater use of commissions. Issues that directly affect specific sub-regions or a group of jurisdictions are referred to a commission comprised of the stakeholder directors. Detailed discussion on the issues – an activity that can consume considerable time and energy – occurs at the commission level. Decisions that cannot, by law, be made at the commission level, are sent as recommended actions from the commission to the board, where they can be formally decided either

by stakeholder directors or the full board (depending on the issue). The directors who receive the commission's recommendations are typically able to vote quickly, without having to re-play the often lengthy discussions that led to the recommendations.

➤ **Engaging Councils**

It is important for municipal councils and their members to be aware of events beyond their immediate borders, and to be aware of the activities of their regional district boards. Increased awareness is important for several reasons, including the reality that no municipality exists as an "island unto itself". Events that occur within a region have potential implications for every municipality in the area.

Bish, in his 1999 *Regional District Review*, points out another reason for councils and their members to stay aware. Bish notes that, in the case of municipalities, regional districts are designed to be accountable to municipal councils, not to the citizens of municipalities. When regional districts make decisions that affect, or that may affect, a municipality's citizens, it is incumbent upon the municipality's entire council to take notice. Bish states that "regional district policies, as they relate to citizens of the municipality, are of concern to the entire municipal council, not just its appointees to the regional district board." With respect to regional district services in which a municipality participates, Bish suggests that, from a citizen's perspective, the ultimate accountability for those services rests with the municipal council, not the regional district. The regional district is simply charged with delivering the service; the council is responsible for providing it. Bish notes that "it is very important that municipal councillors recognize the importance of their role in representing citizens on all municipal service issues regardless of the level of government responsible for [delivering] the service."

Bish's comments notwithstanding, the reality is that many councils and their members are not terribly interested in, or aware of, their regional districts. What can be done to improve this situation? The Working Group reviewed some ideas from around the province:

- The Capital Regional District sends its Director of Finance to brief each of its member councils at budget time. The briefing helps to educate councils and their members about the regional district and its scope of activities. The briefing also keeps each council informed as to what, exactly, the regional district is doing on the municipality's behalf.
- The Cariboo Regional District circulates a briefing to all councils following every board meeting. The briefings are intended to help council members stay abreast of events within the region and at the board table.
- Several regional districts circulate their board agendas and minutes either to each council, or to each council member.

➤ **Staff and Directors**

Whom does staff serve — electoral area directors, municipal directors, or both? This question, which is faced by many regional districts around BC, was tackled by the Working Group.

The consensus view is that a regional district's staff works for all directors. Viewed differently, staff serves "the process", which means that staff is responsible for ensuring that jurisdictions are encouraged and able to pursue joint servicing goals, and that in all activities, the corporate interest is protected.

The organizational structure of regional districts supports the view that staff is intended to serve all directors. In the structure, the CAO reports directly to the entire board, not to a Chair or to a sub-set of directors. Bish's comments in his 1999 work support the view that staff serve "the process". Bish notes that, for regional district CAOs, "assisting with negotiating benefiting area agreements and dealing with a variety of funding formula and voting rules, which are likely to become even more complex in the future, is what their job is about."

In some regional districts, to be sure, staff does not appear to serve all directors equally. Indeed, in some regional district organizations, there is an expectation that staff provide a greater level of

support to electoral area directors. Municipal directors in these regions tend to be viewed, rightly or wrongly, as having access to their own municipality's staff; these directors are, as a consequence, deemed to be less dependent on staff at the region. Electoral area directors, without access to other staff, are perceived to be in greater need of assistance. Staff react to these perceptions by gravitating toward the electoral area directors, especially during service arrangement negotiations, if only to balance the scales.

While understandable in certain cases, the tendency to support electoral area directors at the expense of their municipal counterparts is not consistent with the regional district model. Staff in regional districts – especially the CAO – are expected to serve the entire board of directors; one group of directors is not entitled to receive a premium level of support. If electoral area directors feel that they need additional, focused support from staff, they may request such support through the board. The board may choose to make staff time available. Two conditions, however, should be attached to the board's decision:

- First, that the specific staff allocated to the electoral area directors not include the CAO or other appointed officers. The appointed officers are expected to serve the entire board at all times.
- Second, that the electoral areas which request the extra level of support be expected to pay for the support through an electoral area administration service.

The Regional District of North Okanagan has designated a middle manager as the Electoral Area Coordinator. The position exists to provide necessary support to the region's five electoral area directors. The position's salary is funded through the electoral area administration budget.

➤ **Role of the Chair**

As defined under section 218 of the *Local Government Act*, the Chair is the head and CEO of the regional district. The Working Group supplemented the Chair's legislated duties by noting that the Chair serves as:

- a referee, or peace maker, at the board table or in exchanges between directors
- a facilitator of board discussions
- an impartial enforcer of proper meeting procedures
- the liaison with the CAO and staff for preparation of agendas and other duties
- the official spokesperson for the board and the regional district
- the representative of the regional district at ceremonial and other events

In addition to these responsibilities, the Working Group noted that the Chair is the representative of his or her jurisdiction and, as the representative, is responsible for advocating the jurisdiction's interests.

