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Capital Regional District

625 Fisgard St.,
Victoria, BC V8W 1R7

Notice of Meeting and Meeting Agenda

Governance and First Nations Relations Committee

Wednesday, June 3, 2026 | **9:30 AM** | **6th Floor Boardroom, 625 Fisgard St., Victoria BC V8W 1R7**

M. Little (Chair), K. Williams (Vice Chair), M. Alto, P. Brent, C. Coleman, B. Desjardins,
K. Murdoch, D. Murdock, C. Plant, M. Tait, C. McNeil-Smith (Board Chair, ex officio)

The Capital Regional District strives to be a place where inclusion is paramount and all people are treated with dignity. We pledge to make our meetings a place where all feel welcome and respected.

1. Territorial Acknowledgement

2. Approval of Agenda

3. Adoption of Minutes

3.1. 26-0512 Minutes of the Governance and First Nations Relations Committee meeting of April 1, 2026

Recommendation: That the minutes of the Governance and First Nations Relations Committee meeting of April 1, 2026 be approved as circulated.

Attachments: Minutes: April 1, 2026

4. Chair’s Remarks

5. Presentations/Delegations

The public are welcome to attend CRD meetings in-person.

Delegations will have the option to participate electronically. Please complete the online application at www.crd.ca/address no later than 4:30 pm two days before the meeting and staff will respond with details.

Alternatively, you may email your comments on an agenda item to the CRD Board at crdboard@crd.bc.ca.

6. Committee Business

6.1. 26-0656 2026 General Local Election - Appointment of Chief Election Officer and the Deputy Chief Election Officers

Recommendation: The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:
1. That pursuant to Section 58 of the Local Government Act, the Board appoint Kristen M. Morley as Chief Election Officer with the power to appoint such other assistance as may be required for the administration and conduct of the 2026 General Local Elections; and
2. That the Board appoint Colleen Doty, Kerry Fedosenko, Meriel Galloway, Marlene Lagoa, and Marius Miklea as Deputy Chief Election Officers.

Attachments: Staff Report: 2026 Election - Appointment of Chief Election Officer and Deputies

6.2. 26-0655 Bylaw No. 4781 - Capital Regional District Election and Voting Procedures Bylaw, 2008, Amendment Bylaw No. 5, 2026

Recommendation: The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:
1. That Bylaw No. 4781, "Capital Regional District Election and Voting Procedures Bylaw, 2008, Amendment Bylaw No. 5, 2026", be introduced, read a first, second, and third time.
2. That Bylaw No. 4781 be adopted.

Attachments: Staff Report: Bylaw No. 4781 - CRD Election and Voting Bylaw Amendment

Appendix A: Amendment Bylaw 4781

Appendix B: Bylaw No. 3543 Consolidated (Redlined)

6.3. 26-0647 CRD Service Review Program

Recommendation: The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:
1. That staff be directed to include the Proposed service reviews listed in Appendix B to the five-year workplan;
2. That staff be directed to proceed with the development of an ongoing, standardized process for initiating and conducting regular service reviews.

Attachments: Staff Report: CRD Service Review Program

Appendix A: Board-Approved Methodology for Annual Service Reviews

Appendix B: Overview of CRD Service Reviews

Appendix C: Strategic Planning Activities Advanced This Board Term

6.4. 26-0616 Public Engagement Policy and Framework

Recommendation: The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:
That the Public Engagement Policy (BRD09) and supporting Framework be adopted.

Attachments: Staff Report: Public Engagement Policy and Framework

Appendix A: Public Participation Framework 2014

Appendix B: Draft Public Engagement Policy

Appendix C: Draft Public Engagement Framework

Appendix D: Public Engagement Toolkit

6.5. 26-0475 Regional Grants-in-Aid Policy (BRD13)

Recommendation: There is no recommendation. This report is for information only.

Attachments: Staff Report: Regional GIA Policy (BRD13)
Appendix A: 8 Jun 22 SR & Policy Regional GIA
Appendix B: Hx Past Regional GIA Requests

6.6. 26-0514 Previous Minutes of Other CRD Committees and Commissions for Information

Recommendation: There is no recommendation. The following minutes are for information only.
a) Accessibility Advisory Committee - January 20, 2026
b) Victoria Family Court Youth Justice Committee - February 26, 2026

Attachments: Minutes - AAC January 20, 2026
Minutes - VFCYJC February 26, 2026

7. Notice(s) of Motion

8. New Business

9. Adjournment

The next meeting is at the Call of the Chair.

Meeting Minutes

Governance and First Nations Relations Committee

Wednesday, April 1, 2026	9:30 AM	6th Floor Boardroom 625 Fisgard St. Victoria BC V8W 1R7

PRESENT
Directors: M. Little (Chair), K. Williams (Vice Chair), M. Alto, P. Brent, D. Cavens (for B. Desjardins), C. Coleman, K. Murdoch, D. Murdock (EP) (9:33 am), C. Plant, C. McNeil-Smith (Board Chair, ex officio)

Staff: T. Robbins, Chief Administrative Officer; K. Morley, General Manager, Corporate Services; A. Prisniak, Manager Strategic Initiatives, First Nations Relations; M. Sexsmith, Manager, FOI and Privacy, Privacy and Information Services; M. Lagoa, Senior Manager, Legislative Services/Deputy Corporate Officer; M. Miklea, Manager, Legislative Services/Deputy Corporate Officer, J. Dorman, Committee Clerk (Recorder)

EP - Electronic Participation

Guests: Director J. Brownoff (EP)

Regrets: B. Desjardins, M. Tait

The meeting was called to order at 9:31 am.

1. Territorial Acknowledgement

Vice Chair Williams provided a Territorial Acknowledgement.

2. Approval of Agenda

MOVED by Director Brent, SECONDED by Director Coleman,
That the agenda for the Governance and First Nations Relations Committee meeting of April 1, 2026 be approved.
CARRIED

MOVED by Director Brent, SECONDED by Director Coleman,
That Director Brownoff be permitted to participate (without vote) in the Governance and First Nations Relations Committee meeting of April 1, 2026.
CARRIED

3. Adoption of Minutes

3.1. 26-0389 Minutes of the Governance and First Nations Relations Committee meeting of February 4, 2026

MOVED by Director Brent, SECONDED by Director Williams,
That the minutes of the Governance and First Nations Relations Committee meeting of February 4, 2026 be adopted as circulated.
CARRIED

4. Chair's Remarks

Chair Little provided well wishes to those you celebrate Passover at sundown today.

5. Presentations/Delegations

There were no presentations or delegations.

6. Committee Business

6.1. 26-0386 Freedom of Information and Protection of Privacy Act (FOIPPA) Overview 2025

M. Sexsmith presented Item 6.1. for information.

Director Murdock joined the meeting at 9:33 am.

Discussion ensued on the following:
- increased complexity of requests and tool mechanisms of processing
- building inspection requests and proportion of requests
- fee processing, assessments and waivers
- implications of Bill 9 and potential streamlining of processes

6.2. 26-0369 Regional District Service Reviews - Update

T. Robbins presented Item 6.2. for information.

Discussion ensued on the following:
- methodology and opportunity for further discussion
- risk mitigation as drivers of cost increases
- service delivery and risk implications as a result of budgetary amendments

6.3. [26-0385] Non-Disclosure/Confidentiality Agreement for CRD Committees & Commissions Policy

K. Morley spoke to Item 6.3.

Discussion ensued on the following:
- sanctions and removal of a non-elected official's appointment
- ongoing training and development
- statutory obligations of elected officals

MOVED by Director Brent, SECONDED by Director Coleman,
The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:
That the amended Non-Disclosure/Confidentiality Agreement for CRD Committees & Commissions Policy (BRD12), attached as Appendix A, be approved.
CARRIED

6.4. [26-0390] Previous Minutes of Other CRD Committees and Commissions for Information

The following minutes were received for information:
a) Victoria Family Court Youth Justice Committee - October 23, 2025
b) Victoria Family Court Youth Justice Committee - January 22, 2026

7. Notice(s) of Motion

There were no notice(s) of motion.

8. New Business

There was no new business.

9. Motion to Close the Meeting

9.1. [26-0391] Motion to Close the Meeting

MOVED by Director Plant, SECONDED by Director Williams,
That the meeting be closed for Provincial Government negotiations in accordance with Section 90(2)(b)(i) of the Community Charter.
CARRIED

The Governance and First Nations Relations Committee went into closed session at 10:13 am.

The Governance and First Nations Relations Committee rose from the closed session at 11:25 am without report.

10. Adjournment

MOVED by Director Coleman, SECONDED by Director Murdoch,
That the Governance and First Nations Relations Committee meeting of April 1, 2026 be adjourned at 11:25 am.
CARRIED

____
CHAIR

____
RECORDER

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REPORT TO GOVERNANCE AND FIRST NATIONS RELATIONS COMMITTEE
MEETING OF WEDNESDAY, JUNE 3, 2026

SUBJECT **2026 General Local Election – Appointment of Chief Election Officer and the Deputy Chief Election Officers**

ISSUE SUMMARY

To appoint a Chief Election Officer and Deputy Chief Election Officers for the purposes of conducting the upcoming 2026 General Local Elections.

BACKGROUND

Pursuant to the *Local Elections Campaign Financing Act* and the *Local Government Act*, local governments and Elections BC share responsibility for local elections. Local governments administer elections and set voting opportunity dates, times and places, accept nomination documents, count ballots, announce election results, and follow a process to determine the successful candidate in the event of election ties. Elections BC administers, investigates and enforces the campaign finance disclosure and election advertising rules.

The CRD conducts elections in the three Electoral Areas (EA) for EA Directors and for the Salt Spring Island Local Community Commission and the Juan de Fuca Land Use Committee. In addition, the CRD conducts elections in the EAs on behalf of the Islands Trust Trustees and School District Trustees.

Section 58 of the *Local Government Act* requires a local government to appoint a Chief Election Officer and Deputy Chief Election Officer for the purposes of conducting the upcoming 2026 General Local Election set for Saturday, October 17, 2026. The Chief Election Officer must then appoint election officials required for the administration and conduct of the election, and undertake all the statutory duties set out in the *Local Government Act*.

ALTERNATIVES

Alternative 1
The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:

1. That pursuant to Section 58 of the *Local Government Act*, the Board appoint Kristen M. Morley as Chief Election Officer with the power to appoint such other assistance as may be required for the administration and conduct of the 2026 General Local Elections; and
2. That the Board appoint Colleen Doty, Kerry Fedosenko, Meriel Galloway, Marlene Lagoa, and Marius Miklea as Deputy Chief Election Officers.

Alternative 2
That this report be referred back to staff for additional information.

IMPLICATIONS

A general local election cannot be conducted without the appointment of a Chief Election Officer and at least one Deputy Chief Election Officer. Given the geographic disparity of the three Electoral Areas, and our conduct of the election on behalf of the Islands Trust and School Districts #61, #62, #63 and #64, more than one Deputy Chief Election Officer is required to assist with the elections. CRD coordinates and staffs 30 polling locations for advance and general voting.

Unlike municipal elections which typically have all nominees on one ballot, CRD elections will require 17 different ballot forms to reflect the different races in each EA or sub-regional area, including:

- 3 races for Electoral Area Director;
- 7 races for Island Trustee;
- 11 races for School District Trustee;
- 6 races for the Juan de Fuca Land Use Committee; and
- 1 race for Salt Spring Island Local Community Commission.

CONCLUSION

Preparations are currently underway for the 2026 General Local Election. Appointment of the election officer positions is required and necessary to provide staff and contracted Deputy Chief Election Officers with the proper authority for the successful administration of the election.

RECOMMENDATION

The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:

1. That pursuant to Section 58 of the *Local Government Act*, the Board appoint Kristen M. Morley as Chief Election Officer with the power to appoint such other assistance as may be required for the administration and conduct of the 2026 General Local Elections; and
2. That the Board appoint Colleen Doty, Kerry Fedosenko, Meriel Galloway, Marlene Lagoa, and Marius Miklea as Deputy Chief Election Officers.

Submitted by:	Marlene Lagoa, MPA, Senior Manager, Legislative Services & Deputy Corporate Officer
Concurrence:	Kristen Morley, J.D., Corporate Officer & General Manager, Corporate Services
Concurrence:	Ted Robbins, B. Sc., C. Tech., Chief Administrative Officer

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REPORT TO GOVERNANCE AND FIRST NATIONS RELATIONS COMMITTEE
MEETING OF WEDNESDAY, JUNE 3, 2026

SUBJECT **Bylaw No. 4781 - Capital Regional District Election and Voting Procedures Bylaw, 2008, Amendment Bylaw No. 5, 2026**

ISSUE SUMMARY

The *Miscellaneous Statutes Amendment Act, 2025* has amended several sections of the *Local Government Act* (LGA) pertaining to local elections. As a result, the Capital Regional District's (CRD) Bylaw No. 3543, "Capital Regional District Election and Voting Procedures Bylaw, 2008" (Election Bylaw) requires amending in order to remain aligned with provincial legislation and to incorporate updates required for the 2026 General Local Election.

BACKGROUND

With the General Local Election scheduled for October 17, 2026, staff have reviewed the Election Bylaw to ensure it aligns with the changes in provincial legislation that have occurred since the last General Local Election and to address any process improvements that are planned for implementation in the upcoming election.

The proposed bylaw amendment (Appendix A) seeks to align the Election Bylaw with changes advanced by the province regarding protection of the privacy of individuals choosing to run for elected offices, as well as providing flexibility to municipalities and regional districts on receipt of mail ballots. In particular, mail ballots can now be provided at authorized drop-off locations and no longer directly to the Chief Election Officer located at 625 Fisgard Street, Victoria, BC.

ALTERNATIVES

Alternative 1
The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:
1. That Bylaw No. 4781, "Capital Regional District Election and Voting Procedures Bylaw, 2008, Amendment Bylaw No. 5, 2026", be introduced, read a first, second, and third time.
2. That Bylaw No. 4781 be adopted.

Alternative 2
That this report be referred back to staff for additional information.

IMPLICATIONS

Definitions

The definition of "Secrecy enclosure" has since been defined in the LGA and the Election Bylaw is being updated to reflect the legislation.

The definition of "Ballot" has been broadened to reflect the complexity and number of elections that CRD administers for the regional district (i.e. EA Director, SSI Local Community Commission, JDF Land Use Committee) and on behalf of other organizations (i.e. Islands Trust Trustees and School District Trustees).

The previous definition also limited the CRD to a single automated ballot card. The new definition does not limit the CRD to using a single automated ballot card, while still allowing a composite ballot containing candidates for two or more elections and any assent voting question, if all the races can fit on one card. Due to the rising cost of renting automated vote counting systems, the CRD needs the flexibility to use hand counted ballots for voting where there are few electors, such as in a local service area where an assent vote (referendum) is to be held.

Public Access to Nomination Documents

The Election Bylaw allows for the posting of nomination documents to the CRD website. This practice allows the public and nominees to track new nominations as they are submitted during the nomination period. With the new provincial changes, any nomination documents posted to the website will be redacted to remove the residential address of the nominee, other than the municipality, electoral area or treaty lands in which the nominee is a resident. Members of the public may also request to view the documents in person at the CRD office during regular business hours after signing a statement to protect the use of the information reviewed for election purposes only.

Authorized Drop-off Locations

Pursuant to the legislative changes, the Election Bylaw has been amended to also allow for the designation of drop off locations for mail ballots to facilitate mail ballot voting where mail service is not fast enough to allow for return mail to CRD headquarters.

A redlined version of the proposed changes is attached as Appendix B. The proposed changes to the Election Bylaw must be adopted by the CRD Board no later than July 6th to meet the requirements of section 56 of the *LGA*.

CONCLUSION

With the upcoming General Local Election in October of 2026, staff have reviewed and updated the CRD Election Bylaw to reflect recent legislative changes and implement process improvements necessary to administration of the election.

RECOMMENDATION

The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:

1. That Bylaw No. 4781, “Capital Regional District Election and Voting Procedures Bylaw, 2008, Amendment Bylaw No. 5, 2026”, be introduced, read a first, second, and third time.
2. That Bylaw No. 4781 be adopted.

Submitted by:	Marlene Lagoa, MPA, Senior Manager, Legislative Services & Deputy Corporate Officer
Concurrence:	Kristen Morley, J.D., Corporate Officer & General Manager, Corporate Services
Concurrence:	Ted Robbins, B. Sc., C. Tech., Chief Administrative Officer

ATTACHMENT(S)

Appendix A: Bylaw No. 4781, “Capital Regional District Election and Voting Procedures Bylaw, 2008, Amendment Bylaw No. 5, 2026”
Appendix B: Consolidated Bylaw 3543 (redlined)

Appendix A

CAPITAL REGIONAL DISTRICT
BYLAW NO. 4781

****

A BYLAW TO AMEND CAPITAL REGIONAL DISTRICT ELECTION AND VOTING PROCEDURES BYLAW (BYLAW NO. 3543)

****

WHEREAS:

A. Under Under Bylaw No. 3543, “Capital Regional District Election and Voting Procedures Bylaw, 2008”, the Regional Board provided for the conduct of local government elections and other voting in the Capital Regional District; and

B. Amendment is required to align with recent amendments to the *Local Government Act*; and

C. The Board wishes to amend Bylaw No. 3543 in order to allow for transparency, protection of privacy, and flexibility of documentation drop off at authorized locations.

NOW THEREFORE, the Capital Regional District Board in open meeting assembled hereby enacts as follows:

1. Bylaw No. 3543, “Capital Regional District Election and Voting Procedures Bylaw, 2008” is hereby amended as follows:

   (a) In section 1.1, replacing the definition of "Ballot" with the following;

   "Ballot" means a ballot card, which may be a composite ballot for two or more elections to be voted on, which shows:
   (a) the names of all the candidates for each of the offices to be elected; and
   (b) all the choices on the bylaws or other matters on which the opinion or assent of the electors is sought;

   (b) In section 1.1, deleting the definition of “Secrecy sleeve” in its entirety;

   (c) In section 7., by deleting the words “by Posting on Website” after “Public Access to Nomination Documents”;

   (d) In section 7.1 as follows:

      i. Prior to the words “nomination documents”, by inserting the words “all or part of the”;
      ii. By deleting the word “them”; and
      iii. Prior to the words “on the regional district website”, by inserting the words “redacted copies”;

(e) By inserting a new section numbered 7.2., which reads:

7.2 Alternatively, nomination documents are available for public inspection during regular office hours at the Capital Regional District office at 625 Fisgard Street, Victoria, BC. In accordance with section 89(10) of the *Local Government Act*, a person must sign a statement that the person will not use the information included in them except as permitted by the *Local Government Act* or section 63 of the *Local Elections Campaign Financing Act*.

(f) In sections 10.3, 10.4(b), 10.5 and 10.7 by deleting the word "sleeve" and replacing with "enclosure"; and

(g) In section 17.2(d) by deleting the words "chief election officer at the address specified" and replacing with the words "address printed on the outer envelope included in the mail ballot package, or an authorized drop-off location, if any,".

2. This Bylaw may be cited as "Capital Regional District Election and Voting Procedures Bylaw, 2008, Amendment Bylaw No. 5, 2026".

READ A FIRST TIME THIS	th	day of	20__
READ A SECOND TIME THIS	th	day of	20__
READ A THIRD TIME THIS	th	day of	20__
ADOPTED THIS	th	day of	20__

______________________________ CHAIR

______________________________ CORPORATE OFFICER

Appendix B

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BYLAW NO. 3543

A BYLAW TO UPDATE THE ELECTION PROCEDURES BYLAW PROVISIONS FOR THE CONDUCT OF LOCAL GOVERNMENT ELECTIONS AND OTHER VOTING IN THE CAPITAL REGIONAL DISTRICT, INCLUDING THE USE OF AUTOMATED VOTING MACHINES

Consolidated for Public Convenience
(This bylaw is for reference purposes only)

ORIGINALLY ADOPTED JULY 9, 2008
(Consolidated with Amending Bylaws 3959, 4250, 4486, ~~and~~ 4540 and 4781)

For reference to original bylaws or further details, please contact the Capital Regional District, Legislative Services Department, 625 Fisgard St., PO Box 1000, Victoria BC V8W 2S6
T: (250) 360-3127, F: (250) 360-3130, Email: legserv@crd.bc.ca, Web: www.crd.bc.ca

CAPITAL REGIONAL DISTRICT

BYLAW NO. 3543

****
A BYLAW TO UPDATE THE ELECTION PROCEDURES BYLAW PROVISIONS FOR THE CONDUCT OF LOCAL GOVERNMENT ELECTIONS AND OTHER VOTING IN THE CAPITAL REGIONAL DISTRICT, INCLUDING THE USE OF AUTOMATED VOTING MACHINES
****

WHEREAS under the *Local Government Act*, the Board may, by bylaw, determine various procedures and requirements to be applied in the conduct of local government elections and other voting;

AND WHEREAS, pursuant to Section 112 of the *Local Government Act*, the Board is empowered to provide, by bylaw, for the use of automated voting machines, voting recorders, or other devices for voting in an election;

(Bylaw 4250)

AND WHEREAS, the Board wishes to establish various procedures and requirements under that authority;

NOW THEREFORE, the Board of the Capital Regional District, in open meeting assembled, enacts as follows:

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PART 1 – INTRODUCTION

1. Definitions and Interpretations

1.1. If no meaning is given in section 1.1 for a word or expression in this Bylaw, that word or expression has the meaning given in the *Local Government Act.*

In this Bylaw:

"Acceptable mark" means a completed oval that:

(a) the vote tabulating unit is able to identify, and

(b) has been made by an elector in the space provided on the ballot opposite the name of any candidate or opposite either 'yes' or 'no' on any other voting question;

"Automated vote counting system" means a system that counts and records votes and processes and stores election results, and is comprised of the following equipment having the functions indicated:

(a) a number of ballot- scanning vote tabulating units, each of which rests on a ballot box; and
(b) a number of portable ballot boxes into which voted ballots are deposited, if a vote tabulating unit is not functioning or being used, for counting after the close of voting on general voting day;

"Ballot" means a ballot card, which may be a composite ballot for two or more elections to be voted on, which shows:
(a) the names of all the candidates for each of the offices to be elected; and
(b) all the choices on the bylaws or other matters on which the opinion or assent of the electors is sought;

"Ballot return override procedure" means the use, by an election official, of a device on a vote tabulating unit that causes the unit to accept a returned ballot;

"Board" means the Board of the Capital Regional District;

"Chief election officer" means the person appointed under section 8(1) of the *Local Government Act*;

(Bylaw 4250)

"Deputy chief election officer" means the person appointed under section 8(1) of the Local *Government Act*;

(Bylaw 4250)

"Election" means an election for the number of persons required to fill a local government office;

"Election officials" means the persons appointed by the chief election officer to assist with the administration and conduct of the election or other voting proceedings;

"General local election" means the elections held for the electoral area directors of the regional district which must be held in 2018 and every fourth year after that;

(Bylaw 4250)

"General voting day" means,

(a) for a general local election, the third Saturday in October in the year of the election and includes other voting to be conducted on that date;
(b) for other elections or other voting, the date set under the provisions of the *Local Government Act;*

(Bylaw 4250)

"Jurisdiction" means, in relation to an election, or other voting, the regional district electoral area for which the election or other voting, is being held;

"Local government" means the Board;

"Memory card" means the storage device that stores all the permanent results for the vote tabulating unit;

"Portable ballot box" means a ballot box that is used as a voting place in the election where a vote tabulating unit is not being used or is not functioning;

"Other voting" means voting on a matter referred to in section 170 of the *Local Government Act;*

(Bylaw 4250)

"Regional District Website" means the information resource found at an internet address provided by the Capital Regional District.

"Register tape" means the printed record generated from a vote tabulating unit at the close of voting on general voting day, that shows the number of votes:
(a) for each candidate for each of the offices of Electoral Area Director, and for each office of Local Trustee, and School Trustee, if applicable;
(b) for the number of votes for and against each bylaw or other matter on which the assent of the electors is sought;

"Returned ballot" means a voted ballot which was inserted by an elector into the vote tabulating unit that is not accepted and is returned by the unit to the elector with an explanation of the ballot marking error that caused the ballot to be unacceptable; and

~~**"Secrecy sleeve"** means an open-ended folder or envelope used to cover ballots to conceal the choices made by each elector;~~

"Vote tabulating unit" means the device into which voted ballots are inserted and that scans each ballot and records the number of votes for each candidate and for and against each other voting question.

PART 2 – CONDUCT OF ELECTIONS AND OTHER VOTING

2. Appointment of Election Officers

2.1. The Board must appoint a Chief Election Officer and a Deputy Chief Election Officer under the *Local Government Act.*

3. Required Additional Advance Voting Opportunity

3.1. As authorized under section 107(1)(b) of the *Local Government Act*, an additional advance voting opportunity will be held on the third day before general voting day.

(Bylaw 4250)

4. Further Advance Voting Opportunities

4.1. As authorized under section 108 of the *Local Government Act*, the Board authorizes the chief election officer to establish additional advance voting opportunities for each election, or other voting, to be held in advance of general voting day and to designate the voting places, establish the date and the voting hours for these voting opportunities.

(Bylaw 4250)

5. Voting Place for an Additional General Voting Opportunity Outside the Boundaries of the Jurisdiction

5.1. As authorized under sections 106 and 111 of the *Local Government Act*, the Board authorizes the chief election officer to establish an additional voting place for general voting day outside the boundaries of the jurisdiction, and to designate the voting place for this voting opportunity.

(Bylaw 4250)

6. Resolution of Tie Votes after Judicial Recount

6.1. In the event of a tie vote after a judicial recount, the tie vote will be resolved by conducting a lot in accordance with section 151 of the *Local Government Act*.

(Bylaw 4250)

7. Public Access to Nomination Documents ~~by Posting on Website~~

7.1. In accordance with section 89 of the *Local Government Act* the Capital Regional District may provide for public access to all or part of the nomination documents from the time of delivery until 30 days after the declaration of election results under section 146 of the *Local Government Act* by posting ~~them~~ redacted copies on the regional district website.

(Bylaw 4250)

7.2 Alternatively, nomination documents are available for public inspection during regular office hours at the Capital Regional District office at 625 Fisgard Street, Victoria, BC. In accordance with section 89(10) of the *Local Government Act,* a person must sign a statement that the person will not use the information included in them except as permitted by the *Local Government Act* or section 63 of the *Local Elections Campaign Financing Act*.

8. Use of Provincial List of Voters as the Register of Resident Electors

8.1. As authorized under section 76 of the Local Government Act, the most current list of voters prepared under the Election Act existing at the time an election or other voting is to be held is the register of resident electors for the Capital Regional District."

(Bylaws 3959 & 4250)

8.2. The Provincial list of voters becomes the register of resident electors no later than 52 days before general voting day for each election or other voting for the Capital Regional District."

(Bylaws 3959 & 4486)

PART 3 – AUTOMATED VOTING

9. Use of Voting Machines

9.1. Voting may be conducted in a general local election and other voting for or in respect of one or more jurisdictions using an automated vote counting system.

10. Automated Vote Counting System Procedures

10.1. The chief election officer may decide to conduct any local government election or other voting for or in respect of one or more jurisdictions using an automated vote counting system.

(Bylaw 4250)

10.2. Where the chief election officer conducts a local government election or other voting using an automated voting counting system, the procedures outlined in sections 10.3 to 10.14 will apply within that jurisdiction.

(Bylaw 4250)

10.3. The presiding election official for each voting place and at each advance voting opportunity must, as soon as the elector enters the voting place and before a ballot is issued to the elector, offer and if requested, direct an election official to provide a demonstration to an elector of the method for voting by using an automated vote counting system, including the use of a secrecy ~~sleeve~~ enclosure.

(Bylaw 4250)

10.4. Upon completion of the voting demonstration, if any, the elector must proceed as instructed, to the election official responsible for issuing ballots, who:

(a) shall ensure that the elector:
 (i) is qualified to vote in the election or other voting; and
 (ii) is voting in the correct jurisdiction; and
 (iii) completes the voting book as required by the *Local Government Act*; and

(b) upon fulfilment of the requirements of subsection (a), shall provide a ballot to the elector, a secrecy ~~sleeve~~ enclosure if requested by the elector, and any further instructions the elector requests.

(Bylaw 4250)

10.5. Upon receiving a ballot, and secrecy ~~sleeve~~ enclosure if so requested, the elector shall immediately proceed to a voting compartment to vote.

(Bylaw 4250)

10.6. The elector may vote only by making an acceptable mark on the ballot:
(a) beside the name of the candidate of choice; and
(b) beside either 'yes' or 'no' in the case of each bylaw or other matter on which the assent or opinion of the electors is sought.

(Bylaw 4250)

10.7. Once the elector has finished marking the ballot, the elector must place the ballot into the secrecy ~~sleeve~~ enclosure, if applicable, proceed to the vote tabulating unit and under the supervision of the election official in attendance, insert the ballot directly from the secrecy ~~sleeve~~ enclosure, if applicable, into the vote tabulating unit without the acceptable marks on the ballot being exposed.

(Bylaw 4250)

10.8. If, before inserting the ballot into the vote tabulating unit, an elector determines that he or she has made a mistake when marking a ballot or if the ballot is returned by the vote tabulating unit, the elector may request a replacement ballot by advising the election official in attendance.

(Bylaw 4250)

10.9. Upon being advised of the replacement ballot request, the presiding election official or alternate presiding election official shall issue a replacement ballot to the elector and mark the returned ballot "spoiled" and shall retain all such spoiled ballots separately from all other ballots and they shall not be counted in the election.

(Bylaw 4250)

10.10. If the elector declines the opportunity to obtain a replacement ballot and has not damaged the ballot to the extent that it cannot be reinserted into the vote tabulating unit, the election official shall, using the ballot return override procedure, reinsert the returned ballot into the vote tabulating unit to count any acceptable marks which have been made correctly.

(Bylaw 4250)

10.11. Any ballot counted by the vote tabulating unit is valid and any acceptable marks contained on such ballots will be counted in the election subject to any determination made under a judicial recount.

(Bylaw 4250)

10.12. Once the ballot has been inserted into the vote tabulating unit and the unit indicates that the ballot has been accepted, the elector must immediately leave the voting place.

(Bylaw 4250)

10.13. During any period that a vote tabulating unit is not functioning, the election official supervising the unit shall insert all ballots delivered by the electors during this time, into a portable ballot box, provided that if the vote tabulating unit:

(a) becomes operational, or
(b) is replaced with another vote tabulating unit,

the ballots in the portable ballot box shall, as soon as reasonably possible, be removed by an election official and under the supervision of the presiding election official be inserted into the vote tabulating unit to be counted.

(Bylaw 4250)

10.14. Any ballots which were temporarily stored in a portable ballot box which are returned by the vote tabulating unit when being counted shall, through the use of the ballot return override procedure and under the supervision of the presiding election official, be reinserted into the vote tabulating unit to ensure that any acceptable marks are counted.

