



File No.: 6500-20  
Salt Spring Island OCP-LUB  
Update Project

DATE OF MEETING: June 6, 2024  
TO: Salt Spring Island Local Trust Committee  
FROM: Jason Youmans, Island Planner  
Salt Spring Island Team  
COPY: Chris Hutton, Regional Planning Manager  
SUBJECT: OCP-LUB Update Project

## RECOMMENDATION

1. That the Salt Spring Island Local Trust Committee amend the OCP-LUB Update Project Terms of Reference as shown in Appendix 1 and endorse the document as amended.
2. That the Salt Spring Island Local Trust Committee endorse the consultant scope of services attached as Appendix 2.
3. That the Salt Spring Island Local Trust Committee select Option [X] as the working title for the Salt Spring Island OCP-LUB Update Project.
4. That the Salt Spring Island Local Trust Committee direct staff to prepare an analysis of major budget needs in the 2025/26 fiscal year, with proposed business case revisions to the Salt Spring Island Local Trust Committee Major Projects.

## REPORT SUMMARY

The primary purpose of this report is provide, for Salt Spring Island Local Trust Committee (SS LTC) consideration, a draft scope of services for a consultant to provide community engagement support and other planning services as part of SS LTC’s OCP-LUB Update Project. This report also recommends:

- minor amendments to the project terms of reference
- that SS LTC select an easily identifiable project name around which to begin building branded project content; and
- that SS LTC begin the process of developing business cases for major SS LTC projects for the 2025/26 fiscal year.

## BACKGROUND

SS LTC continues to build the suite of project management documents needed to advance the OCP-LUB Update Project in a transparent and predictable manner.

At its meeting of March 7, 2024, SS LTC passed the following resolution:

**SS-2024-021**

**It was MOVED and SECONDED,**

That the Salt Spring Island Trust Committee direct staff to provide a draft scope of services for review and comment for a planning consultant to undertake the work specified in the Terms of Reference in Appendix 1 as discussed and the OCP-LUB Update Project Business Case.

**CARRIED**

**Trustee Harris Opposed**

The draft scope of services attached as Appendix 2 to this staff report addresses the above resolution.

Outstanding resolutions regarding project management documents for the OCP-LUB update project are as follows:

**SS-2024-020**

**It was MOVED and SECONDED,**

That the Salt Spring Island Local Trust Committee direct staff to provide a draft Project Charter based on the discussions on the Terms of Reference in Appendix 1.

**CARRIED**

**Trustee Harris Opposed**

Staff will deliver a project charter in a future staff report. In the interim, the project Terms of Reference provides sufficient guidance for staff to continue to advance the project.

**ANALYSIS**

***OCP-LUB Update Project Terms of Reference***

The amendments proposed to the OCP-LUB Update Project Terms of Reference reflect the fact that while Islands Trust is committed to reconciliation with First Nations that have treaty and territorial interests in the Islands Trust Area, the organization does not yet have sufficiently strong relationships in place to enable project co-design in a timeframe that aligns with SS LTC's goals. This is particularly true for Salt Spring Island, where 13 Nations have identified interests, which introduces an unknown level of project risk. A commitment to building relationship through this project by meeting a high standard of engagement is potential alternative, and warrants further contemplation.

As with all planning projects, staff recommend that SS LTC strive for early and ongoing engagement with interested Nations, and with Indigenous people on Salt Spring Island.

SS LTC has engaged the services of Indigenous Relations advisor Sue Hallatt to provide guidance in the development of a First Nations engagement approach for SS LTC projects. That work is ongoing.

***Consultant Scope of Services***

The draft consultant scope of services attached as Appendix 2 reflects what staff consider to be the support needed to deliver a targeted OCP-LUB Update Project.

It is divided into deliverables across the 2024/25 and 2025/26 fiscal years. Because of Islands Trust annual budgeting process, the consultant can only be engaged one fiscal year at a time, so the attached scope of services describes what would be needed in each fiscal year over two years.

The consultant scope of services assumes significant consultant involvement not only in the community engagement aspects of the project, but the policy development components as well, recognizing the staff resource constraints in the Salt Spring Island office.

It is staff's intent that staff will undertake development of the Land Use Bylaw amendments to be created based on OCP changes.

### ***Project Title***

The OCP-LUB Update Project needs a name and associated branding that will make it easily recognizable in the community for the duration of the project. As it is a housing-forward targeted update, staff suggest that this be the focus of the project name. Staff provide the following options for SS LTC's consideration:

- 1) Home on Salt Spring: Planning for a Diverse Community
- 2) Housing Options, Housing Equity: A Community Plan for Us All
- 3) Our Island Home: Housing Solutions in a Special Place
- 4) Where we Live: A Community Plan to Honour People and Place
- 5) Island Workers, Island Homes: Planning for a Resilient Community

SS LTC is free to choose from the options above, mix and match as appropriate, or indeed propose an entirely new project name if none of the above options capture the SS LTC's project intent.

Staff have entered into a small contract with a graphic designer to develop a project logo once the project name is finalized.

### ***Major Project Business Cases***

The OCP-LUB Update Project as captured in the project Terms of Reference endorsed by SS LTC is a more substantial undertaking than that which was proposed in the business case SS LTC submitted to Islands Trust Council for the 2024/25 fiscal year. Additionally, work on the project has not proceeded in accordance with the original forecast timelines. As such, due to scope and timeline changes, the bulk of the policy development work on the project is going to take place in fiscal year 2025/26. Staff would like to return at an upcoming meeting with an analysis of budget options to fund this work, and impacts on other SS LTC projects, such as Ganges Village Planning.

