



	REPORT No.: 2021-43
MEETING DATE: SEPTEMBER 16, 2021	DATE PREPARED: AUGUST 30, 2021
SUBJECT: ADVOCACY & ENGAGEMENT POLICY	

RECOMMENDATION

THAT with respect to Report No. 2021-43 (CAO Division) we, The District of Thunder Bay Social Services Administration Board, approve the draft Advocacy & Engagement Policy as presented;

AND THAT we authorize the Chief Administrative Officer to amend the policy with respect to housekeeping items, as may be required from time to time.

REPORT SUMMARY

To present the Board with the draft Advocacy & Engagement Policy for review and consideration.

BACKGROUND

The 2020-23 Strategic Plan 2023 (The Plan) includes 47 total objectives under 9 strategic directions. Objective #41 under Strategic Direction #9 of The Plan is to develop an Advocacy Policy.

COMMENTS

The scope of the Advocacy Policy as proposed in the 2020-23 Strategic Plan has been broadened to include community engagement and forms of advocacy other than policy advocacy. Internal procedures are under development to accompany this policy.

FINANCIAL IMPLICATIONS

There are no immediate financial implications resulting from this report.



CONCLUSION

It is concluded that this report provides a draft Advocacy Policy & Engagement Policy to the Board for consideration.

REFERENCE MATERIALS ATTACHED

Attachment #1 [Advocacy and Engagement Policy](#)

Attachment #2 [Advocacy and Engagement Procedure](#)

PREPARED BY:	Carole Lem, Communications & Engagement Officer The District of Thunder Bay Social Services Administration Board
APPROVED / SIGNATURE:	
	William (Bill) Bradica, Chief Administrative Officer The District of Thunder Bay Social Services Administration Board
SUBMITTED / SIGNATURE:	
	William (Bill) Bradica, Chief Administrative Officer The District of Thunder Bay Social Services Administration Board

POLICY

CATEGORY/SECTION

BOARD - GENERAL

SUBJECT

ADVOCACY & ENGAGEMENT

AUTHORITY

Governance & Procedural By-law 2017

INTENT OF POLICY

1. To establish a protocol for advocacy and engagement efforts undertaken by or on behalf of The District of Thunder Bay Social Services Administration Board (TBDSSAB or the Board);
2. To ensure advocacy and engagement efforts follow best practices;
3. To allow for the prioritization of advocacy and engagement efforts that align with TBDSSAB's vision, mission and values, strategic goals, and the diverse perspectives of our clients and communities;
4. To increase the efficacy of advocacy and engagement efforts by establishing a framework to guide the planning, implementation, and evaluation of efforts and their intended outcomes.

DEFINITIONS

Advocacy

Refers to any deliberate or strategic activity that is intended to ***influence or effect change*** by engaging our ***audience/stakeholders***.

Engagement

Any deliberate or strategic outreach, consultation or communication with our ***audience/stakeholders*** that is intended to ***influence or effect change***.

- "Influence or Effect Change" may mean to increase or change awareness, knowledge, behaviours or attitudes, foster collaboration, effect policy change or influence decisions within TBDSSAB or external organizational, political, economic, and social institutions.
- "Audience/Stakeholders" may include (but is not limited to) service users, TBDSSAB staff, community partners, decision-makers, provincial or federal government officials.
- In nearly all cases, advocacy and engagement activities under this policy will be related to social justice and/or the administration of the service system.

IMPLEMENTATION / BOARD APPROVAL DATE:

September 16, 2021

REVISION DATE(S):

PAGE

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CATEGORY/SECTION BOARD – GENERAL	SUBJECT ADVOCACY & ENGAGEMENT
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Examples of Advocacy and Engagement activities may include (but are not limited to):

- Research/position papers
- Meetings with government officials
- Public campaigns or statements via media, social media, or other platforms
- Participation in working groups, tables, or committees
- Raising and lowering of flags in recognition of an event/campaign

POLICY

The Chief Administrative Officer (CAO) is responsible for the development of TBDSSAB's advocacy and engagement efforts with final approval from the Board for political advocacy activities and strategies.

