

Advocacy Policy

A024 V.01

Purpose

The purpose of the Advocacy Policy is to present a high-level policy statement for The ArQuives regarding the engagement in advocacy activities such as community actions, public policy dialogue, public policy development, and establishing position statements.

Scope

This policy and related procedures apply to all The ArQuives volunteers and staff members who act on behalf of The ArQuives in carrying out their roles and responsibilities. This policy and related procedures must also take other institutional policies into consideration.

Definitions

Public: For the purpose of this policy, clients, users, researchers, and the general public will be referred to as “the public.”

Staff: A staff member is anyone who is a paid full-time, part-time, probationary, temporary, or casual worker.

Volunteer: A volunteer is anyone who, without compensation or expectation of compensation beyond reimbursement, performs a task at the direction of and on behalf of The ArQuives. For the purpose of this policy, interns will be referred to as “volunteers.”

Public Policy Dialogue and Development Activities Charitable (PPDDA): The Income Tax Act requires a charity to be constituted and operated exclusively for charitable purposes, and all the charity’s resources must be devoted to its stated charitable activities carried on by the charity itself. A charity’s activities may include public policy dialogue and development activities (PPDDA) that further a charitable purpose. PPDDAs generally involve seeking to influence the laws, policies, or decisions of government, whether in Canada or a foreign country.

Community Action: Campaigns undertaken by people living in a particular place and includes a broad range of activities and is sometimes described as social action or community engagement.

Position Statements: A position statement is written to provide direction for an organization by describing one side of the arguable viewpoint. The statement generally should provide a description, with support of evidence of the position the organization is taking on the issue and should include a background of the issue.

Institutional Responsibility

The Executive Director will:

1. Establish procedures and update this policy.
2. Provide all staff with training and/or information regarding this policy.
3. Notify staff when any changes have been made to the policy.
4. Monitor the organization's compliance with this policy and related procedures.
5. Review this policy to ensure that it is current and useful.

The Board of Directors will:

1. Approve policy and any policy updates.
2. Notify the ED of any changes to the Policy in writing.
3. Ensure that staff under their supervision receive adequate information and training on this policy.

All staff will:

1. Familiarize themselves with this policy.
2. Attend any training related to this policy.
3. Ask the Executive Director for clarification on this policy if they have questions.

Policy

Overview

The ArQuives may take part in some community action and/or public policy dialogue and development activities as a way of furthering its charitable purpose(s). In order to serve the public, the extent to which The ArQuives can usefully contribute to community or public policy dialogue and development actions should be presented in an informative, accurate, and well-reasoned way to enable the communities we serve to determine their own position and reasoning.

The following policies and procedures are outlined below to distinguish between community action and public policy dialogue and development activities. It is recognized that community action activities might reasonably be thought of as public policy and development activities, or vice versa. In this case, such activities must adhere to both policies outlined below.

Community Action Policy

The ArQuives recognizes that community issues are often addressed most efficiently and effectively when community members work collaboratively to respond. This process may take different forms but for the purposes herein will be considered Community Actions. These may involve The ArQuives coming together with community partners over a time-limited, narrowly defined action, or working with partners on ongoing coalitions and networks to address any number of issues.

In the event that The ArQuives declines involvement in a Community Action, the agency does recognize the personal rights and freedoms of individual staff, volunteers and Board members to participate in the Community Action. However, staff, volunteers and Board members do so as individuals and not as representatives or spokespersons of The ArQuives and must take the necessary steps to ensure their representations are as an individual.

Procedures

When considering acting as a representative of The ArQuives in any Community Action, all staff are required to discuss their participation with the Executive Director. The terms of reference of the Community Action should be available for this discussion and the Executive Director will approve any and all participation depending on the relevance of the Community Action's terms of reference to The ArQuives' vision, mission and strategic priorities.

With the approval of the Executive Director, staff may participate in Community Actions on staff time and in doing so are expected to represent the interests of The ArQuives.

Once approved by the Executive Director, staff may support any initiatives that arise through their participation in Community Actions provided the initiatives are in keeping with the approved terms of reference. For greater clarity, staff who believe that their participation in such Community Actions could put The ArQuives at risk, could be controversial, or could negatively impact the organization must discuss those initiatives with the Executive Director before participating.