### **Rationale for Recommendation**

- 1. That the Salt Spring Island Local Trust Committee amend the OCP-LUB Update Project Terms of Reference as shown in Appendix 1.**

*Staff Comment:* As discussed above, the proposed amendments bring the project Terms of Reference in line with SS LTC's existing relationships with area First Nations and ensures that expectations around project engagement can be met. The OCP-LUB update project is an opportunity to improve relationships and seek opportunities for collaboration, but goals in this regard should be attainable.

- 2. That the Salt Spring Island Local Trust Committee endorse the consultant scope of services attached as Appendix 2.**

*Staff Comment:* Endorsing the proposed scope of services enables staff to develop and post a Request for Proposals to begin the process of seeking a planning consultant to support SS LTC's OCP-LUB Update Project.

**3. That the Salt Spring Island Local Trust Committee endorse selection X as the working title for the Salt Spring Island OCP-LUB Update Project.**

*Staff Comment:* The project names proposed above reflect staff understanding of the intent of the project. Staff do not have a particular recommendation of one project name over another, but advise that a tag line is valuable to building community awareness of the project and what it is intended to achieve. SS LTC is welcome to propose alternatives.

**4. That the Salt Spring Island Local Trust Committee direct staff to prepare an analysis of major budget needs in the 2025/26 fiscal year, with proposed business case revisions to the Salt Spring Island Local Trust Committee Major Projects.**

*Staff Comment:* This resolution is important to ensure that SS LTC and staff have a clear understanding of resource requirements to complete this project and the impact that may have on other SS LTC initiatives.

**ALTERNATIVES**

**1. OCP-LUB Update Project Terms of Reference**

SS LTC is not obliged to accept the recommended amendments to the project Terms of Reference. If this is the case, no resolution is required and the Terms of Reference will remain as endorsed at the April 11 regular meeting. Alternatively, SS LTC may have other amendments that it wishes to make to the Terms of Reference, in which case it could consider the following resolution:

*That the Salt Spring Island Local Trust Committee request staff to amend the Salt Spring Island OCP-LUB Update Project Terms of Reference as follows, and endorse the document as amended:*

*By . . . .*

- 1) XXXXXXXXXXXX
- 2) XXXXXXXXXXXX

If SS LTC wishes to see its requested changes in the Terms of Reference before endorsing it, staff will incorporate the changes and return at the subsequent regular meeting for endorsement.

**2. Consultant Scope of Services**

If SS LTC wishes to make changes to the proposed Consultant Scope of Services it can use the following resolution:

*That the Salt Spring Island Local Trust Committee request staff to amend the Consultant Scope of Services attached as Appendix 2 as follows, and endorse the document as amended:*

*By:*

- 1) XXXXXXXXXXXX
- 2) XXXXXXXXXXXX

If SS LTC wishes to see its requested changes in the Consultant Scope of Services before endorsing it, staff will incorporate the changes and return at the subsequent regular meeting for endorsement.

**3. Project Name**

If none of the proposed project names are to SS LTC’s satisfaction, it may select its own alternative. If such as the case, it could consider using the following resolution:

*That the Salt Spring Island Local Trust Committee direct staff to use the following name for the Salt Spring Island OCP-LUB Update Project:*

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

**4. Major Project Business Cases**

There is no alternative to staff providing this information, as SS LTC must begin developing business cases for the coming fiscal year in accordance with the Islands Trust budget cycle.

**NEXT STEPS**

If SS LTC accepts staff’s recommendations it will take the following next steps:

- Amend the project Terms of Reference as directed and post it to the project website
- Develop and post an RFP for a planning consultant based on the Consultant Scope of Services
- Provide the selected project name to contracted graphic designer to develop project branding and begin developing public-facing project materials

Submitted By:	Jason Youmans, Island Planner	May 29, 2024
Concurrence:	Chris Hutton, Regional Planning Manager	May 29, 2024

**ATTACHMENTS**

1. OCP-LUB Update Project Terms of Reference – Proposed Amendments
2. OCP-LUB Update Project Consultant Scope of Services (Draft)



# Salt Spring Island OCP-LUB Update Project Terms of Reference

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## BACKGROUND/CONTEXT

An Official Community Plan (OCP) is a statement of objectives and policies to guide local government decisions on planning and land use within the plan's geographic area.

Taken together, the policies that comprise an OCP form the medium-term vision of a community and provide predictability for residents about the community's priorities and the type of land use change they can expect to observe around them. Section 473 of the [Local Government Act](#) describes the required content of an OCP. Section 474 of the *Act* describes optional content that local governments *may* include in their OCPs.

Salt Spring Island OCP Bylaw No. 434 was adopted in 2008 and has undergone only a handful of amendments since that time; the last being a modest change to industrial lands policy in 2020.

A land use bylaw is the set of regulations that determines how land on the islands is used today. It includes matters such as:

- Uses
- Lot sizes
- Density
- Building location
- Building height

Salt Spring Island Land Use Bylaw No. 355 (adopted in 1999) was never comprehensively updated to enact the policy direction expressed in the OCP.

## PURPOSE

The purpose of the Salt Spring Island OCP-LUB Update Project is to modernize the Salt Spring Island official community plan and land use bylaw to provide a framework that will guide residential growth and change on Salt Spring Island over the next decade or more. It will do so in a manner that addresses contemporary challenges while remaining consistent with the Islands Trust Policy Statement.

## PROJECT GOALS

The goal of the Salt Spring Island OCP-LUB Update Project is to **increase housing options and housing equity** on the island in ways that integrate:

- The interests of First Nations with treaty and territorial interests in the Salt Spring Island Local Trust Area;
- Ecosystem integrity and connectivity; and
- Climate change resiliency.