- The authority to pursue advocacy and engagement activities requires authority from the CAO, with final approval from the Board as required.
- The Communications and Engagement Officer will serve as a centralized resource for the coordination and tracking of advocacy and engagement activities.
- All TBDSSAB advocacy efforts requiring strategies for engaging with political stakeholders or lobbying provincial and federal governments requires final approval from the Board. The Board will request meetings with government officials for the fulfillment of any advocacy efforts through the CAO with support from Administration.
- A framework is provided in the Advocacy and Engagement Procedure and the accompanying Form.

STANDARDS OF APPLICATION

This policy applies to all TBDSSAB advocacy and engagement efforts.

RELATED POLICIES

Refer to Advocacy & Engagement Procedure for related Policies

RELATED PROCEDURES

Refer to Advocacy & Engagement Procedure for related Procedures

PROCEDURE	PROCEDURE NAME	Advocacy & Engagement Procedure
	PROCEDURE NUMBER	BRD-01:144-01
	PROCEDURE SECTION	COMMUNICATIONS
	POLICY REFERENCE	BRD-01:144
	REVISION DATE	
	SUPERSEDES	n/a
	IMPLEMENTATION DATE	October 1, 2021

PROCEDURE STATEMENT:

To establish a clear and consistent framework to guide The District of Thunder Bay Social Services Administration Board (TBDSSAB or the Board) with the planning, implementation, and tracking of advocacy and engagement activities.

PROCEDURE:

TBDSSAB advocacy & engagement activities will be planned, implemented, and tracked according to the following TBDSSAB Advocacy Framework.

The Communications and Engagement Officer will be the point person to coordinate the planning, implementation, and tracking of advocacy and engagement activities, with approval from the Chief Administrative Officer (CAO) and/or the Board as required.

Staff & Board Member Expectations

Staff and Board Members are responsible for ensuring that all Advocacy and Engagement activities (as defined by the Advocacy and Engagement Policy) are conducted in accordance with the Policy & Procedure.

Neither TBDSSAB staff nor TBDSSAB committees are permitted to pursue advocacy or engagement activities without approval of the CAO.

If any employee or Board member becomes aware of TBDSSAB activities that may be considered advocacy or engagement, the individual is required to notify the Communications & Engagement Officer and/or the CAO as soon as possible.

AUTHORITY AND RESPONSIBILITY:

Office of the Chief Administrative Officer.

TBDSSAB ADVOCACY FRAMEWORK:

1.0 Introduction

This Framework will guide TBDSSAB advocacy activities and has been developed using best practices for advocacy, knowledge mobilization and stakeholder engagement. TBDSSAB's Advocacy Framework is built around a broader definition of advocacy that includes internal practice as well as system and policy-level change. The purpose of the Advocacy Framework is to ensure that TBDSSAB is strategically engaging in advocacy efforts, helping to identify gaps, pivot accordingly, and inform how TBDSSAB tracks and measures success.

2.0 Guiding Principles

The Advocacy Framework follows best practices for advocacy, knowledge mobilization and stakeholder engagement, and includes the following guiding principles.

2.1: Relevance

- Advocacy efforts will clearly align with TBDSSAB's Mission, Vision, Values, areas of service delivery, and its dedication to *Dignity, Respect and Quality of Life*.

2.2: Scope

- Ensure the scope includes multiple levels – not only Policy advocacy.
- Efforts can be made internally as well, in alignment with advocacy priorities, to lead by example and increase the impact of TBDSSAB's advocacy efforts.