(Bylaw 4250)

11. Advance Voting Opportunity Procedures

11.1. Vote tabulating units may be used to conduct the vote at all advance voting opportunities and voting procedures at the advance voting opportunities shall follow as closely as possible those described in Section 10 of this Bylaw.

(Bylaw 4486)

11.2. At the close of voting at each advance voting opportunity the presiding election official in each case shall ensure that:

(a) no additional ballots are inserted in the vote tabulating unit;
(b) the portable ballot box is sealed to prevent insertion of any ballots;
(c) the register tapes in the vote tabulating unit are not generated; and
(d) the memory card of the vote tabulating unit is secured.

11.3. At the close of voting at the final advance voting opportunity the presiding election official shall:

(a) ensure that any remaining ballots in the portable ballot box are inserted into the vote tabulating unit;
(b) secure the vote tabulating unit so that no more ballots can be inserted; and
(c) deliver the vote tabulating unit together with the memory card and all other materials used in the election to the chief election officer at election headquarters, as soon as reasonably possible.

(Bylaw 4486)

12. Special Voting Opportunity Procedures

12.1. Unless the chief election officer determines it is practical to use a vote tabulating unit, a portable ballot box shall be used for all special voting opportunities. The presiding election official appointed to attend at each special voting opportunity shall proceed in accordance with Section 10 of this Bylaw so far as applicable, except that the voted ballots shall be deposited into the portable ballot box supplied by the presiding election official.

12.2. The presiding election official at a special voting opportunity shall ensure that the portable ballot box is secured when not in use and at the close of voting at the final special voting opportunity, the presiding election official shall seal the portable ballot box and return it together with all other election materials to the custody of the chief election officer.

12.3. If a vote tabulating unit is in use at a special voting opportunity, the presiding election official appointed to attend the special voting opportunity shall follow the procedures outlined in Section 11 of this Bylaw as if it were an advance voting opportunity.

13. Procedures After Close of Voting on General Voting Day

13.1. After the close of voting on general voting day at voting opportunities where a vote tabulating unit was used in the election, but excluding advance and special voting opportunities,

(a) each presiding election official shall:

(i) ensure that any remaining ballots in the portable ballot box are inserted into the vote tabulating unit;
(ii) secure the vote tabulating unit so that no more ballots can be inserted;
(iii) generate three copies of the register tape from the vote tabulating unit; and
(iv) deliver one copy of the register tape along with the vote tabulating unit to the chief election officer at election headquarters; and

(b) each alternate presiding election official shall:

(i) account for the unused, spoiled and voted ballots and place them, packaged and sealed separately, into the election materials transfer box along with one copy of the register tape;
(ii) complete the ballot account and place the duplicate copy in the election materials transfer box;
(iii) seal the election materials transfer box;
(iv) place the voting books, the original copy of the ballot account, one copy of the register tape, completed registration cards (if applicable), keys and all completed administrative forms into the chief election officer portfolio; and
(v) transport all equipment and materials to election headquarters.

13.2. At the close of voting on general voting day the chief election officer shall direct the presiding election official for the advance voting opportunity and any special voting opportunities where vote tabulating units were used, to proceed in accordance with Section 13.1 of this Bylaw.

13.3. At the close of voting on general voting day all portable ballot boxes used in the election will be opened under the direction of the chief election officer and all ballots shall be removed and inserted into a vote tabulating unit to be counted, after which the provisions of Sections 13.1, so far as applicable, shall apply.

14. Recount Procedure

14.1. If a recount is required it shall be conducted under the direction of the chief election officer using the automated vote counting system and generally in accordance with the following procedure:

(a) the memory cards of all vote tabulating units will be cleared;
(b) vote tabulating units will be designated for each voting place;
(c) all ballots will be removed from the sealed ballot boxes; and
(d) all ballots, except spoiled ballots, will be reinserted in the appropriate vote tabulating units under the supervision of the chief election officer.

PART 4 – MAIL BALLOT VOTING

15. Mail Ballot Voting and Registration Authorized

15.1. Voting by mail ballot and elector registration by mail in conjunction with mail ballot voting are authorized.

(Bylaw 3959)

15.2. Once a mail ballot package has been accepted by the chief election officer, that voter may only vote by mail ballot.

(Bylaws 3959 & 4486)

16. Application Procedure for Mail Ballot

16.1. A person wishing to vote by mail ballot must apply by providing their name and address to the chief election officer or to an election official designated by the chief election officer for such purposes, using the form required by the chief election officer, within the time limits required by the chief election officer, which time limits the Board authorizes the chief election officer to establish.

(Bylaw 3959)

16.2. Upon receipt of a request for a mail ballot, the chief election officer or designated election official must, within the time limits established by the chief election officer:

(a) make available to the applicant a mail ballot package as specified in section 110(7) of the *Local Government Act* together with, where required, an elector registration application;

(Bylaw 4486)

(b) immediately record and, upon request, make available for inspection:
(i) the name and address of the person to whom the mail ballot package was issued; and
(ii) information as to whether or not the person is registered as an elector.

(Bylaws 3959 & 4250)

17. Voting Procedure for Mail Ballot

17.1. In order to vote using a mail ballot, the elector must mark the ballot in accordance with the instructions contained in the mail ballot package provided by the chief election officer.

(Bylaw 3959)

17.2. After marking the mail ballot, the elector must:

(a) place the mail ballot in the secrecy envelope provided, and seal the secrecy envelope;

(b) place the secrecy envelope in the certification envelope, and complete and sign the certification printed on such envelope, and then seal the certification envelope;

(c) place the certification envelope, together with a completed elector registration application, if required, in the outer envelope, and then seal the outer envelope; and

(d) mail, or have delivered, the outer envelope and its contents to the ~~chief election officer at the address specified~~ address printed on the outer envelope included in the mail ballot package, or an authorized drop-off location, if any, so that it is received within the time limits established by the chief election officer which must be no later than the close of voting on general voting day.

(Bylaws 3959 & 4540)

18. Mail Ballot Acceptance or Rejection

18.1. Upon receipt of the outer envelope and its contents, the chief election officer or designated election official must immediately record the date of such receipt and must then open the outer envelope and remove and examine the certification envelope and the completed elector registration application, if applicable, and if satisfied as to:

(a) the identity and entitlement to vote of the elector whose mail ballot is enclosed; and

(b) the completeness of the certification; and

(c) the fulfillment of the requirements of section 70 of the *Local Government Act* in the case of a person who is registering as a new elector;

the chief election officer or designated election official must mark the certification envelope as "accepted", and must retain all such certification envelopes in custody to deal with any challenges made in accordance with Section 19 of this bylaw.

(Bylaws 3959, 4250 & 4540)

18.2. The unopened certification envelopes must remain in the secure custody of the chief election officer or designated election official until the close of voting on general voting day, at which time the certification envelopes containing the secrecy envelopes must be opened in the presence of at least one other person, including any scrutineers present.

(Bylaw 3959 & 4540)

18.3. Following the close of voting on general voting day, the following procedures must be followed:

(a) under the direction of the chief election officer or designated election official, the certification envelopes containing the secrecy envelopes must be opened;

(b) in the presence of at least one other person including any scrutineers present, the secrecy envelopes must be removed and opened and the ballots contained in those envelopes inserted for counting into a vote tabulating unit or portable ballot box; and

(c) after the procedures set out in paragraphs (a) and (b), the procedures set out in Sections 10 and 13 of this bylaw must be followed to the extent that they are applicable.

(Bylaws 3959 & 4540)

18.4. Where:

(a) upon receipt of an outer envelope, the chief election officer is not satisfied as to the identity of the elector whose mail ballot is enclosed; or

(b) in the case of a person required to complete an application for registration as an elector, the chief election officer is not satisfied that the person registering as a new elector has fulfilled the requirements of section 70 of the *Local Government Act*; or

(c) the outer envelope is received by the chief election officer or designated election official after the close of voting on general voting day,

the certification envelope must remain unopened, and the chief election officer or designated election official must mark such envelope as "rejected", and must note his or her reasons for doing so, and the mail ballot contained in such envelope must not be counted in the election.

(Bylaws 3959, 4250 & 4540)

18.5. Any certification envelopes and their contents rejected in accordance with Section 18.4 of this bylaw must remain unopened and are subject to the provisions of section 160 of the *Local Government* Act with regard to their destruction.

(Bylaws 3959, 4250 & 4540)

19. Challenge of Elector

19.1. A person exercising the right to vote by mail ballot may be challenged in accordance with, and on the grounds specified in section 126 of the *Local Government Act until* 4:00 p.m. on the Thursday two days before general voting day.

(Bylaws 3959 & 4250)

19.2. The provisions of section 126(2) and (5) of the *Local Government Act* apply, so far as applicable, where a challenge of an elector voting by mail ballot has been made.

(Bylaws 3959 & 4250)

20. Elector's Name Already Used

20.1. Where, upon receiving a request for a mail ballot, the chief election officer or designated election official determines that another person has voted or has already been issued a mail ballot in that elector's name, the provisions of section 127 of the *Local Government Act* apply, so far as applicable.

(Bylaws 3959 & 4250)

21. Replacement of Spoiled Ballot

21.1. Where an elector

(a) unintentionally spoils a mail ballot before returning it to the chief election officer or designated election official; and

(b) gives the spoiled ballot package in its entirety to the chief election officer or designated election official;

the elector may request a replacement ballot.

(Bylaw 3959)

21.2. The chief election officer must, upon receipt of the spoiled ballot package, record such fact, and must proceed to issue a replacement mail ballot in accordance with Section 16.2 of this bylaw.”

(Bylaw 3959)

PART 5 – GENERAL

(Bylaw 3959)

22. Validity of Election

22.1. Nothing in this Bylaw is intended to require the setting aside of the results of an election or other voting because of the failure of the chief election officer, deputy chief election officer or an election officer to comply with the provisions of this Bylaw or because an election is not conducted in accordance with this Bylaw.

(Bylaw 3959)

23. Repeal

23.1. Bylaw No. 2162, "Capital Regional District Election and Other Voting Procedures Bylaw, 1993" is hereby repealed.

(Bylaw 3959)

24. Citation

24.1. This Bylaw may be cited as "Capital Regional District Election and Voting Procedures Bylaw, 2008"

(Bylaw 3959)

READ A FIRST TIME THIS	11th	day of	June	2008
READ A SECOND TIME THIS	11th	day of	June	2008
READ A THIRD TIME THIS	11th	day of	June	2008
ADOPTED THIS	9th	day of	July	2008

Making a difference...together

REPORT TO GOVERNANCE AND FIRST NATIONS RELATIONS COMMITTEE
MEETING OF WEDNESDAY, JUNE 3, 2026

SUBJECT **CRD Service Review Program**

ISSUE SUMMARY

On October 8, 2025, the Capital Regional District (CRD) Board (Board) directed staff to establish an ongoing program to conduct one to two service reviews annually. This report provides an overview of the service reviews completed during the current Board term, as well as those underway, planned, and proposed over the next five years.

BACKGROUND

A service review is a structured assessment designed to identify opportunities to improve service delivery. What constitutes an "improvement" may vary depending on the nature of the service, the expectations of users and participants (funders), and considerations of cost. Perspectives on improvements may also differ between those responsible for overseeing the service and those who receive it. Depending on the complexity and type of service, a service review may examine some or all of the following components of service delivery:

- Applicable bylaws and agreements
- Service deliverables and associated resource capacity
- Service delivery model (e.g. in-house and/or contracted approach)
- Operating and capital expenditures
- Key service risks and mitigation strategies
- Assets condition, lifecycle, and long-term management considerations
- Governance and oversight structures

The service review methodology approved by the Board in 2025 (Appendix A) identified two primary areas of focus:

1. Evaluating legacy services to ensure they remain fit-for-purpose, responsive to community needs, and consistent with industry and corporate best practices.
2. Identifying opportunities to streamline or consolidate governance and oversight to improve consistency and efficiency.

Process Undertaken

The Board's direction included two components: first, to identify and prioritize a list of services to be reviewed in the near term (over the next five years); and second, to implement an ongoing, systematic process that regularly initiates service reviews independent of specific Board direction.

To support the first component of this work, staff conducted a review of more than 200 CRD services and applied the approved intake criteria to identify services that may be suitable candidates for review. The initial focus was on legacy services, defined as those active for at least 20 years and currently funded, while also including some more recently established services where there was a clear opportunity to add value.

This was followed by a qualitative assessment, including interviews with service management staff, to:

- Confirm whether services have previously been reviewed or subject to strategic planning processes;
- Identify existing plans to review service mandate, resourcing, governance, or service levels;
- Surface any unaddressed sustainability, efficiency, or governance concerns; and
- Prioritize services where a formal review could provide meaningful value.

The results of the analysis are summarized in Appendices B and Appendix C.

Outcome

CRD services are routinely evaluated, and the Board regularly receives and makes decisions based on the outcomes of these reviews. Appendix B shows that a substantial volume of service review, or related review work, is already underway as part of ongoing operations. A summary is provided below.

Given the breadth and diversity of CRD services, service reviews vary considerably in scope and approach. For clarity, they have been grouped into four categories, each associated with distinct typical review activities:

- Funding model reviews: typically focus on governing policies, establishing bylaws, funding sources and models, and (re)negotiation of service agreements.
- Governance reviews: examine decision-making structures, oversight, and governing bylaws.
- Infrastructure reviews (large, asset-based services): focus on asset management plans, master plans, capital plans, workforce planning, deliverables, and governance frameworks.
- Service reviews (community-facing and internal services): typically assess establishing bylaws, policies, resources, processes, deliverables, and staffing models, as well as undertaking strategic planning processes.

Over 35 service reviews have been completed during the current Board term, including at least six comprehensive service, policy, and governance reviews completed or implemented in 2026:

1. Regional Goose Management Program Review
2. Building Inspection Service Review
3. Galiano Fire Services Unification
4. Performing Arts Facilities Service Consolidation and Expansion
5. Updates to the CRD Investment Policy
6. Greater Victoria Water Supply Area Climate Change Adaptation Service Evaluation

In addition, more than 45 review processes are currently advancing, with a further two dozen reviews planned to start over the next two years. These are identified as *Underway* and *Planned* in Appendix B. These activities are already integrated in workplans.

Beyond current and planned work, staff have identified an additional eight potential future service reviews. These are identified as *Proposed* in Appendix B and include both broad, multi-service reviews and more targeted, service specific evaluations.

For completeness, Appendix C provides an overview of key strategic planning activities advanced during this Board term. These processes shape the ongoing evolution of service delivery by identifying specific areas of enhancement. Staff frequently conduct public engagement as part of these in a range of formats to gather information about community expectations and collaborate with service users in identifying improvements.

The next steps are to confirm Board support for the *Proposed* reviews so they can be integrated into departmental workplans, and to start the work to develop and implement a systematic process for initiating service reviews on an ongoing basis, independent of specific Board direction. This will further embed routine service evaluations across the organization and support the Board's ongoing consideration of review outcomes.

ALTERNATIVES

Alternative 1
The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:

1. That staff be directed to include the *Proposed* service reviews listed in Appendix B to the five-year workplan;
2. That staff be directed to proceed with the development of an ongoing, standardized process for initiating and conducting regular service reviews.

Alternative 2
That this report be referred back to staff for additional information.

IMPLICATIONS

Service Delivery Implications

Consistent with the approved methodology, *Proposed* reviews were prioritized based on potential impact, considering service complexity, draw on corporate resources, scale, and any risk or issues identified by staff. Some reviews focus on opportunities to improve operations, while others respond to expectations from service users or participants. Staff also noted that certain reviews may be contentious, even where they offer operational benefits.

The scale, scope, and complexity of *Planned* and *Proposed* service reviews themselves also vary considerably. For example, a comprehensive review of the services delivered by the Capital Region Housing Corporation would be significantly larger and more complex than a targeted review of a smaller service, such as the Septage Disposal Service. The reviews listed in Appendix B have not been standardized or adjusted for differences in scope.

The CRD delivers many smaller-scale services with relatively modest annual budgets. Despite their budget size, each service must be administered in accordance with governing bylaws and corporate policies, including preparing an annual budget and overseeing service delivery. While the financial impact of any such single service is limited, the cumulative demand for corporate resources to manage many small services is significant. As a result, opportunities to streamline these services are also being considered.

Implementing a service review program, including defining detailed scopes of work, coordinating multiple reviews, and ensuring they are advancing and delivered as planned, will require dedicated staff capacity and a high degree of coordination. Without additional consulting support, this work will place greater demands on internal resources.

Financial Implications

The Board has previously been advised that conducting full-scale service reviews could cost between $20,000–$100,000 per review. The Board has indicated a preference for staff-led reviews to minimize additional costs, and efforts will be made to deliver reviews internally where possible.

A key implication of this revised approach is that timelines may be extended, as reviews will need to be undertaken alongside existing operational responsibilities. In addition, the organization does not have a dedicated audit or review function to provide additional capacity.

Given these constraints, as well as the time required to engage relevant oversight bodies, staff recommend that any *Proposed* service reviews be started after 2028. This timing would enable operational staff to plan and incorporate the work into their planning, following the completion of ongoing and already-planned initiatives and reviews. Staff may also continue to undertake smaller-scale or localized service improvement activities not listed in Appendix B, such as process improvements and other targeted enhancements.

Where external support or additional expenditure is unavoidable, these will be considered through the usual annual service and financial planning process.

Alignment with Board & Corporate Priorities

This work will be introduced and socialized with the incoming Board after the election to ensure awareness of the service review program and to maintain ongoing alignment and continued support.

CONCLUSION

The Board directed staff to establish an ongoing program to conduct one to two service reviews annually. Staff have undertaken an in-depth review to identify the service reviews completed during the current Board term, as well as those underway, planned, and proposed over the next five years.

RECOMMENDATION

The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:

1. That staff be directed to include the *Proposed* service reviews listed in Appendix B to the five-year workplan;
2. That staff be directed to proceed with the development of an ongoing, standardized process for initiating and conducting regular service reviews.

Submitted by:	Fran Lopez, Manager, Strategic Planning
Concurrence:	Ted Robbins, B. Sc., C. Tech., Chief Administrative Officer

ATTACHMENT(S)

Appendix A: Board-Approved Methodology for Annual Service Reviews
Appendix B: Overview of CRD Service Reviews (Underway, Planned and Proposed)
Appendix C: Strategic Planning Activities Advanced This Board Term

Appendix A: Board-Approved Methodology for Annual Service Reviews

BACKGROUND

On April 30, 2025, the CRD Board (Board) directed staff to report back with specific recommendations on “[conducting] one to two service reviews on an annual basis”.

A service review is a structured assessment of an organization’s service(s), aimed at identifying opportunities to improve service delivery. What constitutes an improvement varies depending on the type of service, user expectations and costs. It may also differ between those responsible for overseeing the service and those receiving it. In some cases, improvements may involve increases in the quantity or quality of service delivered, changing the overall value proposition or streamlining business processes. In others, the focus may be on reducing the cost of delivery or, in rare instances, discontinuing a service altogether. Broadly, service reviews are one of many tools used to support efficiency and effectiveness, and long-term financial sustainability.

The province of British Columbia outlines three primary types of service review processes available to regional districts:

- Informal service reviews, initiated at the discretion of the Board.
- Bylaw-based service review, embedded in the service establishing bylaw.
- Statutory service review, formally initiated by a service participant by notification to the Board, other service participants, and the Minister responsible for local government.

The CRD currently delivers over 200 services which vary considerably in scope, scale, expenditure, source of mandate, governance, and, particularly for sub-regional and local services, the number of participants. Several services are governed by legislation and/or are overseen by commissions and committees with varying degrees of delegated authority from the Board. Over the last decade there has been a sustained volume of new services created each Board term and service bylaw amendments, which are subject to approval by the electors, as well as new initiatives and capital projects undertaken.

CRD services are routinely assessed for effectiveness and efficiency through a variety of established mechanisms. Some reviews occur annually, while others are conducted on a cyclical or ad hoc basis, depending on the nature and needs of the service.

1. CRD Planning Framework

The CRD’s Planning Framework is a multi-step, organization-wide coordinated process with several touchpoints involving the Board. The process takes place annually, and provides several levers to the Board to evaluate and manage service levels and growth on an annual basis, including:

- The Service & Financial Planning Guidelines, approved each May, set direction for the multi-year service plans and budget development.
- The Board Priorities Check-In, held in each April/May, confirm the strategic direction for the following year.
- The annual review and approval of the service plans (Community Need Summaries) and provisional and final budgets.
- The approval of financial management strategies, typically applied to all services.

In addition, the Board's work is supported by its standing committees and commissions, which provide recommendations to the Board throughout the year on new or amended policies, strategies, initiatives and projects.

2. Strategic and Operational Plans

Many CRD services are also guided by strategic plans or other guiding documents that shape the ongoing evolution of service delivery and identify specific areas of enhancements. When developing or updating these plans, staff regularly carry out public engagement, both virtually and in person, to gather feedback, understand community expectations, and collaborate with service users to identify opportunities for improvements. Examples of Board-approved plans include:

- 2017 Regional Water Supply Strategic Plan (currently under review)
- 2018 First Nations Relations Task Force Final Report
- 2021-2025 Climate Action Strategy (currently under review)
- 2021 Solid Waste Management Plan
- 2022 Regional Water Supply Master Plan
- 2022-2032 Regional Parks & Trails Strategic Plan and suite of operational management plan, including the Land Acquisition Strategy
- 2014 Core Area Liquid Waste Management Plan (Consolidated) and 2024 Long-Term Biosolids Management Strategy
- 2024-2027 CRD Arts Support Service Strategic Plan

3. Ad hoc targeted service reviews

In addition to the regular planning process and development of strategic plans, the Chief Administrative Officer, General Managers, the Board and the Commissions with delegated authority may occasionally initiate supplementary service evaluations. These targeted reviews are designed to provide deeper insights into specific services or to address a specific opportunity or challenge that has emerged. Past examples include:

- Environmental Services and Water Services Service Delivery Review (2008-2009)
- Parks and Community Services/Environmental Sustainability Departmental Integration (2013)
- Bylaw and Animal Care Service Delivery Review (2014-2015)
- Facility Management Review (2016)
- Board considered conducting a global service review process and directed CAO to enhance divisional service planning after evaluating several approaches (2016)
- Regional Parks Operational and Financial Review (2022)
- Information Technology and GIS Service Review (2022)
- Victoria Family Court and Youth Justice Service Review (2022)
- Organizational Structure Review – CRD Evolves 2024-2025 (2023-2025)
- Saanich Peninsula Water Commission Amalgamation Study (2024-2025)
- Procurement Review (2024-2025)

Since service participants already have the ability to initiate formal service reviews through the existing provincial mechanism, the CRD does not need to replicate that process. Instead, the focus should be on developing a supplementary, Board-led review process that complements existing tools. To ensure this process is effective and adds value, staff recommend that such reviews be carefully scoped to avoid duplication and be clearly justified.

PROPOSED NEXT STEPS

Staff have identified two potential gaps in the CRD's current planning framework that could be addressed through a supplementary, structured service review process.

- There is currently no prescribed approach for reviewing older, legacy services to ensure they remain fit-for-purpose, relevant to the communities they serve, and aligned with industry standards and corporate best practices. To date, reviews of legacy services have relied on staff proactively identifying and initiating them on a case-by-case basis. Staff recommend that the review process include a systematic method for identifying and evaluating such legacy services to ensure they continue to deliver value.

- There is no mechanism for reviewing and potentially consolidating the oversight structure for services that would benefit from consistent and unified management. While consistency is applied at the point of service creation, it often diverges over time. The CRD currently manages over 70 standing committees and commissions, an unusually high number compared to other local governments. These bodies operate under varied governance models, delegated authorities, and administrative support, which places significant demand on organizational capacity. Staff recommend that the review process include an evaluation of oversight structures to improve efficiency, reduce administrative burden, and improve service oversight.

Given the scale and complexity of the CRD's service portfolio, there would be merits in conducting a one-time review of services to address these historical gaps and regularise service oversight. To ensure the process delivers meaningful results, services should be selected based on clear goals and intake criteria, listed below. This targeted approach will help staff focus efforts on the services with the greatest potential for improvement and impact.

The pace of this review would be determined once a list of suitable services has been identified. However, it is important to note upfront that addressing these legacy and governance issues will likely take several years of considerable effort. Following this initial effort, staff would recommend establishing an ongoing process for future assessment in a more proactive and sustainable manner.

Goals and Service Selection Criteria

Staff recommend that the service review process be guided by two overarching goals:

1. Identify opportunities to **improve operational efficiency** by consolidating similar activities, reducing service delivery costs, and/or improving resource utilization.
2. Identify opportunities to **enhance service quality** by implementing new quality control measures, increasing service reliability, and/or discontinuing outdated service models.

To support these goals, staff propose to apply the following issues-based criteria to identify suitable candidate services for review:

1. *Legacy Services:* that have been in operation for 20 or more years and have no undergone a formal review. This is defined as:
   a. No formal review of service levels, mandate, or strategic direction undertaken in the last 20 years, and/or
   b. No public engagement or elector approval sought on service levels, mandate or strategic direction in the last 20 years, and/or

   c. The service is not included as an exempted service in the Regional District Service Withdrawal Regulation. Such services include regional parks, emergency telephone systems (e.g. 911) and solid waste management and recycling.
2. *Services Needing Strategic Realignment:* services that draw on unusually high levels of internal resources or have known issues related to the goals of operational efficiency or service quality[1], such as:
   a. Misalignment between current service delivery and their original mandate or purpose.
   b. Absence of appropriate quality control measures or mechanisms (e.g. service agreements).
   c. Delivery models that are outdated or inconsistent with modern industry practices or corporate standards.
   d. Services impacted by regulatory changes.
3. *Sustainability Concerns:* services facing environmental, social or financial sustainability issues that may impact their long-term viability.
4. *Opportunities for Consolidation:* services that could be consolidated to reduce service delivery costs and capacity demands, while improving consistency and oversight. This may include reviewing the scope and responsibilities of various committees and commissions.

Process

Staff will apply the intake criteria to identify candidate services for review. The Board's input will be sought, and existing governing bodies may also be canvassed to gather suggestions. Candidate services will then be prioritized to ensure that resources are focused on high-impact reviews. The list of candidates and proposed plan for next steps will be brought back to the Board for approval.

IMPLICATIONS

Service Delivery Implications

Service reviews require considerable time and organizational capacity. As noted by the Board, during the deliberation, with over 200 potential services in scope, treating each one equally could result in a lengthy and costly process. Many services are already subject to regular reviews through existing mechanisms. To ensure value and avoid duplication, staff recommend that any supplementary reviews be precisely scoped and clearly justified as outlined in the background.

It is also important to note that the objectives of the CRD Board for this review process may differ from those of the service participants or oversight bodies. These differences can create challenges in defining what constitutes effective and efficient service delivery. Engaging those responsible for operational decisions and oversight is important, as they have shaped the current form of the service and will be instrumental in implementing future changes. However, while consultation with service participants will help ensure informed and inclusive decision-making, it will add complexity and may extend timelines.

To support a successful implementation, the supplementary reviews will need to be planned and scheduled well in advance, allowing for appropriate work planning and allocation of staff time. Existing workplans may need to be re-phased to accommodate this additional work. The estimated timelines may vary depending on the scope. Based on lessons learned during the

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[1] Note that some improvements on such issues were also implemented through CRD Evolves 2024-2025.

planning phase of CRD Evolves 2024-2025, it is estimated that a narrowly focused review could be completed within six months, while a more significant review may take 12 to 18 months.

Additionally, changes to the scope of services would likely require amendments to service establishing bylaws, which is time-consuming and resource intensive work, and may require engaging in an electoral approval process. A coordinated approach to address multiple changes simultaneously may help streamline the implementation process, depending again on the scale and nature of changes.

Financial Implications

To support the review process, external consultant support may be necessary, particularly for large or complex services. The estimated cost per review, excluding internal staffing costs, ranges between $20,000 and $100,000, depending on scope and intricacy. Staff will bring forward any resource requests for Board approval through the annual service planning and financial planning process.

Appendix B: Overview of CRD Service Reviews (Underway, Planned and Proposed)

The following list outlines service review work identified by staff in preparation of this report. Initiatives that are *Proposed* are highlighted in red. For each review, the following information is provided:

- Initiative name
- Category (Service Review, Funding Model Review, Governance Review or Infrastructure Review)
- Status (Completed, Underway, Planned or Proposed)
- Year(s) in which the work took place or is expected to occur
- Description of the scope and key activities undertaken

CROSS-DEPARTMENTAL REVIEWS

1. **CRD Evolves 2024-2025 – Service Review – Completed (2023-2026)** CRD Evolves was the most significant organizational change initiative undertaken in a decade. It focused on establishing a common vision for the organization's future growth and service delivery, reducing duplication and strengthening accountability, improving alignment between service planning and delivery, and maximizing efficiency by leveraging staff capacity and expertise. CRD Evolves implemented seven major changes, along with several smaller realignments, improving operations across more than 20 teams and impacting the work of over 200 members of staff. The final progress report on this initiative is scheduled for July 2026.

2. **Global Review of Contribution Services – Governance Review – Proposed (TBD)** The CRD provides funding for services to a range of non-profit organizations. In some cases, the CRD contracts third parties to deliver services on its behalf. In other cases, the provision of funding or other financial assistance to the non-profit organization to assist it in providing specified services is the CRD service. The latter are known as contribution services. Through this approach, the CRD support a wide range of in-community services, including libraries, arts, health, fire protection and other emergency services.

   Contribution services should be governed by strong accountability and transparency and supported through formal funding agreement or contracts. Over time, the services delivered may fall out of alignment with the CRD's priorities or policies, and agreements may expire without a suitable replacement. Staff propose to undertake a review of all contribution services to assess their alignment with applicable policies and the value they deliver to the community.

3. **Information Technology, Privacy and Record Management Integration Review – Service Review – Proposed (TBD)** This review will examine the functions, roles and interactions between Technology & Digital Transformation and Privacy & Information Services. While these are distinct divisions, their work intersects in critical ways that directly affect service delivery, risk management, and public trust:
   - Privacy & Information Services is responsible for establishing organizational practices for records management, information access, and privacy protection. These practices are most effective when they are embedded in day-to-day operations and systematized.
   - Technology & Digital Transformation, in turn, is responsible for implementing and maintaining the systems and tools that store, manage, and secure records and data.

Increasing reliance on digital systems to deliver programs and services has amplified the importance of ensuring that privacy, access, and records management considerations are fully integrated into system design and implementation. In order to reduce risk, inefficiencies, and costs, information requirements should drive technology procurement and development decisions. While the divisions currently collaborate and share some information systems responsibilities, there is an opportunity to strengthen integration by ensuring information considerations are continuously embedded throughout the lifecycle of technology projects and initiatives. When this occurs late, reactively, or ad hoc it can lead to service delivery challenges.