## PROCESS GOALS

The goals of the Salt Spring Island OCP-LUB Update Project process are to:

- Strengthen relationships with area First Nations through their early and ongoing engagement in ~~the design and execution of~~ a project process that reflects shared values;
- Ensure broad opportunities for community input through a robust public engagement process that reflects the diversity of the community;
- Ensure the Salt Spring Island OCP and LUB are consistent with the Islands Trust Policy Statement;
- Build on the strengths of the existing OCP by retaining those elements that continue to reflect the Island's aspirations; and

- Where appropriate, analyze and incorporate the evidence and recommendations of other governments, agencies, and non-governmental organizations and consider enacting policy and regulatory changes accordingly.

## PROJECT SCOPE

The scope of the Salt Spring Island OCP-LUB Update Project will be guided by focus on the above-noted goal and consistency with the [Islands Trust Policy Statement](#).

The five themes below will define the structural parameters of the project:

### **A. Engage First Nations ~~in Process Design and Execution~~ Early and Ongoing**

Thirteen (13) Nations have treaty and territorial interests in Salt Spring Island and many Indigenous people call the island home. Because a substantive update to the Salt Spring OCP and LUB may guide change on the Island for at least a decade, it is anticipated that area First Nations will take a significant interest in the OCP-LUB Update Project. It is important for SS LTC to understand those Nation's interests in the island and strive for a project process where those interests are understood and considered. For several years, First Nations with treaty and territorial interests on Salt Spring Island have told the Salt Spring Island Local Trust Committee (SS LTC) that they want to be at the table from the earliest days of major projects. As a substantive update to the Salt Spring OCP and LUB will guide change on the Island for at least a decade, it is anticipated that area First Nations will take a significant interest in the OCP-LUB Update Project and expect a level of involvement beyond simply commenting on policies as they are developed. This will take an investment of both time and budget, but will result in a product that is responsive to the [Islands Trust Reconciliation Declaration](#).

### **B. Update, Streamline and Build On Content in the Existing OCP and LUB**

The existing OCP will be used as the point of departure for the update. While a number of community priorities have emerged that merit attention, Salt Spring Island Local Trust Area remains within the Islands Trust Area, and the OCP must be consistent with the Object of the Islands Trust. Therefore, it is anticipated that environmental protection and growth management policies in the current document will endure, albeit in a refreshed form. The Islands Trust Policy Statement is currently undergoing a major amendment, the results of which will inform the scale of change that a renewed OCP can invite. Experience has demonstrated that the current OCP is too prescriptive in areas where greater flexibility may be required to achieve community objectives.

The Land Use Bylaw will then be updated in accordance with the policy direction of the OCP.

This project will also be used to update demographic, contextual and technical information in both the OCP and LUB and to review the required content of OCPs under Section 473 of the [Local Government Act](#). Amendments will be drafted to communicate clearly and in plain language to improve accessibility of the document.

### **C. Use Existing Reports and Plans to Inform Policy and Regulation**

Over the past five years Islands Trust and a number of local agencies and advocacy groups have published reports and plans that identify recommended actions for the LTC in high priority areas and other land use topics. These reports and plans should be the first point of reference as SS LTC considers updates to, and development of new, OCP policies and LUB regulations.



Guiding documents will include, but are not limited to:

- Islands Trust Reconciliation Action Plan
- Salt Spring Island Watershed Protection Plan
- Summary of Recommendations (SS LTC Housing Action Program Task Force)
- Homes for Islanders (Salt Spring Solutions)
- Salt Spring Island Community Wildfire Resiliency Plan (Capital Regional District), Salt Spring Island Active Transportation Plan (Capital Regional District)
- Salt Spring Island Area Farm Plan Renewal (Salt Spring Island Agricultural Alliance)

**D. Use Islands Trust Housing Project Toolkit**

This project will apply the project methodology proposed in the Islands Trust Housing Toolkit, which sets out a structured approach to LTC action on addressing housing issues. In particular, this project will use the Suitable Land Analysis that has been developed as part of the Toolkit to identify areas of the island that are more, or less, suitable for residential development. The data and mapping inputs into the Suitable Land Analysis will be customized to Salt Spring Island and developed in a transparent and engaged manner.

**E. Update Existing Development Permit Areas and Consider New Development Permit Areas**

Existing development permit areas should be revisited to ensure they are consistent with current best practices and evidence-based planning. Additional development permit areas should be considered, such as wildfire resiliency DPA and watershed protection DPA.

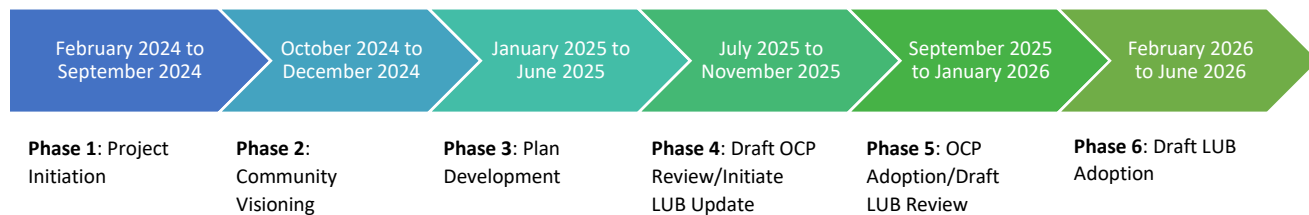
**F. Develop Indicators to Monitor Success**

Through this project a small suite of indicators will be developed and included in the OCP by which SS LTC and the general public can measure whether the goals of the update project are being achieved.

**PLANNING PROCESS AND TIMELINE**

The OCP/LUB Update Project is expected to take 30 months. Figure 1 provides an overview of the process, while Table 1 outlines the planning process showing key project phases, key activities and deliverables. While project activities are reasonably well defined, public engagement activities can be adapted based on the feedback of a Project Advisory Committee and other community interest holders, provided it meets overall project timelines and objectives.