2.3: Organizational Capacity

- Advocacy efforts are more successful when ongoing internal capacity building is built in.
 - Internal capacity building can act as a fit test for determining who should be involved in certain strategies and ensures the team working on advocacy strategies are advocating from a place of evidence-based, current information

2.4: Diversity of Perspectives:

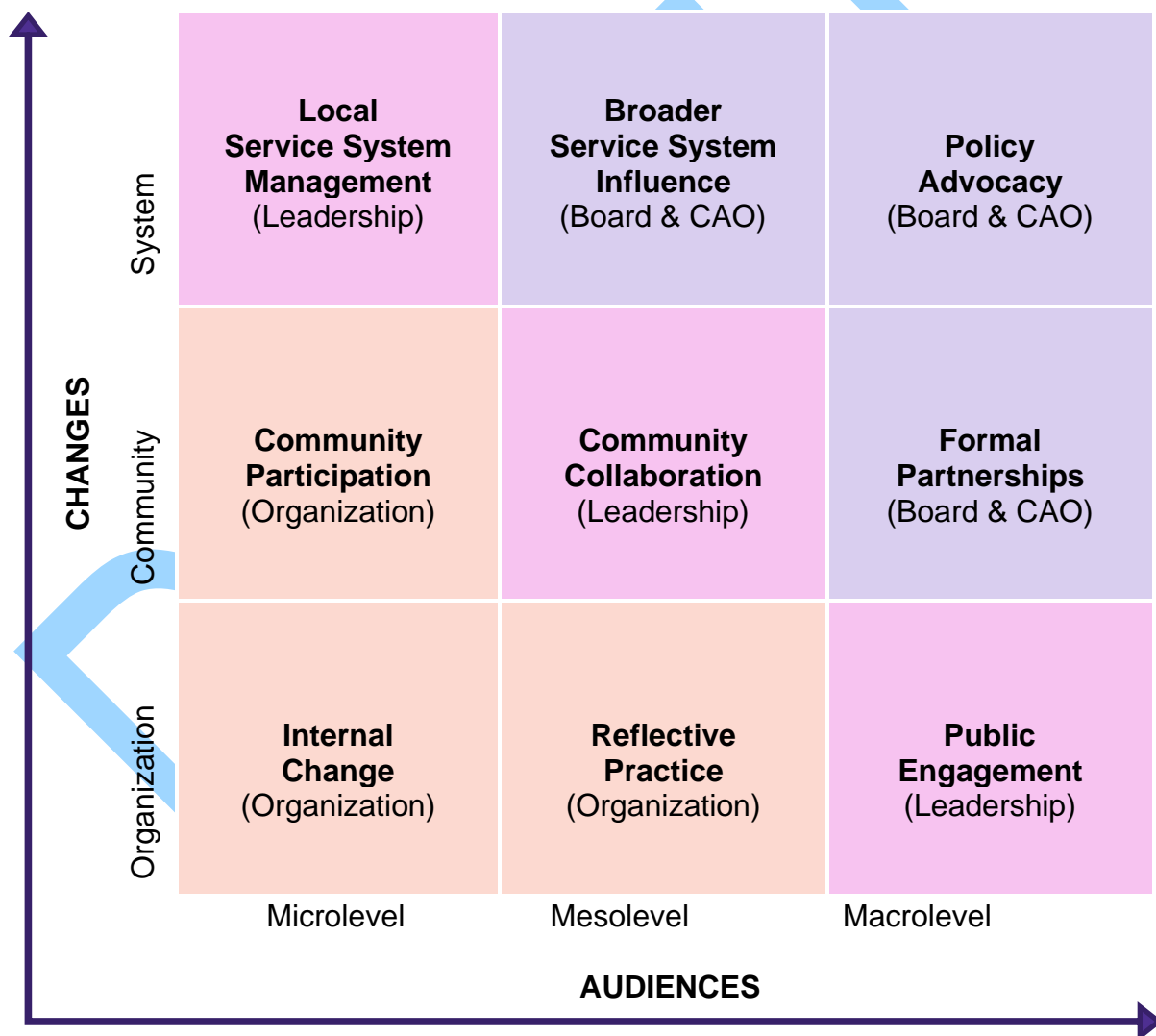
- Include opportunities to engage a diverse audience, including lived experience of the topic.
 - Allowing individuals to have a say in advocacy aligns with the TBDSSAB mission, vision, and values in terms of helping individuals achieve self-sufficiency. "Nothing about us, without us."