The notion that the head and CEO of the organization should also be expected to advocate the interests of a particular jurisdiction is unique to regional districts. In BC's municipalities, the head and CEO – the Mayor – is elected at large and, as such, is expected to promote the interests of the entire municipality, not a specific jurisdiction within the community. Even in municipalities outside of BC that follow a ward system, the Mayor is elected at large to represent the entire community.

A director cannot, in practice, be a staunch advocate of his or her jurisdiction's local interests while simultaneously sitting as Chair. As Chair, the director's clear responsibility is to the corporation, not to his or her electoral area or municipality. The corollary of this statement is that the jurisdiction whose director becomes Chair is under-represented at the board, and placed at a disadvantage. In an effort to address this problem, several regional districts make good use of committees (including committee of the whole). In a committee setting, the regional district Chair can sit as a regular director, able to participate in discussions and decisions as a full representative and advocate of his or her jurisdiction.

➤ **Recognition of EA Directors**

The Working Group highlighted the challenge that electoral area directors face in receiving official recognition from a variety of groups that interact with regional districts, including land developers

and provincial government officials.

Many persons in these groups appear to simply not understand the regional district system and the role of electoral area directors as the elected representatives of their jurisdictions. Also not understood is the fact, for services such as electoral area planning, that the regional district is the competent local authority. Some developers and provincial government officials are reportedly surprised to learn that official community plans and zoning bylaws often exist in unincorporated areas. More troubling is the sense, commonly expressed by regional district officials, that some developers and provincial officials refuse to accept the legitimacy and authority of regional districts and electoral area directors, regardless of the regulations and bylaws that may be in place.

The Working Group's *Action Plan*, which is designed to improve the general understanding of regional districts, should help to rectify some of the current problems. Specific items to develop through the *Action Plan* could include:

- a small information booklet on land development in regional districts (land development appears to be a source of much misunderstanding and conflict)
- one-page fact sheets, to be handed out to construction-industry representatives, on the role of regional districts in approving developments (the Fraser Valley Regional District provides fact sheets to electrical inspectors and health inspectors)
- including funds for electoral area director travel into electoral area administration service budgets, simply to enable directors to attend to meetings and discussions that may impact their areas
- assisting electoral area directors in scheduling meetings with ministers and other provincial officials to present their jurisdictions' concerns and positions

Conclusion:

The Working Group spent the last part of its second session identifying possible components of an *Action Plan*. Following the session, the consultant produced a memorandum that expanded on the points raised in the Group's discussion. The memorandum set the stage for the Group's July session.

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JULY SESSION

Introduction:

The discussions that occurred during the first two sessions were instrumental in helping the Working Group to gain a better appreciation of the challenges faced in trying to improve the general understanding of regional districts, and in addressing issues related to the roles and accountability of directors. The earlier discussions enabled the Working Group to crystallize its thoughts with respect to the kinds of materials and efforts to include as part of an *Action Plan*.

The development of the *Action Plan* was the focus of the third and final discussion session, which took place on Friday, July 9, 2004. The stage for discussion was set, as noted previously, by a memorandum produced for the Group by the consultant. The memorandum outlined, for the Group's review, a framework for the *Plan*, and a list of potential materials to develop through the *Plan*.

Guiding Principles:

When developing plans it is useful to explicitly identify a set of principles to guide the effort, and to shape the ultimate product. The following guiding principles were endorsed by the Working Group for its *Action Plan*:

- **Focused** — The *Action Plan* should be focused on regional districts — more specifically, on efforts aimed at helping people understand, work with and work within the regional district system. The call for an *Action Plan* is based on the premise that most of the problems, conflicts and frustrations surrounding regional districts exist because people do not fully understand how regional districts are structured and intended to function. Improving the general understand-

ing of regional districts, and helping regional district directors to fulfill their roles, will eliminate many of the problems, conflicts and frustrations, which in turn will allow regional districts – and the local government system in general – to function more smoothly.

- **Practical** — The *Action Plan* should be comprehensive in terms of players involved, actions proposed and materials developed. At the same time, however, the *Plan's* scope must be practical. There is little value in creating a plan that is so broad in scope it cannot be easily implemented.
- **Sustainable** — Despite best intentions, plans can fail because they lose momentum. Efforts need to be made to build sustainability into the Group's *Action Plan*.
- **Efficient** — The term "efficiency" used here refers to the *Action Plan's* use of resources. Various agencies and governments have created educational and advisory materials on regional districts. Where appropriate, the *Plan* should make use of existing materials.
- **Inclusive** — There are several bodies and groups that could be involved in helping to implement the *Action Plan*. The *Plan* should encourage and anticipate a broad level of involvement.

