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**REPORT TO GOVERNANCE COMMITTEE
MEETING OF WEDNESDAY, OCTOBER 04, 2023**

SUBJECT **Service Planning 2024 – Advocacy Community Need Summary**

ISSUE SUMMARY

To provide strategic context and an overview of services, initiatives and performance data related to the Advocacy Community Need.

BACKGROUND

The Capital Regional District (CRD) Board approved the 2023-2026 Board Priorities on March 8, 2023. Staff then developed the 2023-2026 CRD Corporate Plan which was approved by the CRD Board on April 12, 2023.

The CRD Corporate Plan presents the work the organization needs to deliver over the four-year term, along with the critical regional, sub-regional and local services, to meet the region's most important needs (i.e., Community Needs) and advance the Board's Vision and Priorities. Board Priorities, Corporate Plan initiatives and core service delivery form the foundation of the five-year financial plan.

The 2024 planning cycle marks the first year of the implementation of the 2023-2026 CRD Corporate Plan. The CRD's annual service plans, known as Community Need Summaries, provide an overview of the operational and strategic context, services levels, initiatives, and performance data for each Community Need. They also provide details of the initiatives, associated staffing, timing, and service levels required to advance the work in future years.

The Advocacy Community Need Summary is attached as Appendix A. The desired outcome is effective and coordinated advocacy.

The CRD reports on the progress of its initiatives and services on a regular basis. The Board receives updates about the Board Strategic Priorities through the Chief Administrative Officer Quarterly Progress Reports. The Board also receives an overview of progress made on delivering the Corporate Plan twice a year at the strategic check-in and provisional budget meetings, which take place in the spring and fall respectively. The next strategic check-in will take place in spring 2024. During the year, standing committees and commissions also fulfill an oversight and advisory role in relation to the work.

ALTERNATIVES

Alternative 1

The Governance Committee recommends the Committee of the Whole recommend to the Capital Regional District Board:

That Appendix A, Community Need Summary – Advocacy, be approved as presented and form the basis of the Provisional 2024-2028 Financial Plan.

Alternative 2

The Governance Committee recommends the Committee of the Whole recommend to the Capital Regional District Board:

That Appendix A, Community Need Summary – Advocacy, be approved as amended and form the basis of the Final 2024-2028 Financial Plan.

IMPLICATIONS

Governance Implications

In 2024, staff have prioritized programs and initiatives that:

- Advance 2023-2026 Board Priorities or Corporate Plan initiatives;
- Operationalize capital investments; and/or
- Are necessary to maintain a core service level following a regulatory change or where there is a safety risk to customers, communities, or staff.

The Executive Leadership Team (ELT) has reviewed and assessed all business cases and confirmed alignment with the criteria. ELT has determined that the consolidated package of work is appropriate and a proportional response to the CRD Board's and communities' expectations of the organization.

Financial Implications

To exercise constraint and cost containment, the CRD Board directed staff to keep the core inflationary adjustment to 3.5% through the 2024 Service and Financial Planning Guidelines. Staff and management have taken the necessary steps to mitigate the financial impact of proposed initiatives as well as cost escalation and high inflation rate experienced in 2022 through to 2023.

Financial and staff impacts for initiatives will be summarized and included in the provisional budget which will be presented at the Committee of the Whole meeting scheduled for October 25, 2023. Starting this year, this will also include a five-year forecast of staffing level changes, which will be reviewed annually.

Service Delivery Implications

Appendix A includes information about existing service delivery, operational considerations, and performance.

CONCLUSION

CRD staff are progressing initiatives identified in the 2023-2026 CRD Corporate Plan, including the Board Priorities. The CRD Board and commissions with delegated authorities determine resourcing through the annual review and approval of the provisional financial plan. To support decision-making, staff provide recommendations on funding, timing, and service levels through the service and financial planning processes.

RECOMMENDATION

The Governance Committee recommends the Committee of the Whole recommend to the Capital Regional District Board:

That Appendix A, Community Need Summary – Advocacy, be approved as presented and form the basis of the Provisional 2024-2028 Financial Plan.

| | |
|---------------|---|
| Submitted by: | Carolyn Jenkinson, Manager, Executive Operations |
| Concurrence: | Andy Orr, Senior Manager, Corporate Communications |
| Concurrence: | Ted Robbins, B. Sc., C. Tech., Chief Administrative Officer |

ATTACHMENT

Appendix A: Community Need Summary – Advocacy

14 Advocacy



Effective and coordinated advocacy

01 Strategy

STRATEGIES & PLANS

- › [Advocacy Strategy for the Capital Regional District](#)

CORPORATE PLAN GOALS

- 14a Influence regional issues & advocate in a consistent, focused way that aligns with the Board Priorities

02 Contacts

| | | |
|--|------------------------|--------------|
| CRD Board Chair | @email | 250.360.3126 |
| Chief Administrative Officer | @email | 250.360.3124 |
| Senior Manager, Corporate Communications | @email | 250.360.3229 |
| Manager, Executive Operations | @email | 250.360.3125 |

03 Operating Context

ACHIEVEMENTS IN 2023

1. Continued to advance advocacy on Board Strategic Priorities and other Board and operational issues that arose during the year.
2. Updated Advocacy Strategy for Board approval and alignment to new Board Priorities.

