

## 6.10.iii Policy & Procedure

### ADVOCACY POLICY

Trust Council: September 12, 2012

Amended: September 30, 2013

#### A. PURPOSE:

1. To provide guidelines for advocacy activities in the context of legislation and policy.
2. To define policies and procedures for effective advocacy.
3. To ensure that advocacy positions are credible and supported by public process.
4. To clarify roles and responsibilities for implementing this policy, for the benefit of Islands Trust as well as the public and agencies involved in advocacy in the Islands Trust area.

#### B. BACKGROUND:

1. The *Islands Trust Act* establishes that the Object of the Islands Trust is to preserve and protect the Trust Area and its unique amenities and environment in cooperation with others. Based on this legislated mandate, Trust Council encourages cooperation by all levels of government, First Nations, industry, business, not-for-profit and community groups to act in ways that advance the Object, using a variety of strategies, such as protocol agreements, letters of understanding and advocacy. All levels of government, First Nations, non-profit agencies, businesses, property owners, residents and visitors share responsibility for the preservation and protection of the unique environment and amenities of the Trust Area.

#### C. REFERENCES:

1. The *Islands Trust Act* defines the Islands Trust's purpose, referred to in the legislation as its "object" and defines Trust Council's advocacy roles in section 8 and 9. Trust Council may, by bylaw, delegate its advocacy role to another party.
2. Islands Trust Policy Statement, section on Roles and Responsibilities

*The Islands Trust Council cannot effectively implement the Policy Statement without the support of all stakeholders. Assistance, cooperation and collaboration are required from local trust committees, island municipalities, the Trust Fund Board, the Provincial Government, other government agencies, non-government organizations, communities, First Nations, property owners, residents and visitors. In the spirit of the legislated object of the Islands Trust, it is expected that all corporate entities of the Islands Trust will consult with other agencies on matters involving potential conflict between the legislated object of the Trust and the legislated mandate of other agencies.*

3. Islands Trust Policy Statement, Part 1: Purpose and implementation of the Trust Policy Statement, Roles and Responsibilities, Role of Other Government and Non-Government Organizations.

*Government agencies and non-government organizations can contribute greatly to the preservation and protection of the environment and amenities of the Trust Area through cooperative actions based on the Policy Statement. Cooperative actions such as protocols and mutually supportive strategies and action plans are necessary for the sustainability of the Trust Area.*

4. Islands Trust Policy Statement, Part II - The Islands Trust object and its meaning

*to achieve its object, the Islands Trust must be an educator, coordinator, and initiator, guiding individuals, organizations and other agencies in support of the object. While the Islands Trust can provide the necessary leadership, responsibility for stewardship of the Trust Area rests with many. Individuals, other government agencies, organizations, and the Province itself all have important roles to play. Cooperative actions are required of other agencies, organizations and individuals to ensure that activities are carried out in a manner that is sensitive to the needs of Trust Area ecosystems and island communities.*

5. Islands Trust Policy Statement, Part II - The Islands Trust object and its meaning, Guiding Principles:

- *The primary responsibility of the Islands Trust Council is to provide leadership for the preservation, protection, and stewardship of the Trust Area's amenities, environment, and resources.*
- *When making decisions and exercising judgment, Trust Council will place priority on preserving and protecting the integrity of the environment and amenities in the Trust Area.*
- *Trust Council will seek information from a broad range of sources in its decision-making processes, recognizing the importance of local knowledge in this regard.*
- *Trust Council believes that open, consultative public participation is vital to effective decision making for the Trust Area.*
- *Trust Council will implement a plan for the advancement of the Policy Statement as part of its annual budget process, and the Executive Committee of Trust Council will report to Council on progress in achieving the goals of the Policy Statement.*

6. Islands Trust Policy Statement, Part III Ecosystem Preservation and Protection, Policy 3.1.9

*Trust Council encourages actions and programs of other government agencies which:*

- *place priority on the side of protection for Trust Area ecosystems when judgment must be exercised,*
- *protect the diversity of native species and habitats in the Trust Area, and*