Developing the Action Plan:

The text in this section of the chapter documents the key points addressed by the Working Group in its discussion of the *Action Plan*.

➤ Purpose

As noted earlier, the premise of the Working Group's effort is that most of the conflicts and frustrations surrounding regional districts exist because people do not understand the structure, function and role of regional districts, or the role of regional district directors. The *Action Plan* is intended to improve the general understanding of regional districts. In so doing, it is expected that the *Action Plan*, once implemented, would result in a more smoothly functioning and more effective local government system.

➤ A Tool Kit

The central feature of the *Action Plan* is the development of a *Tool Kit* — a set of materials and resources that can be used by regional districts to achieve the aims of the *Plan*. Five different types of tools would be included in the *Kit*:

- Best Practices for regional districts to follow in their attempts to improve various audiences' levels of understanding
- Fact Sheets designed to explain specific features and concepts of the regional district model, and to address common irritants
- a PowerPoint Presentation, on the fundamental points of regional districts, that can be adapted to suit different audiences
- Discussion Guides written to help regional districts and their stakeholders talk through complex issues related, primarily, to the roles and accountability of regional district directors
- a Regional District Booklet designed to educate a broad audience on the basics of regional districts

Appendix 1 profiles in greater detail the proposed contents of the *Tool Kit*.

➤ Target Groups

The *Tool Kit* is intended to serve as a resource for regional districts. Put differently, regional districts will be encouraged to put the tools in the *Tool Kit*

to good use.

The groups targeted by the different tools in the *Kit* will be numerous and varied. Municipal councils and their members, for example, will be targeted by some of the best practices developed. Certain fact sheets will be targeted at land developers, or provincial government officials (outside of MCAWS) who interact regularly with regional districts. CAOs and senior staff of municipalities will be identified as possible targets of the discussion guides. First Nations, high school students and ratepayers will be targeted in key presentations.

In an effort to help regional districts match the various materials in the *Tool Kit* to the appropriate target groups, the *Kit* will include a user-friendly index. The index will list the key target groups and identify the materials best suited to each group. Certain materials will be well-suited to, and identified for, more than one group.

➤ Roles and Responsibilities

There are several groups in the broader local government community that have an interest in improving the general understanding of regional districts, and in assisting regional district directors in dealing with some of the challenges they face. The following points identify these groups, and explore the potential roles they may play in implementing the *Action Plan*:

- **Regional Districts** — As suggested earlier, the *Action Plan* initiative is being undertaken at the request of regional districts. The *Tool Kit* that is expected to emerge from the *Plan* is intended to give regional districts the ideas and materials they need to correct misperceptions and address common challenges.

The regional districts, as a collective, have a significant role and level of responsibility with respect to the development of the *Kit*. Regional districts need to contribute ideas and share experiences that can be included as best practices in the *Kit*. Regional districts with existing materials – PowerPoint presentations, information pamphlets, etc. – need to contribute these materials to the *Kit*.

Regional districts also need accept responsibility for actually using the *Kit* once developed. Regional district Chairs, with the support of their boards, need to be proactive in seeking opportunities to make presentations to member councils, to implement the best practices, to educate stakeholders using the fact sheets, and to initiate dialogue using the discussion guides. Chairs need to identify and enlist the help of other directors who are willing to assist in implementing the tools. Regional district CAOs need to make use of the materials in their dealings with their municipal counterparts.

- **UBCM** — UBCM's support and promotion of the *Action Plan* are considered critical to the overall success of the initiative. The following efforts by UBCM would be particular helpful:

- ✓ writing a joint letter of introduction to the *Tool Kit* (to be signed by the UBCM President and the Minister of Community, Aboriginal and Women's Issues)
- ✓ promoting the *Tool Kit* in editions of *UBCM News* (each edition could profile one best practice, fact sheet or discussion guide)
- ✓ sponsoring regional district discussion sessions, using the discussion guides, at UBCM and Area Association events
- ✓ using the materials at a (yet-to-be-established) Directors seminar, which could be titled "Communities in Partnership" (the seminar, ideally, would be attended by both new and seasoned electoral area and municipal directors)
- ✓ hosting an online version of the *Tool Kit* on the Civic Net BC website

In addition to providing support, it is hoped that UBCM would accept the overall responsibility for the development of the *Tool Kit*. It is not being suggested that UBCM should be responsible for actually undertaking the work required to develop the materials. It is being proposed, rather, that UBCM take responsibility for organizing and overseeing the efforts of the groups (e.g., regional

districts) that agree to build the *Kit*. One body needs to take the lead in ensuring that the *Kit* gets developed; the Working Group feels that UBCM is the logical body to play this role.