Staff propose to undertake a review to assess how these functions are structured and how the divisions interact, with the goal of identifying improvements to the service delivery model and associated governance and control mechanisms.

CORPORATE SERVICES

Corporate Services

4. **Privacy Management & Access to Information Programs – Service Review – Completed (2025-2026)** In 2025–2026, the division undertook a focused review of its privacy management and access to information programs, implementing targeted improvements to processes and service delivery to enhance efficiency, consistency, and user experience, and to support more integrated program delivery. This work is ongoing.

5. **Information Management Transition to SharePoint Online/M365 – Service Review – Completed (2024-2025)** Over 2024-2025, Working with Technology & Digital Transformation, an initial service review resulted in redefined roles and responsibilities across the two divisions to support Information Management's new oversight role for SharePoint Online, Teams, and OneDrive. Helpdesk support, system administration and governance responsibilities transitioned to IM for enhanced records management, information access, and privacy protection. Further reviews are needed to support co-managing the broader M365 environment.

6. **Policy Review Project – Service Review – Underway (2025-2027)** Staff have been leading an initiative to consolidate all CRD corporate and administrative policies into a more manageable number (from approximately 120 to 80), to ensure organizational consistency and clearer pathways to information by staff.

7. **Legal Services Optimization – Service Review – Completed (2024)** Legal Services provides expertise and guidance on legal frameworks related to local government, contracts and bylaws, supports commercial and administrative law matters, and oversees the development of corporate policy. In response to increasing demand and an absence of corporate-wide technical supports, staff developed and implemented an intake and reporting system using existing technology for requesting legal support which allows requestors to track the status of their requests, review completed opinions, and work in a confidential and secure file system. This improvement enhances tracking and reporting, ensures timely and consistent responses, avoids duplicate requests, and provides metrics which demonstrate an increasing demand (up 30% year over year) for support from legal experts within CRD, CRHC, and CRHD. In 2025, a "Working with Legal Services" corporate policy was also introduced, providing guidance to staff on when matters can be dealt with internally and when they must be sent to outside counsel; explaining who pays for such opinions; and what services internal counsel may provide.

8. **Procurement Transformation and Red Tape Reduction – Service Review – Underway (2023-2026)** Led by the Corporate Services department and informed by the results of the Employee Experience Survey, staff have conducted a review to identify opportunities to reduce administrative burden and "cut red tape". This work included a review of relevant studies as well as comparison with policies and procedures in other local governments and similar-sized organization. As a result, several improvements have been made, including the introduction of a pilot program for low-value procurements and exemptions from agreement authorization for different classes of agreements. Additional changes are planned in 2026.

9. **Regional Grants in Aid Policy Review – Service Review – Underway (2026)** The CRD Board directed on March 11, 2026, that the Governance and First Nations Relations Committee conduct a review of Regional Grants in Aid policy. This work is being advanced by staff and will be completed in 2026.

10. **Review of CRD's self-insurance model – Service Review – Underway (2025-2026)** Staff are conducting a review of the CRD's self-insurance model. An actuary has been retained to assist in reviewing operational funding, deductibles, and coverages for an organization of this size. Staff expect the work it to be completed in 2026.

<u>Victoria Family Court and Youth Justice Committee</u>

11. **Victoria Family Court and Youth Justice Committee Efficiency Review – Service Review – Proposed (TBD)** The CRD contributed funding to the operation of the Victoria Family Court and Youth Justice Committee, a family court committee established under the Provincial Court Act, since the 1980s. While these committees were once mandatory, they are now optional. The Committee's primary mandate is to distribute small grants for family and youth initiatives, as well as to meet a minimum of four times per year and report on gaps in family and youth services to regional local governments and the Provincial Attorney General.

    The Committee is also empowered to:
    - Monitor court proceedings to address issues related to resources and legislation affecting families and youth;
    - Lobby and advocate for youth and family justice improvements to the Federal and Provincial government, including for continued support for the Mobile Youth Services Team, the region's long-standing police-mental health counsellor team dedicated to preventing youth prostitution and exploitation;
    - Promote and explore alternative legal processes within the youth and family system for better outcomes and diversion; and
    - Liaise with governmental and non-governmental bodies involved in youth justice, typically through an annual reception.

    This service requires significant corporate resources to administer grants and support a high volume of meetings annually. Over time, it has become increasingly difficult to recruit and retain members and contractors. Although a service review was conducted between 2020 and 2022 and resulted in some improvements, including the Committee continuing its business as a CRD commission, challenges remain.

    Considering changes to the legislative environment and ongoing operational challenges, staff propose to conduct a further review to assess the continued suitability of the service. The maximum annual levy for this service is $15,000.

Galiano Island Community Use Building

12. **Galiano Community Use Building Service Review – Service Review – Proposed (TBD)** The Galiano Island Community Library operates from the Galiano Community Use Building, which is owned and maintained by the CRD's Real Estate & Facilities Management division. The CRD also provides funding and advisory support to the Southern Gulf Islands Public Libraries, which manages the Galiano Island public library and is a service administered by the Southern Gulf Islands Library Committee. Providing in-house maintenance services to this facility is inefficient due to its remote location, as staff must travel to the island to carry out routine work. Staff propose to conduct a targeted review of the building's history, current usage, and service levels to identify sustainable and cost-effective long-term options.

Real Estate

13. **CRD Property Portfolio Review – Service Review – Proposed (TBD)** CRD Evolves 2024-2025 combined Real Estate and Facilities Management into a single division in 2025 to strengthen long-term space planning and enable a more strategic, coordinated approach to the CRD's property portfolio. Within this division, the Facilities Management team is a full-services, in-house group responsible for the operation, maintenance and performance of the CRD Fisgard Headquarters and several satellite buildings. Real Estate complements this work by providing corporate real estate expertise across the organization. This includes property acquisition and disposal, lease and agreement negotiations, as well as land use and title research. The team also maintains a comprehensive inventory to CRD-owned properties and legal interests in buildings, and managed office buildings and rental units owned by the CRD.

    Over time, the CRD's portfolio has expanded to include properties leased to third parties, such as three health facilities occupied by the Vancouver Island Health Authority, the Victoria Family Court building and a Juan de Fuca administration building currently occupied by Juan de Fuca Planning, Building Inspection and Emergency Services. Managing this expanding portfolio requires ongoing staffing and financial resources. The total historical value of these properties (as of 2015) is $50M, with a total replacement value of $61M.

ELECTORAL AREA SERVICES

Cross-services

14. **SSI Local Community Commission – Governance Review – Completed (2023)** Established in 2023, the SSI Local Community Commission consolidated governance for 14 local services in Salt Spring Island which were previously overseen by four appointed, volunteer commissions.

15. **Consolidation of Water/Sewer Services Oversight Under an Advisory Committee – Governance Review – Underway (2026)** Staff have put forward proposals to consolidate oversight for local area water/sewer services under Advisory Committees. The proposals have either not been supported by the Electoral Area Directors or by the existing commission Chairs when they were approached. Additional discussions are planned to identify potential efficiency opportunities. In the meantime, staff are addressing under-investment and maintenance in the capital infrastructure, and a Master Plan is being developed for the Port Renfrew Utility Services to guide future investments. Asset Management report cards were recently completed or in progress for the other utility services to complement strategic investment planning.

16. **Health Contribution Services Review – Service Review – Underway (2026)** Staff are conducting a review of three contribution service agreements (Saturna Island Medical Clinic, Galiano Health Service and Pender Islands Health Care Centre) to assess the funding model and eligible services under the Contribution Funding Agreement.

Building Inspection

17. **Separation of the Electoral Area Building Inspection Services – Governance Review – Completed (2020)** In 2020, at the request of the Electoral Area Directors, staff conducted an evaluation considering the separation of the Building Inspection service into three separate services. The approach was eventually rejected due to the economies of scale gained from a single service. This work was completed when the service was the responsibility of Planning & Protective Services, with support from Legal Services.

18. **Building Inspection Service Review – Service Review – Completed (2025-2026)** Staff concluded a comprehensive service review in 2026 that improved the efficiency, productivity and delivery of the Building Inspection service. Key improvements included streamlining applications into a single permit application per project, eliminating separate permits for each construction stage; extending timelines to start and complete construction to provide greater flexibility to applicants; introducing a 50% fee discount for multi-unit affordable housing projects; and implementing a flat application fee along with a revised fee structure for information requests. The wait time for permit processing and information requests have been significantly reduced.

Wilderness Mountain Water Service

19. **Wilderness Mounter Water Service Connection to JDF Water Distribution – Service Review – Underway (2026)** Staff are completing a strategic review to assess the feasibility of connecting this community to the Juan de Fuca Water Distribution service, thereby removing the need for a separate local service.

Surfside Park Estates (Mayne)

20. **Surfside Park Estate Water Storage Tank Study – Infrastructure Review – Completed (2023)** A consultant was retained to conduct a review of the location and replacement options for the existing water storage tanks, taking accessibility into account.

Magic Lake Estates Sewer System

21. **Schooner Wastewater Treatment Plant – Process Optimization – Service Review – Ongoing (2025 – Ongoing)** Staff are reviewing plant performance and operational strategies to enhance reliability and effluent quality.

22. **Magic Lake Estates Water Service Captains Tank Study – Infrastructure Review – Completed (2026)** A study was completed by a consultant in 2026 to review options for replacing the water storage tank, Captains Tank, within the Magic Lake Estates Water Service. The study included a review of tank sizing to accommodate domestic demand and fire flows, and also a review of tank site.

Port Renfrew Water / Port Renfrew Sewer

23. **Port Renfrew Sewer and Water Master Plan – Infrastructure Review – Underway (2026)** Staff have started the development of a Port Renfrew Sewer and Water Master Plan to assess existing infrastructure and guide infrastructure improvements. This work will support the Port Renfrew Official Community Plan update, with a focus on upgrading aging systems. The results are expected by end of 2026.

Saturna Island Water System (Lyall Harbour)

24. **Lyall Harbour-Boot Cove Water Storage Tanks Condition Assessment – Infrastructure Review – Planned (2028)** Staff are planning a study to assess leaks in the storage tank and develop a detailed repair plan. This work is part of a broader program of investments in water infrastructure for this system aimed at ensuring long-term resilience, reliability and sustainability while continuing to provide clean drinking water.

Ganges Sewer

25. **Ganges Wastewater Treatment Plant – Process Optimization and Upgrade Planning – Infrastructure Review – Underway (2026-2027)** Staff are evaluating aeration system performance and upgrade requirements to improve treatment efficiency.

EXECUTIVE SERVICES

CAO & Executive Office

26. **Administrative Services Review – Service Review – Underway (2025-2026)** Staff have been advancing a comprehensive review of the CRD administrative services. The current phase of work is focused on improving efficiency and equity by reviewing administrative organization and reporting structure and roles. It is expected that the study will include recommendations for other opportunities for efficiency reviews, such as administrative expenditures (printing, phones, office supplies, etc.).

FINANCE & TECHNOLOGY

McPherson Theatre / Royal Theatre

27. **Performing Arts Facilities Service Consolidation/Expansion – Service Review – Completed (2023-2026)** Staff have completed comprehensive analysis to consolidate two existing services, Royal Theatre and McPherson Playhouse, and to expand support for existing and future performing arts facilities with regional impact. The new service was established in early 2026 and the transition is underway.

28. **Royal Theatre and McPherson Playhouse Asset Management Plan – Infrastructure Review – Underway (2026-2027)** Staff are advancing a series of studies for the Royal Theatre and McPherson Playhouse, including a heritage conservation study, condition assessments, and specialized infrastructure inspections. These studies will inform the development of a 20 to 30-year asset management plan that will be foundational to the long-term stewardship and management of these facilities.

Finance

29. **New Financial Model (Financial System Improvements) – Service Review – Completed (2025)** Following the transition to a more robust enterprise resource planning platform, staff reviewed and enhanced the CRD financial model to better support the organization's future needs. These comprehensive enhancements improved year-end processes, in alignment with best practices, and enabled additional financial system functionality to streamline existing processes.

30. **Updates to the CRD Investment Policy – Service Review – Completed (2026)** Staff in the Financial Services and Legal and Risk Management divisions collaborated to strengthen the policy's governance and risk management controls. The proposed revisions are intended to provide clarity and enhance documentation and reporting protocols within applicable statutory investment authorities.

31. **EUNA Budget Software Solution – Service Review – Underway (2025-2027)** As part of ongoing efforts to modernize the CRD's enterprise financial management capabilities, staff identified a critical need for a dedicated financial planning and analysis solution to strengthen operating, capital and personnel planning. To address this need, staff are implementing new budget software, EUNA, which will modernize budget entry and reporting processes and practices.

32. **Procurement Advisory – Service Review – Completed (2025)** As part of CRD Evolves 2024-2025, a new Procurement Manager role was created in 2025 to evaluate and standardize procurement practices at the CRD and establish a procurement advisory function. The role has been supporting consistent and compliant procurement by reducing risk through stronger documentation and evaluation practices, improving consistency across departments and projects, providing access to practical examples of compliant procurement, providing greater visibility into opportunities, providing easier access for suppliers across regions and providing procurement training for staff.

33. **Updates to the CRD Procurement Policy – Service Review – Underway (2025-2026)** The CRD procurement policy, which was originally adopted in 2017, is being revised to modernize it after the establishment of the Procurement Advisory function in the Finance & Technology department, remove duplicated services and better define the CRD's procurement style. A mature procurement model, supported by a robust policy, enhances service delivery by ensuring access to high quality goods and services while reducing costs and operational risks.

HOUSING PLANNING AND PROTECTIVE SERVICES

Capital Region Housing Corporation (CRHC)

34. **CRHC Service Review – Service Review – Planned (2027-2028)** New comprehensive operational and service review planned for 2027. The proposed scope of work will be developed in 2026.

Capital Regional Hospital District (CRHD)

35. **CRHD Funding Model Review – Funding Model Review – Underway (2026)** The CRHD Board directed staff on October 29, 2025, to review the 30% contribution for major capital and 40% contribution for minor capital and make a recommendation on a potential lower percentage based on a consolidated CRD budget and evolving costs for newly established services. Work is underway in consultation with Island Health.

Electoral Area Fire Services

36. **Fire Governance Review – Service Review, Governance Review – Completed (2021-2023)** Staff completed a comprehensive review to address inefficiencies in the fire service governance structure, gaps in regulatory compliance and limited oversight over services, as well as to respond to evolving regulatory requirements. Staff are implementing recommendations.

37. **Galiano Fire Services Unification – Service Review – Completed (2025-2026)** Fire services were unified under Galiano Island Volunteer Fire Department to address long-standing challengers in managing fire services and formalizing cooperation between both departments.

Livestock Injury Compensation (Juan de Fuca, Salt Spring Island and Southern Gulf Islands)

38. **Animal Control Services Governance Changes – Governance Review – Completed (2020-2021)** The Electoral Area Directors directed that three distinct animal injury compensation services be created to ensure costs were allocated solely to the Electoral Area in which claims arise. Legal Services facilitated this work by facilitating the conversion of the animal control service from Letters Patents to an establishing bylaw as well as the creation of three separate sub-services.

Regional Transportation Service

39. **Regional Transportation Service Establishment – Service Review – Completed (2022-2025)** Staff conducted a comprehensive review of all CRD transportation functions to support the establishment of a new regional service.

Regional Emergency Program Support (REMP)

40. **REMP Provincial Agreement Review – Funding Model Review – Underway (2026)** Review of the agreement with the province is planned for 2026.

INFRASTRUCTURE AND WATER SERVICES

Cross-services

41. **Water & Wastewater Effective Utility Management Model Assessment – Service Review – Planned (2028)** The Effective Utility Management model is an independent framework to assess an organization’s effectiveness in managing utility services. A third-party assessment will be undertaken to evaluate the maturity of select CRD utility services across 10 attributes and five management success factors. The assessment will also produce a roadmap to identify priority areas for improvements. This work will be completed in advance of the next iteration of the Regional Water Supply Strategic Plan to inform its development.

42. **First Nations Service Agreement Updates – Service Review – Underway (Periodically)** The CRD provides water and wastewater services for several First Nations through tailored service agreements. These agreements are periodically updated, as required.

Juan de Fuca Water Distribution

43. **Juan de Fuca Water Distribution System Asset Management Plan – Infrastructure Review – Completed (2025-2026)** Staff supported the development of a comprehensive Asset Management Plan for the Juan de Fuca Water Distribution service. The plan included an assessment of asset condition, risk management, system capacity, maintenance and repair strategies (including workforce impacts), and financial planning.

44. **Juan de Fuca Water Distribution Development Cost Charge Update – Funding Model Review – Completed (2025)** The Juan de Fuca Development Cost Charge program was reviewed to update key components of the program including projects, costs and rates. Juan de Fuca Development Cost Charge rates decreased in 2025 due to increased population density and the amount and type of development taking place in the Juan de Fuca Water Service Area. The Juan de Fuca Development Cost Charge program has helped pay for costs associated with increased demand for water distribution infrastructure within the Juan de Fuca water service area since 1999.

45. **Water Distribution Local Service Conditions, Fees and Charges Bylaw No. 3889 Update – Funding Model Review – Underway (2026)** The Water Distribution Local Service Conditions, Fees and Charges Bylaw, is being reviewed and updated to align with updated Engineering Specifications. The review and proposed changes are targeted to be completed in 2027.

Regional Water Supply

Water Supply and Engineering:

46. **Deep Northern Intake & Transmission Pipeline Study – Infrastructure Review – Completed (2022)** An assessment of option was completed for how to access additional water within the Sooke Lake Reservoir to provide resilience to the system in the event of an emergency. Work was completed in parallel with the Regional Water Supply Master Plan.

47. **Regional Water Supply 2022 Master Plan – Service Review – Completed (2022)** Master planning document outlining the future outlook of the Regional Water Supply system. The plan recommends 21 major projects to be implemented over the next 30 years to meet anticipated water supply and treatment needs based on the projected population for the year 2050.

48. **Supply System Risk and Resilience Study– Infrastructure Review – Completed (2022)** Provided an analysis of the impact to the Regional Water Supply under an emergency condition. Work was completed in parallel with the Regional Water Supply Master Plan.

49. **Seismic Assessment of Critical Facilities (Phase 1) – Infrastructure Review – Completed (2022)** An assessment was completed of the anticipated seismic performance of assets within the Regional Water Supply. This work provided guidance for future stages of work on the topic. Work was completed in parallel with the Regional Water Supply Master Plan

50. **Regional Water Supply Desktop Condition Assessment – Infrastructure Review – Completed (2025)** Desktop assessment of the condition of the Regional Water Supply linear infrastructure (watermains and valves).

51. **Regional Water Supply Transmission Main Acoustic Leak Detection Survey Report – Infrastructure Review – Completed (2025)** Report detailing the results of an acoustic leak detection survey done to assess the performance of the Regional Water Supply assets.

52. **Regional Water Supply Development Cost Charge Program – Funding Model Review – Underway (2020-2027)** Staff will develop and implement a Development Cost Charge bylaw for the Regional Water Supply service to contribute funding to growth-related supply infrastructure upgrades.

53. **Regional Water Supply Asset Management Plan – Infrastructure Review – Planned (2026-2027)** Staff will develop a comprehensive Asset Management Plan for the Regional Water Supply System. This will include assessments of operating and capital expenditures, key service risks and associated management strategies, and asset condition, lifecycle, and long-term management strategies.

54. **Regional Water Supply Level of Service Agreements – Infrastructure Review – Planned (2027-2030)** Agreements with the municipal customers defining the level of service provided by the Regional Water Supply system.

55. **Regional Water Supply Transfer Point Agreements – Infrastructure Review – Underway (2021-2030)** Agreements to delineate ownership boundaries between the Regional Water Supply system and the municipal water distribution systems.

56. **Regional Water Supply Risk Registers – Infrastructure Review – Ongoing (Ongoing)** Ongoing process to compile Risk Registers for the Regional Water Supply.

57. **Regional Water Supply Funding Model Review – Funding Model Review – Planned (2027)** A comprehensive review of the Water Rate Model is planned for 2027.

Dam Safety Program:

58. **Regional Water Supply Dams – Probabilistic Seismic Hazard Assessment (PHSA) – Service Review – Underway (2026)** PSHA is phase 1 of new Dam Seismic Retrofit Program. Staff will be hiring an expert team to evaluate the regional seismicity risk, to determine design seismic loading for existing and future assets. The results of the project will include a regional ground motion model to be used for site-specific seismic assessments at dam sites, as well as be available to support planning for other major infrastructure improvements.

59. **Regional Water Supply Dams – Instrumentation and Surveillance Improvements – Service Review – Underway (2026-2030)** Staff are working on development of dam safety Automated Data Acquisition System (ADAS) to improve surveillance of performance of major dams in the portfolio, starting with Sooke Lake Dam in 2026. The ADAS will allow for operations to monitor critical dam performance data 24/7 via SCADA, and non-critical performance data to be monitored by IWS Dam Safety Section to inform risk assessments and assess dam condition.

60. **Dam Safety Management System – Service Review – Underway (2028)** Staff are working to formalize a dam safety management system, incorporating policies, responsibilities, plans and procedures, documentation, training, and review and correction of deficiencies and non-conformances, as per Canadian Dam Association dam safety guidelines.

61. **Planning for Centralized Dam Safety Section Initiative – Service Review – Underway (2028)** Infrastructure Planning & Engineering (IPE) are working with Regional Parks to plan the consolidation of dam safety technical responsibilities within IPE’s Dam Safety section, including hazard reviews, formal inspections, dam safety studies, regulatory communications and documentation, etc. Regional Parks will first complete a Dam Portfolio Risk Assessment of their 14 dams.

Watershed Protection:

62. **Goldstream Watershed Drainage Structure Assessments – Infrastructure Review – Planned (2027)** Staff will conduct a detailed assessment that compares modelled peak flows with the capacity of existing culvert and bridges and use the insights of this analysis to prioritize which structures are highest priority for replacement, funding and resourcing.

63. **Sooke Lake and Deception Watershed Dams – Flood Forecasting System – Service Review – Completed (2025)** Staff hired a contractor to complete a Flood Forecasting System to evaluate flooding and hydrological loading risks for Sooke Lake and Deception Watershed Dams. The Flood Forecasting System includes watershed simulation model, dam operations modeling, and hydraulic modeling to help assess dam safety risks, including emergency reservoir drawdown capabilities.

64. **Deception Gulch Dam – Seismic Assessment – Service Review – Underway (2026)** Staff hired a contractor to complete a seismic assessment of Deception Gulch Dam in 2026, to inform whether or not major dam rehabilitation is required.

65. **Sooke Watershed Drainage Structure Assessments – Infrastructure Review – Completed (2023)** Staff conducted a detailed assessment that compared modelled peak flows with the capacity of existing culvert and bridges and used the insights of this analysis to prioritize which structures were highest priority for replacement, capital funding and resource needs.

66. **Leech Restoration Project Closeout – Infrastructure Review – Completed (2009-2025)** The Leech Water Supply Area was acquired by the CRD in 2007 and 2010. These watershed lands will provide future source water for the Regional Water Supply System. A 16-year capital plan was undertaken between 2009 and 2025 to restore the Leech Watershed. A Project Closeout Report was presented to the Regional Water Supply Commission in early 2026 to summarize the works completed over the 16 years to restore and prepare the Leech Water Supply Area forests and lands for future water supply.

67. **Greater Victoria Water Supply Area Climate Change Adaptation – Service Review – Completed (2026)** Staff conducted an evaluation of service delivery to account for climate change adaptation. The resulting plan identifies recommended initiatives and actions to mitigate climate change in the Greater Victoria Water Supply Area, which will increase service needs.

68. **Security Assessment – Service Review – Planned (2028)** This assessment may proceed in 2027 and will evaluate existing security services against identified threats and risks and make recommendations for improvements.

69. **Leech Watershed Drainage Structure Assessments – Infrastructure Review – Planned (2029)** Staff will conduct a detailed assessment that compares modelled peak flows with the capacity of existing culvert and bridges and use the insights of this analysis to prioritize which structures are highest priority for replacement, funding and resourcing.

70. **Kapoor lands Watershed Drainage Structure Assessments – Infrastructure Review – Planned (2031)** Staff will conduct a detailed assessment that compares modelled peak flows with the capacity of existing culvert and bridges and use the insights of this analysis to prioritize which structures are highest priority for replacement, funding and resourcing.

71. **Goldstream Watershed Dams – Dam Safety Review Audit – Service Review – Underway (2026-2027)** Staff have hired a consultant to complete a legislated Dam Safety Review of the 11 embankment dams in the Goldstream Watershed. The Dam Safety Review will provide list of safety deficiencies to inform action planning for capital improvements within the Dam Safety Program.

<u>Saanich Peninsula Water Supply</u>

72. **Saanich Peninsula Water Commission Amalgamation Study – Governance Review – Underway (2024-2026)** Feasibility study underway exploring the implications of amalgamating the Saanich Peninsula Water Commission with the Regional Water Supply Commission. The study was initiated following a referral motion from the District of Central Saanich Council in November 2023.

73. **Saanich Peninsula Water Service Asset Management Plan– Infrastructure Review – Underway (2025-2026)** Staff are developing a comprehensive Asset Management Plan for the Saanich Peninsula Water Supply System. This includes assessments of operating and capital expenditures, key service risks and associated management strategies, and asset condition, lifecycle, and long-term management strategies.

74. **Saanich Peninsula Water Service Operational Optimization Review – Service Review – Underway (2025-2026)** Staff are reviewing the operations of the Saanich Peninsula Water Service. This will have an impact on operating and capital expenditures, as well as Service deliverables and resource allotted to the deliverable

75. **Saanich Peninsula Water Supply Master Plan Update – Infrastructure Review – Planned (2026-2027)** Develop a long-term Master Plan for the Saanich Peninsula Water Supply system, to address future infrastructure needs.

76. **Saanich Peninsula Water Supply Development Cost Charge Update – Funding Model Review – Planned (2026-2027)** Review the existing Development Cost Charge bylaw and update as needed to address future growth-related infrastructure investments.

<u>Core Area Wastewater Service</u>

77. **Liquid Waste Management Risk Management Framework – Service Review – Underway (2026)** Staff are advancing the development of a Standard Risk Management Framework for liquid waste management.

78. **Core Area Wastewater Master Plan – Infrastructure Review – Planned (2026-2028)** Staff will develop a Core Area Wastewater Water Master Plan to assess existing infrastructure and guide infrastructure improvements upon the completion of the Wastewater Strategic Plan.

79. **Core Area Wastewater Development Cost Charge Program Development – Service Review – Planned (2028)** When the Core Area Wastewater Treatment Plan was completed and the Service Establishment Bylaw was amended, staff flagged that a Development Cost Charge for the Core Area Wastewater Treatment service would be established to fund future wastewater projects related to growth. Staff will initiate the work to create this program in 2028.

Treatment:

80. **McLoughlin Point Wastewater Treatment Plant (MPWWTP) Odour Management and Improvements – Infrastructure Review – Completed (2025)** Staff assessed odour generation and mitigation strategies to improve air quality at the facility and neighbouring area.

81. **MPWWTP Outfall Inspection and Condition Assessment – Infrastructure Review – Completed (2025)** Staff inspected and evaluated outfall condition and hydraulic performance to inform asset management planning.

82. **MPWWTP and Core Area Conveyance Management of Change Program Implementation – Service Review – Ongoing (2024-Ongoing)** Staff have been implementing a formal Management of Change framework with standardized procedures, risk assessment, and workflows to ensure controlled and consistent management of operational, process and system changes.

83. **MPWWTP Chemical Dosing Optimization – Service Review – Ongoing (2025 – Ongoing)** Staff have been assessing coagulant dosing strategies to optimize treatment performance and reduce chemical consumption, and integration of a machine learning agent for process improvement.

84. **MPWWTP Maintenance Bypass Risk and Mitigation Assessment – Infrastructure Review – Underway (2026)** Staff have been evaluating potential bypass scenarios, associated risks, and mitigation strategies to support operational resilience and regulatory compliance.

85. **MPWWTP Disk Filter Optimization and Fouling Mitigation Study – Service Review – Underway (2026)** Staff have been evaluating tertiary filtration performance, fouling mechanisms, and cleaning strategies to improve reliability and efficiency.

Conveyance:

86. **Macaulay Point Pump Station – Screen and Grit Performance Removal Improvement – Infrastructure Review – Completed (2025)** Staff assessed screening and grit removal performance to reduce solids carryover and downstream process impacts.

87. **Core Area Wastewater Concrete Condition Assessment – Infrastructure Review – Underway (2026-2027)** Staff are developing detailed concrete condition assessments for wet wells and other degraded concrete at pump stations in the Core Area. The project will also provide recommendations for design and construction of upgrades and repairs based on condition assessment works and remediation planning.

88. **Core Area Conveyance Discharge MH of CRL to Marigold Pump Station – Condition Assessment – Infrastructure Review – Completed (2025)** Staff evaluated structural integrity and condition to support maintenance and rehabilitation planning.

89. **Core Area Conveyance System Performance at Peak Flow – Service Review – Completed (2025)** Staff completed analysis of flow control, operational logic, and system behaviour under wet weather and peak flow conditions and risk management.

90. **Core Area Wastewater Sewer Cleaning and Inspection – Infrastructure Review – Underway (2026)** Core Area Wastewater sewers are cleaned and inspected on a five-year cycle. This work is performed annually on an ongoing basis.

91. **Core Area Wastewater Acquisition of Outstanding Right of Ways – Service Review – Planned (2026-2029)** Some of the Core Area Wastewater Service infrastructure is located on privately owned land that do not have rights-of-way. A plan is being developed to acquire Statutory Right of Ways for all infrastructure over time. Work started with the development of a study and plan prior to acquisition.

Saanich Peninsula Wastewater Service

92. **Saanich Peninsula – Process Modelling (BioWin) for Performance and Capacity Evaluation – Service Review – Underway (2026-2027)** Staff are developing a process model to assess treatment performance and support future planning decisions.

Corporate Capital Project Delivery Services

93. **Establishment of new Corporate Capital Project Delivery Services function – Service Review – Underway (2025-2027)** As part of CRD Evolves 2024-2025, a new Corporate Capital Project Delivery Services Division was created in 2025 to set up and support consistent organizational project management standards. Staff are updating the internal Project Management Guideline, with the revised document intended to function as a Project Management Procedure Manual. The objective is to provide an updated, comprehensive set of procedures aligned with technical and industry best practices. Once complete, the manual will serve as a readily available resource for all CRD staff involved in any aspect of the project delivery process.

PARKS RECREATION AND ENVIRONMENTAL SERVICES

Regional Goose Management

94. **Regional Goose Management Program Review – Service Review – Completed (2055-2026)** Staff undertook a service review to evaluate the effectiveness of the initiative. The CRD Board directed staff to continue delivering the service and expand its funding on March 11, 2026.