**Figure 1: Planning Process Timeline**



**Table 1: Planning Process**

PHASE	ACTIVITIES	KEY DELIVERABLES
<b>Phase 1</b>  <b>PROJECT INITIATION</b>  <b>February 2024 to September 2024</b>	<i>Early First Nations Engagement</i> <ul style="list-style-type: none"> <li>Advise of intention to launch OCP/LUB update project</li> <li>Engage in discussions about <del>co-</del><a href="#">development of project process</a><a href="#">interests in process and outcomes</a></li> <li>Understand capacity expectations to participate</li> </ul>	Letters of Understanding with individual Nations or organizations representing multiple Nations
	<i>Research and Analysis</i> <ul style="list-style-type: none"> <li>Complete Communities Assessment undertaken by consultant</li> <li>Compile Baseline Conditions Report</li> <li>Compile OCP policies that have not been implemented</li> </ul>	Complete Communities Assessment Report  Baseline Conditions Report  Unimplemented Policies Report
	<i>Community Engagement Preparation</i> <ul style="list-style-type: none"> <li>Procurement and Onboarding of Project Consultants</li> <li>Develop project website and other communication materials</li> <li>Identify key community interest holders</li> <li>Form Project Advisory Committee</li> <li>Confirm Engagement Strategy</li> </ul>	Engagement Strategy  Establish Project Advisory Committee  Establish Consultant-Led Working Groups
<b>Phase 2:</b>  <b>TARGETED COMMUNITY VISIONING</b>  <b>October 2024 to December 2024</b>	<i>Ongoing First Nations Engagement</i> <ul style="list-style-type: none"> <li>Understand First Nations vision and goals for Salt Spring Island</li> </ul>	Phase 2 First Nations Engagement Summary
	Develop housing options and housing equity vision statement, identify key issues and assess priorities. This could include: <ul style="list-style-type: none"> <li>Community events/workshops</li> <li>Community-led group interest holder meetings</li> <li>Community survey</li> <li>Interest holder interviews</li> <li>Meetings tailored to particular demographics or specific interest areas</li> </ul>	Phase 2 Engagement Summary  Vision Statement  Comprehensive list of planning issues and priorities

PHASE	ACTIVITIES	KEY DELIVERABLES
<b>Phase 3:</b> <b>OCP DEVELOPMENT</b> January 2025 to June 2025	Develop and explore policy options related to key issues through: <ul style="list-style-type: none"> <li>• Project Advisory Committee meetings</li> <li>• Form consultant-led subject-area working groups as needed</li> </ul>	Preferred Policy Options
	Staff development of Draft OCP amendments	Draft OCP amendments
<b>Phase 4:</b> <b>DRAFT OCP REVIEW</b> and <b>INITIATE LUB UPDATE</b>	<i>Ongoing First Nations Engagement</i> <ul style="list-style-type: none"> <li>• First Nations review of Draft OCP amendments</li> </ul>	Phase 4 Engagement Summary
July 2025 to November 2025	<ul style="list-style-type: none"> <li>• Community events/open house to review Draft OCP amendments</li> <li>• Interest holder meetings</li> <li>• Survey to assess reception to the Draft OCP amendments</li> </ul>	Phase 4 Engagement Summary Final Draft OCP
	Staff development of Draft LUB amendments	Draft LUB amendments
<b>Phase 5:</b> <b>OCP ADOPTION</b> and <b>DRAFT LUB REVIEW</b>	<ul style="list-style-type: none"> <li>• Final edits to the Draft OCP</li> <li>• Public Hearing</li> <li>• Executive Committee approval</li> <li>• Ministerial approval</li> </ul>	Adopted OCP Monitoring Plan
September 2025 to January 2026	<i>Ongoing First Nations Engagement</i> <ul style="list-style-type: none"> <li>• First Nations review of Draft LUB amendments</li> </ul>	Phase 5 First Nations Engagement Summary
	<ul style="list-style-type: none"> <li>• Community events/open house to review Draft LUB amendments</li> <li>• Interest holder meetings</li> <li>• Survey to assess reception to the Draft LUB amendments</li> </ul>	Phase 5 Engagement Summary Final Draft LUB
<b>Phase 6:</b> <b>LUB ADOPTION</b> February 2026 to June 2026	<ul style="list-style-type: none"> <li>• Final edits to the Draft LUB</li> <li>• Public Hearing</li> <li>• Executive Committee approval</li> </ul>	Adopted LUB

## PROJECT COMMUNICATIONS

Project communications will be addressed in detail through a standalone project engagement strategy and plan. In general, however, project communications will include the following component parts:

- A memorable project name and tagline<sup>1</sup>
- A core visual style and suite of complementary graphics to be used for all initiatives and communication tactics throughout the project and corresponding engagement process. These graphics will be informed by the four integrated themes of the project: Housing options and housing equity; reconciliation with Indigenous People; ecosystem connectivity, and climate change resilience
- Tools and tactics to reach underrepresented segments of the population that are typically harder to reach through engagement processes
- Key messages that form the basis for communication materials, e.g., media releases, invitations, subscriber notices, posters, and enable the project team to speak with “one voice”, ensuring clear, concise, and consistent messaging across all communication. Key messages provide context, manage expectations around process and outcomes, and encourage people to become involved in the process. Key messages also communicate how participants’ input will be used. Engagement best practices suggest that participants will expect to know:
  - The project goals, boundaries or scope of the OCP-LUB update and the engagement process, i.e., what parts of the OCP-LUB are on the table vs. off the table at this time
  - how their input will be used to inform the OCP-LUB update
  - who will make the final decision, informed by community feedback, on the vision, goals, and land use concepts identified OCP-LUB
  - when and how the OCP and LUB updates will be adopted and implemented
- Accessing the following media channels as appropriate or available:
  - Social media
  - Print media
  - Print/digital promotion
    - Partnerships - Use local interest holding groups to amplify project messaging
  - Engagement Platform(s) Software

## COMMUNITY ENGAGEMENT

Community engagement and participation is a fundamental part of the OCP/LUB Update planning process. While SS LTC retains final authority over whether the plan is adopted, a strong level of input and ownership is important for the plan’s legitimacy. The planning process will seek to be equitable and reach a broad spectrum of the community.