Procedure: **Advocacy & Engagement Procedure**

3.0 Advocacy Matrix

The framework (matrix) below illustrates an array of advocacy strategies that may be utilized, organized around two main dimensions: the changes desired (y-axis) and the audiences targeted (x-axis).

This matrix can be used to help guide advocacy strategies. Not all levels are required, nor will they always be relevant. Prior to beginning an advocacy initiative, this framework can be used to guide a planning discussion. Questions to accompany this matrix, and determine the applicability of each level, are included in the **Advocacy & Engagement Request Form**.



Colour codes: Responsibility - Organization Leadership Board & CAO

Procedure: **Advocacy & Engagement Procedure**

3.1: Matrix Levels & Related Policies/Procedures

Advocacy & Engagement tactics will vary on a case-by-case basis. The following is a list of examples of advocacy tactics organized by the various levels in the advocacy matrix.

- i. Internal Change:
 - Process Reviews
- ii. Reflective Practice
 - Staff training and education opportunities
 - Diversity, Equity & Inclusion Initiatives
- iii. Public Engagement
 - Social Media posts/campaigns.
 - Media events/interviews.
 - Surveys and information gathering.
 - Participation in Awareness Events, Advocacy or Recognition Campaigns.
 - Participation in Booths/Community Events.
- iv. Community Participation
 - Support causes, awareness activities
 - Flag raising/lowering
- v. Community Collaboration
 - TBDSSAB Participation in Working Groups.
- vi. Formal Partnerships
 - Letters of Support & Endorsement
- vii. Local Service System
 - Supporting a cause through funding agreements
 - TBDSSAB Participation in Working Groups.
- viii. Broader Service System
 - Conference Presentations
 - Meetings with other service managers
- ix. Policy Advocacy
 - Advocacy/Position Papers
 - Meetings with government officials

Procedure: **Advocacy & Engagement Procedure**

4.0 Responsibilities

- The Communications & Engagement Officer will track activities.
- Specific outcomes and measures will be determined for each activity, in collaboration with the Supervisor, Research & Social Policy.
- See related Job Aid(s) for more information.

5.0 Process

Advocacy and Engagement activities must be submitted for consideration by the CAO.

Step 1:

- Use the “Is this Advocacy?” decision tree to determine whether or not an activity is considered advocacy.
- Submit a request form by email to the Communications & Engagement officer 8 weeks in advance.