- **MCAWS** — The support of MCAWS, like that of UBCM, is considered critical to overall success of the initiative. A joint letter from the Minister and the UBCM President (noted earlier) would be helpful, as would a link from the Ministry's website to the *Tool Kit*.

Beyond indicating its support, the Ministry could help to develop the materials for the *Tool Kit*. Staff at the Ministry certainly have the experience and skills to assist in produce fact sheets, best practices (drawing on lessons "from the field"), a general regional district booklet, and other components. There are some overlaps between the materials envisioned for the *Tool Kit* and materials already being developed within MCAWS. Ministry staff are well positioned to identify and take advantage of these overlaps.

Finally, the Ministry has a role to play in using the *Tool Kit*. Specifically, MCAWS has the opportunity to use presentations and other materials from the *Kit* in meetings with other ministries that need to deal with regional districts.

- **LGMA** — As the organization that represents senior local government staff both from municipalities and regional districts, LGMA has a keen interest in helping to raise the overall understanding, and perceived value, of regional districts in the local government system. LGMA could help, specifically, in the following ways:

- ✓ a formal statement of support, by the LGMA Executive, for the *Tool Kit*
- ✓ promotion of the *Kit* in editions of *Chapter 290* and at LGMA events, including LGMA Chapter events
- ✓ inclusion of discussion sessions, using the discussion guides, at LGMA functions
- ✓ inclusion of the *Tool Kit* materials – in particular, the discussion guides – in

MATI I, II and III curricula

- **Working Group 1** — Working Group 1 was created to develop the *Action Plan*. With the submission of this report, which includes the *Plan*, the Working Group will have completed its mandate. Should the Group be disbanded, or should its mandate be extended to include some other role?

The members of the Working Group recommend that the UBCM Executive extend the Group's mandate to include an evaluation role. More specifically, the Group feels that it could add value to the overall effort by evaluating, on an ongoing basis, the implementation of the *Tool Kit*. In this role, the Group would be in a position to provide appropriate recommendations on a regular basis to the Executive. Regular recommendations would add to the sustainability of the *Plan* – one of the guiding principles of the initiative.

Potential roles for municipalities in developing and/or promoting the *Tool Kit* were discussed by the Working Group. The Group decided that municipalities, at least initially, should not be expected to get involved. Municipalities – councils, municipal directors, staff – would be the target audience of many of the materials produced in the *Kit*. Expecting municipalities to be both receivers and promoters of information is not realistic.

There will, of course, be elected and staff officials from certain municipalities who will wish to assist in the promotion, and even the development, of the *Kit* materials. Such individuals should be encouraged. Overall, however, municipal officials should not be expected to play active roles, at least initially.

► Evaluation of Efforts

As a general rule, every new initiative should be evaluated periodically in order to ensure that efforts are reaching their intended audiences, and achieving their intended effects. The Working Group's recommended *Action Plan* is no exception to this rule.

Initiatives can be evaluated, and results measured, either quantitatively or qualitatively. After some discussion, the Working Group determined that qualitative measures are most appropriate for the *Action Plan*. Much of the evaluation, the Group determined, could be based on informal feedback received by Group members and others at key events, and through regular discussions. Group members suggested that they, and others, will learn quickly from their peers whether or not the materials in the *Tool Kit* were being used and, if so, whether or not they were making a positive difference.

The Group also determined that efforts to evaluate the initiative should be supplemented with a more formal, annual survey of UBCM members. In simple terms, the survey would attempt to find out whether, in the eyes of members, the *Tool Kit* was working. The survey would likely consist of two parts: one part that remained constant over the years, and one part that changed annually in an attempt to ask questions of particular relevance at any given time.

As noted earlier, Working Group 1 recommends that the UBCM Executive extend the Group's mandate to include responsibility over evaluation.

Conclusion:

The Working Group's third session ended with some discussion around the need to consider short and long term activities of the *Action Plan*. Chapter 4 of this *Report* presents the *Action Plan*, complete with the important phases and tasks to undertake in the short term as well as later, as the *Plan* proceeds.

4

THE ACTION PLAN

The Basics:

Before detailing the specific tasks, responsibilities and target dates of the *Action Plan*, it is useful to identify the *Plan's* basic points.

► Purpose

The purpose of Working Group 1's recommended *Action Plan* is to improve the general understanding of regional districts, and to address, using non-legislative solutions, common concerns related to the roles and accountability of directors.

The *Action Plan* is based on the premise that many of the problems, conflicts and frustrations surrounding regional districts exist because people do not fully understand how regional districts are intended to function. Improving the general understanding of regional districts, along with the roles of regional district directors, will help to eliminate many of problems, conflicts and frustrations that persist. Eliminating these problems, conflicts and frustrations will, in turn, allow regional districts – and local government in general – to function more smoothly.