Community members will be able to participate in the planning process for the Salt Spring Island OCP/LUB Update in a number of ways, including:

- Applying to join the OCP-LUB Update Project Advisory Commission
- Being recruited to a consultant-led working group
- Participating in community-led engagement activities
- Completing community surveys
- Attending open houses
- Sharing ideas and thoughts with SS LTC when the plan is presented at LTC open meetings and/or public hearings

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<sup>1</sup> If appropriate

The Salt Spring Island Local Trust Committee has requested that staff apply the principles of [Beyond Inclusion – Equity in Public Engagement](#) to this project. Those principles are:

- 1) Invite participation within an authentic and accountable engagement process
- 2) Plan early and proactively
- 3) Establish respectful relationships with Indigenous Peoples
- 4) Engage the internal diversity of a community
- 5) Work in a reciprocal relationship with communities
- 6) Tailor engagement plans to the context
- 7) Commit to ongoing learning and improvement
- 8) Advance systemic equity

A separate project engagement strategy and project engagement plan will be developed to implement the LTC's equity-focused engagement approach.

Engagement with First Nations and Indigenous island residents will be considered in a separate, but linked, First Nations engagement approach.

### **PROJECT ADVISORY COMMISSION**

A Project Advisory Planning Commission will be established as a special advisory planning commission to provide advice to the Project Team and act as a filter before project materials are provided to SS LTC for consideration.

The Project Advisory Commission will be comprised of up to 7 individuals from the community, ideally with broad geographic, social, cultural and professional representation.

Key roles of the OCP-LUB APC will be to:

- Advise on community engagement to ensure broad outreach is effectively undertaken throughout the community;
- Promote the project and public engagement opportunities within the community;
- Provide support to staff and consultants at public engagement events;
- Review background documents as directed by staff; and
- Provide feedback to staff and SS LTC on plan concepts, policy options, and the draft plan

### **SUBJECT-AREA CONSULTANT-LED WORKING GROUPS**

The consultant to lead engagement and policy option development on this project will establish subject-area working groups if the need for specialized expertise is identified.

The following subject-area working groups could be established:

- Housing Options and Housing Equity Working Group
- Climate Change Resiliency Working Group (with the following potential sub-groups):
  - Freshwater Sub-Group
  - Forest/Wildfire Sub-Group
  - Shoreline Sub-Group
- Short-term Rentals Working Group
- And other working groups, as needed.

Key roles of the consultant-led working groups will be:

- To review and synthesize relevant documents; and
- To provide policy advice based on document review and professional expertise

### AGENCY WORKING GROUP

A working group of staff from government agencies with jurisdiction over various Salt Spring Island services will be convened to ensure that those interests are appropriately reflected in the planning process and final documents.

### KEY COMMUNITY INTEREST HOLDERS

**Table 3: Key Community Interest Holders**

RESIDENTS	ADVOCACY GROUPS	SERVICE GROUPS	AGENCIES
Of Salt Spring Island Of British Columbia <ul style="list-style-type: none"> <li>• Property owners</li> <li>• Renters</li> <li>• Seniors</li> <li>• Students and youth</li> <li>• Healthcare workers</li> </ul>	Advocacy groups are organizations that use various forms of advocacy to influence public opinion and public policy  Examples on Salt Spring Island could include: <ul style="list-style-type: none"> <li>• Chamber of Commerce</li> <li>• SSI Community Health Society</li> </ul>	Service groups are organizations that provide tangible social or physical services to the community  Examples on Salt Spring Island could include <ul style="list-style-type: none"> <li>• Islanders Working Against Violence</li> <li>• Salt Spring Conservancy</li> </ul>	Agencies are generally government or government-like organizations that provide physical or social services  Examples on Salt Spring Island are: <ul style="list-style-type: none"> <li>• Capital Regional District (CRD)</li> <li>• North Salt Spring Waterworks District (NSSWD)</li> </ul>

### ROLES AND RESPONSIBILITIES

#### Salt Spring Island Local Trust Committee

SS LTC are the project champions. They set the project priorities, allocate resources and are the ultimate approval authority.

#### Planning Staff

This project will be managed by the Regional Planning Manager, and coordinated by an Island Planner, with support from other planners and administrative staff as required. Staff will oversee consultants undertaking community engagement, technical studies and data acquisition and processing. Staff will lead the actual policy writing.

#### OCP-LUB Update Project Advisory Committee

The OCP-LUB Update Project Advisory Committee will provide advice to Planning Staff and SS LTC on matters concerning the project. It will receive draft strategies from staff or consultants before implementation, and review draft summaries and reports before submission to SS LTC. The Project Advisory Committee will have the opportunity to review the draft OCP or sections thereof as they are completed and make recommendations to staff for amendment before submission to SS LTC.

#### Residents and General Public

All individuals with an interest in the local area will be invited to participate in the planning process through providing input to identify issues and opportunities and review draft OCP concepts, plans and guidelines.

## **Interest Holder Groups**

Interest holder groups such as service and advocacy groups will contribute to the planning process in the same way as residents, but may also be the subject of focussed consultation with respect to their particular areas of interest. Interest holder groups can also help with outreach, issue identification, opportunities and actions and reviewing policy options.

## **Consultants**

Consultants may be retained to provide expertise or to undertake studies to supplement the expertise of the Project Team. Special topic areas could include community engagement, wildfire risk mitigation, watershed protection, and hazard areas.

