



Policy:	7.1.5
Approved By:	Trust Council
Approval Date:	December 7, 1996
Amendment Date(s):	
Policy Holder:	Chief Administrative Officer

OMBUDSPERSON REFERRALS

Purpose

To standardize the process for dealing with administrative fairness complaint inquiry and investigation referrals from the Ombudsperson's office concerning local trust committees, Islands Trust Council and the Islands Trust Conservancy Board by the Corporate Secretary of the Islands Trust.

A. Definitions

n/a

B. Policy

The implementation of this policy is assigned to the Corporate Secretary.

1. Initial Contact by the Ombudsperson's Office

- 1.1 Initial contacts by staff from the Office of the Ombudsperson for assistance, information or documentation shall be referred to the Corporate Secretary.
- 1.2 Initial contacts regarding a specific file from the Office of the Ombudsperson about the Islands Trust shall be logged within the Islands Trust Complaint Referral Log by the Corporate Secretary.
- 1.3 The Corporate Secretary may contact staff or trustees in confidence, for the purposes of providing assistance to an inquiry from the Office of the Ombudsperson.

2. Investigation Process

- 2.1 The Corporate Secretary shall forward the investigation referral to the appropriate Islands Trust Manager and the Chief Administrative Officer.
- 2.2 The Chief Administrative Officer or Manager should forward the investigation referral to the relevant Islands Trust body or person with instruction for acknowledgment within timelines outlined in 2.4.2 of this Policy.
- 2.3 The Corporate Secretary may enter into a consultation process under section 14(3) of the *Ombudsperson Act* with the designate from the Office of the Ombudsperson.

2.4 The consultation process may involve:

2.4.1 the Corporate Secretary coordinating direct access to designated staff and trustees by staff of the Office of the Ombudsperson;

2.4.2 a 30-day response time unless otherwise agreed to in writing by the Corporate Secretary and staff of the Office of the Ombudsperson; and

2.4.3 documentation clarifying the role of the Office of the Ombudsperson and the Islands Trust along with key steps of the Office of the Ombudsperson investigation process.

3. Referral Tracking

3.1 The Corporate Secretary is responsible for tracking all steps of the process to its conclusion.

3.2 Trustees and staff are to provide records relevant to the investigation directly to the Corporate Secretary for safekeeping.

4. Resolution of Disagreements

4.1 At any time throughout an investigation, a local trust committee, Islands Trust Council or the Islands Trust Conservancy Board may, by resolution, request a meeting with the Ombudsperson through the Corporate Secretary.

C. Legislated References

Handling of Administrative Fairness Complaints (7.1.2)

Bylaw Enforcement Policy (5.5.1)

Freedom of Information and Protection of Privacy Policy and Procedures (7.6.1 and 7.6.2)

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

n/a