- *prevent pollution of the air, land and fresh and marine waters of the Trust Area.*
7. Trust Council Policy 1.3.i Policy Statement Implementation Policy
  8. Trust Council Policy 2.1.i Statutory Rules of Conduct
  9. Trust Council Policy 2.1.ii Standards of Conduct
  10. Trust Council Policy 2.4.i Executive Committee Terms of Reference
  11. Trust Council Policy 2.4.iv Trust Programs Committee Terms of Reference
  12. Trust Council Policy 3.2.ix Islands Trust/Trust Fund Board Communications
  13. Trust Council Policy 5.4.ii Procedural Fairness in Rezoning
  14. Trust Council Policy 6.3.i Budget Process
  15. Trust Council Policy 6.10.i Annual Report
  16. Trust Council Policy 6.10.ii Communications
  17. Trust Council Policy 6.12.ii UBCM/AVICC Membership and Resolutions
  18. Trust Council Policy 7.1.iii Use of Local Trustee letterhead
  19. Trust Council Policy 7.1.vii. Receipt of Confidential Information from External Governmental Organizations and Agencies
  20. Trust Council Policy 7.1.iv & vi Use of Islands Trust letterhead and logo
  21. Trust Council Policy 7.1.vii Receipt of Confidential Information from External Government Organizations and Agencies
  22. Trust Council Strategic Plan
  23. Local Trust Committee Official Community Plans
  24. Trust Fund Board Policy 03008 Consulting Trust Council, Local Trust Committees, Island Municipalities, and Local Trustees on Trust Fund Board Matters
  25. Trust Fund Board Policy 96009 Roles and Responsibilities
  26. Trust Fund Board Policy 03006 Relationships with External Groups
  27. Trust Fund Board Policy 03008 Consulting Trust Council, Local Trust Committees, Island Municipalities, and Local Trustees on Trust Fund Board Matters
  28. Best Election Practices for Staff and Trustees - Guidelines

## D. DEFINITIONS:

In this policy,

1. **“Advocacy”** is the act of influencing and/or seeking cooperation with other agencies and decision-makers about laws, regulations, policies, programs, budgets, priorities, and other decisions relevant to the Islands Trust mandate.
2. **“Islands Trust bodies”** are the legal entities within the organizational structure of the Islands Trust, including Trust Council, local trust committees, council committees and the Trust Fund Board.
3. **“Consultation”** is the act of seeking comment on a proposed position or program, or other decision and then considering input received.

## E. GENERAL POLICIES:

1. From Communications Policy 6.10.ii: “In all communications, staff and trustees should identify whether they are representing a Local Trust Committee, the Executive Committee, Trust Council, or the Trust Fund Board” or speaking as an independent elected official or private citizen.”
2. Islands Trust bodies will conduct their advocacy activities in a manner that enhances Islands Trust’s reputation as an organization that works proactively, constructively and collaboratively to advance the Object in an informed, organized, respectful, and transparent way.
3. Islands Trust bodies will ensure that their advocacy positions are consistent with the *Islands Trust Act*, the Object and established policy and are supported by a resolution of Trust Council, Executive Committee, Trust Fund Board or local trust committee.
4. Islands Trust bodies will ensure that their advocacy positions consider the roles and needs of all other bodies of the Islands Trust. When practical, Islands Trust bodies will coordinate their advocacy efforts through the Executive Committee so that related issues can be advanced strategically, in the context of Trust Council’s Strategic Plan.
5. When making decisions about new advocacy positions and actions, Islands Trust bodies will base those decisions on research, such as: a) a review of related past Trust Council and Executive Committee decisions and actions; b) consistency with the Islands Trust Policy Statement; c) consistency with Official Community Plan policies; d) relevant evidence; e) contextual information; f) an assessment of partnership opportunities; g) implications of proceeding or not proceeding with certain courses of action; and h) potential workload implications for staff and trustees.
6. When practical, Islands Trust bodies will proactively monitor the legislation and policy development activities of other levels of government so that advocacy actions can be undertaken early in the policy development process when they might be most effective.

7. When developing an advocacy position, or substantially changing an advocacy position, Islands Trust bodies will consult other Islands Trust bodies that could be affected. The consulted body will consider adding the item to its next public agenda and convey through a resolution whether or not there are any concerns, the nature of the concern and, if appropriate measures that would resolve or address the concern. In the case of an urgent matter, an Islands Trust body may wish to comment through a resolution without meeting process.
8. Islands Trust bodies will adapt their advocacy strategies in response to changing political and economic contexts and new information.
9. Islands Trust bodies will consider the impact on existing work programs when considering advocacy positions.
10. Islands Trust bodies will ensure their advocacy positions and strategies:
  - respect the roles and needs of other stakeholders, and demonstrate a sincere attempt to build lasting relationships, even during conflict;
  - are non-partisan;
  - respect the public policy process by targeting requests to decision-making bodies with the mandate to act on the request and; demonstrate adequate knowledge and expertise, using scientific knowledge where appropriate.
11. Advocacy letters from Islands Trust bodies to elected officials should be signed by an elected official and be grounded in a resolution made at a public meeting.
12. Before announcing an advocacy position, Islands Trust bodies will prepare a strategic communications plan, and prepare for media attention and comment from constituents, stakeholders or partners. Community outreach may be considered before and/or after taking a position.
13. When entering partnerships for the purpose of advocacy Islands Trust bodies will consider broader implications such as:
  - conflicts may arise between the requirements of statutes such as the *Community Charter* or *Local Government Act* and the practices of non-governmental groups;
  - partnerships may require employees to receive confidential information requiring prior authorization by Trust Council or the Executive Committee consistent with Trust Council Policy 7.1.vii Receipt of Confidential Information from External Government Organizations and Agencies; and
  - partners may expect commitments for a longer duration than a one-year budget cycle or three-year election cycle.
14. Islands Trust bodies will ensure that advocacy strategies involving partnerships, especially those using the Islands Trust logo, include agreement among all partners on the provisions in E.12, the roles and responsibilities within the partnership and the decision-making processes.