Environmental Innovation/Solid Waste Management Plan Solid Waste Disposal

95. **Environmental Innovation and Environmental Resource Management Amalgamation – Service Review – Underway (2026)** The new Environmental Innovation division was established in 2025 to consolidate the responsibility for the climate action service and programs and the long-term management of biosolids generated by the wastewater system. In 2026, responsibility for solid waste management and recycling programs through the Environmental Resource Management division will be amalgamated with the Environmental Innovation, creating a single division responsible for all operations and capital investments at Hartland Landfill, as well as a broad portfolio of environmental stewardship programs and functions. This organizational consolidation is expected to improve coordination and support more efficient operational and investment decision-making. Following the completion of the transition, staff will assess the effectiveness and resourcing of the division in 2027 and determine whether it is necessary for a formal service review to be initiated as part of the ongoing program.

96. **Hartland Landfill Service and Funding Model Review – Service Review, Funding Model Review – Underway (2026-2027)** The CRD Board has directed a comprehensive review of regional flow control, long-term funding model and tipping fees adjustments.

Port Renfrew Refuse Disposal

97. **Port Renfrew Transfer Station Feasibility Study – Service Review – Underway (2026)** Staff are advancing a feasibility study to assess how the Port Renfrew Transfer Station can continue to meet current and future service needs for both the Port Renfrew and Pacheedaht communities. The study will include an analysis of usage rates (including seasonal variations), a review of operations, the establishment of baseline data on waste volume and composition, and the identification of lessons learned from recent upgrade. The resulting analysis will

evaluate potential site improvements and opportunities for operational optimization, supported by high-level cost estimates and informed by a 20-year demand forecast.

SEAPARC

98. **SEAPARC Infrastructure Growth Plan – Infrastructure Review – Underway (2026)** Work underway to develop an Infrastructure Growth Plan which will provide Class D capital and operating costs. Expecting to complete the plan and present to the Commission in 2026.

Biodiversity & Environmental Stewardship

99. **Biodiversity & Environmental Stewardship Service Review – Service Review – Planned (2027)** Consideration of a service expansion (applying for a UNESCO Urban Biosphere Designation) has been postponed to next CRD Board strategic planning process.

Septage Disposal

100. **Septage Disposal Service Review – Service Review – Planned (2026)** Service options analysis is planned for 2026 to address known service vulnerabilities.

Panorama Recreation Center

101. **Panorama Recreation Master Plan – Infrastructure Review – Planned (2028)** Planned development of a 20-Year Master Plan focused on the sustainability of the recreation facilities into the long-term future.

102. **Panorama Recreation Service Expansion – Service Review – Proposed (TBD)** The Peninsula Recreation Commission, with support from Panorama Recreation staff, regularly evaluates its recreation services to ensure they are delivered effectively and efficiently and meet the needs of the communities. For several years, the communities of North Saanich, Central Saanich and Sidney have expressed interest in exploring whether Panorama Recreation could assume responsibility for additional parks-based recreation services. Expanding the service in this way would significantly change its current scope.

    The Commission approved the Panorama Recreation Plan (2022-2026) in March 2022 and currently focused on implementing its priorities. A Facilities Needs Assessment was also completed in 2025 to start examining the current scale and scope of facilities on the peninsula and identify gaps. While this work remains the primary focus, staff could undertake a more detailed assessment of service expansion in the future, should there be an interest. To this end, staff propose to conduct a master plan process to develop a long-term (up to 20-25 year) facility/asset management plan and to evaluate the efficiency and effectiveness of the sub-regional service delivery model including an analysis of the financial implications of expanding Panorama Recreation's mandate to include parks-based recreation facilities, for the Commission's consideration.

Regional Parks

103. **728 Beaver Lake and Mill Hill Space Planning – Infrastructure Review – Planned (2026)** Office space review of existing office configuration to fit new Regional Parks staff. At 728 Beaver Lake a trailer is being installed to accommodate lockers and create more office space to accommodate the inclusion of a second Park Operations Manager.

104. **Fleet Services and Communication Reorganization – Service Review – Completed (2024-2025)** Through CRD Evolves, responsibility for Fleet services and Communications support was transferred from Regional Parks to Corporate Asset & Maintenance Management and Corporate Communications & Engagement, respectively. Regional Parks staff supported this transition by participating in planning and implementation to ensure continuity of service.

105. **Regional Transportation Service Establishment – Service Review, Governance Review – Completed (2025)** As part of the transition planning work to establish the Regional Transportation Service, Regional Parks staff conducted a comprehensive review of the Regional Trails program to identify, document and support the transfer of responsibilities to the new service. As a result of changes driven by the new service, including updates to governance, Regional Parks no longer reports to the Regional Transportation Committee.

106. **Regional Parks Procurement Support – Service Review – Underway (2026)** Staff repurposed a vacant position to address a critical need for additional, centralized Procurement support for the Regional Parks division. The role was redesigned and transferred to Financial Services' procurement function, with a focus on supporting the growing procurement demands of Regional Parks.

107. **Regional Parks Asset Management – Infrastructure Review – Ongoing (Ongoing)** Staff regularly develop asset management and equipment replacement plans for the Regional Parks service. These plans include assessments of asset condition, risk, and system capacity, as well as strategies for maintenance, repair, and long-term financial planning.

108. **Regional Parks Dam Safety – Infrastructure Review – Planned (2027)** Staff are planning to increase capacity to manage the safety of Regional Parks' 14 dams. Many of these dams are aging and, while they provide important public amenities, they must be actively managed to reduce risks to public safety, property and the environment. Planned improvements include enhanced monitoring and surveillance, installation of new instrumentation and update to key documentation, including Dam Emergency Plans.

109. **Regional Parks Reorganization – Service Review – Planned (2026)** Staff will be advancing a comprehensive review of Regional Parks operations, focused on the operating models for service delivery in regional parks.

110. **Amendment of CRD Parks Regulation Bylaw – Service Review – Planned (2027)** Bylaw No. 4225 regulates the use of regional parks and trails. Staff conduct regular administrative reviews to ensure the bylaw remains current, addresses emerging issues, and reflects Board-approved direction. The bylaw was last updated in 2021. Staff will undertake a comprehensive review to identify any required updates and will bring forward recommendations for Board consideration.

<u>Millstream Remediation Service</u>

111. **Millstream Meadows Future Uses Options Review – Infrastructure Review – Underway (2026)** Millstream Meadows, located at 1965 Millstream Road, is a 12.8-hectare property in the District of Highlands (Highlands) that was used for the unregulated disposal of septage and other trucked liquid waste between the early 1940s and 1985. The CRD received the property from the Province as a Sponsored Crown Grant in 1984. Environmental site investigations were initiated in the 1990s and gradually grew in scope as the extent of contamination became better understood. Since 2005, the CRD and the Province have worked cooperatively to investigate and remediate contamination at the property, with the end goal of beneficial re-use.

The remediation project was completed in July 2025 when the province issued Certificates of Compliance, marking the conclusion of nearly two decades of remediation efforts. Staff are now working with interest holders to evaluate future options for this site.

Saanich Peninsula Waterways Environmental Action Service

112. **Saanich Peninsula Harbours Service Review – Service Review – Proposed (TBD)** The Saanich Peninsula Waterways Environmental Action Service was established in 2021 at the request of North Saanich, Central Sanich and Sidney. Its purpose was to support a coordinated approach to environmental issues affecting near-shore waters and to implement initiatives in the harbours, waterbodies and watercourses surrounding the Saanich Peninsula. Proposed activities included monitoring and reporting on issues, coordinated with interest holders on issues and implementing programs to restore and improve the near-shore waters.

    Shortly after the service was established, the CRD and participating municipalities jointly decided not to requisition funding. As a result, while the service mandate remains in place, it is not currently funded or and no work is being advanced. Staff propose to review the continued need for the service and assess whether funding new initiatives through the service would be warranted. The maximum annual levy for this service is $75,000.

Appendix C: Strategic Planning Activities Advanced This Board Term

The following strategies and strategic plans were *Completed* this Board term:

1. **2023-2026 Board Priorities and CRD Corporate Plan** to set broad strategic direction for all CRD services.
2. **Corporate Communications & Engagement Strategic Plan 2024-2027** to outline the vision for effective organizational communications at the CRD.
3. **People, Safety & Culture Strategic Plan 2024-2027** to outline the vision for strategic human resources and occupational health and safety at the CRD.
4. **2024 CRD Accessibility Plan** to outline how the CRD will increase accessibility across its spaces, services and communications.
5. **2024-2027 Arts and Culture Support Service Strategic Plan** to outline how the CRD supports, champions and develops the arts in the region. The plan was adopted following a staff-led program review and community consultation in 2023.
6. **2025 Regional Water Supply Strategic Plan** to outline commitments and strategic priorities that will guide the future direction for the Regional Water Supply service.
7. **2025 Watershed Spill Management Plan** to assess current spill preparedness, including equipment, resources, training, agreements, procedures, and to provide recommendations, strategies and a field guide to improve service preparedness.
8. **SEAPARC Recreation Plan 2025-2035** to provide direction for the services and programs provided in consideration of the service's infrastructure needs, service mandate and service delivery priorities. The Infrastructure Growth Plan is the next step forward to refine how the infrastructure needs identified in the strategic plan should be delivered.
9. **2026-2035 Regional Water Conservation Plan for Greater Victoria** to guide regional water conservation and demand management to ensure long-term safe, reliable and sustainable regional water supply.
10. **CRHC 2045: “A Path to 5,000”**, a long-term framework that envisions the Capital Region Housing Corporation (CRHC) providing high-quality tenant experiences through the financially sustainable management of 5,000 homes by 2045. This vision builds on the CRHC’s current development momentum to expand the supply of affordable rental homes for families and individuals in the region.
11. **Regional Parks Volunteer Plan 2026-2031**, a strategic framework to guide the growth, diversification, and modernization of the Regional Parks Volunteer Program, supporting stewardship objectives while informing future operational and staffing decisions.

The following strategies and strategic plans are *Underway:*

12. **Five-year CRD Reconciliation Action Plan** will articulate goals and initiatives intended to advance reconciliation with First Nations. The draft plan is presently in the second phase of engagement with First Nations and staff anticipate reporting back to the CRD Board before the end of 2026. Work to develop a CRD Reconciliation Action Plan was brought forward as part of 2022 service planning process and subsequently paused to focus first on strengthening government-to-government relationships with First Nations.

13. **CRD Equity Diversity & Inclusion Strategic Plan**, which is related to the People, Safety & Culture Strategic Plan, is under development. The plan is expected to be completed in 2026.
14. **Financial Services Strategic Plan**, which will update the 2021 Strategic Plan, is under development. The plan is expected to be completed in 2026.
15. **Digital, Technology & Data Strategic Plans** are under development to set priorities and strategic direction across all Technology & Digital Transformation functions, while identifying both current and future organizational needs. The work has been paused pending the recruitment of a new Senior Manager.
16. **Regional Housing Affordability Strategy for the CRD** update to the 2018 strategy is underway. It identifies key policies, strategies and initiatives required to advance the long-term livability and sustainability of the region. The plan is expected to be completed in 2026.
17. **Regional Transportation Plan** development is underway. The plan outlines the Regional Multi-modal Network and gives policy direction and actions. The current plan was approved in 2014. The plan is expected to be completed in 2027.
18. **Water Supply Wildfire Management Plan** development is underway. This internal plan will support the provision of in-house wildfire prevention, detection and suppression functions. The plan will assess preparedness, including equipment, resources, standby, training, procedures and fuel management, and provides strategies and recommendations to increase service levels as climate change increases fire hazard risk. The plan is expected to be completed in 2026.
19. Staff are working with a consultant to develop a comprehensive **Biosecurity Strategy and Action Plan for the Greater Victoria Water Supply Area (GVWSA).** The assessment will evaluate risks from invasive, novel, and unwanted species and will provide strategies, preparedness measures, procedures, training and recommendations to increase service levels in line with biosecurity risks. The plan is expected to be completed in 2026.
20. **Regional Water Supply Master Plan Program Implementation Plan** development is underway. It will develop a guidance document for the CRD to pursue the delivery of the long-term 2022 Master Plan Program. The plan is expected to be completed in 2026.
21. Staff, with support from a consultant, are developing a **Juan de Fuca Water Meter Strategic Plan** for the Juan de Fuca Water Distribution System meter infrastructure. The objective is to address aging metering infrastructure and look at new technology options. The plan is expected to be completed in 2026.
22. **CRD Climate Action Strategy 2026-2030** update is underway to identify targeted ways to both reduce greenhouse gas emissions and adapt to climate change. The plan is expected to be completed in mid-2026.
23. **Regional Parks Cultural Practice and Safety Policy** is being developed to outline how the CRD regional parks will be operated with a view to Indigenous cultural practices while promoting inclusion, equity and reconciliation. Once approved, it will guide the work of Regional Parks employees, elected officials, volunteers, contractors, and agents, as well as, where applicable, conservation partners, permit holders and special-interest groups. Development of this policy is identified as an action in both the Regional Parks and Regional Trails Strategic Plan 2022-2032 and the CRD Corporate Plan 2023-2026. The plan is expected to be completed in 2026.
24. **Regional Parks Interpretive Plan** is being developed to guide programming and products, including signage, guided walks, and educational materials, aligned with conservation, education, and reconciliation goals. The plan will modernize interpretive services across the regional parks system, ensuring content is inclusive, culturally respectful, and grounded in ecological knowledge. The CRD Regional Parks and Regional

Trails Strategic Plan 2022–2032 identifies interpretation as a key tool for enhancing visitor experience, supporting environmental stewardship, and advancing reconciliation with First Nations. The plan is expected to be completed in 2026.

25. **Regional Parks Accessibility Guidelines** are being developed to support inclusive parks planning and policy development. These guidelines will provide a framework to ensure that all visitors can experience the natural environment of regional parks and trails by improving equitable access. They will offer direction across key areas, including service delivery, signage and wayfinding, pedestrian circulation, park facilities, and visitor information. The plan is expected to be completed in 2026.

The following strategies and strategic plans are *Planned:*

26. **CRD Board Advocacy Strategy Update** (planned for 2027). Staff are planning to complete a review of the Board Advocacy Strategy. In addition, the CRD Board suggested that preparing an expanded strategy be considered as a future priority by the new Board at the 2026 Board Priorities Check-in.
27. **Regional Wastewater Strategic Plan** (timeframe to be determined). Staff are exploring the feasibility of developing a Regional Wastewater Strategic Plan. The decision is subject to approval from the provincial regulator. If approved, the plan will cover all in-region wastewater services.
28. **Core Area and Saanich Peninsula Wastewater Strategic Plan** (planned for 2026-2027). Staff will develop a strategic plan for wastewater within the capital region. This document will guide decision-making and long-term planning, including Master Plans, the Liquid Waste Management Plan, etc.
29. **Forest Ecosystem Stewardship Plan** (planned for 2026-2028). This plan will guide the management of the GVWSA forests to deliver multiple service benefits while adapting to climate change. Adjustments to current service levels may be required to ensure forests are resilient for future climate conditions.
30. **Wildlife Management Plan** (planned for 2028). This plan will guide the protection and management of wildlife habitat in the GVWSA and will establish service levels to support effective wildlife management.

Making a difference...together

REPORT TO GOVERNANCE AND FIRST NATIONS RELATIONS COMMITTEE
MEETING OF WEDNESDAY, JUNE 3, 2026

SUBJECT **Public Engagement Policy and Framework**

ISSUE SUMMARY

Staff have prepared a Public Engagement Policy and Framework that reflects current Capital Regional District (CRD) Board and organizational commitments for consideration. Once adopted, it would supersede the CRD Public Participation Framework.

BACKGROUND

The CRD Public Participation Framework (Appendix A) has helped guide public engagement activities for various issues and projects since 2014. In 2021, the CRD created an administrative policy to support the implementation of an engagement platform (GetInvolved.crd.bc.ca) and alignment with emerging best practices.

Since 2024, staff have been advancing an initiative to enhance public participation and engagement practices and frameworks to foster trust and understanding, guided by resident input and equity, diversity and inclusion principles (initiative 11b-1 in the CRD 2023-2026 Corporate Plan).

The first phase of the initiative included collaboration with the Regional District of Nanaimo and an external consultant to examine practices used by comparable jurisdictions, along with current research on accessibility and inclusion in public engagement. The International Association for Public Participation's (IAP2) best practices have been widely adopted by local government organizations within British Columbia and across Canada and have been incorporated into the proposed materials. The second phase included a review of findings from the CRD Regional Resident Survey and communication with internal staff to identify and address questions. This work has resulted in the following materials ready for consideration:

1. Board Policy (Appendix B): high-level summary of engagement goals and roles/responsibilities; adoption of IAP2 spectrum, values & principles.
2. Public Engagement Framework (Appendix C): outlines the process for delivering public engagement initiatives.

To build internal capacity and support implementation of the updated policy and framework, staff created a Public Engagement Toolkit (Appendix D) with a comprehensive set of checklists, guidelines and templates to promote consistent and efficient implementation of initiatives.

ALTERNATIVES

Alternative 1
The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:
That the Public Engagement Policy (BRD09) and supporting Framework be adopted.

Alternative 2
That this report be referred back to staff for additional information.

IMPLICATIONS

Alignment with Board & Corporate Priorities
This work supports Board priority goal 2b) “Foster greater civic participation among diverse community members” and is captured in the Corporate Plan as action 12b-1) “Enhance the public participation and engagement practices and framework to foster trust and understanding, informed by input from residents and equity, diversity and inclusion principles.”.

Alignment with Existing Plans & Strategies
This work is also reflected in the Corporate Communications & Engagement Strategic Plan and is connected to two desired outcomes: 1) Fostering meaningful connections with communities and 4) Placing Equity Diversity, inclusion and accessibility at the heart of communications.

Equity, Diversity & Inclusion Implications
People, Safety & Culture Division staff reviewed the policy, framework and toolkit to ensure alignment with work underway to create an Equity, Diversity and Inclusion strategy.

The proposed policy outlines the CRD’s commitment to “improving engagement with diverse community members” and public engagement goals related to inclusion, equity and accessibility.

Under the proposed framework, identification of interested and affected people would be determined early in the planning phase and outreach to underrepresented voices would be scoped according to each initiative’s objectives and impact. The framework includes an evaluation phase where learnings can be captured and shared to help inform future initiatives and support continuous improvement.

The toolkit includes questions and guidance at each phase to further identify and address existing dynamics and barriers to participation, as well as checklists to support accessibility when organizing events. Staff shared materials and an update on this initiative with the Accessibility Advisory Committee on May 19, 2026 and will maintain the Toolkit as a living document.

Financial Implications
One-time funding for completion of this work was included in the Corporate Communications & Engagement Division budget following Initiative Business Case approval in 2024. Remaining funds will be used to provide training for staff to support adoption of principles and practices outlined in the policy, framework and toolkit starting in Fall 2026.

First Nations Implications
Although the proposed policy does not apply to First Nations engagement, the First Nations Relations Division provided input on the framework and toolkit content to reflect current practices and the importance of prioritizing First Nations engagement as a distinct process with its own requirements and government-to-government dynamics. Information prepared for public engagement initiatives can also assist with First Nations engagement activities; regular check-ins occur between staff when timelines of both processes overlap to ensure alignment.

Service Delivery Implications
Adhering to the policy and framework and ultimately reaching underrepresented voices will require additional resources in the form of staff time and hard costs (e.g., venues, equipment, translation). These resources will need to be allocated and managed by program area project leads for each initiative as part of divisional budgets and service planning. Smaller local projects, particularly those in electoral areas, have resource constraints (e.g., staff availability), as well as practical challenges (e.g., accessibility of venues) that will take time and planning to fully address.

Social Implications
Public engagement occurs when an organization proactively seeks input from individuals or groups outside of itself to inform decision-making or problem-solving. Typically, those engaged are the people most likely to be affected by the matter under consideration. This process helps strengthen trust and confidence in decisions while promoting transparency and accountability. More than simply sharing information and collecting feedback, it reflects a genuine commitment to listening and being influenced, within clearly defined boundaries. Once adopted, the policy and framework will be posted online for public transparency of the CRD's commitments and process.

CONCLUSION

The Public Engagement Policy and Framework have been prepared to reflect and guide the CRD's commitments related to meaningful public engagement as well as accessibility, diversity, equity and inclusion. The Public Engagement Toolkit serves as a supporting resource for staff and consultants to support implementation and continuous improvement.

RECOMMENDATION

The Governance and First Nations Relations Committee recommends to the Capital Regional District Board:
That the Public Engagement Policy (BRD09) and supporting Framework be adopted.

Submitted by:	Zoe Gray, Manager, Website & Public Engagement
Concurrence:	Andy Orr, Senior Manager, Corporate Communications & Engagement
Concurrence:	Ted Robbins, B. Sc., C. Tech., Chief Administrative Officer

ATTACHMENTS

Appendix A: Public Participation Framework – 2014
Appendix B: Draft Public Engagement Policy
Appendix C: Draft Public Engagement Framework
Appendix D: Public Engagement Toolkit

Appendix A

Capital Regional District Public Participation Framework

Overview

Over the past few months, a Staff Cross Departmental Committee has been exploring how to improve the CRD's public participation with and for the communities and residents we serve. Through the discussions, the Committee identified challenges ranging from the wider community not understanding who and what the CRD is and what services we provide, to a lack of consistent application of public participation processes among departments and finally, a strong reliance on external consultants. There were also many common points of interest among Committee members, the most obvious was the agreement that staff need to do a better job engaging the residents of the Capital Regional District in our decision making processes – and the need to do this collectively.

There was a clear understanding and linkage that effective public participation is increasingly seen as an integral part of a strong governance framework.

What is public participation?

In order for this Framework to truly be effective, it is important to begin from a common point of understanding of exactly what public participation is. Globally, public participation is when an organization reaches outside of itself to seek the involvement of others in its decision-making process. Generally, participants in these processes are those who are most likely to be affected by the matter under consideration. Organizations have come to embrace public participation processes as a means for strengthening trust and confidence in the decision-making process.

There is a recognized continuum of public involvement denoted within the term public participation, from simply sharing information about a pending decision (informing) through to creating a partnership arrangement, one based on mutual trust, and a willingness to agree on a course of action together.

For elected and government officials, public participation is commonly seen as a mechanism to support transparency and accountability. It is more than giving information and receiving feedback — it is a deliberate commitment that government makes to its public and stakeholder groups to listen and to be influenced within expressed limits.

The CRD's Public Participation Framework consists of the following components:

1. **CRD Board's Commitment to Public Participation**
2. **CRD's Spectrum of Public Participation**
3. **CRD`s 8 Principles for the Practice of Public Participation**
4. **Working Co operatively with the CRD's Municipalities and Electoral Areas**
5. **First Nations Engagement and the CRD**
6. **Roles and Responsibilities in CRD Public Participation Process**
7. **CRD Staff Resource Handbook: (for internal use)**

Chapter 1: Overview of Public Participation

Chapter 2: Key Steps Required for Successful Public Participation Processes

Chapter 3: Definitions of Common Terms Used

Chapter 4: Working with the CRD's Municipalities

Chapter 5: Better Understanding First Nations Engagement

Chapter 6: Techniques, Methods and Recommended Applications

Chapter 7: Conducting Effective Evaluations

Chapter 8: Learning through CRD Experiences

Chapter 9: Various Templates

Component 1: CRD Board's Commitment to Public Participation

A common practice for many orders of governments across Canada is to have a publicly stated overarching commitment to public participation. As the CRD Public Participation Framework is unrolled for all, the adoption of the following statement at the CRD Board level is recommended:

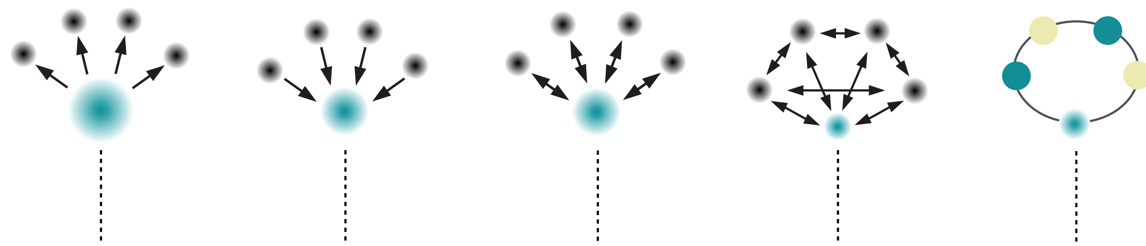
The Capital Regional District is committed to undertaking public participation processes in the development and delivery of public policies, programs, legislation and services.

The Capital Regional District is also committed to promoting a consultative culture across all departments and divisions.

Component 2: CRD's Spectrum of Public Participation

As with any continuum of public participation, the key goal is to align the project scope, process and techniques within the CRD governance of decisions. In many public participation experiences, the process may incorporate a flow within the Spectrum. Clearly understanding where in the Spectrum any given decision can be made will undoubtly result in the building of wide spread public trust.

CRD Public Participation Spectrum



	Inform and Educate	Gather Information	Discuss	Engage	Partner
OBJECTIVES OF PUBLIC PARTICIPATION	To provide balanced and objective information to support understanding by the public.	To obtain feedback on analysis, alternatives and/or decisions.	To work with the public to ensure concerns and aspirations are understood and considered.	To facilitate discussions and agreements between public parties to identify common ground for action and solutions.	To create governance structures to delegate decision-making and/or work directly with the public.
CRD COMMITMENT	To inform the public.	To listen to and acknowledge the public's concerns	To work with the public to exchange information, ideas and concerns.	To seek advice and innovations from amongst various public parties.	To work with the public to implement agreed-upon decisions.
PARTICIPANT'S RESPONSIBILITY	To become informed and educated.	To take an active role in keeping oneself informed and up to date.	To be open to other points of view and work with staff and other members of the public.	To put aside personal agendas and participate honestly in discussions.	To work with CRD Staff to implement agreed-upon decisions.

Source: Auditor General of British Columbia 2009 (CRD modified version)
Report 11: Public Participation: Principles and Best Practices for British Columbia

Component 3: CRD's 8 Guiding Principles For The Practice of Public Participation

The key underpinning concept of having a set of principles is to build a culture and value of public participation within the CRD; principles that can qualify or characterize processes while allowing flexibility in the approaches.

1. Active Citizenship	The CRD acknowledges the benefits, as an organization and in civil society, for active citizens' involvement in CRD's public participation and decision making processes.
2. Commitment	Leadership and strong commitment to information, consultation and engagement in active participation is needed at all levels – from CRD Directors, senior managers and staff.
3. Clarity	Objectives for, and limits to, information, consultation and active participation will be well defined from the outset. The respective roles and responsibilities of citizens (in providing input) and the CRD (in making decisions for which we are accountable) must be clear to all.
4. Time	Public consultation and active participation will be undertaken as early in the decision making process as possible, to allow for a greater range of solutions to emerge and to raise the chances of successful implementation.
5. Objectivity	Information will be objective, complete and accessible. All citizens will have equal treatment when exercising their rights of access to information and participation.
6. Resources	Adequate financial, human and technical resources are required if public information, consultation and active participation in policy making are to be effective. CRD staff will be supported through guidance and training and the provision of adequate resources.
7. Coordination	Initiatives will be coordinated across the CRD to enhance knowledge management, ensure policy coherence, avoid duplication and reduce the risk of 'consultation fatigue' among staff and citizens.
8. Evaluation	In order to increase the CRD's organizational capacity and success; evaluations of public participation processes will be incorporated into every process.

Component 4: Working Cooperatively With The CRD'S Municipalities And Electoral Areas

There is a strong recognition and understanding of the value of working with member municipalities and electoral areas when public participation process occurs in their communities. For staff, understanding what role and expectation there is to inform, involve or even partner with the municipality at the beginning planning stage plays an important part, if not a key element in building trust and ensuring successful results. The CRD commits to proactively communicate with municipalities and electoral areas when public participation processes are planned as well, assess the degree of cooperation and collaboration required based on the initiative.

Component 5: First Nations Engagement And The CRD

Consultation and engagement with First Nations is different than public consultation because it is driven by the law, not just good public policy. The Canadian courts have emphasized that the federal and provincial governments must consult with First Nations when making decisions that may affect aboriginal and treaty rights and accommodate those rights where appropriate. Aboriginal and treaty rights are also protected under the Constitution of Canada.

It is important to keep in mind that the CRD cannot assume responsibility for the legal obligations to consult now imposed on the senior governments. It can, however, be delegated procedural steps such as gathering information on First Nations interests. It is also important to recognize that First Nations and the CRD are neighbours so it makes sense to work with First Nations in a meaningful way to seek their input, to apply their input to avoid future problems and to seek opportunities to work together whenever working on a project that may affect their interests or provide opportunities to build a stronger relationship.

Component 6: Roles And Responsibilities In CRD Public Participation Processes

Board and Committees

The CRD Board is ultimately responsible to all the citizens of the Capital Regional District and therefore, acts in the best interests of the region as a whole.

During its review and decision-making process, the Board and Committees have an obligation to recognize the efforts and activities that have preceded its deliberations. Directors should have regard for the public involvement processes that have been completed in support of projects.

CRD Staff

Staff responsible for the design and implementation of public participation processes have an obligation to ensure that the Guiding Principles are the backbone of their processes. In addition to the responsibilities established by the Guiding Principles, staff have a responsibility to:

1. pursue public involvement with a spirit that recognizes the value it adds to projects;
2. in all public involvement activities, work towards fostering long-term relationships based on respect and trust;
3. encourage positive working partnerships;
4. take-up the challenge to draw out the silent majority, the voiceless and the disempowered;
5. ensure that decisions and recommendations reflect the needs and desires of the entire community; and
6. ensure that no participant or group is marginalized or ignored.

Corporate Communications

Corporate Communications is responsible for ensuring CRD public participation processes are carried out with confidence, knowledge and integrity. In addition, Corporate Communication will: maintain the Staff Resource Handbook; support departments who require resources and guidance; serve as a coordinating body; assist with the provision and coordination of training and host bi annual Staff Forums.

All Participants

The public is also accountable to the process and the accomplishment of the project goals. All participants have a responsibility to:

1. focus on the real issues and not on the furthering of personal agendas;
2. balance personal concerns with the needs of the community as a whole;
3. have realistic expectations;
4. participate openly, honestly and constructively, offering ideas, suggestions, alternatives, etc.;
5. listen carefully and completely;
6. identify their concerns and issues early in the process;
7. provide their names and contact information if they want direct feedback;
8. make every effort to work within the project schedule; if this is not possible then this should be discussed with staff as soon as possible. Participants must also recognize that process schedules may be constrained by external factors (e.g. broader project schedules or legislative requirements);
9. recognize that there is no single voice that is more important than all others, and that there are diverse opinions to be considered;
10. work within the process in an integrated and cooperative manner;
11. accept some responsibility for keeping themselves aware of current issues; when possible, participants should also make others aware of project activities and solicit their input; and
12. recognize that the measure of the success of the process is the fullness of public involvement and the quality of the outcome.