Further, should the Community Action activity become political in nature, particularly in any partisan way, all activity must adhere to the Public Policy Dialogue And Development Activities Policy below.

Public Policy Dialogue and Development Activities Policy

The ArQuives may participate in Public Policy Dialogue and Development Activities (PPDDA) if they are non-partisan and connected and subordinate to our charitable purposes.

PPDDA's are generally defined as activities that involve seeking to influence the laws, policies or decisions of a government, whether in Canada or a foreign country. Such activities might include making statements, taking positions or participating in group activities such as forums, debates, demonstrations, marches or protests. Such participation could be either physical or virtual.

As a registered charity, The ArQuives cannot participate in or devote resources to the direct or indirect support of, or opposition to, any political party or candidate for public office. A charity is explicitly prohibited from such activities under the rules outlined in the Income Tax Act.

Procedures

Staff must inform the Executive Director of any PPDDA as it develops or seek the approval of the Executive Director to participate in the activity in advance.

The Executive Director will inform and seek approval of the Board of Directors of the nature of the PPDDA and The ArQuives' role in the activity if it presents serious financial or legal implications.

The Executive Director is responsible for developing adequate and necessary position statements, key messages and communications strategies to inform staff and the public of the activity action.

The Executive Director or designate will communicate the internal key messages, protocols, and strategies to staff.

All external communications will be delivered by the Executive Director. In the event that the community action presents a risk to the Executive Director, individual staff or the agency itself, the Executive Director will inform the Chair(s) of the Board and contact legal or appropriate authorities immediately.

It may be appropriate or prudent that the Executive Director delegates all communication responsibility to the President(s) of the Board of Directors or their alternate on certain issues.

In the absence of the Executive Director, the President(s) of the Board will act as the spokesperson for the agency. In the absence of the President(s) of the Board, the Secretary of the Board will act as spokesperson.

At least annually or more frequently if needed, the Executive Director will provide a report to the Board that summarizes PPDDA's for the previous 12 months with the objective of reviewing current and future expected activity and demonstrating such activity is adhering to this policy.

Policy Regarding Establishing Position Statements Policy

The purpose of this Statement of Policy and Procedure is to outline processes for developing and approving Position Statements for The ArQuives. This policy applies to all staff.

All position statements of the organization will be subject to review and approval by The ArQuives' Executive Director and forwarded to the Board of Directors. Where position statements may pose a risk to the organization, they will be forwarded to the Board of Directors for consideration before approval.

Procedures

It is the responsibility of the Board of Directors to establish clear objectives for the organization's policy regarding oversight of advocacy efforts, and to suggest areas where position statements may or may not be appropriate. All policies should be reviewed at least every two years.

It is the responsibility of the Executive Director, in collaboration with members of staff, to consider candidate areas for position statements and select those for concentration which are most strategic and/or most pressing.

It is the responsibility of the Executive Director to review and approve all positions of the organization. Where position statements are deemed to pose a possible risk to the organization, they will be forwarded to the Board of Directors for consideration and approval.

It is the responsibility of the Executive Director to ensure that the Board of Directors is aware of all of the organization’s position statements.

It is the responsibility of the Executive Director and staff to ensure that position statements are integrated into detailed communications plans and activities.

At least annually or more frequently if needed, the Executive Director will provide a report to the Board that summarizes all position statements released for the previous 12 months with the objective of understanding the purpose of such statements and demonstrating such activity is adhering to all policies and procedures of the organization.

Amendment, Modification or Variation

This Policy may be amended, varied, or modified in writing after consultation and agreement by The ArQuives Executive Director and Board of Directors. The Executive Director shall be responsible for making revisions to the policy every three years, or with greater or lesser frequency as warranted. This review process seeks to correct any oversights in previous terms of reference and to account for new circumstances that have arisen since the last review.

Document Title	A024 Advocacy Policy
Version Number	1.0
Author and Title	David DesLauriers, Board of Directors
Date Approved	December 7, 2020
Date of Next Review	2023

References and sources:

CRA - Public policy dialogue and development activities by charities. Reference number CG-027