Policy:	6.12.1
Approved By:	Trust Council
Approval Date:	June 6, 1992
Amendment Date(s):	September 17, 2026
Policy Holder:	Chief Administrative Officer

TRUSTEE TRAINING/CONFERENCE ATTENDANCE

Purpose

To outline Council's support, subject to available resources, for trustee training and conference attendance as a means to enhance trustees' contribution to the organizational effectiveness of the Islands Trust.

A. Definitions

n/a

B. Policy

1. Authorization for Trustee Training

1.1 Trust Council

1.1.1 Trust Council and/or the Executive Committee may request a trustee to undertake target training and/or attend specific conferences and seminars on behalf of Trust Council.

1.1.2 Trustees may request support to undertake target training and/or attend specific conferences and seminars on behalf of Trust Council.

1.1.3 All requests of trustees and/or to trustees for training or conference attendance shall be reviewed by the Executive Committee for Trust Council consideration when possible or approved by the Executive Committee.

1.1.4 The Executive Committee's recommendations or approvals will be guided by their responsibility to monitor and control the Trust Council Training/Conference account.

1.1.5 The Executive Committee is responsible for proposing trustee in-service training programs for Trust Council consideration via the Finance Committee within the annual budget process.

1.2 Islands Trust Conservancy

The Islands Trust Conservancy Board shall be responsible to budget, approve and control Board member training and conference attendance within its annual budget.

1.3 Local Trust Committees

Local trust committees shall be responsible, by way of a resolution, to budget, approve and control trustee training and conference attendance related to the local trust committees within its annually budgeted LTC - Local Expense Account.

1.4 Council Committees

Council Committees shall be responsible, by way of resolution, to budget, approve and control trustee training and conference attendance related to Council Committee interests within its annually budgeted Council Committee Expense Account.

1.5 Executive Committee

The Executive Committee shall be responsible, by way of resolution, to budget, approve and control Executive Committee member training and conference attendance related to Executive Committee interests within its annually budgeted Executive Committee - Training/Conference account.

2. Expectations of Trustee

2.1 It is expected that trustees, for Trust-supported training and conference attendance, will provide a written report to the approving authority body and to Trust Council at the next quarterly meeting.

2.2 It is expected that trustees, for Trust-supported training and conference attendance, will provide useful materials to the administrative secretary to copy for the Trust's reference library.

2.3 It is expected that trustees, when making a request to attend a training program or conference, will submit costs, rationale and benefits to the relevant approving authority (See Attachment 1-Training Request Form).

2.4 It is expected that trustees, whenever possible, will submit requests to attend upcoming training programs within the annual budget process via the appropriate approval authority.

3. Approving Authority Expectations

3.1 It is expected that each approving authority will:

3.1.1 solicit submissions of trustees for any requests during the upcoming fiscal year;

3.1.2 consolidate and prioritize these submissions with their budget submission to the Finance Committee;

3.1.3 monitor follow-up reports by trustees.

4. Administrative Requirements

For ease of processing, it is required that the attached Training/Conference form (Attachment 1) be utilized to request and process requests for Training/Conference attendance.

For ease of reporting out, it is required that the attached Conference/Convention Attendee Reporting form (Attachment 2) be completed two weeks post event, and circulated via email to all trustees with a Carbon copy to the Executive Coordinator.

5. Funding Guidelines

5.1 Level 1

5.1.1 Approving authority requests a trustee to attend - 100% expenses and registration fee or, as otherwise agreed and/or determined by the budget; or

5.1.2 Trustee attendance approved by an approving authority as high relevance/benefit to it - 100% expenses and registration fee, or as otherwise agreed and/or determined by the budget.

5.2 Level 2

Potential relevance to approving authority while of a personal developmental interest to the trustee - a portion of expenses and registration fee, as agreed and/or determined by the budget.

5.3 Level 3

Primarily of personal development interest to the trustee - No sponsorship by Islands Trust.