Component 7: CRD Staff Resource Handbook (For Internal Use)

A Resource Handbook will assist staff who are responsible for designing and implementing public participation processes and ensure a high degree of consistency in applications across the CRD. For example, the general public will have the same experiences when different departments conduct public participation processes. The following chapters are included in the Resource Handbook and it will become the touchstone for future training sessions and bi annual Staff Forums.

CRD Staff's Resource Handbook:

- Chapter 1: Overview of Public Participation
- Chapter 2: Key Steps Required for Successful Public Participation Processes
- Chapter 3: Definitions of Common Terms Used
- Chapter 4: Working with the CRD's Member Municipalities and Electoral Area
- Chapter 5: First Nations Engagement
- Chapter 6: Techniques, Methods and Recommended Applications
- Chapter 7: Conducting Effective Evaluations
- Chapter 8: Learning through CRD Experiences
- Chapter 9: Various Templates

CAPITAL REGIONAL DISTRICT
CORPORATE POLICY

Making a difference...together

Policy Type	*Board*		
Section	*Executive Services, Corporate Communications & Engagement*		
Title	PUBLIC ENGAGEMENT POLICY		
Adopted Date		Policy Number	BRD09
Last Amended			
Policy Owner	Corporate Communications & Engagement (CCE)		

1. POLICY:

Public engagement, also referred to as public participation, provides opportunities for the public to engage in problem-solving and processes that support decision-making at the Capital Regional District (CRD). The CRD is committed to fostering public engagement that is inclusive, equitable, and reflective of the region's diversity.

2. PURPOSE:

To establish roles, principles, and process for delivering public engagement initiatives.

This policy:

(a) creates a consistent, transparent, coordinated, and outcomes-driven approach to public engagement;
(b) recognizes that people want to participate in the processes that lead to decision-making on issues that affect them and creates an appropriate level of engagement based on assessed community impact and benefit; and
(c) facilitates meaningful and effective consultation, information sharing, involvement, collaboration, and empowerment processes in compliance with legislative requirements.

3. SCOPE:

This policy applies to all formal public engagement undertaken for CRD, Capital Region Housing Corporation (CRHC), and Capital Regional Hospital District (CRHD) programs, policies, plans and projects and delivered by CRD staff, elected officials, commissioners, contractors, volunteers, or partner organizations working on behalf of the CRD.

This policy does not apply to First Nations engagement. Engagement with First Nations follows a separate process with support from the First Nations Relations division.

4. DEFINITIONS:

"**Public Participation** or **Engagement**": refers to any process that involves the public in problem-solving or decision-making. It is premised on the belief that community members should have meaningful opportunities to engage in the decisions that affect their communities.

“**Community Member**”: means residents living within the boundaries of the CRD, or service area directly affected by the initiative.

“**International Association of Public Participation (IAP2)**”: refers to the association of professionals in the field of public participation who seek to advance and extend the practice of public participation through training, certification, standards, values, and advocacy throughout Canada and around the world.

“**IAP2 Spectrum of Participation**”**:** IAP2's Spectrum of Public Participation is a tool designed to assist with the selection of the level of participation that defines the public's role in any public participation process.

5. PROCEDURES:

In British Columbia, the *Community Charter* (CC) and *Local Government Act* (LGA) outline the minimum requirements for when local governments must engage with the public. Generally, these are considered to be the ‘minimum’ requirements which may be exceeded, as needed.

The CRD commits to utilizing the IAP2 Core Values (Schedule A), Spectrum of Public Participation (Schedule B) and Code of Ethics (Schedule C) in developing public engagement initiatives.

This policy will be implemented through the Public Engagement Framework and Toolkit, which outlines best practices and steps for planning, implementing, and evaluating effective and meaningful engagement, in a detailed manner.

5.1 Public Participation Goals

The CRD is committed to improving engagement with diverse community members using a collaborative, transparent, and authentic approach that is developed on a case-by-case basis for a variety of plans, projects, and initiatives.

The CRD’s public engagement goals are to be:

a) **Inclusive and Equitable**: Creating open and accessible opportunities for everyone affected by a decision to participate, actively removing barriers and seeking out diverse voices, including equity-deserving groups;
b) **Impactful**: The public's contributions are considered and can have a real impact on the decision-making process;
c) **Relevant**: Providing clear and accessible information about the engagement process, the decisions being made, and how input will be used;
d) **Timely and Accessible**: Considering public engagement as early in the process as possible, in accessible formats and locations, giving participants enough time to participate and allowing for a greater range of solutions to emerge;
e) **Reliable**: Information will be factual, complete and accessible. Questions will be answered, and input will be considered fairly;
f) **Coordinated**: Initiatives will be coordinated corporately to enhance knowledge management, support consistency, avoid duplication and reduce the risk of ‘consultation fatigue’ among staff and community members;
g) **Evaluated**: To increase the CRD’s organizational capacity and success; evaluations will be incorporated into every public engagement process; and

h) **Transparent and Accountable**: Clearly communicate how public input will be used and report back on outcomes.

5.2 Public Engagement Requirements

Public engagement is appropriate when:

a) there is a legal or statutory requirement for public consultation;
b) the public has been told there would be opportunity to provide input into a project which will affect them; and/or
c) the project will impact people and groups, key decisions about the project have not yet been made, and opinions or advice offered by the public may influence the outcome.

Engagement plans provide order, structure and clear expectations to participants, elected officials and staff. Public engagement plans must be developed in consultation with the CRD Corporate Communications & Engagement (CCE) Division and approved by the CAO or an individual with delegated authority prior to the engagement starting.

The CRD has corporate online engagement channels that meet privacy requirements and are required to be used for all public engagement activities. Using these channels ensures participants recognize them as CRD initiatives and builds an ongoing relationship. CRD CCE staff can provide direction on the appropriate use of the channels.

5.3 Roles & Responsibilities

5.3.1 Elected Officials:

Board members, and appointed commissioners are responsible for making decisions that represent the interests and values of the community.

They have an important role as decision-makers and advocates for public engagement, and can contribute in the following ways:

a) represent residents and connect with them to determine top priorities for engagement;
b) prioritize engagement efforts by working with staff to identify areas where public input can make a meaningful difference in decisions and help set public engagement priorities;
c) support and promote inclusive and transparent engagement initiatives and opportunities to ensure a high rate of participation by a wide range of residents;
d) direct community members to the established processes for garnering, monitoring and compiling input, and avoid circumventing these;
e) allow staff to take the lead role in identifying best practices and methods for engaging the public on various issues;
f) consider input gathered from community members and interested groups when making decisions and clarify the rationale for decisions reached;
g) listen and observe during public engagement events and processes; and
h) avoid making public commitments or statements that could pre-empt decisions or misrepresent the scope of consultation.

5.3.2 CRD Staff & Officers:

Staff lead the planning, implementation, and reporting from public engagement initiatives.

Staff are responsible for developing and applying professional expertise to public engagement processes, as well as being technical experts who provide background and advice on decisions being made.

Project leads are responsible for liaising with the CCE Division to plan each initiative with clear roles and responsibilities between staff as outlined in the *Public Engagement Guidelines - Staff Roles & Responsibilities*.

Staff responsibilities include the following:

a) work with elected officials to identify where public input can make a meaningful difference in decisions, program development, and service delivery;
b) use engagement tools and outreach strategies to identify community priorities and what barriers may prevent residents from participating. Ensure this input is used to inform service planning, improve accessibility and strengthen future engagement processes;
c) establish, and communicate engagement priorities, then apply a consistent set of policies and procedures in designing and implementing engagement activities;
d) keep elected officials informed of engagement activities, outcomes, process design, framing issues for productive input, effective communications, and increasing engagement over time;
e) ensure timely and respectful communication with all those who engage and show how their input has been used to influence decisions, programs and services;
f) engage in ongoing learning and professional development about public engagement best practices; and
g) ensure that community input is well documented, transparent and that communication efforts are as complete and well-timed as possible.

5.3.3 Commissioners, Contractors, Volunteers, Partners:

CRD Commissioners, contractors, volunteers, and partners support staff in public participation efforts and provide specialized expertise, community connections, or additional capacity.

Their contributions may include the following:

a) work with staff to ensure public engagement is considered for all policies, programs, projects, or services;
b) seek advice, support and approval from staff as required to plan, deliver, and evaluate public participation initiatives;
c) utilize the Public Engagement Policy, Framework, and Toolkit to ensure engagement activities are consistent throughout the organization;
d) deliver engagement activities in accordance with the scope of work and engagement objectives; and
e) promote engagement opportunities.

5.3.4 Residents:

Residents contribute to informed decision-making and the quality of life in their community by sharing their ideas, experiences, and concerns constructively and respectfully.

Their contributions can include the following:

a) help identify community needs and priorities;
b) identify barriers to participation and opportunities for improvement;
c) make efforts to stay current and learn more about issues within the community;
d) participate in engagement initiatives and encourage others to participate;
e) express their point of view and contribute ideas while respecting opposing perspectives;
f) be willing to listen to and learn from other community members; and
g) vote in local government elections.

5.4 Privacy

All public engagement initiatives, including initiatives conducted by vendors or consultants, must have a designated CRD staff person responsible for ensuring:

a) the Manager, FOI and Privacy, or their delegate, has provided advice respecting whether personal information is likely to be collected, used, disclosed, stored, or accessed, and whether a Privacy Impact Assessment (PIA) is required to be completed; and
b) any recorded information resulting from public engagement activities that is required as evidence or to support CRD business activities is managed in accordance with the CRD's records management policies and stored in appropriate CRD recordkeeping systems.

6. SCHEDULE:

A. IAP2 CORE VALUES
B. IAP2 SPECTRUM OF PUBLIC PARTICIPATION
C. IAP2 CODE OF ETHICS

7. AMENDMENTS:

Adoption Date	**Description:**
October, 2021	*Approved by CAO. Adopted by ELT.*
XXXX, 2026	*Revision of content to align with new Public Engagement Framework. Rescinded ADM97 and turned into Board Policy.*

8. REVIEWS:

Review Date	**Description:**

2029	3-year review.

9. RELATED POLICY, PROCEDURE OR GUIDELINE:

- *CRD Public Engagement Framework*
- *CRD Public Engagement Toolkit*
- *Public Engagement Guidelines: - Staff Roles & Responsibilities*

SCHEDULE A

IAP2 CORE VALUES

CORE VALUES

iap2

IAP2 Federation's Core Values for Public Participation define the expectations and aspirations of the public participation process. Processes based on the Core Values have been shown to be the most successful and respected.

1. Public participation is based on the belief that those who are affected by a decision have a right to be involved in the decision-making process.
2. Public participation includes the promise that the public's contribution will influence the decision.
3. Public participation promotes sustainable decisions by recognising and communicating the needs and interests of all participants, including decision makers.
4. Public participation seeks out and facilitates the involvement of those potentially affected by or interested in a decision.
5. Public participation seeks input from participants in designing how they participate.
6. Public participation provides participants with the information they need to participate in a meaningful way.
7. Public participation communicates to participants how their input affected the decision.

SCHEDULE B

IAP2 SPECTRUM OF PUBLIC PARTICIPATION

IAP2 Spectrum of Public Participation

IAP2's Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public's role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

INCREASING IMPACT ON THE DECISION

	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

SCHEDULE C

IAP2 CODE OF ETHICS

CODE OF ETHICS

IAP2 Federation's Code of Ethics is a set of principles that guides us in our practice of enhancing the integrity of the public participation process. As practitioners, we hold ourselves accountable to these principles and strive to hold all participants to the same standards.

1 Purpose
We support public participation as a process to make better decisions that incorporate the interests and concerns of all affected stakeholders and meet the needs of the decision-making body.

2 Role of Practitioner
We will enhance the public's participation in the decision-making process and assist decision makers in being responsive to the public's concerns and suggestions.

3 Trust
We will undertake and encourage actions that build trust and credibility for the process among all the participants.

4 Defining the Public's Role
We will carefully consider and accurately portray the public's role in the decision-making process.

5 Openness
We will encourage the disclosure of all information relevant to the public's understanding and evaluation of a decision.

6 Access to the Process
We will ensure that stakeholders have fair and equal access to the public participation process and the opportunity to influence decisions.

7 Respect for Communities
We will avoid strategies that risk polarising community interests or that appear to "divide and conquer."

8 Advocacy
We will advocate for the public participation process and will not advocate for a particular interest, party, or project outcome.

9 Commitments
We will ensure that all commitments made to the public, including those made by the decision maker, are made in good faith.

10 Support of the Practice
We will mentor new practitioners in the field and educate decision makers and the public about the value and use of public participation.

Appendix C

Making a difference...together

PUBLIC ENGAGEMENT FRAMEWORK & TOOLKIT

Building Our Community Together

PART ONE

Public Engagement Framework

Territorial Acknowledgement

The CRD conducts its business within the Territories of many First Nations, including but not limited to BOḰEĆEN (Pauquachin), MÁLEXEŁ (Malahat), paaʔčiidʔatx (Pacheedaht), Spune’luxutth (Penelakut), Sc’ianew (Beecher Bay), Songhees, SȾÁUTW (Tsawout), T’Sou-ke, WJOŁEŁP (Tsartlip), WSIḴEM (Tseycum), and xʷsepsum (Kosapsum) Nations, all of whom have a long-standing relationship with the land and waters from time immemorial that continues to this day.

Introduction

Our region's diverse communities are constantly changing, and the needs and expectations of our residents are evolving. How people share information, and the opportunities for involvement in problem-solving and processes that lead to decision-making are changing too.

Meaningful public engagement facilitates better conversations between government and residents so we can be responsive to the needs and wants of the people we serve. We are on a continuous journey to adapt and improve practices to foster mutual understanding, strengthen relationships and create public engagement processes that are inclusive.

What is public engagement?

Public engagement, also commonly referred to as public participation, is any process that involves the public in problem-solving and processes that lead to decision-making. It is premised on the belief that residents should have meaningful opportunities to engage in processes that lead to decisions affecting their communities. It moves past one-way communication and welcomes residents into the decision-making process by ensuring timely information and awareness of opportunities to provide input before decisions are made.

Not all topics require the same level of public engagement. Based on the impact of the decision or change, and the input needed to inform the decision, different tools and techniques are considered in each instance. Meaningful public engagement should consider the diverse needs of those our decisions impact, and government bodies are responsible for removing barriers and encouraging participation from all voices, particularly those that are underrepresented historically.

Why do we engage?

We engage because, although we have skilled technical experts working across our organization, no one knows the community and its nuances better than the people living and working in it every day. When we engage, their input becomes part of the process and helps us make decisions that are responsive to what the community needs and values.

When public engagement is meaningful, everyone gains something valuable. Governments benefit from hearing diverse perspectives and understanding the public's interests, concerns, and priorities, and the public gains a greater understanding of how decisions are made. With effective communication, our accountability to residents is enhanced. With timely access to factual and relevant information, there is less misinformation, and residents feel heard.

What is the International Association of Public Participation (IAP2)?

IAP2 is an association of professionals in the field of public participation who seek to advance and extend the practice of public participation through training, certification, standards, values, and advocacy around the world.

The IAP2 developed several tools that have become commonplace among local governments. The Core Values and Spectrum of Public Participation assist in establishing clear expectations and defining the level of participation in any public engagement process.

The IAP2 Code of Ethics provides a set of principles that guide the practice of public participation, enhancing the integrity of the process.

As a regional district, the adoption of the IAP2 tools supports consistent engagement with the community. This includes the responsibility to share feedback with IAP2 and a commitment to continuous learning as models and tools evolve.

IAP2 Spectrum of Public Participation

IAP2's Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public's role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
Public Participation Goal	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
Promise to the Public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

← **Information enables participation at any level of the spectrum** →

Core Values for the Practice of Public Engagement

- Public engagement is based on the belief that those who are affected by a decision have a right to be involved in the decision-making process.
- Public engagement includes the promise that the public's contribution will influence the decision.
- Public engagement promotes sustainable decisions by recognizing and communicating the needs and interests of all participants, including decision makers.
- Public engagement seeks out and facilitates the involvement of those potentially affected by or interested in a decision.
- Public engagement seeks input from participants in designing how they participate.
- Public engagement provides participants with the information they need to participate in a meaningful way.
- Public engagement communicates to participants how their input affected the decision.

When do we engage?

When developing a new project or considering changes to programs or policies, it is critical to consider whether the public needs to be engaged.

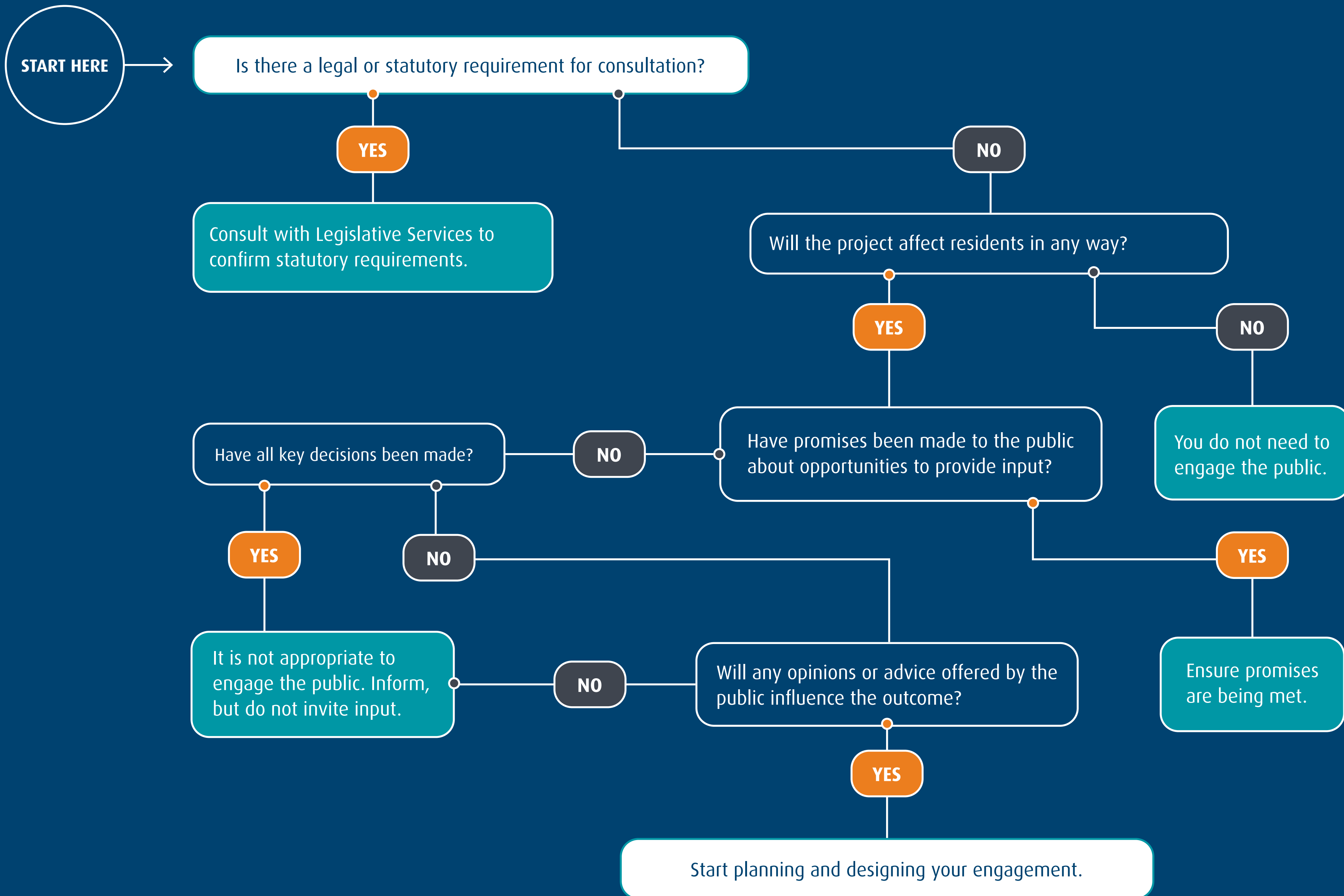
Public engagement may not be required or suitable in every case, but when it is, we want to ensure we are engaging with residents as early as possible. When engagement does not occur or is rushed, there may be negative impacts to the project schedule, costs, and public support. Early dialogue is important in determining when and to what extent public engagement is needed.

There are situations where a decision has already been made or activities are happening due to factors that are not negotiable. In those situations, public engagement is not appropriate, and it is better to focus on communicating the change.

In British Columbia, the *Community Charter* and *Local Government Act* outline the minimum requirements for when local governments must engage. Generally, these are regarded as the minimum requirements and are often exceeded.

> The CRD recognizes local First Nations are important rightsholders with distinct laws, protocols and systems of governance. As such, engagement with First Nations follows a separate and distinct process with support from the First Nations Relations division.

Do I need to engage the public in my project?



PLAN

- Assess the need for engagement or determine the level of community impact
- Determine engagement objectives
- Identify interested and impacted people and groups

DESIGN

- Determine the strategy
- Choose techniques
- Develop key messages
- Create an engagement plan
- Establish measures and timelines

PROMOTE

- Tell your story
- Invite participation

CONNECT

- Implement engagement plan
- Host events / information sessions
- Gather input

EVALUATE

- Evaluate the process

CLOSE THE LOOP

- Report on feedback
- What We Heard Report

Who we serve

A community snapshot

As stewards for our communities, the more we understand about the people we serve, their experiences and the barriers to participation, the more attuned we will be to meeting their needs and appreciating their perspectives.

SIZE OF CAPITAL REGION
2,338 square kilometres

POPULATION SERVED
415,451

INDIGENOUS IDENTITY
20,195
[5% of regional population]

TOP 3 LANGUAGES SPOKEN AT HOME
English **374,750**
Mandarin **4,590**
Yue [Cantonese] **2,655**

HOUSEHOLD COMPOSITION
Married **44%**
Common Law **12.1%**
Single **43.8%**

AVERAGE NUMBER OF CHILDREN
1.6

AVERAGE AGE
45.1 years old

MEDIAN HOUSEHOLD INCOME
$84,000

OWNERS VS. RENTERS
Owners: **62.9%** Renters: **36.9%**

EDUCATION LEVEL
- No high school **10.3%**
- High school graduation **27.7%**
- Post-secondary certificate or diploma below bachelor's degree **28.3%**
- Bachelor's degree or higher **33.8%**

POVERTY RATE

0-17:	18-65:	65 plus:
9.5%	**8.5%**	**10.5%**

3 LARGEST INDUSTRIES
- Health care and social assistance
- Public administration
- Retail trade

RECENT GROWTH
8.4% from 2016 to 2021
4.6% from 2021 to 2023
(Population estimate, not Census)

NUMBER OF IMMIGRANTS
77,095 (18.2%)

NUMBER OF REFUGEES
4,050

Source: Statistics Canada, 2021 Census of Population.

Roles & Responsibilities: Who does what?

Elected Officials

Elected officials are responsible for making decisions that represent the interests and values of the community. They have an important role as decision-makers and advocates for public engagement and can contribute in the following ways:

- Represent residents and connect with them to determine top priorities for engagement.
- Prioritize engagement efforts by working with staff to identify areas where public input can make a meaningful difference in decisions and help set public engagement priorities.
- Support and promote inclusive and transparent engagement initiatives and opportunities to ensure a high rate of participation by a wide range of residents.
- Direct residents to the established processes for garnering, monitoring and compiling input, and avoid circumventing these.
- Allow staff to take the lead role in identifying best practices and methods for engaging the public on various issues.
- Consider input gathered from residents and interested groups when making decisions and clarify the rationale for decisions reached.
- Advocate for adequate resourcing of public engagement initiatives where needed.
- Listen and observe during public engagement events and processes.
- Avoid making public commitments or statements that could pre-empt decisions or misrepresent the scope of consultation.

CRD Staff & Officers

Staff lead the planning, implementation and reporting from engagement initiatives. Staff are responsible for developing and applying professional expertise to public engagement processes, as well as being technical experts who provide background and advice on decisions being made. Staff responsibilities include the following:

- Work with elected officials to identify where public input can make a meaningful difference in decisions, program development and service delivery.
- Use engagement tools and outreach strategies to identify community priorities and what prevents residents from participating. Ensure this input is used to inform service planning, improve accessibility and strengthen future engagement processes.
- Establish and communicate engagement priorities, then apply a consistent set of policies and procedures in designing and implementing engagement activities.
- Keep elected officials informed of engagement activities, outcomes, process design, framing issues for productive input, effective communications, and increasing engagement over time.
- Ensure timely and respectful communication with all those who engage and show how their input has been used to influence decisions, programs and services.
- Engage in ongoing learning and professional development about public engagement best practices.
- Ensure that community input is well documented, transparent and that communication efforts are as complete and well-timed as possible.

Residents

Residents contribute to informed decision-making and the quality of life in their community by sharing their ideas, experiences, and concerns constructively and respectfully. Their contributions can include the following:

- Help identify community needs and priorities.
- Identify barriers to participation and opportunities for improvement.
- Make efforts to stay current and learn more about issues within the community.
- Participate in engagement initiatives and encourage others to participate.
- Express their point of view and contribute ideas while respecting opposing perspectives.
- Be willing to listen to and learn from other community members.
- Vote in local government elections.

First Nations

The CRD recognizes that First Nations are self-determining governments and that engagement with First Nations is separate and distinct from public participation. The CRD is committed to respectful, government-to-government relationships guided by the principles of reconciliation. Engagement with First Nations on matters of mutual interest will be early, meaningful, and will align with the CRD's Statement of Reconciliation.

At the same time, it is important that public engagement methods and the language we use acknowledge and respect the experience of Indigenous individuals who may participate, as well as the long-standing relationship with the land and waters that First Nations have held since time immemorial that continues to this day.

Commissioners, Contractors, Volunteers, Partners

CRD Commissioners, contractors, volunteers, and partners support staff in public participation efforts and provide specialized expertise, community connections, or additional capacity.

Their contributions may include the following:

- Work with staff to ensure public engagement is considered for all policies, programs, projects, or services;
- Seek advice, support and approval from staff as required to plan, deliver, and evaluate public participation initiatives;
- Utilize the Public Engagement Policy, Framework and Toolkit to ensure engagement activities are consistent throughout the organization;
- Deliver engagement activities in accordance with the scope of work and engagement objectives; and
- Promote engagement opportunities.

Terms of Engagement

Have a good time and enjoy sharing and hearing ideas!

1. Be open to new ideas and opinions
2. Respect each other — listen when others are speaking and be aware of your own body language
3. Allow everyone a chance to share their perspectives
4. Listen actively
5. Share your story, experience and point of view
6. Respectfully ask questions to gain a better understanding
7. Stay on topic
8. Respect each other's time. If you would like to discuss the topic more, take the opportunity to stay after the meeting and share your ideas with the staff team
9. The goal is not to agree, it is to gain a deeper understanding of the issues and opportunities

Thank you

The Capital Regional District and the Regional District of Nanaimo would like to acknowledge and extend thanks to the many Canadian communities and organizations from which we drew inspiration, ideas, and best practices during the development of this Framework.

Four local governments came together originally in 2019 to develop an engagement framework and toolkit that would establish a common language and approach to engagement efforts and provide practical tools for our respective staff and communities to engage in a meaningful way. We continue to build upon this foundation.

We would also like to thank the many diversity, inclusion, accessibility and equity seeking groups that have shared their experience and knowledge with the world to help us create resources to respond to the diverse and underrepresented needs of our communities. We acknowledge that there is more work to be done as an organization and are committed to continuous learning and improvement. We strive to foster an environment where every individual feels heard, valued, and respected, and we recognize the importance of listening and engaging further to guide our actions and policies.

Appendix D

Making a difference...together

PUBLIC ENGAGEMENT

Toolkit

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Public Engagement Toolkit

WHY IS AN ENGAGEMENT TOOLKIT IMPORTANT

An engagement toolkit establishes a consistent approach to our public engagement efforts. It helps ensure that our staff and consultants are coordinated and proactive in their engagement approach, providing a more seamless and predictable experience for our residents.

This toolkit is inspired and informed by best practices and lessons learned across the public sector. The toolkit includes templates and tools that will help us build organizational capacity for more effective public engagement and two way conversation with our community.

It's important to remember that proper public engagement takes time and dedication. This toolkit is to help guide you through your engagement planning process, and the steps that are mandatory are also noted. Before conducting or developing any public engagement process, please review and become familiar with the CRD Public Engagement Policy and Framework.

CRD PUBLIC ENGAGEMENT POLICY

PUBLIC ENGAGEMENT FRAMEWORK

Planning for Success: How We Engage

A successful public engagement process involves six key steps:

This toolkit has a variety of resources and materials for each step.

Plan

1. Determining Scope
2. Roles and Responsibilities
3. Identification of Interested and Affected People

Design

4. Engagement Techniques & Tools
5. Removing Barriers
6. Key Messaging
7. Privacy Considerations
8. Budgeting for Effective Public Engagement
9. Engagement Plan Template

Evaluate

21. Feedback and Evaluation Forms

Promote

10. Social Media
11. Media and Emails
12. Creating Your Project Web Page
13. Writing Style Guide

Close the Loop

19. Reporting on Public Engagement Efforts
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Connect

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17. Facilitation Tips and Checklist
18. Survey Design

APPROVED POLICIES

- Corporate Communications Policy
- Public Engagement Policy

STEP	ACTIVITIES	APPROXIMATE TIME NEEDED
Plan	• Assess the need for engagement or determine the level of community impact • Determine engagement objectives • Identify Interested and affected people and groups • Consult with First Nations Relations and Privacy Office for advice and direction on any parallel First Nations engagement process • Determine staff involvement and approvals required	**5-10% of overall project schedule** **Very early on, before project begins**
Design	• Determine the strategy • Choose techniques and tools for promotion and engagement • Develop key messages • Create an engagement plan for approval * • Complete Privacy Impact Assessment *	**25% of overall project schedule**
Promote	• Tell your story • Invite participation	**20% of overall project schedule** **Provide minimum two weeks' notice for events**
Connect	• Implement engagement methods • Gather input • Facilitate and manage events	**25% of overall project schedule**
Close the loop	• Create a What We Heard Engagement Summary * • Report to decision-makers what we heard; determine whether additional engagement is required. • Report to participants what we heard and next steps in the project.	**10-15% of overall project schedule** **Aim to close the loop within 30 days of concluding engagement phase or process.**
Evaluate	• Evaluate the engagement process to determine what worked well, what didn't and what changes or if further engagement might be needed. • Reflect on lessons learned that can inform future engagement.	**10% of overall project schedule** **Complete soon after engagement is complete while fresh in your mind.**

*Required deliverable as part of the process

Plan

1. Determining Scope

These questions are prompts to guide discussions, or to prepare an initial engagement scope. They will then inform the engagement plan template.

