



# POLITICAL ACUMEN TOOLKIT

CAMA  ACAM

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# INTRODUCTION

CAOs stand at the crossroads of municipal management and politics. They are the only employee of Council, and therefore, their job is to follow the direction set by the municipality's elected officials.

However, the CAO is also a leader. In this role, the CAO is responsible for managing Council relationships outside of the municipality at other levels of government, supporting and negotiating the interactions between other municipal staff and elected officials, administering the municipality's relationship with the public they serve, and providing continuity during Council changes. While it is imperative that senior administrators remain apolitical, being able to understand and maneuver politics plays a crucial part in managing the ambiguities that are inherent to their roles.

Recognizing the importance of political understanding to the role of senior administrators in local government, the Board of the Canadian Association of Municipal Administrators (CAMA) formed a Committee to find ways of strengthening political acumen as a core competency for CAOs, their direct reports, and the next generation of municipal leaders. The Political Acumen Toolkit is the result of the efforts of this Committee. It provides information, downloadable resources, and links to additional materials that will support CAOs and senior managers in building a bridge between the administrative and the political realms. Specifically, the toolkit offers advice that clarifies roles and responsibilities with governance, supports relationship-building at all levels, encourages situational- and self-awareness in municipal leaders, helps manage personal risk, and furthers effective communication and stakeholder engagement.

The toolkit also acts as a resource for CAOs to use with aspiring leaders to mentor them in the less tangible skills required to achieve success in the role. Political acumen is a skill that is best learned through coaching, observation, and experience. While every effort has been made to capture the knowledge of experienced CAOs in

this toolkit, mentorships are needed to learn firsthand how to navigate the political nature of municipal management. CAMA's Mentorship Forum was developed in tandem with the toolkit to encourage and facilitate these relationships between experienced and new leaders, as well as support succession planning in local government. Similar to other social networking sites, the Forum is a resource for connecting with other CAMA members, finding mentors, obtaining support from colleagues across the Country, and discussing municipal issues on a pan-Canadian level.

CAOs operate in a unique position, and because of this, they can often feel a lack of support in their roles as they face challenging or even overwhelming situations. Every municipal leader has been there at some point. CAMA hopes this toolkit will become a valuable resource to support senior administrators in their careers, and that the Mentorship Forum will provide a practical way for CAMA members to reach out to each other for support.

## Defining Political Acumen

Political Acumen can be defined in many ways. CAMA members have described it as:

- Understanding the power structures, motivations, and influences at play in the municipal decision-making process as well as the implications of these decisions at policy-making and public levels.
- Diplomacy and the ability to navigate politically sensitive issues.
- Bridging the technical and the political.
- Critical thinking and emotional intelligence in the political domain.
- Understanding the impact of politics on administration.

- The ability to look at issues from the perspective of elected officials and anticipate public reaction.
- Using effective communication to influence decision-making.
- A combination of intuition and learned skills for understanding, mitigating, or influencing decisions, processes, and their impacts on a municipality.
- Understanding the informal and social implications in addition to the fiscal and operational outcomes of decisions.

Political acumen has been defined by others as:

- “A way of thinking and behaving;”
- Being able to “better guide choices and behaviour in each context in order to accomplish one’s goals and objectives;” and
- A core competency that includes “personal/self knowledge and interpersonal skills, a capacity to read people and situations, a capacity for proactive and strategic stakeholder engagement and alignment, and the ability to use environmental strategic thinking and scanning to understand the context” (Constantinou, 2017, p. 2).

In an **online leadership & political acumen course** offered through LinkedIn’s learning platform, Lynda.com, political acumen is also described as the ability to accurately perceive and judge the formal and informal influences that shape decision-making. That is, it is about reading the situation to make decisions “based on what is really going on” (Andreatta, 2013).

What is clear from these definitions is that political acumen is not any one thing. Instead of being a single specific skill-set, it is a combination of competencies that will serve a CAO and other senior administrators in a variety of different ways. Political acuity needs to be acquired and practiced. While it may come naturally to some individuals, others will need to learn it through experience, observation, and talking to colleagues they trust and respect.

#### **Additional Resources:**

- Constantinou, P. (2017). Political Acuity and Staff-Council Relations. Canadian Journal of Local Government.
- Andreatta, B. (2013). **Understanding Political Acumen**. Lynda.com

Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.