FACTORS THAT WILL AFFECT OUR OPERATIONS IN 2024 AND BEYOND

- By definition, positive outcomes of advocacy are almost entirely dependent on third parties acting in ways that we believe will benefit the region.
- A successful advocacy strategy is targeted, focused and requires message discipline and consistency. Those we are advocating to must understand what our priorities are and that we are committed to advancing them.
- While the Board is within its right to advocate on matters that are outside of the CRD's service or legislated mandate, a lack of subject matter expertise internally can create significant challenges in putting together content to support advocacy efforts.
- Securing advocacy meetings can be challenging, depending on the appetite of the stakeholder involved. However, having a record of strong performance on a service provides us with essential credibility to secure these discussions.
- To be effective in gaining the support of senior orders of government, local government, and partners, the Priorities agreed to by the Board will remain the basis of the Advocacy Strategy, unless updated by the Board annually, or supplemented by resolutions of the Board to advocate on specific initiatives. The Board Priorities are organized under five themes with defined initiatives and desired outcomes. Role clarity, clear communication, and reporting is essential for both elected officials and staff to enhance effectiveness and portray the strength of common cause.

OPERATIONAL STATISTICS

| | |
|------|------------------------------|
| 2019 | › 37 outgoing letters |
| 2020 | › 16 outgoing letters |
| 2021 | › 14 outgoing letters |
| 2022 | › 7 outgoing letters |
| 2023 | › 8 outgoing letters to date |

Details are updated quarterly in the [Advocacy Dashboard](#) and presented as part of the Chief Administrative Officer Quarterly Report to the CRD Board.

04 Services

The services listed below rely on the support of several corporate and support divisions to operate effectively on a daily basis. More information about these services is available in the Corporate Services and Government Relations Community Need Summaries.

SERVICE BUDGET REFERENCES¹

- › 1.014 CAO and Executive Services
- › 1.118 Corporate Communications
- › 1.011 Board Expenditures

1. EXECUTIVE SERVICES

Description

Includes the Office of the CAO and Executive Administration, Corporate Communications, Human Resources and Corporate Safety, and Salt Spring Island Administration. Under the direction of the CAO, Executive Services:

What you can expect from us

- ▶ Provide overall management of CRD departments and programs, foster relationships and submit recommendations and progress reporting to the Board.
- ▶ Provide Board Chair and Board support.

Staffing Complement

Executive Administration
Corporate Communications

2. ADVOCACY SUPPORT

Description

The Board may act on any advocacy topic where it feels there is a regional interest or to support a local interest in collaboration with Electoral Area Directors. An Advocacy Strategy was developed in 2019 and updated in 2023 to assist the Board to be effective at gaining the support of other orders of governments and partners. The Board Strategic Priorities are the basis for Board advocacy. The process for adding to those is by Board resolution with follow-up actions typically directed through the Board

¹ Service budget(s) listed may fund other services

Chair, Chief Administrative Officer or Executive Leadership Team. The Board Chair may ask for the support of other Directors or staff to assist with efforts based on relationships, expertise and experience.

What you can expect from us

- ▶ Oversee the preparation of technical information briefs for the Chief Administrative Officer and/or Board Chair.
- ▶ Coordinate outreach including, but not limited to, correspondence and meetings.
- ▶ Track responses in the [Advocacy Dashboard](#), which transparently reports on all advocacy activities undertaken.

Staffing Complement

This work is incorporated into the existing workplans of the Senior Manager, Corporate Communications and Manager, Executive Operations.

05 Initiatives

Below are the initiatives listed in the [Capital Regional District 2023-2026 Corporate Plan](#) and the related initiative business cases (IBCs), including financial and staffing impacts, proposed for 2024. The financial impacts reflect full program costs, including cost of staffing.

| Initiative | Implementation year(s) | Impacts in 2024 |
|---|------------------------|-----------------|
| 14a-1 Work collaboratively to address multi-jurisdictional issues that impact residents' wellbeing in alignment with the Board Priorities | Ongoing | - |



06 Performance

◀ GOAL 14A: INFLUENCE REGIONAL ISSUES & ADVOCATE IN A CONSISTENT, FOCUSED WAY THAT ALIGNS WITH THE BOARD PRIORITIES

Targets & Benchmarks

The CRD has a well-structured Advocacy Strategy that outlines the approach and maintains an Advocacy Dashboard keeping detailed records of all meetings, letters, phone calls documenting the advocacy initiatives discussed. The Advocacy Dashboard is a public facing document that is updated regularly and shared with the CRD Board through the Chief Administrative Officers' Quarterly Report.

Achieving a provincial or federal policy change or senior government action through regional district advocacy can be a slow and incremental process although worthwhile. Advocacy efforts may take years to yield results making it challenging to attribute specific outcomes to advocacy. Establishing a direct causal link between advocacy efforts and policy changes can be complicated as other factors such as public opinion, election outcomes or external events can influence policy decisions. Response levels to specific requests are unpredictable and often dependent on ministry approach and the immediate priorities of senior orders of government. Measuring the success of advocacy efforts can be difficult for local government and regional districts as they are often more nuanced and subjective. For these reasons, a specific performance target has not been identified.

07 Business Model

PARTICIPANTS All municipalities and electoral areas

FUNDING SOURCES Requisition

GOVERNANCE [Capital Regional District Board](#)