► Tool Kit

The central component of the proposed *Action Plan* is the development of a *Tool Kit* — a set of materials and resources that can be used by regional districts to fulfill the *Plan's* purpose. The *Tool Kit* would feature five different types of tools:

- Best Practices for regional districts to follow in their attempts to improve various audiences' levels of understanding
- Fact Sheets designed to address specific features, concepts and irritants

- a PowerPoint Presentation, on the fundamental points of regional districts, that could be adapted to suit different audiences
- Discussion Guides written to help regional districts and their stakeholders talk through complex issues related, primarily, to the roles and accountability of regional district directors
- a Regional District Booklet designed to educate a broad audience on the basics of regional districts

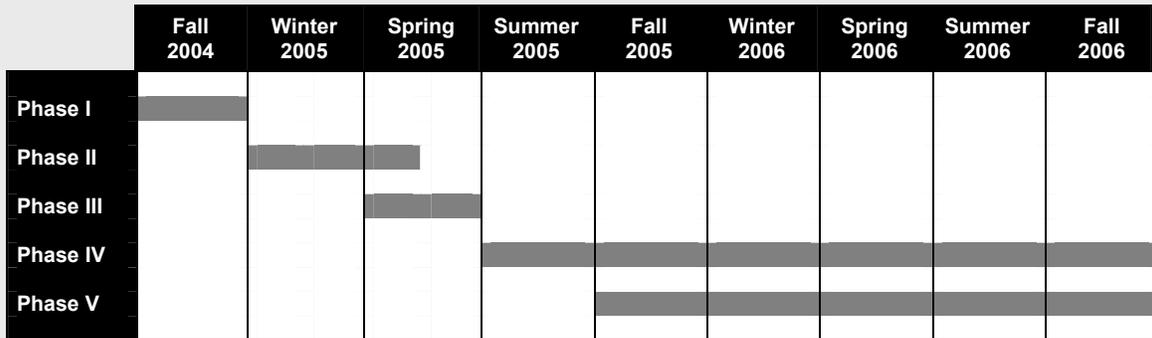
► Key Players

There are four groups with important roles to play in the various phases of the *Action Plan*. Figure 4.1 identifies these groups and their specific roles.

Figure 4.1
Players & Roles

Player	Specific Role
Regional Districts	<ul style="list-style-type: none">· support <i>Action Plan</i>· assist in development of <i>Tool Kit</i> by contributing ideas and materials· use materials from <i>Tool Kit</i>
UBCM	<ul style="list-style-type: none">· accept recommended <i>Action Plan</i>· oversee development of <i>Tool Kit</i>· promote <i>Tool Kit</i>· evaluate <i>Tool Kit</i> and its implementation (this last role could be delegated to Working Group 1)
MCAWS	<ul style="list-style-type: none">· support <i>Action Plan</i>· assist in development of <i>Tool Kit</i>· use <i>Tool Kit</i> materials in dealings with other ministries
LGMA	<ul style="list-style-type: none">· support <i>Action Plan</i>· promote <i>Tool Kit</i>· incorporate <i>Tool Kit</i> materials in MATI curricula

**Figure 4.2
Action Plan Overall Timeline**



➤ **Key Phases & Timeline**

There are five basic phases to the recommended *Action Plan*:

- Phase I: Obtain Support
- Phase II: Develop *Tool Kit*
- Phase III: Educate Users of *Tool Kit*
- Phase IV: Promote and Implement *Tool Kit*
- Phase V: Evaluate Efforts

Figure 4.2 at the top of the page presents a simplified, two-year timeline to guide the overall implementation of the *Action Plan*.

The Details:

Each of the broad phases of the *Action Plan* contains specific tasks that must be undertaken in order for the entire *Plan* to succeed. The subsections below identify, for each phase, the important details.

➤ **Phase I: Obtain Support**

The goal of the *Plan's* first phase is to obtain the support required to proceed with implementation. Three specific tasks are proposed under Phase I:

- **Task 1: Submit Report to UBCM Executive** — The first task is for Working Group 1 to submit its *Report & Action Plan* to the UBCM Executive. The UBCM Executive established the Working Group with the mandate to develop an *Action Plan* for recommendation

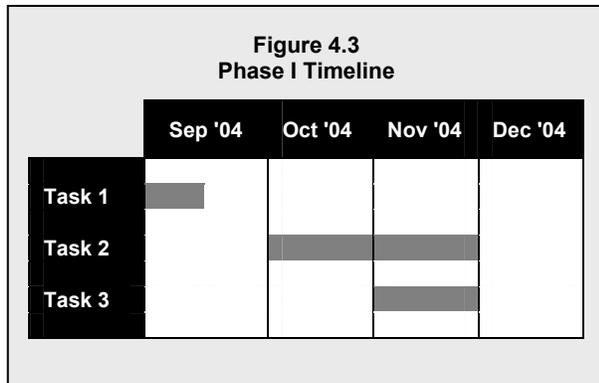
back to the Executive. The Executive's formal acceptance of the *Plan* is, therefore, required at the outset of Phase I.