---

**F. ROLES AND RESPONSIBILITIES:****Trust Council**

1. The Islands Trust Council establishes overall advocacy direction through the Islands Trust Policy Statement, sets priorities through its strategic plan and takes advocacy positions by resolution.

**Executive Committee**

2. The Executive Committee coordinates Trust Council's advocacy direction.
3. Executive Committee members encourage a coordinated approach to advocacy and external liaison as part of their appointment to local trust committees and the Trust Fund Board.
4. The Executive Committee appointee will notify Executive Committee when a local trust committee or the Trust Fund Board passes a resolution related to advocacy.
5. The Executive Committee directs individual advocacy actions in accordance with the advocacy direction set by Trust Council through resolutions and the strategic plan.
6. The Executive Committee may assist local trust committees, island municipalities and the Trust Fund Board with advocacy if a request for support is referred to the Executive Committee by resolution of those bodies.
7. The Executive Committee will seek a resolution of support from a local trust committee before engaging in advocacy on a local trust area issue.
8. The Executive Committee will include a report on advocacy activities in its quarterly report to Trust Council.
9. The Executive Committee will use their annual joint meeting with the Trust Fund Board and Bowen Island Municipality to discuss current and emerging advocacy topics of mutual interest.

**Local Trust Committees**

10. Local trust committees conduct advocacy based on the Islands Trust Object, the Islands Trust Policy Statement and their Official Community Plan(s).
11. Local trust committees may, by resolution, undertake advocacy on land use issues specific to their local trust area and consistent with the official community plan after considering whether the position may fetter their discretion on current or future land use planning decisions.
12. Where the Islands Trust Council has adopted a bylaw pursuant to Section 10 of the *Islands Trust Act* that delegates powers under Section 8(2)(b),(c), (d) or (e) of the *Islands Trust Act* to a local trust committee, the local trust committee may, by

resolution, undertake related advocacy, subject to any restrictions or conditions specified in the bylaw.

13. The duties of elected office to make unbiased decisions about land use planning will take precedence when an advocacy topic overlaps with those duties.
14. When a local trust committee adopts an advocacy position, it will inform the Executive Committee, and will consider how the item relates to the staff work program.
15. If a local trust committee wishes to advocate on an issue not related to land use planning or not consistent with its Official Community Plan, the local trust committee Chair will seek approval from the Executive Committee to allocate staff time to the project.
16. If a local trust committee wishes to advocate on an issue overlapping with the jurisdiction of another Islands Trust body or island municipality, it will consult with the affected body. After considering the advice from that body it may take an independent position that is consistent with the object of the Islands Trust and the Islands Trust Policy Statement, and will inform that body of the position.

### **Trust Fund Board**

17. Trust Fund Board advocacy is governed by Trust Fund Board policies TFB 96009 Trust Fund - Roles and Responsibilities, TFB 03006 Relationships with External Groups and TFB 03008 Consulting Trust Council, Local Trust Committees, Island Municipalities, and Local Trustees on Trust Fund Board Matters. If the Trust Fund Board wishes to advocate on an issue overlapping with the jurisdiction of another Islands Trust body or island municipality, it may consult with the affected body as described in those policies. After considering the advice of that body it may take an independent position consistent with the object of the Islands Trust, and will inform the affected body of the position.