- What is the decision to be made?
- Which departments need to be aware/involved in the process?
- What elements of the decision can be informed by public input? What cannot be influenced? Refer to the decision tree in the Framework.
- What does “success” or meaningful public engagement look like?
- How will we know if we have been successful?
- Who is affected by the decision being made?
- What is the potential impact or interest each interested group will have in the decision?
- What information will those affected or interested need to participate?
- What is our historical relationship with interested people and groups? What has our previous experience been?
- How do they receive information?
- How do they like to provide input?
- What risks are involved? How can we mitigate those risks?
- What opportunities exist? How can we best take advantage of the opportunities?
- How much time is needed to facilitate public engagement? (e.g. notification, invitation, events, data analysis, reporting)
- Have we allocated budget for public engagement efforts? (e.g. advertising, venue rental, catering, print and display materials, overtime, consulting fees)
- What other issues or topics could come up in this conversation?
- Are there opportunities to integrate other questions or issues in the same engagement process?
- Is a separate First Nations engagement process required, and if so what is the sequencing? Talk to First Nations Relations.

The 2024 Resident Survey found that only 12% of residents feel well-informed about CRD’s decision-making process, while 49% report being slightly or not at all informed. Make sure you plan to explain the process as well as the decision to be made.

When planning for participation, consider ways to make participation more equitable:

- What engagement tools and approaches would make participation more equitable and resonate with interested people and groups?
- What barriers may prevent participation from under-represented voices and how might those barriers be overcome?
- How are you including the voices and perspectives of diverse people as part of the process? What groups of people are impacted by this initiative? Why would they benefit from knowing about the initiative or process?
- Whose voices or perspectives have you not heard from, and why? What are potential barriers to participation and how will you identify and address them?
- How will this program, service or initiative differently affect individuals and communities, in relation to different aspects of their identities?
- Consider: race, ethnicity, colour, ancestry, place of origin, political belief, religion, marital status, family status, physical disability, mental disability, sex, gender identity or expression, sexual orientation, age, class, socioeconomic status, and any other relevant aspects of identity.

When thinking about when best to engage, there are certain things to consider:

- Look for existing opportunities to engage your audience (e.g. regular meetings)
- Think about times/events where there are many people in one place (e.g. festivals)
- Prioritize your audience's convenience over your own
- Seek out a representative amongst your selected public and ask them for advice
- Avoid busy times and vacation seasons, long weekends, religious holidays, and spring break
- Provide plenty of notice to potential participants, at minimum two weeks
- Pay attention to what other regional district, community events and engagement activities are occurring
- What religious, cultural or dates of significance are happening for the community or groups you are engaging with?

2. Roles and Responsibilities

Project leads play a critical role when it comes to ensuring the public's voices are heard, valued, and considered in CRD decisions. This includes identifying early on what type of support you will need as well as viewing public engagement as an integrated part of your overall project rather than a separate component. Reach out to the Corporate Communications & Engagement team early on to share project information and assess resources needed internally and externally. Refer to the roles and responsibilities chart to help inform your project charter.

ROLES & RESPONSIBILITIES CHART

3. Identification of Interested and Affected People

There are a variety of people or organizations that might be affected or interested in the decision or project at hand.

It is important to remember that any issue or decision affects different people in different ways. Anticipating the various people that might be interested or affected helps inform project planning, including information needs and determines which engagement techniques might be considered.

Connect with the First Nations Relations division to confirm the resources and approach you need to have in place beyond the public engagement process. Get advice well before launching a public engagement process to ensure consistency with the CRD Statement of Reconciliation, relevant legislation and government-to-government agreements in place with First Nations.

When identifying who we need to hear from, there are several important questions to consider:

- Who is directly impacted by the decision?
- Who may be indirectly impacted?
- Who might be impacted but we don't typically hear from?
- Who has the influence to enable or inhibit the decision?
- Who are important perspectives or networks to engage in the process?

Individuals: (Examples)

- Residents (various socioeconomic, cultural, geographic locations, gender, age, household compositions)
- Indigenous people — if identified, customized plan needs creating
- Cyclists
- Motorists
- New immigrants
- Parents of school-aged children
- Persons with physical, cognitive or sensory barriers
- Pet Owners
- Property owners
- Renters
- Seniors
- Visitors
- Youth

Business and Economic Groups (Examples)

- Business owners
- Employees and employee groups
- Industry groups
- Business associations
- Development associations
- Chamber of Commerce
- Colleges and Universities
- Large employers

Government Bodies (Examples)

- Ambulance
- BC Transit
- Coast Guard
- Emergency Management
- Federal Government
- Fire services
- First Nations — if identified, create a customized plan
- Health Agencies
- Neighbouring municipalities
- Police
- Provincial Government
- School Districts
- Social service providers

Community and Advocacy (Examples)

- 2SLGBTQI+ groups
- Arts groups
- Environmental groups
- Ethnic groups
- Heritage Groups
- Neighbourhood or Community Associations
- Special event organizers
- Sports and recreation groups
- Sports associations
- Support groups for people with disabilities
- Transportation groups (cycling, accessibility, walking, taxi association)

Underrepresented Voices

Historically there are voices within our community that have been underrepresented in public engagement and decision-making. We continue to listen and learn to the needs and preferences of individuals and groups to continually inform and adapt our engagement methods. We are committed to applying what we learn to our policies, training and the language we use.

We all have a role and responsibility for removing barriers from our public engagement methods to be inclusive and accessible to all. Underrepresented voices may include the following and others:

- Immigrants
- Refugees
- People on Low Income and Renters
- People with Disabilities
- Youth
- Indigenous People
- Racialized People
- 2SLGBTQI+

Words Matter

Inclusive language is free from prejudice, stereotypes and discrimination. Learn more about appropriate language that empowers and respects all participants from the **Government of BC**.

Diversity, Equity and Inclusion in Public Engagement

Key Terms

It's important to recognize that the meaning of terms can vary between contexts and communities, and words carry embedded assumptions and histories.
Being transparent about how one defines and uses terms helps to build shared understanding and identify differences in perspectives. The following definitions can be used to create a common understanding of the meaning of the terms equity, diversity, inclusion and accessibility as part of public engagement initiatives.

Diversity refers to the variety of unique dimensions, qualities, characteristics that an individual possesses, and the mix that occurs in a community or a group of people. Diversity includes factors such as race, ethnicity, language, age, gender identity and expression, sexual orientation, culture, religion, belief system, marital and family status, socioeconomic status, physical and intellectual abilities, mental health, work status, life experiences and thinking style.

Inclusion means to involve people who reflect the demographic, attitudinal and experiential diversity of the communities that may be impacted by a decision. Inclusive public engagement nurtures a sense of welcome, belonging, recognition and safety for all people, where diverse perspectives and ways of life are valued and respected.

Accessibility exists when all members of the communities impacted by a decision can access and fully participate in the engagement space and processes. Accessibility is about removing barriers and increasing inclusion and independence for everyone, especially people with disabilities. Barriers can be caused by environments, attitudes, practices, policies, information, communication or technologies, and be affected by intersecting forms of discrimination.

Equity exists when resources and opportunities for participation are distributed in a manner that responds to historic and ongoing disadvantages faced by marginalized groups. Equitable public engagement provides mutually beneficial opportunities for people to contribute and is mindful of power and privilege within engagement processes, institutions and broader systems. Equity is about treating people according to their diverse needs in a way that enables all people to participate, perform and engage to the same extent. Whereas equality treats everyone as the same, equity treats people differently dependent on need, circumstance and consideration of historical and systemic barriers to power and access.

Marginalized is a term used to describe groups of people who face historic and/or ongoing barriers to participating in the civic sphere due to socioeconomic inequities, lack of political rights or recognition, or other forms of oppression, discrimination or persecution. Some marginalized groups that have historically been under-represented in democratic processes and leadership include Indigenous Peoples, people of colour, women, gender non-binary individuals, LGBTQ2S+ individuals, people with disabilities, youth, seniors, immigrants and refugees, people with drug or alcohol dependencies and people from lower socioeconomic backgrounds and levels of education. Other common terms to describe marginalized groups include priority, vulnerable, targeted, hard to reach, disadvantaged, under-served, disenfranchised, disempowered, underprivileged, at-risk or high-risk. Different groups or individuals may have varying associations and preferences between these terms.

TAILORING YOUR EFFORTS

Needs of Interested and Affected People and Groups

It's important to anticipate the information interested and affected people and groups will need and determine how best to engage them in the process. There are several questions that will assist in understanding where they are starting from:

- What do they care most about?
- What are they most concerned about?
- Have they engaged in the past?
- What was the experience?
- What barriers may exist to their engagement?
- How do they receive information?
- How have they typically provided input or participated in the past?

The table on page 10 outlines an example of how you might anticipate the needs and corresponding engagement activities to ensure they are aware of opportunities; have the information they need to participate fully and that activities are designed to meet their needs. This can be a useful tool when developing an engagement plan and when reporting back on how specific interested people and groups were engaged.

Examples of how efforts can be tailored

Interested and Affected People or Group	Interests	Desired information	Engagement activities
General	All services provided Services not provided but thought to be All projects and initiatives	Background reports Recent data Board decisions Visuals of proposed options Tax impact/fee impact Key policies Engagement approach	Website Letter of invitation or awareness Article submitted to their newsletter/website Online survey and/or in-person event Presentation at an upcoming meeting Clear point of contact and more than one way to contact Social media Media
Neighbourhood/Community Association	Land-use Changes in neighbourhood Costs to taxpayers Neighbourhood involvement Timing of proposed changes Capital projects Nearby parks	Tax impact Neighbourhood benefits Design features/amenities	Direct invitation to President to participate In-person or online event Booth at a neighbourhood market Posters or signage in neighbourhood
Business Owners	Economic vitality Changes to business district Tax rates Timing of proposed changed Land-use Construction impacts	Rate schedules Approved policies	In-person visit from key staff to affected businesses Presentation to business association or Chamber of Commerce
Not for-Profit Sports Associations	Sports facilities Rental rates Recreational program or policy changes	Accessibility Service fees/costs	Interactive pop-up event at sporting event Signage promoting web survey in sporting facilities

RELATIONSHIP MAPPING

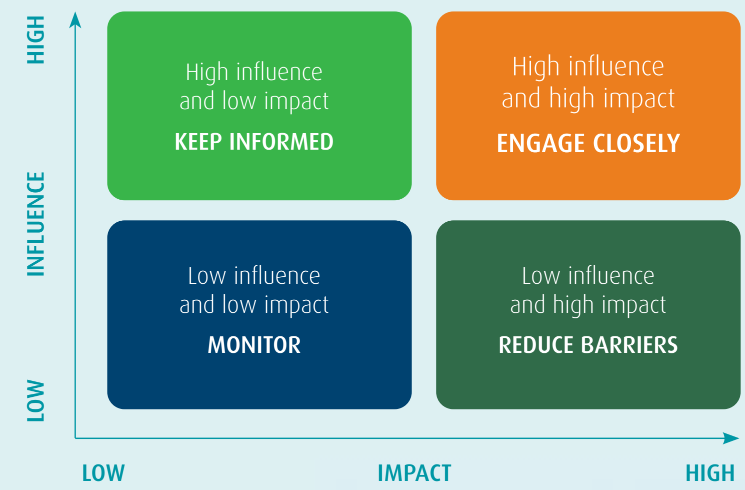
Once you have identified potential interested people and groups, it is important to anticipate how people or organizations might be impacted or interested in a decision.

A mapping exercise involves gathering key project staff and contacts to help identify the impacts and influence of people and groups. The placement of interested and affected people and groups within the four quadrants will inform strategies tailored to each interest's needs.

1. Create the matrix noted on this page on a wall or a large table-top piece of paper.
2. Brainstorm all the groups who might be involved or interested in your decision or project. Write their names on sticky notes (one note per name).
3. Place the sticky notes on the matrix, considering both their level of influence (low to high) and the level of impact the decision or project may have on them (low or high).

Decide how best to meet the needs of those identified based on their level of impacts and influence.

Relationship Mapping Matrix



SOURCE: Consultation Institute

4. Engagement Techniques & Tools

The IAP2 spectrum helps determine the level of engagement a decision or project requires and helps establish clear objectives and commitments for how public input will affect the decision. The spectrum increases the level of engagement from left to right, with increasing expectations of public impact, participation, and costs as you move to the right towards empower. The tools and techniques are determined by the public participation goal or objective. It will be expected that you inform at minimum throughout the project.

	Inform	Consult	Involve	Collaborate	Empower
Public Participation Goal	To provide the public with balanced and objective information to assist them in understanding the problems, alternatives and/or solutions.	To obtain public feedback on analysis, alternatives and/or decision.	To work directly with the public throughout the process to ensure that public issues and concerns are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision-making in the hands of the public.
Promise to the Public	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and issues are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for direct advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.
Example Tools	• Fact sheets • Websites • Information sessions	• Public comment • Focus groups • Surveys • Public meetings	• Workshops • Deliberate polling	• Citizen Advisory • Committees • Consensus building • Participatory • Decision-making	• Citizen juries • Ballots • Referenda

ENGAGEMENT TOOLS TO CONSIDER

Tool	IAP2 Spectrum	Description
Social media • Facebook • Instagram • LinkedIn	Inform	Social media helps connect information with people. Social media is an immediate way to share information with large numbers of people and provide information that can be easily shared by others. Social media is another way of monitoring public commentary and assessing or responding to misinformation.
Information display at a community event or gathering place	Inform	A display where project information is available, and questions can be asked of staff.
Promotional video	Inform	Short videos suitable for online distribution. They can be used to educate, inform or promote.
Media/News Release	Inform	Used to inform media of a project and upcoming engagement opportunities.
Fact Sheets/FAQs	Inform	Provide commonly requested information about a particular issue or project, usually 1-2 pages and available online or in print. Can be updated as the project advances, based on questions the public have.
E-newsletter	Inform	Community members and interested groups can sign up to Get Involved CRD project page to receive updates and stay informed about projects.
Online Engagement platform **Get Involved CRD**	Inform - Involve	Create an online space for your project with easy access to information related to engagement topic and feedback opportunity. Interactive features to provide input and ask questions [e.g. Q+A, survey, polls, discussion forums, interactive maps etc.] Level of engagement is determined by the interactive methods utilized.
Presentation	Inform	Offering informative presentations throughout the community can build relationships and share project information. Other tools and methods would need to be used to collect input.
Information Session	Inform	An advertised in-person event where residents can learn more about the topic, including background, process and decision to be made. Staff and technical experts are available to answer questions. May or may not include a presentation, and if so should be communicated.

Continued...

Tool	IAP2 Spectrum	Description
Online Information Session	Inform	An advertised virtual event where residents can learn more about the topic, including background, process and decision to be made. Staff and technical experts are available to answer questions. May or may not include a presentation, and if so should be communicated.
Surveys (Telephone, mail-in, online)	Consult	Use to obtain data on opinions, concerns, issues, satisfaction levels. Review the CRD survey guide before drafting your survey.
Focus groups	Consult	Small, often representative or specifically selected group that are facilitated to test ideas or messages and gauge perceptions and opinions. Can be facilitated in-person or online.
“Pop-up” event	Consult	Provide a temporary physical presence and a way to reach your audience directly. They can educate, raise awareness, and create an opportunity to ask questions of staff or provide feedback. May or may not be advertised.
In-person open house	Consult	An advertised in-person event where residents can learn more about the topic, including background, process and decision to be made. Staff and technical experts are available to answer questions, and feedback can be collected through 1:1 discussion, surveys, interactive display boards or stations. May or may not include a presentation, and if so should be communicated.
Online Open House	Consult	An advertised online opportunity where residents can learn more about the topic, including background, process and decision to be made. Staff present materials and plans and participants have opportunity to ask questions/provide input through interactive features [e.g. Q+A, chat, survey, virtual sticky walls]. May incorporate other technology or software to facilitate conversations.
Community meeting	Consult	Attending/presenting at meetings organized by a local community group, business, sector or industry interests. Is an opportunity to make presentation, answer questions and depending on their format, potentially an opportunity to pose specific questions to attendees to provide input. Format should be confirmed with organizer prior to attending.
Site visit/tours	Consult	Tours of an area or project site led by a project manager or another well informed employee or consultant, for interested people and groups, community members, media and elected officials to gain a greater understanding of issues and implications. Attendees can ask questions and provide input verbally, feedback form, roundtable introductions and closing remarks. Site tours are often used to educate and other input methods [e.g. surveys] are used to capture deeper input.

Continued...

Tool	IAP2 Spectrum	Description
Public hearing	Consult	Official meetings where individuals or groups are invited to share their views on an agenda item. Typically, a formal meeting with legislated requirements. Used to satisfy regulatory requirements such as bylaw readings and land-use matters. Dialogue is time-limited, and comments are recorded.
In-person Workshop	Involve	A facilitated session to discuss a particular topic. May involve multiple speakers and multiple aspects of the topic results in recommendations or potential solutions. Requires facilitator[s] to moderate overall agenda and group/table discussion. Attendees can provide input that is captured through group discussion, flipcharts, interactive exercises, and/or graphic facilitation.
Online workshop	Involve	A facilitated online session to discuss a particular topic. May involve multiple speakers, breakout rooms and multiple aspects of the topic and results in recommendations or potential solutions. Requires facilitator[s] to moderate overall agenda and breakout rooms. Attendees can provide input – through breakout rooms, interactive documents, comments in chats, virtual sticky walls, etc.
Design charrettes [online or in-person]	Involve	Charrettes are designed to encourage the participation of all. It is an intensive planning session where residents, designers and others collaborate on a vision for development. It provides a forum for ideas and offers the unique advantage of giving immediate feedback to the designers. More importantly, it allows everyone who participates to be a mutual author of the plan. Input is captured through group dialogue, written comments on sticky notes, illustrations, and flip charts.
World Cafes	Involve	An informal conversational process intended to facilitate open and intimate discussion around a certain topic. Working off predetermined questions, participants change tables during the process and focus on identifying common ground in response to each question. Input is captured through flip charts, sticky notes and large group dialogue.
Deliberative polling	Involve	A random, representative sample is first polled on a targeted issue. After this baseline poll, members of the sample are invited to gather at a single place for a day to discuss the issues.
Advisory committee	Collaborate	A group of interested people or representatives of interested groups that provide input on a project or initiative. Requires staff support for terms of reference, selection, meeting agenda and minutes and reporting purposes. Input can be collected through meeting minutes, roundtable discussion and breakout exercises with flip charts.

Continued...

Tool	IAP2 Spectrum	Description
Task force	Collaborate	A group of interested people or representatives of interested groups with Terms of Reference and a limited timeline that provide input on a specific project or issue. Requires staff support for terms of reference, selection, meeting agenda and minutes and reporting purposes. Input is collected through in-depth two-way dialogue, formal recommendations, and meeting minutes. Group methods might be utilized to encourage dialogue and facilitate gathering feedback and recommendations.
Open space meeting	Collaborate	A participant led discussion ideal for encouraging participants to gain ownership of an issue and come up with solutions. Participants agree on the areas of discussion that have importance for them and then take responsibility for facilitating the sessions. Group methods might be utilized to encourage dialogue and facilitate gathering feedback and recommendations.
Participatory decision making	Collaborate	Several interested people (residents, staff, experts, etc.) come together to find a common ground or consensus on a solution that will benefit everyone. In a participative decision-making process, everyone has an opportunity to share their perspectives, voice their ideas and tap their skills to improve team effectiveness and efficiency. The participants determine the result, and it is implemented.
Alternative approval process [AAP]	Empower	Local governments can obtain elector approval through an Alternative Approval Process [AAP]. Information about the issue or opportunity should be provided. Electors then have at least 30 days to sign and submit a response form to the regional district. When 10% or more of eligible electors' sign and submit a response form during an AAP, a local government can proceed to referendum or put the matter on hold and develop alternatives for consideration.
Referendum	Empower	The official choice in response to a specific question made by casting a ballot.
Voting	Empower	The official choice made in an election by selecting candidates on a ballot.

5. Removing Barriers to Engagement

Inclusive engagement is about building strong and sustainable relationships within your community. One of the key components to making public engagement processes responsive, inclusive, and culturally appropriate is building the capacity of staff to understand the implications of age, gender, race, culture, and socio-economic status on public process.

Effective public engagement takes careful planning and acknowledgement that each population that we work with is a unique opportunity to broaden our understanding of what makes a community, and we have a responsibility to seek out underrepresented voices that may be affected by decisions.

1. **Build personal and organizational relationships with people within your region, including marginalized and equity-seeking groups.**
   - Are there key individuals or groups you already have or should be building a relationship with?
   - Is there someone else in the organization who already has these relationships?
2. **Consult the religious, cultural and dates of significance calendar when selecting your engagement dates.**
   - Are there events or occasions that may prevent participation?
3. **Provide pre-registration opportunities that identify accessibility needs of attendees.**
4. **Create a welcoming atmosphere.**
   - Does your process reflect, honour, and welcome all members of the community?
   - Do the venues you choose invite participation and engagement?
     - Choose gathering places that are comfortable and that are conducive to the interactions that you want to have.
     - Choose technology that is accessible to all, or alternate ways for providing input.

Common barriers to participation:

- Lack of awareness
- Transportation
- Language
- Childcare
- Lack of trust
- Day or time of day
- Technology
- Accessibility

Insights about engagement with CRD public activities - from the 2024 Resident Survey

- Awareness is the primary barrier (63.7%)
- Trust/value perception issues (22.4%) indicate communication gap
- Time constraints (21.6%) suggest need for flexible engagement option
- Multiple barriers often overlap, requiring multi-faceted solutions

5. **Increase accessibility.**

- Is the venue accessible to people with physical disabilities?
- Is the venue accessible from various modes of transportation (buses, cyclists, pedestrians, etc.) and offers adequate parking?
- Is the technology accessible and commonly used by those participating?
- Do the online tools offer captions and transcription for those who may be deaf or hard of hearing?
- Do the images online include descriptions which can be read by screen readers for those who are visually impaired?
- Are there other barriers or issues that should be considered?
    - Language [e.g. low language ability, literacy]
    - Time of day/day of the week
    - Childcare
    - Power dynamics between and within community groups
    - Food/environmental allergies

6. **Develop alternative methods of engagement.**

- Do you offer multiple ways for contributing input and feedback? [e.g. online and in-person methods, hard copy of online survey option]

7. **Maintain a presence with the community.**

- Are there community events that you can participate in that people will already be gathering for?
- Are there opportunities for you to meet community members and build relationships?

8. **Partner with diverse organizations and agencies.**

- Are there organizations that have relationships with the people or communities you are looking to reach that you can connect with (remember to consider power dynamics)?

Things to Think About

- What language, images or messages associated with this program, service or initiative could be used to cultivate inclusion?
- Are there any language, images or messages that reinforce stereotyped narratives or dominant cultural norms? If so, how will these be assessed and remediated?
- Is there a need for communications materials (i.e. safety information, posters, brochures, etc.) to be translated into languages other than English?
- What accessibility considerations need to be addressed to ensure equitable access to information and events for all people?

6. Developing Key Messaging

Consistent and plain language messages are critical to the success of the process. This information will help encourage the public to take interest and participate in the decision-making process and will be used to guide media interviews, social media, speaking remarks, and print materials.

Clear	Present the information in accessible, plain language and use visuals to support understanding where possible, and at an easy-to-understand, Grade 8 reading level.
Concise	Use brief, bulleted lists for quick understanding instead of wordy paragraphs.
Concrete	Convey factual information in a straightforward manner. Avoid speculation and take care to remove any bias.
Correct	Fact-check your copy carefully to ensure the information is accurate.
Coherent	Eliminate wordiness and technical jargon.
Complete	Check with people in other departments to ensure you have not missed key information.
Courteous	Be respectful of the time and effort participants are giving. All points of view are valuable.

KEY MESSAGE ELEMENTS

- Develop three to five key messages
- Keep sentences short and create stand-alone sentences — provides less opportunity for the information to be taken out of context
- The basic elements of messaging should include the elements of the 5 W's and H: Who, What, When, Where, Why and How.
- Provide context that compels the listener to care or want to learn more
- Reference where the strategic direction or context has come from (e.g. Regional Growth Strategy, Strategic Priorities, Master Plan, Financial Plan, etc.)

KEY MESSAGE TIPS

- Use simple words, avoid jargon or buzzwords
- Avoid qualifiers such as "I think," "I believe," "I feel," and "I hope" – makes the speaker sound uncertain
- Use active language, not passive
- Use words that help paint a picture in the listener's mind
- Avoid references to internal terminology such as projects, process and programs
- Identify a few keys facts or data that support your key messages
- Use language that is inclusive and appropriate

KEY MESSAGE EXAMPLES

Key messages will summarize the key components of the decision/opportunity: the timeline, who makes the decision and how the public can get involved.

Decision/Opportunity The regional district is considering options for upgrading a recreation facility and is seeking the public's input to inform their decision.

Who The Capital Regional District's recreation commission is planning for the future as our community grows and changes.

What The recreation centre requires significant investment to repair the building and continue to serve the needs of the community. The area has grown and changed over the years, so it's important to hear from residents about what is important to them when planning for future investment.

When The recreation commission will decide how to proceed with improvements to the facility as part of its capital planning process this fall.

Where To learn more, complete an online survey, and find details for the upcoming information session at getinvolved.crd.bc.ca

Why Recreation facilities and programs support the health and well-being of our community. They create safe and affordable spaces to bring the community together. This facility has served generations of families in this area and as community needs change, facilities must also change.

How The commission will have several considerations when deciding how to proceed. They will have to consider the condition of the building, overall community needs, affordability, and the input of facility patrons.

7. Privacy Considerations

When we design public engagement activities, we will most likely be planning to collect personal information from participants. This could include information such as names, contact details, opinions, demographic information, or even videos and photographs.

It's important to protect this information to respect individuals' privacy rights under the Freedom of Information and Protection of Privacy Act (FOIPPA). This includes:

- Using the correct tools
- Determining if you need to ask specific questions or collect input
- Determining what you will do with information once it is collected

Gathering input of any kind requires a privacy impact assessment. A standardized template for use of the engagement platform is available to streamline this process.

PIA CHECKLIST

Building privacy protections into the design of all CRD public participation initiatives helps ensure that people feel safe participating and that their information is handled responsibly. It also helps prevent misuse, accidental sharing, or loss of sensitive data.

Considering privacy from the start—sometimes called "privacy by design"—is a best practice that builds trust and reduces risk for both the public and the CRD. To do this effectively, it's important to connect early with the Privacy and Information Services team. They can help identify potential risks, recommend safeguards, and make sure that personal information is collected, used, and stored properly.

8. Budgeting for Effective Public Engagement

It is important to anticipate the costs associated with engaging the public and these should be outlined within the overall project budget. Also, recognize that when engagement efforts have not been funded appropriately there is risk to the overall project. Less than adequate engagement can potentially result in higher costs overall if there are delays or additional engagement is required.

Consult with the First Nations Relations team on estimating budget required specific to any First Nations engagement process early on and ahead of setting your public engagement budget.

Reflecting on the IAP2 spectrum, the more intensive the engagement promise is, the higher the cost to implement. These costs should be included in the engagement plan.

Potential Costs

Consultants/Contractors (if required)
Public engagement consultant, Communications consultant

Data gathering
Public opinion polls/surveys, Online surveys, Facilitator(s), Focus group

Technical requirements
Computer analysis, AV Equipment (podium, screens, speakers, laptop set-up and rental), Captioning [if required]

Logistics
Venue, Refreshments, Security/Parking attendants, Tables and chairs, Interpretation/Translation, Insurance, Assistive hearing devices, described audio, and accessible outdoor surfaces, Transportation [if required]

Communications
Graphic design [layout of posters, digital ads, display boards etc.], Print advertising, Online advertising, Website development and maintenance, Web-casting sessions, Print materials, Presentation materials, Signage, Professional photography/videography

INTERNAL RESOURCES

Staff resourcing [estimated hours/weeks]
Special event costs (overtime or callouts for set-up, deliveries, take down)
Additional internal consulting costs

9. Engagement Plan Template

Once a problem or opportunity requiring public awareness or participation has been defined a detailed engagement plan should be developed to outline all elements of the process. Having information contained in one location creates a quick point of reference and ensures that all aspects of public engagement have been considered. This is intended to be the internal playbook and contain all things to be considered, done and by whom.

ENGAGEMENT PLAN TEMPLATE

Engagement Plan Highlights

Prepare an Engagement Highlights Summary to share with the Board as part of a staff report then with participants by posting it on the project web page. Details can be cut and pasted from the internal engagement plan for consistency.

ENGAGEMENT HIGHLIGHTS TEMPLATE

Engagement Approvals

An approved engagement plan is mandatory for all projects requiring public engagement. In addition, specific communication deliverables such as media releases and engagement deliverables such as surveys have an internal review and approval process. Review the Approval Guidelines to help inform your work plan and timelines.

APPROVAL GUIDELINES

Promote

10. Social Media

Social media can be a powerful, efficient, and cost-effective way to engage and inform the community. Through short, visual messages, the public can stay informed about the projects and issues that matter most to them, and they can share the information with their networks.

Tips for posting

- Be consistent
  - Tone of voice (friendly and informative)
  - Use interesting, colourful, or clever visuals (video or images)
- Focus your messaging
- Determine which hashtags will help reinforce or share your message
- Measure and analyze results through analytics, comments and shares
- Share information that is related or reinforcing of your messaging

Corporate Communications & Engagement is responsible for preparing and posting content to the CRD's social media channels.

11. Media and Emails

Liaise with Corporate Communications & Engagement to announce the beginning of your initiative and how to get involved. This typically includes a media release and an email to subscribers who have signed up for news and/or engagement updates for each community impacted by your initiative.

The 2024 Resident Survey revealed the following insights:

- Email dominates as the preferred communication method at 67.9%, followed by text messaging at 43.8%, indicating strong preference for direct digital contact.
- Traditional media channels maintain significant relevance, with radio (36.6%), newspaper (29.9%), and television (26.9%) reaching substantial audiences.

12. Creating Your Project Web Page

Keep the audience you are writing for top of mind as you prepare content for the Get Involved platform. What you're writing should be like a conversation with a friend.

Write the way you speak

- This is a common rule in web writing. The content that you create should be like a conversation between two people. Stuffy language can get in the way.
- One of the easiest ways to write as you talk is with contractions. People talk in contractions — like can't and don't — and using them helps people relate to what you're writing. The important thing to remember, though, is not to overuse them. Only use them when they sound natural.
- Remember to use the active voice. For example, instead of writing, "The bill should be paid by the property owner," we would write, "The property owner pays the bill." It's much simpler and more direct.

Be short and to the point

- If a headline is longer than 11 words, it's probably too long. Use full names and titles in headlines.
- Paragraphs should be two to three sentences at most.
- Aim for a sentence length of 15 to 20 words. For example: "Perhaps more important than firefighting itself in many modern industrial countries is fire prevention," could just be: "Fire prevention is important."
- Keeping things brief can also increase readability and make the site more user-friendly for people using smartphones or tablets.
- Break information into 'chunks' by using shorter paragraphs, bulleted lists, and headings to break up text and indicate a structure for those scanning the page. This will also help people using screen readers.