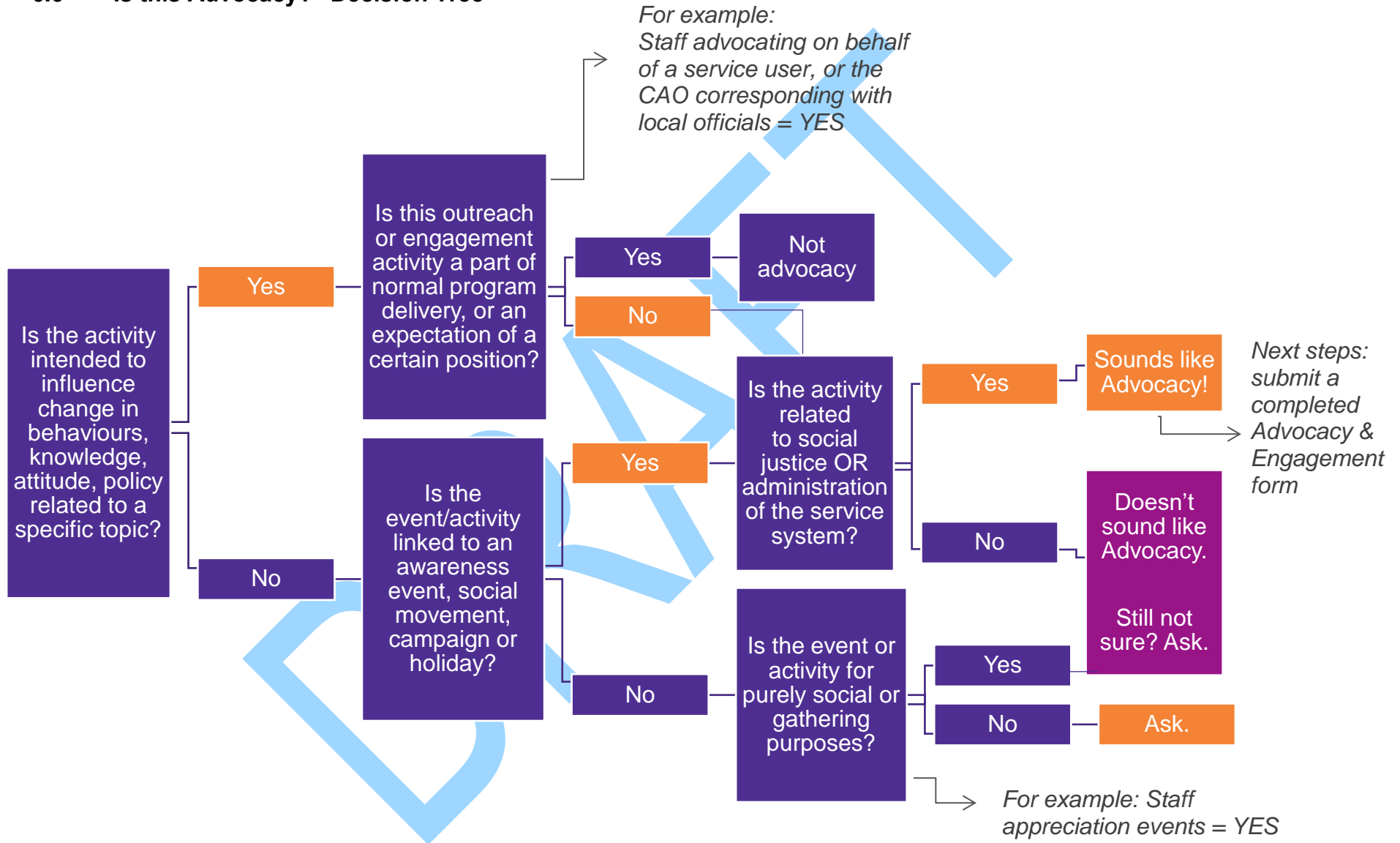
Step 2:

- Once a strategy and evaluation plan are drafted through this process, it will be presented to the CAO for approval.
- The CAO will determine in consultation with the Board Chair if the activity requires Board approval.

Step 3:

- A summary report of advocacy and engagement initiatives will be provided to the Board once per year

6.0 “Is this Advocacy?” Decision Tree



RELATED POLICIES & PROCEDURES:

BRD-01:94 Endorsement and Letter of Support
BRD-01:110 Social Media Policy
BRD-01:111 Corporate Communication Policy
BRD-01:144 Advocacy & Engagement Policy
CAO-01:10 Requests For Financial Support
CAO-01:136 Surveys
CAO-01:140 01 Process Reviews Procedure
HR-01:133 Workplace Diversity and Inclusion Policy
HS-01:75 Flag Etiquette
Committees & Working Groups procedure – to be developed
Events & Engagement Procedure – to be developed
Research Papers Requests Procedure – to be developed

RELATED FORMS:

Advocacy & Engagement Request Form

DRAFT