### **Individual trustees**

18. Only the Chair of Trust Council may represent Trust Council advocacy positions to the media unless the Chair designates this role to a trustee.
19. Individual trustees may advance advocacy positions that are established by local trust committee policy, resolution or bylaw.
20. Trustees will comply with policies on communications, letterhead and logo when communicating about advocacy or other topics.
21. Local trustees are encouraged to notify the Executive Committee of any upcoming meetings with provincial or federal ministers to ask if there is an opportunity to promote the broader interests of the Islands Trust. The likelihood of success increases when positions are sponsored by the broader organization, and are consistent with other positions being advocated to that same minister.

22. Before advancing an advocacy position as a private individual, a trustee must ensure he or she is taking into account the principles of administrative fairness and he or she is acting in accordance with Trust Council Guidelines on Statutory Rules of Conduct and section 103 of the *Community Charter* which imposes restrictions regarding conflict of interest and outside influence.
23. Municipal trustees will be responsible for liaison between Trust Council and the municipality on advocacy issues in between the annual joint meeting between the municipality and Executive Committee.

### **Staff**

24. The Chief Administrative Officer will be responsible for the Islands Trust's advocacy policies and procedures.
25. Staff who become aware of emerging legislative or other issues relevant to the Islands Trust mandate will notify their Director, who will raise the topic at the subsequent team meeting. If the issue warrants further action, the request will be forwarded to the Trust Area Services Director for discussion at Executive Committee.
26. Trust Area Services staff are responsible to alert the Executive Committee to new issues that directly affect Islands Trust operations or mandate and to seek political direction before investing staff time exploring the issue.
27. When a local trust committee passes a resolution related to advocacy, Local Planning Services staff will notify the Director of Local Planning, who will then notify the Director of Trust Area Services.
28. Local Planning Services staff are responsible for research on issues identified by local trust committees relating to land use planning, the official community plan and any advocacy topics that are related to additional powers delegated to the local trust committee by Trust Council.
29. When a local trust committee considers an advocacy issue that is relevant to the whole Trust Area, including Bowen Island Municipality, the Director of Local Planning Services may ask Executive Committee for support from Trust Area Services. Executive Committee will consider the requests for service and the advice of the CAO, and decide on staff support to carry out the local trust committee direction as time allows.
30. When researching background about a potential advocacy position, staff will convey to contacts that the inquiry is for research purposes only.
31. When researching advocacy positions, staff will work with external contacts at the staff-to staff level, and will communicate with non-Islands Trust elected officials only with the permission of the appropriate Chair and/or the Chief Administrative Officer.
32. When participating in advocacy partnerships that involve the receipt of confidential information, staff will comply with the Trust Council Policy 7.1.vii Receipt of



Confidential Information from External Governmental Organizations and Agencies (See E12).

33. When Trust Area Services staff are involved in advocacy work related to Trust Fund Board activities or interests, they will notify the Trust Fund Board Manager, and as appropriate, work with Trust Fund Board staff to prepare briefing and decision documents for the Trust Fund Board.

## **G. SPOKESPEOPLE:**

1. Communications Policy 6.10.ii. will guide decisions about spokespeople.
2. As the official representative of the Islands Trust Council, the Chair of the Islands Trust Council may independently and immediately state advocacy positions that are consistent with the Object, the Policy Statement or previous resolutions of Islands Trust bodies.
3. Spokespeople should keep their comments as concise as possible, limit their comments to their own scope of knowledge and, when practical, should indicate that their statements are in support of the Object, Policy Statement policies or resolutions of an Islands Trust body. Where additional technical detail is desired, a staff or consultant report or comment can support the spokesperson.
4. Spokespeople should advance advocacy positions in a manner that is consistent with Trust Council's policy on standards of conduct.
5. Spokespeople should notify the Chief Administrative Officer (CAO) and Executive Committee of public statements made on an advocacy topic as soon as possible, and provide copies of any printed materials used to the directors of units with a relevant work program.

## **H. REPORTING:**

1. The Director of Trust Area Services will prepare a summary of advocacy activities for inclusion in the Islands Trust annual report.
2. The Executive Committee will report advocacy activities to each quarterly Trust Council meeting and seek updates from other Islands Trust bodies involved in advocacy.
3. Annually, the Executive Committee will report to the Trust Council on advocacy actions and highlights from conventions of the Association of Vancouver Island and Coastal Communities and Union of British Columbia Municipalities.

## **I. BUDGET:**

1. Funding for advocacy activities will be considered in accordance with the Islands Trust Council's policy on budget process.

**J. EVALUATION:**

1. Islands Trust bodies are encouraged to celebrate positive results by thanking or congratulating key decision-makers.
2. In the last year of every Islands Trust Council term the Executive Committee will review and evaluate the effectiveness of the advocacy work undertaken during the term, considering the general policies in section E.