Jargon and government legalese

- We should be writing to the person with the least amount of knowledge on the topic.
- Don't be afraid to say "we" instead of "The District." Instead of "residents" or "applicants," consider saying "you."

Run-on sentences and multiple commas in a sentence

Use periods where you can, it will help a reader digest the content.

Words like "may" and "shall"

- When something needs to be done to complete a task, make sure a resident knows by using strong words like "must."

Acronyms

- A web page shouldn't require a glossary of terms or a legend for acronyms. Spell out what you're talking about in detail.

Symbols

- While symbols — like "&" and "@" — can shorten your text, it is better to spell out what you're writing. Symbols like these will only confuse your readers, especially those who may be learning English as a second language.

Visuals

- Visuals should add value to the text, helping communicate complex concepts and reduce the amount of text required.
- Videos, photos, charts and diagrams can increase accessibility for those with literacy or language barriers making the information more universally understood.
- Always include "alternative text" to convey the meaning and context of a visual.

Repetition

- If the full title of person or place has been used already as a first reference on the page, we don't have to repeat that full title. "Board Chair Jane Doe" would simply become "the Chair" later on the page.

Refer to the corporate writing style guide and graphic standards to ensure our materials are consistent.

13. Writing Style Guide

We are committed to creating content that empowers, educates, and guides our residents. We can achieve this by making our messaging clear, relevant, interesting, and engaging.

Only experts can make what's difficult look easy, and it's our job to demystify topics and educate.

Define technical terms in plain language and ensure you have provided enough information on the topic before asking them for input.

Use short sentences as much as possible and keep it to one thought per paragraph. Brevity is key! This can also help readability and make the information more digestible for people using mobile devices.

Canadian Press Style Guide

Media and communications materials, including media releases, follow the writing standards outlined in the Canadian Press (CP) Style Guide. The *CP Style Guide* is updated routinely by the Canadian Press and is followed by media and most public sector agencies to ensure consistent written style and formats. A hard copy is available from Corporate Communications & Engagement.

WRITING STYLE GUIDE

Connect

14. First Nations Territorial Acknowledgement

Acknowledging the traditional territory or land in which we work is a way to pay respect to First Nations people who were here before settlers, and to educate and remind us all of the long-standing relationship First Nations have with the land and waters where we have come to be. It encourages us to learn more about the people whose lands we live on, wherever we come from, and to learn more about our history and relationships. It is also a reminder that we are all responsible for these relationships.

An acknowledgement is recommended at the commencement of CRD hosted events, ceremonies or gatherings, or for formal greetings or remarks. We can also use this acknowledgement any time we come together as staff colleagues.

The following acknowledgement is provided as a starting point to speak to at the commencement of a CRD-hosted event or workshop and should be done mindfully as a way to learn about the Territories and Nations you are acknowledging. If possible, find a way to say something about why this matters to you personally or how it connects to the work.

The CRD conducts its business within the Territories of many First Nations, including but not limited to BOḰEĆEN (Pauquachin), MÁLEXEȽ (Malahat), paaʔčiidʔatx̣ (Pacheedaht), Spune'luxutth (Penelakut), Sc'ianew (Beecher Bay), Songhees, SȾÁUTW̱ (Tsawout), T'Sou-ke, W̱JOȽEȽP (Tsartlip), W̱SIḴEM (Tseycum), and xʷsepsum (Kosapsum) Nations, all of whom have a long-standing relationship with the land and waters from time immemorial that continues to this day.

When hosting a larger community event or official opening, it may be appropriate to request a local Elder to do a welcome to the territory in accordance with protocol. Reach out to the First Nations Relations division for support with this.

It's also important that you clarify up front that First Nations engagement may be occurring through a separate and distinct process. This helps ensure transparency and respect for parallel engagement efforts. Before your session, please check with the First Nations Relations (FNR) team to confirm whether a separate engagement process is underway.

Writing guidelines

Specific style standards in the CRD Writing Style Guide pertaining to First Nations Relations are presented in Section 13.2, First Nation as Government.

As appropriate, use First Nation or Nation. It is becoming more common for communities to prefer Nation over First Nation. Some Nations emphatically do not like to be referred to as a First Nation. Therefore, when referencing the two neighbouring Nations: "met with Songhees and xʷsepsum (Kosapsum) Nations" or "met with Songhees Nation and xʷsepsum (Kosapsum) Nation". Use the Nation's preferred language, spelling, capitalization, and pronunciation.

First Nations are an order of government on par with the Crown. When listing agencies and institutions, First Nations should be referenced either before or immediately after the federal government. "The CRD has partnered with First Nations, federal, provincial and local government to..."

Additionally, when writing and speaking, Indigenous Peoples can be used interchangeably with First Nations, although it is preferable to speak to the specific Nation when possible. Indigenous is appropriate when speaking of urban diaspora communities and when many different nations are included, ie. CBC Indigenous. Indigenous is generally capitalized when used in this context.

15. In-person Event Checklist

When determining whether to have an in-person or virtual meeting, several elements should be considered. If the meeting requires deep collaboration, brainstorming, or relationship-building, an in-person meeting may be more effective. Conversely, if the meeting is primarily informational, or if attendees are participating across a broad geographic area, a virtual format might suffice. Technological availability, time constraints, cost and engagement levels are also important considerations.

Venue and timing

- Choose a venue that will accommodate more than the number of people you expect
- Choose a venue that is accessible for those with mobility, sensory, visual or hearing needs and meets physical accessibility standards
- Consider accommodation of a variety of needs, including assistance dogs, walkers, wheelchairs, scooters, and strollers
- Choose a venue that is inclusive of diverse races, cultures, and gender identities
- Consider how the venue supports multiple transportation modes, vehicle and bike parking, and bus routes
- Sufficient parking
- Visit the venue the same time of day as your event is planned to assess the natural light or additional lighting needs
- Consider the acoustics and temperature of room
- Confirm what other events are occurring during the time of your event
    - Will those events attract or detract people from attending?
    - Will those other events create conflict or excess noise?
    - Will there be enough parking for attendees with another event taking place?
- Confirm any audio-visual needs and whether the venue can accommodate them — consider the needs of deaf and hard of hearing participants to help determine whether captioning or ASL interpreters are needed
- Confirm where the washrooms and emergency exits are located
- Confirm who will be on-site during your event and obtain their contact information
- Confirm what time you can access the venue to ensure ample time for setup and take down
- Confirm garbage, recycling, and compost equipment receptacles or availability
- Confirm availability of table and chairs — including room setup
- Check that emergency evacuation procedures are in place for all individuals, including people with disabilities and seniors.

Invitations and promotion

Provide ample (minimum of two weeks) notice for people to participate and use multiple channels to reach the broadest audience. Communicate your event broadly using multiple methods:

- Direct invitation to those most affected or interested, by email, phone call or mail [e.g. letter or postcard]
- Social media
- Posters (in the community and on buses)
- News release
- Print or online advertising
- E-newsletters
- Outreach to interested groups who are typically underrepresented
- Email to municipal partners
- On CRD website events calendar

Invitations

- Inviting people — provide a way for people to reach out in advance to include contact information (phone, email) on all materials so attendees can request assistance when they RSVP.

  For example, you could say: If you require any assistance or accommodations, please include this information in your RSVP by (date), or contact (name/ phone/ email/) by (date)

- Include information on accessibility features, such as ASL interpreters, real-time captioning, closed loop audio systems, dietary accommodation, non-toxic materials and accessible entrances and parking, as well as a map on how to get to the event with pick-up/drop-off locations
- Ask attendees to not wear scented products
- Avoid embedding essential information in graphic formats because they can't be read out to people using assistive technology such as screen readers
- Use captions and audio descriptions for videos

Supplies

- Clearly marked container for feedback forms, surveys or comment cards
- Nametags for key attendees and staff
- Business cards
- Miscellaneous items: tape, zap straps, scissors, large envelopes, band-aids, paper clips, large clips, elastics, petty cash, etc.
- Attendee counter or "clicker"
- Pens, pencils, permanent markers, colourful markers
- Door signage or sandwich boards to help attendees find the room
- Easels and flip-chart paper
- Feedback forms/comment cards
- Audio-visual equipment – laptop, projector, speakers, microphone, HDMI cords to connect laptop to projector, presentation remote, USB, screens
- Visual aids — posters, maps, PowerPoints, background reports, etc.
- Consider the need for assistive hearing devices, Vocal Eye described audio, and accessible outdoor surface, such as Mobi-Mats (portable mats that make the ground more accessible and smoother), assistive hearing devices and receivers (Auracast)
- Notice of filming or photography if video or photos are being taken
- Photo release form if planning to publish an identifiable person's image
- Podium
- First Aid kit
- Refreshments (coffee/tea, cookies, muffins)
- Large format paper, sticky notes (various colours and sizes), Sticky dots
- Table linens
- Tables and chairs
- Venue contacts and key contact information
- Water for presenters
- Children's activities – Lego, books, colouring posters and crayons
- Dog treats and water bowl [if pet friendly event]

Notice of Photography Signage

Create and post a notice of photography sign in a visible place at or near the entrance to ensure you have notified attendees that you intend to capture and share photos of the event publicly.

Provide an option for those who would prefer not to appear in photos. An arm band, large sticker or vest might be offered to differentiate them in group photos.

DOWNLOAD TEMPLATE

Staff roles at event

- Ensure you have included enough staff to help set-up, facilitate and take down event
- Establish clear roles and responsibilities for the event (set-up, reception, facilitation, assistants, technical experts, media spokesperson, who will give the territorial acknowledgement etc.)
- Meet prior to event start time to discuss what may occur at the event and ensure staff have a shared level of understanding about key elements of the issues and event — including what happens after the event
- Attendees should be greeted and thanked as they leave
- Acknowledge the traditional territories your organization is on/where the topics/issue is affecting
- Take photos of comment boards, flipcharts, or interactive display boards to record visually and for quick reference what was heard. These photos can also assist with data entry and reporting after the event
- Take photos of the event with identifiable faces hidden from plain view
- Determine who is taking the data (notes, flip charts, etc.) or input from the event and what is being done with it
- Track how many people stop to talk, take material, what questions are commonly asked etc. (this data will be included in the What We Heard summary)
- Ensure attendees are aware of next steps or where they can go for more information after the event
- Debrief at the end of the event to share staff perspectives about what was heard, what was surprising, what worked well, what should be done differently in future

Hosting a meeting

- Provide a short, clear introduction that welcomes attendees:
  - Introduce who you are and what other employees or consultants are participating in the session
  - Articulate a clear purpose and the length of the session, as well as how and when input will be collected
  - Share what feedback you are inviting and what happens with the input after the session.
- If addressing a group, share expectations for a respectful and effective meeting:
  - Honour the time we have together
  - We all share the responsibility for an effective meeting
  - Respect the diversity of experience and wisdom of all here
  - Everyone has a voice
  - Challenge ideas, not people
  - Speak to be understood, listen to understand
  - Aim to add to the conversation, avoid duplication
  - We may need to move along from an idea — there will be opportunities to provide feedback after the meeting.

Accessibility Considerations

- Provide any contractors with a copy of these accessibility guidelines and clearly communicate that you expect contractors will adhere to the guidelines wherever possible
- Consider accessibility requirements for a variety of needs, including sensory, communications, chemical sensitivity, and mobility needs
- Consider accommodation of a variety of needs, including assistance dogs, walkers, wheelchairs, scooters, and strollers
- Plan your event as far ahead as possible (especially large events), to:
  - Allow enough notice for attendees to arrange HandyDART transportation and accompanying assistance. E.g. HandyDART users require more time than those who travel independently.
  - Arrange any on-site services needed, such as American Sign Language (ASL) interpretation. It takes at least two weeks to arrange for on-site assistance such as ASL.
  - Arrange for Braille transcription at least 4 weeks before your event.
- Provide an ASL interpreter, especially for events with more than 100 people
- Provide real-time captioning, especially for events with more than 100 people, and ensure your site has technology to support this

Choosing accessible venues

- Schedule an on-site visit before you reserve the venue
- Consider inviting individuals with various needs, such as mobility and sensory needs, in your on-site visit
- Consider the timing of your event, avoiding early morning and late evening, if possible
- Many seniors/elders and people with disabilities need assistance, which is often difficult to arrange early and late in the day
- Limit external noise

Entrances, exits, pathways, hallways, corridors

- Clearly marked
- Turning space with a six-foot diameter
- Minimum 39 inches wide
- Free of any impediments or tripping hazards
- Preferably no lip or a maximum lip of one-half inch beveled
- Smooth, level surface with no stairs
- Avoid slopes where possible (no more than 5% slope)

Well-marked paths at entrances with information about accessibility throughout the trail or path (for example, identify any interruptions of the accessible surface, such as steps, steep slopes, and so on)

Doors

- Ensure automatic door openers are activated (otherwise, wedge the door open if allowed by fire regulations)

Elevators

- Minimum 36-inch opening
- Large enough to accommodate a person with motorized wheelchair or scooter, and an attendant or assistance dog

Lighting

- Avoid dark and muted venues
- Ensure adequate lighting in parking locations, venue, and so on
- Avoid use of strobe lighting (it can trigger a seizure for people with epilepsy)

Ventilation

- Ensure ventilation of fresh outside air so people with chemical sensitivities are more comfortable
- Be aware of any ongoing construction or remodeling that could impact the circulation of air-borne allergens such as dust, paint fumes

Acoustics

- Consider the impact of ambient noise for people hard-of-hearing

Surfaces

- Level and smooth
- Concrete, asphalt, compacted crushed granite or limestone, linoleum, and tight-weave carpets without underlay
    - Grass is not accessible when wet
    - Wood chips or bark mulch are not accessible surfaces
    - Drain rock is not an accessible surface
- Avoid slopes where possible (no more than 5% slope)

Washrooms

- Washrooms and change rooms are inclusive of all
- At least one washroom large enough to accommodate a person with a motorized wheelchair and their attendant
- At least one single-user washroom with signage to reflect universal, functions-based designation
- For outdoor events, provide wheelchair-accessible portable toilets and ensure that people using motorized or manual wheelchairs can get to them on accessible surfaces

Stages

- Stage entrance must be level, gently sloping, ramped, or have a lift
- Ramp slopes no more than 5%
- Provide a stand-alone microphone (wireless or with an adjustable stand) for people who need to sit or use mobility devices
- Podiums are at least one metre away from the stage edge, to prevent accidents and falls for speakers who are blind or partially sighted, who may not be able to see the end of the stage
- Lecterns can adjust to different heights for people who need to sit or use mobility devices, or use two lecterns with different heights

Pathways

- Pathways to displays, stages, speaker's podium should be minimum 39 inches wide, and include turning circle space with a diameter of 6 feet
- Pathway slopes no more than 5%
- Consider tripping hazards, obstacles, stairs, curbs, and bumps that would prevent people using wheelchairs, walkers, or canes from navigating the pathway

Parking and pick-up/drop-off

- Minimum 2% of total parking available should be accessible and at least 4 spaces more than anticipated
- Spaces should be at least 8.5 feet wide with adjacent side and rear access of at least 6.6 feet wide
- Two accessible parking spaces may share a common access aisle
- Clearly marked location for HandyDART and taxi
- Ensure there is clear access to the HandyDART pick-up location after the event ends, until all attendees waiting for HandyDART have been picked up

Signage

- Clearly and visibly signed accessible entrances, parking, washrooms, public phones, transit points, and other conveniences
- Consider translating existing signage with multiple languages to increase understanding and avoiding confusion among users
- Avoid using gender symbols of bodies and focus on function symbols
- Use high contrast colours — light text on dark background or dark text on light background
- Use a text size of at least 14 point and sans serif font, such as Arial
- Provide signage in three formats if possible — tactile graphics, tactile lettering, and Braille
- Place signage at eye level for people seated in mobility devices (1.2 m from the floor, based on the City of Toronto standard)
- Ensure signage does not block sidewalks or create a trip hazard
- Signage asking attendees to not use scented products

Seating

- Avoid designating a single area "for wheelchair use" — this segregates and stigmatizes individuals using wheelchairs, prevents them from having the same choices as other attendees, and prevents them from being seated with friends and colleagues
- Provide sufficient places with no seats for people in wheelchairs or scooters to use. If possible, scatter these throughout the venue
- Where seats are movable, provide areas by the aisles with no chairs so people with mobility aids can maneuver into these spaces
- Ensure aisles between seating rows are wide enough for people using mobility aids — a minimum 36 inches of clear space
- Provide seats near the front of the room for people with visual or hearing needs with clear access to ASL interpreters and speakers
- Ensure there are chairs directly in front of the real-time captioning screen for people who are deaf or hard of hearing

Tables

- Provide sufficient space between tables for people using mobility devices and assistance dogs to go between
- Ensure the space between occupied chairs from adjacent tables is at minimum 36 inches
- Have one chair missing from each table for people using mobility aids

Counters and reception desks

- Ensure desks are 29 to 34 inches from the floor, to ensure people using mobility aids can access the desks
- Offer scent-free sanitizers

On-site assistance

- American Sign Language (ASL) interpreters – reserve space on stage and microphone for interpreters when speaking for a deaf person
- Real-time captioning — provide a large screen in front of room and seats provided in the front for people who are deaf or hard of hearing
- Provide interpreters and real-time captioning with prior information on program content and length, copies of speaker notes, and PowerPoint presentations, titles, and any technical language or unique features
- Arrange escorts to the stage for attendees who are blind or partially sighted. Escorts should communicate where the edge of the stage is and stay with the attendees to escort them to and from the stage
- Consider language translation
- Consider assistive hearing devices, Vocal Eye described audio, and accessible outdoor surface, such as Mobi-Mats (portable mats that make the ground more accessible and smoother)

Displays and exhibits

- Consider the display height so they're accessible to people using wheelchairs or scooters
- Consider the use and location of tablecloths that could impede wheelchairs or scooters.
- For guidance, refer to the Smithsonian Guidelines for Accessible Exhibition Design

Food and beverage

- Accommodate food sensitivities and dietary requests
- Label accommodated meals
- Consider serving accommodated meals first in case a correction is needed, however, be mindful that all attendees want to enjoy their meals at the same time
- Offer non-plastic containers and bendable straws
- Clearly label ingredients
- Provide water, and provide help pouring
- Avoid sharp objects such as toothpicks
- Communicate dietary accommodations to caterers, and ensure they follow through

Staff and volunteer training

- Designate a person trained on accessibility issues as a resource to staff, volunteers, and attendees for any questions, issues, or emergencies both before and during the event
- Provide orientation to all staff and volunteers, including ushers on accessibility features of the event venue
- Provide training on assisting seniors/elders and people with disabilities about seating, mobility, bathroom, food, drink, getting items, and escorting to the stage
- Ensure emergency evacuation procedures are known and assign specific individuals to assist people with disabilities and seniors
- If food is served buffet-style, ensure that food ingredients are well labelled or that staff and volunteers know the ingredients
- Develop and introduce a trans* and gender-variant inclusion information session for staff and contractors

Event materials, presentations, and attendees

- Use non-toxic materials, such as unscented markers and non-plastic name badges
- Use high contrast colours — light text on dark background or dark text on light background
- Use a text size and sans serif font that is easy for all to read.
- Offer materials and agendas in advance, in digital, large print or Braille formats if requested
- Consider using captions and audio descriptions for videos
- Ask speakers and presenters to verbally describe any visual content in their presentations
- Ask speakers and attendees to identify themselves by name each time they speak for the benefit of visually impaired individuals
- Ask speakers and attendees how they want to be referred to — by name or pronoun. Pronouns may be either feminine (she, her, hers), masculine (he, him, his) or gender-neutral (they, them, theirs)
- Welcome participants using gender-neutral terms (such as people or folks) — not ladies and gentlemen or guys

Assistance dogs

- Designate an outdoor toilet space
- Provide a waste bin
- Provide water bowls

16. Online Event Checklist

Online engagement should embrace the same thoughtful approach to planning as in-person. It's important to anticipate and plan for providing a positive and meaningful attendee experience. Establishing clear engagement objectives for your project will determine whether an online meeting is a suitable tool for your topic.

Important to consider

- Who will attend and what is their comfort or familiarity with online technology?
- How will feedback be collected in the session?

Scheduling a meeting

- Include a clear title for your session, that is consistent with other tools being used to promote the meeting.
- Set the duration with care. A typical online session is one hour, including questions, and never over two hours.
- A waiting room can be enabled so you can see who has arrived and can officially start the meeting when ready. Waiting rooms are useful for protecting the personal privacy of external participants. The waiting room message can be personalized so they know they are at the correct meeting place.
- Event should require registration. The RSVP option should be included in an invite and the link should be included in communications materials. This creates an opportunity for people to share with any accommodations they may need well in advance. Registration also allows you to estimate the number of attendees and email them reminders closer to the date.
- Ensure the meeting invitation includes information about privacy information and where their information may be stored. Also include tips to help protect their privacy.
- Ensure promotion of the event outlines the format of the event [e.g. presentation, moderated, Q+A]. Plan to record sessions that are open to the public for those who cannot attend 'live' but may wish to watch later to learn more.
- If session is being recorded make sure that is clear to all attendees and communicate the benefit of recording to those who could not make it.

Preparing for an Online Event

- Schedule time to rehearse with staff [and any consultants] team beforehand. Take the opportunity to test internet connection, monitor, headphones, audio levels, and sharing of files. Practice, practice, practice!
- Review branding options for the platform and ensure they are consistent with organizational brand standards.
- Ensure the backdrop is appropriate and well-lit. Consider a branded virtual background if needed.
- Participant experience is important, and the input collected is key to decision-making. Role play with colleagues to test how you will solicit and collect input – e.g. chat room, question and answer and telephone.
- Identify a colleague who will assist in moderating, keeping notes and providing support as needed.
- Have a way to communicate with meeting leads while meeting is happening established in advance – separate chat, texting, etc.

Meeting roles

To ensure a successful online meeting, several key roles can be assigned.

1. **Facilitator/Host** Responsible for guiding the meeting, setting the agenda, and ensuring that the discussion stays on track. Manages time effectively and encourages participation from all attendees.
2. **Note-Taker/Recorder** Documents key points, decisions, and action items during the meeting. Distributes meeting minutes afterward to ensure everyone is on the same page.
3. **Timekeeper**
   a. Monitors the time allocated for each agenda item and alerts the group when it's time to move on.
   b. Helps maintain the meeting's schedule and ensures that all topics are covered.
4. **Participant/Contributor** Engages in the discussion, shares insights, and provides feedback. Actively and respectfully listens and contributes to the conversation, ensuring a collaborative environment.
5. **Technical Support** Assists with any technical issues that may arise during the meeting, such as connectivity problems or software malfunctions.
6. **Moderator** Manages the flow of conversation, especially in larger groups or meetings. May handle Q&A sessions, ensuring that questions are addressed in an orderly manner.

Hosting a meeting

- Arrive early to your online meeting so you are ready to go when participants arrive. Start on time. If you have started the session but are not ready to begin, signal to those in attendance that you will wait a few minutes to begin.
- Provide a short, clear introduction that states:
  - Who you are and what other employees or consultants are participating in the session
  - If you're recording the session, ensure you let attendees know it is being recorded.
  - Acknowledge the traditional territories your organization is on/where the topics/issue is affecting.
  - Articulate a clear purpose and the length of the session, as well as how and when input will be collected (e.g. throughout, or at the end)
  - Share what feedback you are inviting and what happens with the input after the session.
  - Share how they will respond to open ended questions, when invited– type in chat, raise hand on video or come off mute.
- Emphasize the importance of personal privacy and respectful dialogue:
- Protection of personal information is important; please note we do not require any personal information during this meeting, and we encourage you to turn off your mic and video when listening. Offer the opportunity for those who are uncomfortable with being recorded to exit the session.
- Outline how participants can edit the information that others see (e.g. name that is displayed)
- Share respectful meeting expectations
  - Honour the time we have together
  - We all share the responsibility for an effective meeting
  - Respect the diversity of experience and wisdom of all here
  - Everyone has a voice
  - Challenge ideas, not people
  - Speak to be understood, listen to understand
  - Aim be additive, not duplicative
  - We may need to move along from an idea – there will be opportunities to provide feedback after the meeting. [email, survey, etc]
- Try not to talk for too long without checking in with the attendees – this will help keep participants engaged. Check for chat comments or consider using a quick poll or raising of hands to gauge where people are at.
- If there are specific questions being asked of participants, be sure to have a clear format for those questions and a corresponding timeline to keep the agenda on track. Put the question on the screen or read it aloud so it is clear to participants.

Interactive features

Moderated discussion

Participants can verbally ask questions or provide comment if their microphone is unmuted. The facilitator should outline when and how comment and questions should be received during the session to ensure a productive and timely format is followed. Comments or feedback could be welcomed throughout, or a facilitator may plan opportunities at specific times, or at the end of a presentation. In combination with the chat or raise hand function, participants can indicate their desire to pose a question or comment, and the facilitator can then pause and engage when appropriate. To limit background noise in large meetings, the host should let participants know that they will mute all microphones until they are ready to receive questions. This will limit background noise.

Polling

Poll questions are another way to engage participants. Polls can help keep the content dynamic while keeping participants engaged. The polling feature allows you to create single choice or multiple-choice polling questions for your meetings. You should plan questions and set up polls when planning and scheduling the meeting. Polls allow for you to gather (and share) immediate responses from your attendees.

Examples of useful ways to use poll questions:

- Create an icebreaker and get the interaction started
- Let your audience inform the content — e.g. where would you rank your level of understanding about this topic?
- Get input on the meeting — e.g. would you prefer to ask questions throughout, or at the end?
- Learn where people are from — e.g. which municipality do you live in

Chat

The in-meeting chat allows you to send chat messages to the other attendees. Consider whether the private chat between attendees should be disabled. In-meeting chat can be automatically saved.

Raise hand

Depending on the video conferencing tool, meeting participants can often simulate a hand raise by placing a “raise hand” icon beside their name to communicate with the host and other participants without disrupting the flow of the meeting.

All participants can see the icons that everyone else has chosen. In addition, the host sees a summary of how many participants are displaying each icon and has the option to remove all feedback when addressed.

Question and answer

The Q&A function in the Zoom webinar tool can allow attendees to ask questions for the host and panelists to answer. The questions can be viewable to all attendees or only to the host and panelists until the questions are answered.

Technology issues

- If you or participants are experiencing lagging or slowness, encourage participants to turn off mic and video when listening.
- Participants can log-off and join the meeting in progress, should they need to reset their computer or settings.
- If you as host have technological glitches — pause, break, rely on co-moderator. If a short break is needed, communicate a five-minute break to resolve the matter.
- If a security breach/unauthorized access to the session were to occur, turn off the host video. Acknowledge it appears a participant is using the technology inappropriately. You may want to pause the meeting for a moment and return shortly. When you return to the session, ask the participants if they would like to proceed with the session. If a second breach occurs, the meeting should be concluded.

Closing a session

- Leave attendees with a call to action and outline next steps.
- Close session with appreciation for their participation and share contact information and project website on a visual.

Follow up

- After event consider sending out thank you messages to attendees with link to engagement platform for more information and updates.
- Consider asking for feedback regarding the experience of the online event to help with the evaluation of the engagement.
- If the event was recorded post the recording so those who were unable to participate can still benefit from the event.

17. Facilitation Tips and Checklist

Whether an in-person or online event, public meetings or events where interested people and groups are brought together to provide input or ask questions about an issue are generally more effective and more efficient if they are facilitated, particularly if the issue is controversial. A facilitator manages the meeting, keeps conversations on track and ensures each participant's voice is heard. This tip sheet will provide some information on how to accomplish these tasks.

What is facilitation? What is the role of a Facilitator?

The definition of facilitate is "to make easier" or "to help bring about". The role of the facilitator is to help the participants work together by providing and managing the meeting process or structure, while the participants remain focused on the meeting content. The facilitator keeps the process on track and moving forward with all participants engaged, making best use of time and resources.

An effective facilitator quickly establishes and builds trust with the group through honesty and transparency in his/her communication. Facilitators must know what questions to ask, when to ask them, and how to structure questions to get good answers without defensiveness. Facilitators should know how to rephrase or reframe questions and comments, giving positive reinforcement, encouraging contrasting views, including quieter members of the group, and dealing with domineering or hostile participants.

Before the meeting

- Know who the meeting participants will be, and which community groups will be represented
- Understand the purpose of the meeting and the desired outcome. What will a successful meeting look like?
- Together with the project lead, establish a structure for the meeting and confirm the agenda
- Select and design a process and agenda for the meeting that will help participants to engage effectively and provide the feedback required
- Have a meeting plan but be willing to be flexible in response to the situation
- Set up the venue or online space, and ensure that other logistical details have been taken care of
- Provide adequate notice of the meeting, its purpose and agenda to participants

During the meeting

- At the beginning of the meeting, with the group:
  - Review the purpose and the expected outcome of the meeting
  - Review the ground rules/expectations
  - Review the items for discussion and the timeline
- Be very clear about your role as a facilitator
- During the meeting, maintain eye contact with participants.
- Try not to talk too little or too much
- You are there to bring out the views and contributions of participants
- Help stimulate discussion in the group when needed, asking the right questions and providing context for the discussion
- Be sure that everyone is heard and able to participate fully
- Know when to draw in those who may not be participating initially, and prevent others from dominating — to ensure that all voices are heard
- Summarize when necessary and build on the contributions of the participants
- Keep the discussion on topic — be aware of when the group is off topic or confused and when structure may be needed
- Explain, summarize and help to paraphrase participants' input when necessary
- Decide when to extend a discussion and when to move the group onto the next topic; remind the group when they are off subject
- Prepare to work through conflicts between participants by creating trust within a "safe space"
- Stick to the pre-determined timeline
- At the end of the meeting, provide closure and reiterate action items/next steps
- Ensure accuracy and that proper record/minutes are kept of the meeting (e.g. record of discussion, decisions made, next steps, action items).

GOOD FACILITATORS

- Value people and their ideas
- Think quickly and logically
- Are excellent communicators
- Are active listeners
- Avoid jargon and acronyms
- Speak clearly, at a moderate pace and an appropriate volume
- Guide the discussion, but don't lead it
- Raise questions to bring out different viewpoints
- Restate ideas when the person presenting them is not clear

18. Survey Design

Surveys can offer a streamlined method for gathering and evaluating public feedback on projects. Survey methodology can vary depending on the input required and who it is required from.

Varying types of surveys

Opt-in survey, with promotion and engagement targeted at key people and groups. To do this demographic data must be collected as part of the survey process. Staff monitor participants, shifting engagement and communications strategies to target underrepresented demographics.

Probability survey, where a random representative sample of the population is selected to complete the survey. This approach ensures a representative sample of responses. This type of survey is usually conducted by a consulting firm specializing in this type of engagement.

Closed survey, This type of survey is limited to those residents that are invited to participate. This can be regulated by unique codes, IP addresses, etc.