## **RELATIONSHIP TO OTHER INITIATIVES**

The OCP/LUB Update Project will ensure that the OCP advances, or considers opportunities to advance, other Islands Trust, agency, or community initiatives. Current initiatives that will influence the content of the OCP and LUB are:

**Islands Trust Policy Statement:** The Islands Trust Policy Statement is currently undergoing a renewal process of its own. It is anticipated that by the time a renewed Salt Spring Island OCP is ready for adoption the Policy Statement project will be complete. Any OCP adopted by the Salt Spring Island Local Trust Committee must be consistent with the Islands Trust Policy Statement.

**Islands Trust Reconciliation Action Plan:** The Islands Trust Reconciliation Action Plan describes the organization's path toward better relationships with the First Nations with treaty and territorial interests in the Islands Trust Area. The Salt Spring Island OCP-LUB Update Process should advance that plan, particularly Actions 3.2, 3.3 and 3.4.

**Salt Spring Island Watershed Protection Plan:** The Salt Spring Island Local Trust Committee recently endorsed a Watershed Protection Plan for the Island. The OCP-LUB Update Process should consider opportunities to advance the recommended actions of that plan.

**Salt Spring Island Community Wildfire Resiliency Plan:** The CRD recently completed a Wildfire Resiliency Plan for the island. This plan contains several actions that SS LTC can consider to support community wildfire resiliency. These actions could be advanced through the OCP-LUB Update Process. Alternatively, policies proposed through the OCP-LUB Update Process should not be inconsistent with the recommendations of the Resiliency Plan.

**Salt Spring Island Active Transportation Network Plan:** The CRD recently completed an Active Transportation Network Plan for the Island. The renewed OCP should facilitate or complement the actions proposed in that plan.

Current non-governmental initiatives that could influence the OCP-LUB Update Process include:

**Transition Salt Spring Climate Action Plan 2.0:** The 2020 Climate Action Plan authored by Transition Salt Spring provides a range of recommended actions that SS LTC could take to advance climate change resilience in the community. The OCP Update Process should consider opportunities to advance those recommended actions.

**Salt Spring Solutions Homes for Islanders:** This 2023 publication from Salt Spring Solutions proposes a range of initiatives that SS LTC could consider to advance housing options for middle and low-income earners on Salt Spring Island. The OCP Update Process should consider opportunities to implement the recommended actions of this report.

## BUDGET

Item Descriptions	Total Budget Cost
Early and ongoing consultation with 13 First Nations with treaty and territorial interests on SSI	\$26,000
Consultant to conduct and facilitate a robust and inclusive public engagement program and policy options development	\$50,000
Consultants to provide technical review if required	\$10,000
Communication and educational info, printouts, mail-outs, brochures, posting of meetings and legal notifications	\$9,000
Technical support on virtual and in-person sessions, and facility rental for in-person sessions, open houses and community engagement meetings	\$3,000
<b>Total</b>	<b>\$96,000</b>

## DELIVERABLES

The following deliverables will be achieved through the Salt Spring Island OCP-LUB Update Project:

1. Updated Salt Spring Island Official Community Plan
2. Updated Salt Spring Island Land Use Bylaw
3. Monitoring Plan

## PROJECT CHANGE MANAGEMENT

A change management structure is proposed to ensure that the project achieves its intended objectives and outcomes on time and on budget. However, it is also understood that new information or developments often emerge in the course of public policy processes that may impact the original project plan. The Regional Planning Manager will bring forward substantial changes that would affect the project budget or timeline outlined in this Terms of Reference for LTC and approval. The evaluation will assess the following, as necessary:

- Budget and schedule impacts
- Alignment to the project objectives
- Contract implications
- Relational implications (public, inter-governmental)
- Feasibility and benefits of the change
- Complexity and/or difficulty of the change options requested
- Scale of the change solutions proposed
- Risk to the project in implementing the change
- Risk to the project in not implementing the change
- Impact on the project in implementing the change (time, resources, finance, quality)



May 28, 2024

## Draft Scope of Services for OCP-LUB Update Planning Consultant

### INTRODUCTION

The Salt Spring Island Local Trust Committee is seeking proposals from qualified consultants with recent experience in official community plan and bylaw development as well as equity-focused community engagement to support a targeted update to the Salt Spring Island Official Community Plan and Land Use Bylaw. The work will include the design – and delivery alongside staff – of community and interest-holder engagement.

Technical tasks for the consultant will include:

- review and implementation assessment of housing-related policy directions proposed in recent community-generated reports
- plan audit and housing policy gap analysis
- analysis of community engagement results
- development of targeted updates to the OCP's community vision and relevant objectives as they relate to residential land uses
- development of new policy options and drafting of next policy directions for residential land uses

This a housing-focused update, although all changes should also advance the integrated mandates of:

- Reconciliation with Indigenous peoples
- Climate Change resilience and
- Ecological integrity

This proposed Scope of Services reflects work that will span two fiscal years. Because of Islands Trust's annual budget process it will require two RFPs; one for fiscal year 2024/25 and one for fiscal 2025/26 once the project budget for that year is approved.

### BACKGROUND

Like almost all communities in British Columbia, the Salt Spring Island Local Trust Area continues to struggle with a housing crisis. The high cost and limited availability of real estate and the traditional form that modern residential development has taken on the island means that there are few housing options for working families entering the market, small units for independent seniors, or homes to rent. Addressing this issue in the Islands Trust Area brings particular challenges, as solutions must be considered in the context of the Islands Trust object to preserve the natural environment and the area's unique amenities, and the resource constraints that characterize a rural island.

The overarching goals of this Salt Spring Island Local Trust Committee project is to **increase housing options and housing equity** on the island in ways that integrate:

- The interests of First Nations with treaty and territorial interests in the Salt Spring Island Local Trust Area;
- Ecosystem integrity and connectivity; and
- Climate change resiliency.