## **Politics and the Role of a Senior Administrator**

The role of a CAO is apolitical, and therefore, it is imperative that the CAO and other administrators remain impartial in all matters. At a high level, the role of Administration is to implement the policies of elected officials. This creates an interesting relationship between the political and the non-political in municipal activities. To successfully navigate this nebulous territory, it is important that municipal leaders understand the politics of a situation as well as have a firm grasp on their role. As much as the CAO and other administrators work in the political realm and need to have a solid understanding of political influences, these roles require that you stay neutral to be able to act effectively on behalf of your municipality.

It is well known that at the federal, provincial/territorial, and, in many cases, the municipal level, partisan politics are entrenched in our governance culture. When changes occur at any level, it shifts perspectives, priorities, and the ways we go about doing business for the public good. Astute CAOs and municipal leaders learn how to adapt to the ever-changing political waters and build a level of trust and credibility with the politicians they work with. Without this, they run the risk of being subject to the opinions of elected officials and can find themselves without a job if they are perceived to be out of alignment with the current political environment or Council.

Developing strong leadership skills plays a significant role in navigating politics as a CAO. Leadership has been defined as the ability to effectively influence others to act in ways that are grounded in shared values, in the pursuit of a shared vision. This is not unlike political acuity itself.

Trust-building is a key ingredient not only for political acumen but for leadership in general. As Kouzes and Posner (2010) state in their book *The Truth about Leadership*, trust is a fundamental component of your credibility and capacity to get things done. They suggest developing four behaviours to increase your ability to be perceived as trustworthy:

1. Behaving predictably and consistently - Letting others know they can count on you.
2. Communicating clearly - Being clear about your intentions and commitments.
3. Taking your promises seriously - Keeping your word when you make a commitment.
4. Being forthright and candid in what you communicate - Knowing what to disclose and what not to while remaining honest in the information you provide.

Honing skills like these will go a long way toward developing your political acumen and leadership style within your municipality. Indeed, leadership and political understanding go hand-in-hand. Focusing on situational leadership and adapting your approach to the context requires a firm grasp of political acumen. Likewise, refining your political acumen skills requires a display of leadership. The role of a CAO and other senior managers is to use both skill-sets to effectively navigate municipal politics while still maintaining a separation between the political and the administrative.

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#### Additional Resources

- Kouzes, J. & Posner, B. (2010). The truth about leadership: The no-fads, heart-of-the-matter facts you need to know.

Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.

## Top 10 Tips for Political Acumen

Political acumen requires situational knowledge across a diversity of municipal landscapes. However, there are some truths that apply throughout. Here are the top 10 ways to demonstrate political acuity:

1. **Integrity:** Maintaining your integrity is crucial to achieving success as a CAO. This rings true in all of your actions as well as supporting ethical behaviour on the part of your elected officials.
2. **Roles:** Council, the CAO and other Senior Administrators must all have a clear grasp of their role in municipal governance. Council orientations, training, and mentorship are key to understanding the boundaries and mitigating the risk that comes with blurred lines between roles.
3. **Priorities:** As a CAO your actions should be aligned with those of Council. Take the time to learn what Council's priorities are, and do not be afraid to clarify if needed.
4. **Trust:** Establishing trust is a cornerstone of leadership and lays the foundation of political acumen. Trust is not a given and must be earned through your actions.
5. **Respect:** Even if you do not agree with your political leaders or the decisions they make, you must always respect them and demonstrate this respect to your staff and the public.
6. **Transparency:** Maintain a culture of no surprises and no secrets between you and your Council. Being transparent and honest is vital to building relationships that will support your career now and into the future.
7. **Relationship-Building:** Work at building rapport at all levels. Whether it is your staff, your Council, your municipal neighbours, the media, or interactions at the provincial or federal levels, relationship-building goes a long way toward achieving the goals of your municipality.