- **Task 2: Contact RDs**— Following the 2004 UBCM Conference, at which the *Plan* would be introduced, it is proposed that the UBCM President write to each regional district. The letter would formally present the *Action Plan* and identify the key role to be played by regional districts in the *Plan's* implementation. The letter would also, most importantly, formally request each regional district's support for the *Plan*, and each regional district's commitment to assisting with the development and implementation of the *Tool Kit*. A copy of the actual *Plan* would be attached to the letter.
- **Task 3: Contact Other Players** — The formal support of the Minister of Community, Aboriginal and Women's Services, and the LGMA Executive, will be important to the success of the initiative. It is proposed that the UBCM President write to both the Minister and the LGMA President to formally introduce the *Plan*, and to formally request the support of their respective organizations.

Figure 4.3 suggests a timeline for the Phase I tasks.

➤ **Phase II: Develop *Tool Kit***

As noted earlier, the development of the *Tool Kit* (see *Appendix 1*) is the central feature of the entire *Action Plan*. UBCM is the body that has been



assigned responsibility for the overall *Tool Kit* development process. Five separate tasks make-up the process. Each task is detailed separately in the points that follow:

- **Task 1: Prepare Templates & Lists** — The development of the *Tool Kit* will ultimately involve (and rely on) the efforts of a number of different groups. The more guidance these groups can be given, the more effective they will be in providing assistance.

In an effort to provide maximum guidance, it is suggested that UBCM prepare a series of templates for the different types of tools to be developed, as well as a preliminary table of contents for each set of tools. Consider, for example, the Best Practices component of the *Tool Kit*. It is proposed that UBCM construct a single template, or format, that can be used by regional districts and others to document individual best practices. The template would prompt writers for the following types of details:

- ✓ contributor (e.g., name of regional district)
- ✓ title of best practice
- ✓ target group (e.g., municipal councils, media, provincial officials, etc.)
- ✓ purpose and intended result
- ✓ when to use / when not to use
- ✓ specific steps to follow
- ✓ costs to expect
- ✓ critical success factors
- ✓ pitfalls to avoid
- ✓ persons to contact for further information

Along with the template would be provided a preliminary list of Best Practices to produce (i.e., a preliminary table of contents for the

Best Practices section of the *Kit*). The purpose of the list would not be to limit the imagination of regional districts, but rather to prompt their thinking. The preliminary list identified in Chapter 3 of this *Report* could be considered for use.

In all, it is proposed that UBCM prepare templates and preliminary tables of contents for the Best Practice, Fact Sheet and Discussion Guide components of the *Tool Kit*. For the PowerPoint Presentation and Regional District Booklet components, it is suggested that UBCM prepare preliminary tables of contents only.

- **Task 2: Solicit Materials** — Once the templates and preliminary tables of contents have been prepared, it is suggested that they be sent by UBCM to the Chair and CAO of each regional district. As noted earlier, regional districts, as a collective, have a significant role and level of responsibility with respect to the development of the *Kit*. Put simply, the successful development of the *Kit* will depend on regional districts' collective willingness to submit ideas and materials. In its contact with regional districts, UBCM needs to impress upon the Chair and CAO the importance providing useful information in a timely manner.

In addition to contacting regional districts, UBCM should be encouraged to solicit materials from staff at MCAWS, as well as from LGMA. Staff at MCAWS will have helpful materials and insights to share for the *Tool Kit*. LGMA may be also be in a position to provide input directly, or to solicit input from its (willing) municipal members.

- **Task 3: Assign Workload** — UBCM, as noted earlier, is responsible for overseeing the development of the *Tool Kit*. In this capacity, it is expected that UBCM will undertake some of the actual work required to write and assemble the *Kit*. It is not anticipated, however, that UBCM will undertake all of the work itself. The actual development of the *Tool Kit* must be a collective effort, to be shared by UBCM, MCAWS, regional districts themselves and possibly others (e.g., LGMA). As the third task under Phase II, UBCM would

divide, among key players, the work required to complete the development of the *Kit*.

- **Task 4: Review & Edit Work** — Drafted materials, once completed, will be sent to UBCM. Upon receiving the materials, UBCM will need to review and edit them.
- **Task 5: Assemble & Distribute** — The final task in Phase II is to assemble the finished materials for distribution as the *Tool Kit* to regional districts. During assembly, UBCM will need to develop an index that matches tools to target groups (see Chapter 3). UBCM will also need to obtain a joint letter of introduction, signed by the UBCM President and the Minister of Community, Aboriginal and Women's Services.

After some discussion, the Working Group reached the conclusion that the *Tool Kit* should be released as a complete document — i.e., only after all materials have been prepared and assembled. The Working Group does not support the staggered release of individual pieces. To be sure, the *Kit* will be a living, changing resource that will be expanded and amended over time. For the *Kit's* initial release, however, the Group considers it important to present a full document.