C. Legislated References

Annual Budget

D. Links to Supporting Forms, Documents, Websites, Related Policies and Procedures

Attachment 1: Training Request Form

Attachment 2: Conference/Convention Attendee Reporting Form

Attachment 1

ISLANDS TRUST
REQUEST FOR TRAINING, CONFERENCE AND WORKSHOPS

TRUSTEE INFORMATION

Name: Enter Your First and Last Name LTA: Trustee: [Enter Your Local Trust Area]

Is this request for a conference: No☐ Yes☐ (if Yes, please note that Executive Committee or Trust Council resolution of approval is required as per sections 1.1.3 and 2.3 and 4 of Trust Council Policy 6.12.1)

COURSE/CONFERENCE INFORMATION

Name of Course/Conference: Enter name of the course

Date(s) of Course/Conference: Enter date and hours if less than full day

Offered by: Enter the name of the course supplier

Training Location: Enter location

Brief Summary of Course/Conference content: (attach detailed course information)

Enter summary of course

Describe how this training will benefit Islands Trust and you.

Enter description of course benefits and advantages to you and to Islands Trust

Are you aware of other trustees who are attending this event?

Enter names of other trustees attending

FUNDING GUIDELINES

☐ Level 1 funding – Approving authority requests a trustee to attend OR trustee attendance approved by an approving authority as high relevance/benefit to it

☐ 100% expenses and registration fee

☐ or as otherwise agreed and/or determined by the budget

☐ Level 2 funding – Potential relevance to approving authority while of a personal developmental interest to the trustee

- A portion of expenses and registration fee, as agreed and/or determined by the budget

TRAVEL STATUS

☐ Full travel status

☐ Negotiated travel expenses – please indicate details:

Enter details of negotiated travel expenses

COST SUMMARY:

Registration Fee	0.00
Per Diem Meal Costs	0.00
Accommodation **	0.00
Travel to/from Location **	0.00
Course Materials	0.00
Other	0.00
Total Training Request	**$ 0.00**

*** Contact the Victoria Administrative Assistant for assistance with accommodation and travel estimates.*
All travel arrangements (flights, hotel reservations, etc.) are to be coordinated through the Victoria Administrative Assistant.

Trustee Signature _____ Date _____

EC or TC Resolution number (if required) _____ Date _____

REGISTRATION

Confirm you have registered for this course: **Yes** ☐ **No** ☐ (Administrative Assistant to register)

PAYMENT

Confirm "cheque payment" selected on registration: **Yes** ☐ (Finance to send cheque) **No** ☐

REGISTRATION AND PAYMENT INSTRUCTIONS:

1. Register for the course/conference and choose "cheque payment" as the option. Print and attach the invoice to this form. Finance will arrange for payment of your course/conference fee. ***If you are unable to register without making payment, please contact Finance immediately.***
2. Submit completed form to the Victoria Administrative Assistant.

It is the Employee's responsibility to notify the Victoria Administrative Assistant immediately if the Employee is unable to attend the course so that any available refund can be obtained.

CONFERENCE/CONVENTION
ATTENDEE REPORTING

Conference/Convention:	
Date/Location of Conference/Convention:	
Attendee(s):	
Submitted By:	
Date of Report:	

CONFERENCE OVERVIEW

Conference Theme/Purpose *(Brief description of the main focus or goal of the event):*

Keynote Speakers/Notable Presenters *(List any major speakers and topics covered):*

SESSION SUMMARIES

Session #1	
Session Title & Presenter(s):	
Content Summary:	
Potential Follow-up Actions by Islands Trust:	

Session #2	
Session Title & Presenter(s):	
Content Summary:	
Potential Follow-up Actions by Islands Trust:	

Session #3	
Session Title & Presenter(s):	
Content Summary:	
Potential Follow-up Actions by Islands Trust:	

NETWORKING

1. Contact(s):
   Topic(s) Discussed:
   Potential Collaboration Opportunities:

2. Contact(s):
   Topic(s) Discussed:
   Potential Collaboration Opportunities:

3. Contact(s):
   Topic(s) Discussed:

Potential Collaboration Opportunities:

RESOURCES & MATERIALS

(Add links to websites, online resources, or additional conference/convention information)

FURTHER INFORMATION

(Any need-to-know information not captured above)