Several recent reports from Islands Trust and other local agencies and organizations help to inform the context of the OCP-LUB Update. These include:

- Salt Spring Island Complete Communities Assessment (*in progress*)
- Islands Trust Reconciliation Action Plan
- Salt Spring Island Watershed Protection Plan
- Summary of Recommendations (SS LTC Housing Action Program Task Force)
- Homes for Islanders (Salt Spring Solutions)
- Salt Spring Island Community Wildfire Resiliency Plan (Capital Regional District),
- Salt Spring Island Active Transportation Plan (Capital Regional District)
- Salt Spring Island Area Farm Plan Renewal (Salt Spring Island Agricultural Alliance)
- Salt Spring Island Climate Action Plan (Transition Salt Spring)
- Salt Spring Island Housing Needs Report (new one anticipated 2025, Capital Regional District, 2020)

## THE COMMUNITY

With a population of nearly 12,000 people, plus many tourists and seasonal residents, Salt Spring Island is the largest, most populated, and most visited of BC's Gulf Islands. It has a rural character, with natural areas, agriculture, an artisan community, and an emphasis on health, wellness, and sustainability that appeals to residents and visitors alike. The island has three public elementary schools and a large high school that draws students from around the Gulf Islands. It has a hospital with a 24-hour emergency department, and an RCMP station staffed with on-island officers. The median age of Salt Spring Island residents is 56.4 years, more than a decade older than the provincial average of 42.8.

Land use planning is administered by the Islands Trust. The Islands Trust is a unique federation of local governments, with a provincial mandate to preserve and protect the unique amenities and environment. The Salt Spring Island Local Trust Committee develops and adopts community plans and land use bylaws for the Salt Spring Island Local Trust Area. The Capital Regional District provides a range of services on the island, as do a handful of improvement districts. The largest of these improvement districts, the North Salt Spring Waterworks District, provides potable water to more than 2,100 residential and commercial lots from two surface water sources.

Salt Spring Island is home to a rich biodiversity and a variety of ecosystems. In and around the area, there are 48 species at risk. The area is critical habitat for Dun Skipper butterflies, Gray's Desert-parsley and two species at risk: the Little Brown Bat and Sharp-tailed snake.

Islands Trust acknowledges that the lands and waters that encompass the Islands Trust Area have been home to Indigenous Peoples since time immemorial and honours the rich history, stewardship, and cultural heritage that embody this place we all call home. There are 13 First Nations with treaty and territorial interests in the Salt Spring Island Local Trust Area and Islands

Trust Council is committed to establishing and maintaining mutually respectful relationships between Indigenous and non-Indigenous Peoples.

## PROJECT PURPOSE

Planning goals of the OCP-LUB Update Project are as follows:

**Increase housing options and housing equity** on the island in ways that integrate:

- The interests of First Nations with treaty and territorial interests in the Salt Spring Island Local Trust Area;
- Ecosystem integrity and connectivity; and
- Climate change resiliency.

Residential land use policies that emerge from this project should be either neutral in their impact on, or ideally advance, the integrated themes above.

Process goals of the OCP-LUB update project are as follows:

- Strengthen relationships with area First Nations through their early and ongoing engagement in a project process that reflects shared values;<sup>1</sup>
- Ensure broad opportunities for community input through a robust public engagement process that reflects the diversity of the community;
- Ensure the Salt Spring Island OCP and LUB are consistent with the Islands Trust Policy Statement;
- Build on the strengths of the existing OCP by retaining those elements that continue to reflect the Island's aspirations; and
- Where appropriate, analyze and incorporate the evidence and recommendations of other governments, agencies, and non-governmental organizations and consider enacting policy and regulatory changes accordingly.

Expectations of the project consultant are as follows:

- Provide an equity-based community engagement and communications plan informed by [Beyond Inclusion: Equity in Public Engagement](#)
- Work with staff to develop targeted OCP amendments that balance planning and technical expertise with local values and community knowledge, to revise the OCP in a way that is embraced by the community
- Work with staff to develop OCP amendments that are clear and provide consistent guidance and direction for Council, staff, and the community at large
- Confirm the residential context of existing Land Use Designations or propose alternative Land Use Designations
- Articulate an updated community vision, and residential land use goals and objectives that

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<sup>1</sup> This is not a responsibility of the project consultant

capture the unique context of Salt Spring Island

- Assess residential land use needs based on current data and projections; including linkages to the Complete Communities Assessment, housing needs assessment, community climate action and GHG profile, growth projections, and available land base
- Develop policies to manage the Ganges Village Area boundary and Fulford Village Area boundary and any future expansion
- Develop a new wildfire resilience development permit area in consultation with Salt Spring Island Fire Rescue and other relevant agencies, guided by the findings of the Salt Spring Island Wildfire Resilience Plan
- Develop additional development areas, or amend existing, to address project goals

## **FINAL DELIVERABLES**

At the completion of the OCP Update, SS LTC expects to receive the following deliverables:

- Recommended amendments to relevant OCP vision, goals, objectives and policies, identifying the specific sections or clauses of the OCP to be amended
- A detailed Community Engagement Summary report
- An Action Plan for the OCP, including recommended OCP amendments that lists priorities for action along with the timeframe for implementation (immediate/short/medium/long term), and monitoring and evaluation metrics
- All maps in shapefile file format or another ESRI ArcGIS compatible format, plus a user-friendly format to be integrated on the Islands Trust website
- Delivery of all documents and materials collected throughout the project, to be retained as part of the public record
- Attendance at relevant SS LTC meetings

## **DESCRIPTION OF WORK**

The following is an outline of the expected works to be completed. Additional topics and tasks may be added to the work plan as the project unfolds and new issues are identified.