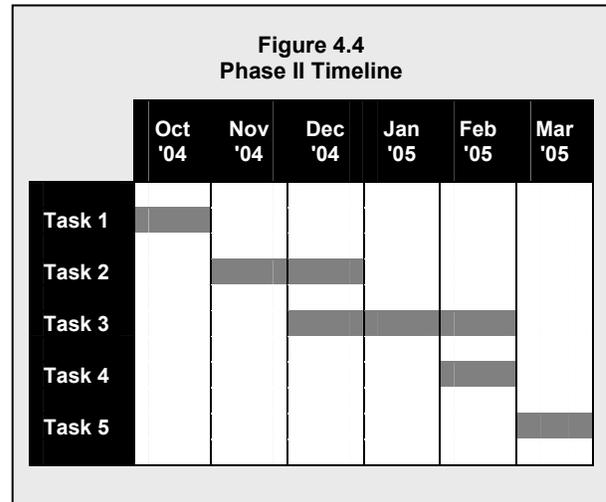
It is assumed that both paper and electronic versions of the *Tool Kit* will be produced. Each regional district should be offered access to both versions.

Figure 4.4 provides a timeline for the five tasks that make-up Phase II.

➤ **Phase III: Educate Users of *Tool Kit***

The *Tool Kit* is expected to serve, primarily, as a resource for regional districts to use in their efforts to improve the general understanding of the regional district model, and to address common concerns related to the roles and accountability of directors. The Chair and CAO of each regional district have a particular responsibility, because of their positions, to ensure that the tools in the *Tool Kit* are put to good use.

Chairs and CAOs, it is felt, would benefit from a



half-day seminar session that explored the questions of how and when to use the *Tool Kit* materials. There is opportunity for such a session in Spring 2005 in conjunction with the scheduled "Regional District CEOs/CAOs Forum".

UBCM would be responsible for developing the half-day seminar on the use of the *Tool Kit*. The seminar would feature:

- a review of the reasons for developing the *Kit*, and an explanation of the *Kit's* purpose
- a review of the *Kit's* components, including the Best Practices, Fact Sheets, Discussion Guides, PowerPoint Presentation and Regional District Booklet
- discussions (plenary and small group) aimed at identifying opportunities to use the various materials
- small group exercises to practice using the Discussion Guides

The Chairs and CAOs of each regional district in BC would constitute the primary audience for the seminar. Also at the seminar, however, would be staff from MCAWS who, as suggested earlier, would be encouraged to use certain materials in dealings with provincial government officials from other ministries. Individuals involved in developing MATI curricula could be invited to attend the seminar to learn how the materials might be incorporated into the MATI lesson plans.

➤ **Phase IV: Promote & Implement *Tool Kit***

As indicated in Figure 4.2 (see page 17), the Phase IV promotion and implementation of the *Tool Kit* is intended to be an ongoing activity. Regional districts, as a collective, have the primary responsibility over implementation, or use, of the *Kit*. It is expected that regional districts – the Chairs and CAOs in particular – will continually seek and exploit opportunities to:

- apply the Best Practices
- distribute and discuss the Fact Sheets
- make presentations using the (adapted) Power-Point Presentation
- hold discussions using the Discussion Guides
- distribute the Regional District Booklet

Other groups such as MCAWS and LGMA also have a role to play in using the *Kit's* materials.

All groups that support the *Action Plan* have a responsibility to promote the *Tool Kit*. Put simply, the onus is on all players to find opportunities to raise the profile of the *Kit* and its aims.

Given the ongoing nature of Phase IV, there are no tasks, *per se*, to chart on a timeline. There are, however, numerous suggestions to assist the various groups that need to be involved in promoting and/or using the materials. Consider the following points:

- Regional districts, UBCM and others can promote the *Tool Kit* as part of the annual Local Government Awareness Week event.
- Materials can be both promoted and used at key UBCM seminars, including the triennial Newly Elected Officials seminar (which next occurs in January, 2006), and the proposed annual or biennial seminar titled "Communities in Partnership" for regional district electoral area and municipal directors.
- Materials can be promoted and used at UBCM's annual conference each Fall, and at Area Association conferences each Spring.
- LGMA's annual conference, and the LGMA Chapter semi-annual meetings provide useful opportunities to promote and test materials. Structured discussions, using the Discussion Guides, would be particularly well-suited to

these events.

- The annual MFA conference in March of each year is another event at which to promote and use the materials.
- The annual MATI I, II and III sessions are events at which all materials in the *Kit* can be promoted, and certain materials (e.g., Discussion Guides) can be used.
- *UBCM News* is published four times per year, every March, June, August and December. Each edition could advertise the *Tool Kit*, and profile one selection from the materials. Each edition could also profile one regional district's efforts to use the materials.
- LGMA's quarterly publication, *Chapter 290*, offers another opportunity to profile the *Kit*.
- Regional districts could schedule meetings with MLAs (new and returning) and their staffs following the Spring, 2005 provincial election. Select materials from the *Kit* (e.g., presentation) could be used in these meetings.