Feedback forms can also be utilized in specific instances where input has been collected previously or through other channels. Open-ended feedback forms may be considered when inviting feedback on a draft document.

ASKING/DESIGNING GOOD SURVEY QUESTIONS

Soliciting input

When designing questions to solicit input, you should revisit your public engagement objectives to ensure the questions get to the heart of achieving the objective and collecting the input needed to inform upcoming decisions. Questions are then tailored to the objectives of specific phases or key decision points. A mix of open-ended and closed questions should be considered. Avoid jargon and overly technical information.

Disaggregated data

Disaggregating data means breaking it down into smaller categories based on attributes such as ethnic group, gender, age, income, geography or other relevant factors. When collecting and analyzing input, keep in mind that sometimes the overall trend or pattern can hide key differences in the experiences of specific groups. Consider using disaggregated data to identify gaps and prioritize your outreach efforts.

When asking for demographic information as part of a survey, it's important to have clear objectives and safeguards in place to prevent misuse or harm. Contact the Privacy Office for direction on how to manage disaggregated data and review the Human Rights Commissioner's Special Report to learn more about this evolving area of practice.

Open-ended versus closed ended questions

Open ended questions ask respondents to respond to a question in their own terms. Open-ended questions allow the greatest variety of responses, but are time consuming to ask and require a lot of work to analyze.

Closed ended questions are questions where the respondent is asked to place themselves into one of a limited number of responses which are provided to them. Closed ended questions, when well designed, ensure that respondents interpret questions the same way.

Respondents are more likely to skip an open-ended than closed-ended question

Review our Survey Guide for more details on how to get started, content and format standards, testing tips, timing and approvals information.

CRD SURVEY GUIDE

Close the Loop

19. Reporting out on Public Engagement Efforts

The final step in the engagement process is ensuring that the community is aware of what input was collected and how it was used. It's important to make sure decision makers receive and consider the input before a decision has been made. It's also an opportunity to build trust by closing the loop with participants.

A *What We Heard* Engagement Summary report will be produced that provides an overview of the process undertaken, who participated, what was asked, what was heard and the project next steps. The *What We Heard* Engagement Summary report demonstrates transparency and documents the efforts undertaken.

Staff should be considering what was heard as the project moves forward and incorporating the input wherever possible. Once complete, this report should be presented to elected officials for information before making final decisions on the project.

Refer to the approvals chart to confirm who needs to review the report before presenting to decision makers. Once received for information by the elected officials, the *What We Heard* Engagement Summary should be shared with those who participated and the broader public by adding it to the Get Involved CRD project page and sharing to those connected to the page via e-newsletter.

20. What We Heard:
Engagement Summary

The *What We Heard* Engagement Summary report should include:

Overview of the Project/Process and Objective for Engagement

- Key background
- Engagement objectives
- Strategic approach or principles applied

2 Outline the Process – steps to be undertaken in overall process and associated timeline

- Engagement opportunities should be evident through steps

3 Awareness and Engagement Activities Undertaken

- Describe how events and surveys were promoted – advertisements, social media, media release
- Outline number, dates, and locations of events and surveys
- Include photos of events and images of promotional tools used and/or media coverage

4 What We Heard

- Include photos of events and images of promotional tools used and/or media coverage
- Theme/analyze open-ended comments. Depending on volume, privacy considerations and preferences of decision-makers, at times all open-ended comments are included as an appendix for review. *Note: Open-ended comments can often unintentionally identify an individual. A detailed review of all comments must be completed.*

5 Who We Heard From

- Number of participants, relevant demographics (e.g. renter vs. owner, age, neighbourhood, previous participant, etc.)
- Which demographics were underrepresented comparatively to community composition

6 Next Steps

- Outline the next steps in the process and how input will be used/was used to inform the decision
- Note upcoming meetings or decision points and associated timeline
- Include web address for finding related or additional information

WWH REPORT AND PRESENTATION TEMPLATES

Evaluate

21. Feedback and Evaluation Forms

Participant Feedback

Participant feedback is helpful in understanding whether they received the information they needed and whether they found the process and experience accessible and meaningful.

Ask participants to share their feedback to help you improve future events and activities.

POST-EVENT FEEDBACK FORM

Staff Evaluation

Some questions to consider when evaluating your public engagement activities are:

- Did you meet, exceed, or satisfy the goals you had set out at the outset of the planning process?
- Was the issue clearly defined before starting?
- Did the engagement adhere to the core values of public engagement set out in this toolkit?
- Did you include potential participants in the design of your engagement activity?
- Were the appropriate interested people and groups identified?
- Did the identified interested people and groups participate?
- Were the tools and techniques appropriate?
- Were a variety of techniques used?
- Were there any unforeseen circumstances or constraints?
- Were individuals and interested people and groups given adequate opportunity to participate in all aspects of the process?
- Was the engagement inclusive? Did it meet the needs of those with disabilities or language barriers?
- Which voices were underrepresented?
- Was the received input relevant and valuable?
- Were all critical issues addressed?
- Did you effectively record and analyze the input received?
- Was the engagement completed within the set budget and timeline?
- Were participants made aware of how the engagement and their feedback could/would be used?
- Did the input inform the decision?
- What went well?
- Were participants generally satisfied with the process?
- What will you do differently next time?
- Do you have recommendations for further investigation or research?

Connect with the Manager, Website & Public Engagement to share lessons learned and any recommendations. This step is crucial to continuing to improve and adapt.

EVALUATION FORM

crd.ca

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REPORT TO GOVERNANCE AND FIRST NATIONS RELATIONS COMMITTEE
MEETING OF WEDNESDAY, JUNE 3, 2026

SUBJECT **Regional Grants-in-Aid Policy (BRD13)**

ISSUE SUMMARY

To provide information on the board approved Regional Grants-in-Aid (GIA) Policy (BRD13).

BACKGROUND

On March 11, 2026, the Capital Regional District (CRD) resolved the following motion:

> *"That the Governance and First Nations Relations Committee review the Capital Regional District Boards' Regional Grants-in-Aid Policy."*

This report provides information on the Board approved Regional GIA Policy, related history, a review of CRD services with granting programs and information on regional GIA from other jurisdictions in British Columbia.

Regional Grant-in-Aid Authority

Under the *Local Government Act* (LGA), a regional district board may provide assistance in the form of a grant-in-aid for the purpose of benefiting the community or any aspect of the community. However, the LGA prohibits a board from providing assistance to an industrial, commercial or business undertaking.

The CRD Regional GIA is a historical service under the authority and legislative powers of the LGA. Grants are funded by all thirteen municipalities and three electoral areas. It is separate from the electoral area GIA services, which are individual services originally established through letters patent and modernized through establishing bylaws.

No Regional Grants-in-Aid Board Policy

Since 1994 successive CRD Boards have adopted policy resolutions declining to issue regional GIA, preferring instead that individual municipalities determine whether to contribute to specific initiatives. The Board's current position, adopted on June 8, 2022, is reflected in the Regional GIA Policy (BRD13) which states that the CRD shall not issue regional GIA. The approved staff report and policy are attached as Appendix A.

Capital Regional District Service Specific Grants versus Regional Grants-in-Aid

Many CRD services have granting authority enabled through their service establishment bylaw. The CRD currently administers several programs through these services that provide financial assistance to community organizations, individuals and local initiatives across the region. These programs are intended to advance the service mandate. Some examples are listed below:

Grant Program and Streams	CRD Service
Arts Grants	1.297 Arts & Culture Support Service
✓ Equity Grant	
✓ IDEA Grant	
✓ Grow Forward Grant	
✓ Project Grant	
✓ Operating Grant	
Rethink Waste Grants	1.521 Environment Resource Management
✓ Zero Waste Event Grant	
✓ Community Grant	
CRD Rural Housing Program	1.311 Regional Housing Trust Fund
✓ Accessory Dwelling Unit Incentive Program	
✓ Rural Housing Pre-Development Funding	

In addition to current active grant programs, several newly established CRD services also include granting authority within their establishing bylaws. These include the Regional Transportation Service, the Foodland Access Service and the Performing Arts Facility Service. These services could develop and administer grant programs within the service mandate in the future.

The regional GIA differs from these service specific programs in that it is a general permissive authority under the LGA rather than a program established to achieve a specific service mandate.

Other Regional Districts' Grants-In-Aid Policies

Staff surveyed a selection of regional districts on Vancouver Island and the Lower Mainland to identify if and how neighbouring jurisdictions provide regional GIA support.

While many surveyed regional districts provide some form of GIA, there is no consistent approach to whether or how regional GIA is used. Most jurisdictions apply different eligibility, evaluation, adjudication and funding criteria, and many have controls in place to limit the expansion of GIA to organizations seeking support. A key control is that a grant should not be provided where the proposed activity falls within the scope of an already established service, as this helps avoid overlapping or duplication with existing service-specific grant authorities.

IMPLICATIONS

Legal Implication

While Board policy provides direction to guide decision-making, the Board retains the discretion to exercise its statutory service authority granted by LGA, notwithstanding previous policy positions. The Board has exercised the regional GIA authority only on a limited number of occasions as exceptions. Previous grants and related Board decisions are summarized in Appendix B.

Financial Implications

Section 374(9) of the LGA limits expenditures for regional GIA to 10 cents per $1,000 of the net taxable value of land and improvements within the regional district. Cost apportionment for a Regional GIA service would include all municipalities and electoral areas. Based on the 2026 assessment base, the maximum allowable requisition for a Regional GIA service is estimated at approximately $18.8 million. The actual requisition would be determined annually through the Board-approved financial planning process within the legislated maximum.

Service Delivery Implications

The Board could consider rescinding the no Regional GIA Board Policy and establish a formal Regional GIA program.

Under this approach, staff would develop a defined service mandate, program framework and administrative guidelines. Implementation of such a program would require incremental administrative resources and operational capacity to manage intake, evaluation, reporting and financial administration.

Under this model, the Board would retain decision-making authority over funding allocations, including the approval of eligible projects and the determination of annual funding levels through the financial planning process.

This approach would align the Regional GIA service with established CRD grant administration models, providing a more structured and transparent framework for evaluating and distributing funding. However, it may also raise considerations regarding the scope of eligible applications and the potential for requests that fall outside the CRD's core service areas or established mandates. Careful program design and eligibility criteria would therefore be important to ensure alignment with Board priorities and statutory authority.

There is also potential for duplication or overlap between CRD Regional GIA and CRD service specific grant programs. There is a risk that similar types of projects could be considered under multiple funding streams, leading to inefficiencies. Impacts would depend on program design, including eligibility criteria, funding priorities and the extent of coordination with CRD services.

CONCLUSION

The CRD currently maintains a policy of not issuing regional GIA, while retaining the authority to do so under the LGA. Any future consideration of a Regional GIA program would require clear program design, administrative capacity and alignment with Board priorities and statutory limits.

RECOMMENDATION

There is no recommendation. This report is for information only.

Submitted by:	Lia Xu, MSc., CPA, CGA, Manager, Local Services and Corporate Grants
Concurrence:	Nelson Chan, MBA, FCPA, FCMA, Chief Financial Officer & General Manager, Finance & Technology
Concurrence:	Kristen Morley, J.D., Corporate Officer & General Manager, Corporate Services
Concurrence:	Ted Robbins, B. Sc., C. Tech., Chief Administrative Officer

ATTACHMENTS

Appendix A: June 1, 2022 Staff Report, Regional Grants-In-Aid Board Policy, and Regional Grants-in-Aid Policy (BRD13) approved on June 8, 2022
Appendix B: History of Past Regional Grants-in-Aid (GIA) Requests (since 1994)

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REPORT TO GOVERNANCE COMMITTEE
MEETING OF WEDNESDAY, JUNE 01, 2022

SUBJECT **Regional Grants-in-Aid Board Policy**

ISSUE SUMMARY

To update the Regional Grants-in-Aid Board Policy.

BACKGROUND

The CRD has a long established policy of not awarding Regional Grants-in-Aid (GIA). The current policy is derived from a February 23, 1994, Board policy resolution, which directs staff to "establish a no grants policy regarding regional grant-in-aid, other than those regional grants-in-aid from a single jurisdiction". At the February 2, 2022, Governance meeting, staff were directed to remove provisions in GIA levied against taxpayers of an individual municipality and maintain the "No Regional GIA" position. Additionally, staff were directed to ensure GIA for Electoral Areas remain status quo. Staff have confirmed Electoral Area authority is accounted for in separate services through Supplementary Letters Patent and will not be impacted by a Regional GIA policy.

The CRD continues to receive requests for Regional GIA, most recently in support for the Ukrainian Canadian Cultural Society of Vancouver Island. Appendix A is an updated Regional GIA Board Policy in alignment with current language and corporate standards to support the long standing practice and direction from committee this past winter.

ALTERNATIVES

Alternative 1
The Governance Committee recommends to the Capital Regional District Board:
That the Regional Grants-in-Aid Policy be adopted.

Alternative 2
The Governance Committee recommends to the Capital Regional District Board:
That the Board rescind the "No Regional GIA" Board Resolution Policy, and direct staff to develop a coordinating program with guidelines including an evaluation process and budget which does not exceed 10¢ per $1,000 on the net taxable value of land and improvements in the regional district, and where the Board remains the decision-maker in granting funds to eligible projects.

IMPLICATIONS

Service Delivery and Financial Implications

Alternative 1
The policy attached in Appendix A executes Board direction from February 2022 and brings the previous 1994 Board Policy Resolution into alignment with current corporate standards and templates of the CRD. There are no financial implications with this alternative.

Alternative 2
The Board could consider raising funds for Regional GIA as part of the annual service review and budget process where staff would prepare defined service mandates and develop a coordinating program with guidelines similar to Electoral Area GIA services. Resources and capacity would be needed to administer a Regional GIA program. The Board would remain the decision-maker over which eligible projects are awarded funding.

Section 374(9) of the *Local Government Act* limits expenditures for Regional GIA to 10¢ per $1,000 on the net taxable value of land and improvements in the regional district. Cost apportionment would include all municipalities, electoral areas, and First Nations. Based on the 2022 assessment base, the maximum requisition for a Regional GIA service would be approximately $16.5 million or $87.50 per average household. Actual requisition would be determined through the annual budgeting process.

The aforementioned process mirrors the electoral area model and provides a structured and transparent program to consider all Regional GIA applications. There could be concern that by providing a Regional GIA program, the CRD will consider requests that are outside its service authority or mandate.

CONCLUSION

The CRD has a long established policy of not awarding Regional Grants-in-Aid (GIA). At the February 2, 2022, Governance Committee meeting, staff were directed to remove provisions in GIA policy levied against taxpayers of an individual municipality and maintain the “No Regional GIA” position which is included in the updated Regional Grants-in-Aid policy found in appendix A.

RECOMMENDATION

The Governance Committee recommends to the Capital Regional District Board:
That the Regional Grants-in-Aid Policy be adopted.

Submitted by:	Rianna Lachance, BCom, CPA, CA, Senior Manager, Financial Services
Concurrence:	Nelson Chan, MBA, FCPA, FCMA, Chief Financial Officer
Concurrence:	Kristen Morley, J.D., General Manager, Corporate Services & Corporate Officer
Concurrence:	Robert Lapham, MCIP, RPP, Chief Administrative Officer

ATTACHMENT(S)

Appendix A: Regional Grants-in-Aid Policy

CAPITAL REGIONAL DISTRICT
CORPORATE POLICY

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Policy Type	Board [Corporate]		
Title	REGIONAL GRANTS-IN-AID POLICY		
Adopted Date		Policy Number	BRD13
Last Amended			
Policy Owner	Financial Services		

1. POLICY:

The Capital Regional District shall not issue regional Grants-in-Aid.

2. PURPOSE:

While the CRD has authority under its *Local Government Act* authority to issue regional Grants-in-Aid (GIA), including using this power to issue a grant from a single jurisdiction, the CRD Board believes it is up to individual municipalities and electoral areas to determine which organizations shall receive a GIA, rather than the CRD Board making those decisions.

3. SCOPE:

This policy applies to all regional GIA requests received but does not apply to other grant or contribution programs, such as the Electoral Area Grant-in-Aid program.

4. AMENDMENT(S):

Adoption Date	**Description:**
June 8, 2022	Board adoption

5. REVIEW(S):

Review Date	**Description:**
June 2025	Three year default review period.

6. RELATED POLICY, PROCEDURE, OR GUIDELINE:

2012 Grants-in-Aid Policy (Electoral Areas) Applications

2010 Grants-in-Aid Policy (Electoral Areas) Guidelines

Appendix B

History of Past Regional Grant-in-Aid (GIA) Requests (since 1994)

Board Approved Regional GIAs as exceptions notwithstanding the “No Regional GIA” Policy:

1. March 11, 2026: Island Corridor Foundation (ICF) Funding Request for the Reconciliation Corridor Initiative, conditionally approved for up to **$1.7 million (M).** In 2012 ICF was conditionally approved for $1.2M; funding was not ultimately distributed as the conditions were not met and the funds were held in surplus. The 2026 award comprises of the 2012 award in addition to $0.5M in earned interest.

2. April 13, 2022: One-time GIA direct award to the Ukrainian Canadian Cultural Society of Vancouver Island’s Ukrainian Aid & Displaced Persons Assistance Fund, approved and paid for **$15,000**.

3. May 26, 2016: One-time GIA direct award to the Greater Victoria Festival Society to support Fort McMurray Wildfire fundraising concert, approved and paid for **$2,500**.

Board Declined GIA Requests:

1. September 9, 2015: Urban Wildlife Stewardship Society Funding Request, request for $35,000, regional GIA request declined.

2. August 8, 2012: Salish Express Commuter Rail Implementation Funding Plan Request, request for $70,000, regional GIA request declined.

3. April 11, 2007: Island Corridor Foundation Grant-in-Aid Request, request for $4,899.02, regional GIA request declined.

4. January 26, 1994: Regional GIA Request from the Community Social Planning Council of Victoria, request for $22,100, regional GIA request declined.

Minutes of the Accessibility Advisory Committee meeting, held January 20, 2026 at 1:00 pm, 6th Floor Boardroom, 625 Fisgard Street, Victoria BC

PRESENT:
Committee Members: T. Bolt (Chair), J. Parr (Vice Chair), J. Briante (EP), M. Essery (EP), L. Hube, Z. Lundrie (EP), B. Manning-Jones, G. Robinson, E. Syring (EP)(1:17pm), M. Little (GFNRC Liaison) (EP)

Staff: C. Neilson, Senior Manager, People, Safety and Culture; K. Bittorf, Manager, Salt Spring Island Parks and Recreation(EP); G. Nesbitt, Human Resources Advisory, People, Safety, and Culture; J. Ives, Committee Clerk, J. Dorman, Committee Clerk (Recorder)

EP – Electronic Participation

Regrets: P. Danforth, R. Welland

The meeting was called to order at 1:01 pm.

1. Territorial Acknowledgement

C. Neilson provided the Territorial Acknowledgement.

2. Election of the Chair

C. Neilson called for nominations of Chair of the Accessibility Advisory Committee for 2026.

B. Manning-Jones nominated T. Bolt. T. Bolt accepted the nomination.

C. Neilson called for nominations a second time.

C. Neilson called for nominations a third and final time.

Hearing no further nominations, C. Neilson declared T. Bolt Chair of the Accessibility Advisory Committee by acclamation.

3. Election of Vice Chair

C. Neilson called for nominations of Vice Chair of the Accessibility Advisory Committee for 2026.

T. Bolt nominated J. Parr. J. Parr accepted the nomination.

C. Neilson called for nominations a second time.

C. Neilson called for nominations a third and final time.

Hearing no further nominations, C. Neilson declared J. Parr Vice Chair of the Accessibility Advisory Committee by acclamation.

4. Approval of Agenda

MOVED by M. Essery, SECONDED by B. Manning-Jones,
That the agenda for the Accessibility Advisory Committee meeting of January 20, 2026 be approved.
CARRIED

5. Adoption of Minutes

MOVED by B. Manning-Jones, SECONDED by L. Hube,
That the minutes of the Accessibility Advisory Committee meeting of November 18, 2025 be amended in 8.2. to replace SPARK with SPARC.
CARRIED

6. Chair's Remarks

Chair Bolt spoke about the accessibility challenges and deficiencies in the BC Act of Transportation Design Guide, highlighting gaps in infrastructure and designs for adaptive and accessible use, and encouraged the committee to advocate as CRD undertakes new projects.

7. Presentations/Delegations

7.1. Presentations

There were no presentations.

7.2. Delegations

There were no presentations.

8. Committee Business

8.1. Accessibility Reviews for three Salt Spring Island Recreation Facilities

K. Bittorf spoke to Item 8.1.

MOVED by M. Essery, SECONDED by L. Hube,
The Accessibility Advisory Committee recommends the Governance and First Nations Relations Committee recommends to the Capital Regional District Board:
That the Accessibility Advisory Committee Chair provide a letter of support for the Sparc BC Local Community Accessibility Grant Program.
CARRIED

E. Syring joined the meeting electronically at 1:17pm.

8.2. Inventory Project Update

G. Nesbitt presented Item 8.2. for information.

Discussion ensued on revisiting the accessibility plan and ongoing improvements to the plan.

8.3. Disability & Inclusion Awareness Training

G. Nesbitt presented Item 8.3. for information.

Discussion ensued on the content of the training and the opportunity to participate in future training sessions.

9. Notices of Motion

Notice of Motion: Municipal Park Accessibility (Director Little)

Director Little provided the following Notice of Motion for consideration at the next meeting of the Accessibility Advisory Committee:

"That as a matter of information, that Director Little, as Chair of the Governance and First Nations Relations Committee and Vice-Chair of the CRD Board, and Governance and First Nations Relations Committee liaison to the CRD Accessibility Advisory Committee, present the accessibility feedback raised in the Committee meeting to Director Murdock of the District of Saanich regarding accessibility at a District of Saanich park".

10. New Business

10.1. Evacuation Chair

C. Neilson shared that testing will be conducted and shared that information has been provided to staff . Staff would like to invite members to participate in this process. Please contact Chris Neilson if you are interested.

11. Adjournment

MOVED by M. Essery, SECONDED by L. Hube,
That the Accessibility Advisory Committee meeting of January 20, 2026 be adjourned at 1:45 pm.
CARRIED

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Chair

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Committee Clerk

Minutes of the Victoria Family Court and Youth Justice Committee meeting held Thursday, February 26, 2026, CRD Boardroom, 6th floor, 625 Fisgard Street

PRESENT:
COMMITTEE MEMBERS: M. Little (Chair), K. Guiry (Vice Chair), J. Bateman, J. Crawford, S. Kim, K. Marshall (EP), M. McLean, T. O'Keefe (EP), M. Olsen (EP), S. Rappaport, S. Riddell (EP), R. Stanton, T. Vanwell (EP), B. Gash, M. Westhaver (EP)

STAFF: T. Pillipow, Senior Committee Clerk, Legislative Services; M. Essery (Recording Secretary) (EP)

EP - Electronic Participation

Guests/Resource Members: K. Easton, Director of Implementation, Foundry BC, West Shore, Sooke & Port Renfrew; A. Schactman, Former Clinical Coordinator, Foundry BC, Victoria; H. David, Intern (UVIC), Foundry BC; R. Labelle, Honeycomb Webworks; K. Petersen, Operations Director, Youth Empowerment Society; J. Hunter, Executive Director, Youth Empowerment Society

Regrets: K. Armour, D. Brown, C. Day, C. Lervold, M. Wagner

The meeting was called to order at 11:34 am.

1. Territorial Acknowledgement

Vice Chair Guiry provided a Territorial Acknowledgement.

2. Approval of the Agenda

MOVED by K. Guiry, SECONDED by S. Kim,
That the agenda for the Victoria Family Court and Youth Justice Committee meeting of February 26, 2026 be approved as amended to move item 11.1. Motion with Notice to be considered under Committee Business as Item 6.2.
CARRIED

3. Adoption of Minutes

3.1. Minutes of the Victoria Family Court and Youth Justice Committee Meeting of January 22, 2026

MOVED by S. Kim, SECONDED by J. Bateman,
That the minutes of the Victoria Family Court and Youth Justice Committee meeting of January 22, 2026 be adopted.
CARRIED

3.2. Notes of the Victoria Family Court and Youth Justice Committee Steering Committee meeting of February 12, 2026

MOVED by K. Guiry, SECONDED by S. Kim,
That the notes of the Victoria Family Court and Youth Justice Steering Committee meeting of February 12, 2026 be received for information.
CARRIED

4. Chairperson's Remarks

The Chair thanked all for being here and reinforced that the committee's two aims are to educate and to advocate.

5. Presentations/Delegations

There were no delegations.

5.1. Resource Agencies

There were no presentations from resource agencies.

5.2. Foundry BC Presentation

Invited guests from Foundry BC delivered a comprehensive overview (PDF) of the peer-supported, on-demand, low-barrier services offered to British Columbians aged 12-24 both online and at 19 Foundry locations across BC (with 16 more in development). Some 56k individuals in this age group have opted in since 2018, many developing safe and trusting long-term relationships with staff.

Rooted in the social determinants of health and wellness, Foundry services include primary care (physical and mental health, substance use support) as well as employment, housing and food security supports. These address the urgent need for centralized, youth-centred interventions in the face of system navigation challenges, the barriers faced by marginalized youth and the rising tide of anxiety, youth suicides and overdose deaths.

While the Ministry of Health provides start-up and annual funding, each branch must fundraise for operational needs such as drop-in counselling and administrative support. To that end, committee members were invited to become Foundry champions and do their part to raise awareness, identify donors and secure multi-year sustainable funding.

Leads on the following should be sent to Ms. Easton via email.

- **Financial support:** Through direct contributions, allocating discretionary funds, or hosting/championing a fundraising initiative that benefits Foundry.

- **Community connections:** Introductions to local businesses, service clubs, foundations, and individual philanthropists who may be interested in supporting youth mental health in their communities.
- **In-kind contributions:** Support such as land opportunities, construction materials, professional services, advertising, or other community assets that can help reduce capital or operating costs.
- **Advocacy and awareness:** Using their platforms to raise awareness about Foundry's impact, champion youth mental health, and reinforce the importance of sustained investment in integrated youth services.

6. Committee Business

6.1. 2025 Annual Report

**MOVED by J. Bateman, SECONDED by K. Guiry,
To Amend 2025 Annual Report and circulate when final financials are available.
CARRIED**

6.2. Motion with Notice: VFCYJC Advocacy Letter to Central Saanich Police Board Re: Mobile Youth Services Team (S. Kim)

**MOVED BY S. Kim, SECONDED BY S. Riddell,
That the Victoria Family Court and Youth Justice Committee write a letter to the Central Saanich Police Board advocating for the Mobile Youth Services Team. This will include the Panel presentation notes and be copied to all partners as well as Victoria RCMP, West Shore RCMP, Central Saanich RCMP and Saanich RCMP.
CARRIED**

7. Sub-Committee Business

7.1 Priorities and Grants (M. McLean)

Priorities Chair M. McLean shared that the Priorities Committee had recently received a grant application from Shoreline and that this application will be reviewed in the near future.

7.1.1. Victoria Youth Empowerment Society – Final Grant Report (J. Hunter)

The Victoria Youth Empowerment Society presented information from their Final Report from a grant received by the Victoria Family Court and Youth Justice Committee. They shared how grateful they were for the committee's support.

7.2. Capital Region Action Team for Sexually Exploited Youth

There was no report.

7.2.1. Formal Appointment of CRAT Chair

Congratulations to R. Stanton who is the new C.R.A.T. Chair. B. McElroy will help with the transition.

7.2.2. Presentation on the History and Purpose of CRAT

R. Stanton shared this information and will email it to our secretary so that it can be shared with our members and on our website.

7.2.3. Mobile Youth Services Team Update

Tabled until a future meeting.

7.3. Youth and Family Matters (R. Stanton)

R. Stanton provided the BC Coroner Service Report: Child Mortality in BC 2020-2024 for information.

7.4. Court Watch (M. Little)

M. Little will remain Chair. Thanks to B. Gash who has volunteered to help with this subcommittee.

7.4.1. Revival of the Sub-Committee to Focus on Legislation and Service/System Gaps

Tabled until a future meeting.

7.5. Communications (J. Bateman)

J. Bateman will remain Chair of the Communications Subcommittee.

7.5.1. Draft Calls to Action (M. McLean)

M. McLean is working on it. Tabled until a future meeting.

K. Marshall left the meeting at 12:50 p.m.
S. Riddell left the meeting at 12:52 pm.

7.5.2. VFCYJC Website (R. Labelle, Honeycomb Webworks)

R. Labelle submitted a Proposal for Enhancing Digital Engagement and Website Infrastructure.

There was no motion made as this money is already in our budget and the committee thanked Ryan for his work to improve the efficiency of our website.

7.5.3. Future Guest Speakers

The April 26 VFCYJC Guest Speakers will be M. Golden and L. Nelson from the Pacific Centre Family Services Association.

Other potential speakers identified for future meetings: Hon. Jodie Wickens, Minister of Children & Family Development; a representative from the BC Child and Youth Mental Health division; a representative from the Victoria Native Friendship Centre; Colin Tessier, Threshold Housing Society; a representative from the BC First Nations Justice Council; Hon. Nikki Sharma, Attorney General; and a representative from the Victoria Bar Association (sponsor of Law Day).

7.5.4. Open House 2026

A working group consisting of J. Crawford, M. Essery, K. Guiry, and M. Little was formed for the Resource Agencies Networking Reception. There was a suggestion of having youth speakers from the Youth Empowerment Society. A possible date is May 27, 2026 at the Victoria City Hall antechambers.

7.5.5. Draft Report on the Panel Discussion of October 23, 2025

Tabled until a future meeting.

8. Treasurer's Report

Treasurer J. Bateman reported on the process transferring CRAT funds from the District of Oak Bay to the VFCYJC account managed by the CRD.

9. New Business

9.1. Succession Planning and the Qualification Matrix

Committee members are encouraged to complete the Qualification Matrix and email it to vfamcourt@gmail.com.

A reminder that we're looking for CRD appointments and the CRD will advertise for interested individuals.

9.2. Future Meeting in Central Saanich or Another Host Municipality

Chair Little will liaise with S. Riddell about hosting the April 23, 2026 VFCYJC meeting in Central Saanich.

9.3. BC Coroner Service Report: Child Mortality in BC 2020-2024

The link to the final report is here.

10. Correspondence

There was no correspondence.

11. Motion With Notice

11.1. Motion with Notice: VFCYJC Advocacy Letter to Central Saanich Police Board Re: Mobile Youth Services Team (S. Kim)

Item 11.1 was moved to be considered as item 6.2.

12. Adjournment

MOVED BY M. McLean, SECONDED BY S. Kim,
That the Victoria Family Court & Youth Justice Committee meeting of February 26, 2026 be adjourned at 1:27 pm.
CARRIED

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Chair

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Committee Clerk