### **FISCAL 2024/25 (to March 31, 2025)**

Anticipated budget: \$50,000

#### **Phase 1<sup>2</sup> – Project Initiation**

- Convene key staff and consultant team for introduction and understanding of expectations

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<sup>2</sup> See project phases and timelines in project Terms of Reference

- Develop and establish a roster of local resources with skills and expertise
- Develop a detailed Work Plan that aligns with the phases described in the project Terms of Reference, noting responsibilities for the consultant(s) and planning staff
- Develop, with staff, a detailed community and interest holder Community Engagement and Communications Plan to maximize local resources, existing events and identify opportunities for meaningful public participation in a practical context and using multiple platforms. The engagement plan should be developed to align with the phases set out in the Terms of Reference/Work Plan
- Consultation with OCP Advisory Committee to confirm approach established through initial meetings with staff
- Identify any missing expertise and develop a strategy to enhance the team, potentially with the use of sub-contractors

#### Phase 1 Deliverables

- A detailed Work Plan, with key deliverables, and a timeline with clearly defined and trackable milestones
- A comprehensive Community Engagement and Communications Plan
- Work Plan and Community Engagement and Communications Plan to be presented to SS LTC at a public meeting

#### **Phase Two – Targeted Community Visioning**

##### A. Plan Audit and Reports Review: Technical Review and Issues Identification

- Conduct a thorough review of the current OCP identifying areas that need improvement relative to the stated project goals
- Conduct a thorough review of recent relevant plans and supporting documents completed by the Salt Spring Island Local Trust Committee and other agencies and organizations that may inform the new OCP, providing observations about implementation relative to existing OCP and LUB policies
- Meet with planning staff, OCP Advisory Committee, and trustees to identify additional issues that need to be addressed in the OCP Review
- Report results of Technical Review and issues identified
- Prepare community engagement and interest-holder consultation materials to confirm findings with the public
- Interim Deliverables:
  - Report summarizing conclusions from OCP review and Gap Analysis
  - Report summarizing results of review of relevant plans and policies
  - Summary of Key Issues
  - Presentation of findings from Technical Review and Key Issues to OCP Advisory

Committee

- Prepare “Backgrounder” information packages on each of the Key Issues and topics identified<sup>3</sup>, with options, in preparation for engagement activities

B. Community and Interest-Holder Engagement

- Assist staff to prepare launch of community and interest-holder consultations
- Provide the public with results of work completed to date and Backgrounders about the intersection of residential land use and Indigenous reconciliation, climate change resiliency and ecological integrity
- Support staff presentation of findings of plan audit to the public and support public participation in further issue identification and validation
- Review current Vision, Goals and Objectives, both general and residential
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- Lead community review of existing OCP vision and objectives to assess validity
- Interim Deliverables:
  - Analysis of community engagement results
  - Presentation of engagement summary to staff

C. Vision, Goals and Objectives

- Draft proposed amendments to Community Vision using knowledge gained from technical review of current OCP, engagement activities, and evaluation of community values
- Draft proposed amendments to General Goals and Objectives and Residential Land Use Objectives using knowledge gained from technical review and engagement activities

Phase 2 Deliverables

- First draft of the following revised OCP elements:
  - Revised Vision
  - Revised General Goals and Objectives; Revised Residential Land Use Objectives
- Present revised Vision, Goals and Objectives to Advisory Committee and LTC
- Summary report of works completed in Phase 2

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<sup>3</sup> Presumed to be the intersection of residential land use and Indigenous reconciliation, climate change resiliency and ecological integrity.

## FISCAL 2025/26

Anticipated budget: \$50,000

### **Phase 3 – OCP Development**

#### A. Community and Interest Holder Consultation

- Support staff to host public session to present, discuss, and confirm results of engagement activities undertaken in Phase 2
- Review draft revised Vision, Goals and Objectives:
  - Support staff to present proposed amendments to the public
  - Seek improvements for next draft
- Support staff to present and seek community input on options for growth management, guided by the outcomes of the Complete Community Assessment

#### Interim Deliverables

- Summary of results from public engagement on growth management
  - Community Map and refreshed OCP Maps markups and drafts

#### B. OCP Policy and Action Development

- Review Land Use Designations and propose revisions where appropriate to confirm future directions set in policies
- Draft Policies, Strategies and Actions using knowledge gained from technical review, consultation to date, and development of draft Vision, Goals and Objectives
- Draft new Wildfire Resilience development permit area
- Review existing Development Permit Areas and their guidelines against revised vision, goals and objectives, and in consideration of project goals
  - Draft amendments to existing DPAs or draft new ones
- Recommend amendments to OCP Maps based on new information gained through technical review, community consultation, and development trends
- Develop indicators with staff that reflect project goals will allow for realistic monitoring over the next 10 years

#### Phase 3 Deliverables

- Submit refined draft OCP amendments that include:
  - Draft Vision, and General Goals and Objectives
  - Draft Residential Land Use Goals and Objectives

- Draft Policies, Strategies, and Actions
- Draft Land Use Designations
- Draft Wildfire Resilience development permit area
- Draft additional development permit area amendments of new development permit areas
- Draft Indicators as developed through consultation with staff
- Present draft bylaw amendments to OCP Advisory Committee

#### **Phase 4 – Draft OCP Review**

##### **A. Community and Interest Holder Consultation**

- Present draft OCP bylaw amendments to the community
- Review and confirm what was heard in Phase Two Community Consultations
- Confirm Growth Management Strategies, Land Use Designations, Development Permit Areas, and OCP Maps
- Seek input on anything missing from the proposed OCP amendments

##### **B. Final Revisions**

- Make final changes following community engagement activities
- Prepare OCP amendments for final presentation

#### **Phase 3 Deliverables**

- Presentation of Final Draft OCP amendments and maps
  - Final Presentation to OCP Advisory Committee
  - Final Presentation to Staff
  - Final Presentation to SS LTC