➤ **Phase V: Evaluate Efforts**

Phase V, like Phase IV, is intended to be an ongoing activity. Evaluation will consist of both informal and formal efforts:

- Informal evaluation, which will occur continually, could involve Working Group members canvassing their peers at various gatherings and in various exchanges (in the event that the Working Group's mandate is extended to include responsibility for Phase V).
- Formal evaluation will consist, primarily, of an annual survey of UBCM members.

APPENDIX

A1

THE TOOL KIT

The central feature of the *Action Plan* is the development of a *Tool Kit* — a set of materials and resources that can be used by regional districts to

achieve the aims of the *Plan*. Table A1.1 profiles the proposed contents of the *Tool Kit*.

Figure A1.1
Proposed Contents of *Tool Kit*

Tool	Description
Best Practices	<ul style="list-style-type: none">➤ develop a series of best practices (BPs) for regional districts (RDs) to follow in their attempts to improve various audiences' levels of understanding➤ most BPs to be based on actual experiences from RDs that have proven effective➤ BPs to consider creating:<ul style="list-style-type: none">- holding RD meetings throughout the region (in an effort to increase profile and understanding of RD)- organizing a "council of councils", or a "plenary gathering" of all elected officials in the region- making presentations to member councils on contributions to RD services- giving briefings to councils following RD board meetings- publishing RD quarterly newsletters / updates- publishing a "RD Page" in local newspapers- involving local MLAs in RD discussions- undertaking strategic planning for the regional district corporation- building strong inter-jurisdictional staff relationships➤ a series of BPs to focus on media relations:<ul style="list-style-type: none">- educating media representatives on the basics of RDs- approaching the media- producing a press release- issuing joint press releases (e.g., with member municipalities)- working with your (RD) communications staff
Fact Sheets	<ul style="list-style-type: none">· fact sheets could be produced to address specific misunderstandings and irritants· as their title suggests, fact sheets to provide only the facts — i.e., not written to provide advice to RDs➤ fact sheets to consider:<ul style="list-style-type: none">- the RD role in land use planning approvals- RD voting rules- the process for establishing RD services- the financing of RD services- service reviews – purpose, options, processes- similarities and differences between RDs and municipalities- RDs and property tax notices- the Municipal Finance Authority and RDs

Tool	Description
PowerPoint Presentations	<ul style="list-style-type: none"> ➤ a customizable, shell presentation on regional districts (purposes, structure, functions, issues) could be created and adapted for use by RDs in different settings ➤ potential audiences to include any group that interacts with RDs, or any group that may be interested in learning more about what RDs exist to do: <ul style="list-style-type: none"> - staff from provincial ministries and agencies - municipal councils - municipal staff - First Nations - school classes - various groups of residences (service recipients) - organizations from the development industry (e.g., UDI, CHBA, etc.)
Discussion Guides	<ul style="list-style-type: none"> ➤ Working Group discussions revealed that several issues and challenges related to regional districts, and the roles and accountability of directors, are inherently complex ➤ regional districts that encounter these issues can be encouraged to explore them through open discussion; open discussion among stakeholders, it is expected, will help to improve the understanding of the roles and accountability of directors, as well as, more broadly, the regional district model ➤ discussion guides in the <i>Tool Kit</i> could assist regional districts in structuring such exchanges ➤ each guide could identify and describe an issue, present the different perspectives on the issue, and present questions intended to prompt and guide discussion ➤ the potential issues to be featured in discussion guides include those explored in detail by the Working Group at its second discussion session: <ul style="list-style-type: none"> - the promotion of regional vs. local interests in decision-making - the relationship between councils and their municipal directors - directors' responsibilities to the RD corporation - responsibilities of individual council members (non-directors) in regional district business - the relationship between RD staff and directors - balancing the dual roles of the RD Chair (CEO and local advocate) - the EA director as the voice of the EA ➤ discussion guides could be presented and tested at group events such as UBCM's annual conference and UBCM chapter meetings, and at UBCM-sponsored seminars for directors
Regional District Booklet	<ul style="list-style-type: none"> ➤ a general information booklet outlining the basics about regional districts in BC ➤ booklet could be titled "An Introduction to BC's Regional Districts" ➤ UBCM has a booklet (the "Yellow Booklet") on local government in BC, including regional districts; material from this booklet could be updated for the regional district booklet ➤ the audience for the booklet would be broad ➤ distribution could be "passive" (e.g., make booklets available at civic buildings and online); or, distribution could be "active" (e.g., mail booklet directly to all households and businesses)