8. **Neutrality:** Leave the politics to the politicians. The role of CAO is to remain neutral on issues while offering the best advice possible to the elected officials making the decision and providing leadership to other municipal staff.
9. **Communication:** Communication is not only what you say but what you hear. Take the time to listen to Council, residents and other stakeholders to truly understand where they are coming from and be honest in the information you provide. Be open and respectful in your discussions with Council and never take anything personally.
10. **Feedback:** Do not be afraid to ask for feedback. Meeting with your Council formally and informally can help ensure you are aligned with the strategic plan they have set for the municipality. Finding a mentor can also be a valuable resource for working through challenging situations and having someone to go to for support.

## Using the Toolkit

The Political Acumen Toolkit was developed by **Transitional Solutions Inc. (TSI)** in collaboration with the Canadian Association of Municipal Administrators (CAMA). TSI is a municipal consulting firm headquartered in Edmonton, Alberta that provides services across Canada. TSI's team of consultants have been in your shoes as CAOs and senior administrators and have brought their firsthand experience of political acumen in local government to the development of this toolkit.

The authors and the CAMA Political Acumen Committee made every effort to reflect the nuances of different government bodies and their requirements across the Country. However, it is always important to check your local legislation, regulations and bylaws to ensure you are aware of the requirements for each subject matter area in your province or territory. For example, there may be specific requirements for council orientation sessions or council agendas in each part of Canada.

While we have endeavoured to provide as many samples as possible, it is also good to check with a trusted colleague or mentor from your area to receive information on local standards. The CAMA National Office can connect you with experienced CAOs and Senior Administrators from across the Country.



# ADMINISTRATION & COUNCIL

Navigating the relationship between Administration and Council as a CAO can be challenging. Even when it seems like things are going well, this can change quickly and often without warning.

CAOs who receive the highest accolades can still find themselves moving to new positions only a short while later. For this reason, it is necessary to maintain neutrality as an Administration and separation between the roles and responsibilities of the CAO and staff versus the roles and responsibilities of elected officials and Council.

The following section describes common pitfalls and tips for managing the following areas of Administration and Council interactions:

- Council Meetings
- Council Remuneration
- Council Ethics
- Council Orientations
- Council & CAO Relationship
- Council & Staff Relationships
- Council Changeover

## Council Meetings

Because of the public nature of Council meetings, the relationship between the CAO and Council becomes most visible here to other staff, the public, and the press who are often in attendance. Here are some key strategies for managing these highly evident interactions.

## Non-Verbal Communication

Our non-verbal communication speaks volumes. In Albert Mehrabian's book on *Nonverbal Communication* (1972), he asserted that 55% of communication is body language, 38% of communication is the tone of voice, and 7% is the actual words spoken. While these numbers are overused and have been refuted/clarified since the original studies, they highlight how much we can read from non-verbal cues alone.

Keeping this in mind during Council meetings is important. Often it is not what is said but rather how one reacts with their facial expressions, posture, sighs and other non-verbal cues that demonstrates how well or poorly a Council and its CAO/Administration are working together. Be aware of what your body is communicating and try to stay neutral with your words, actions, and interactions.

## Seating

In some instances, the CAO sits with Council at the Council table, while in others, the CAO and his or her team sit separately. For those who sit at the same table, it can be difficult for the public to tell who is elected and who is not. The CAO may also be perceived as being of the same stature as the elected official, which is not the case. While some Heads of Council may need or want the CAO beside them, particularly if they are not strong leaders, this can create false perceptions.

**Best Practice:** Whenever possible, separate staff from elected officials in Council Chambers or around the Council table.

## Role of Administration

Administration attends Council meetings as advisors and to provide information, analysis and recommendations that will enable informed decision-making by Council. Discussion on each agenda item should be amongst elected officials with input from staff only when requested. In other words, the Administration should only speak when spoken to. CAOs often have a habit of contributing when they should remain silent. This becomes particularly true the longer a CAO remains in the same community, if the CAO lacks political acumen.

Seasoned CAOs recommend taking training in as many core competency areas as possible to add tools to your CAO toolkit when working with Council (Constantinou, 2017). In addition, it is important not to be afraid of making mistakes and learning from them. Mistakes help you learn and build your political acuity so that you can better achieve both your personal career goals and the goals of your municipality.

## Prepare, Prepare, Prepare

Part of having a successful Council meeting involves taking a comprehensive review of every matter coming before Council. You need to anticipate every possible angle. Ask yourself:

- What will the reaction/level of acceptance of different community groups be? Remember, your community is not homogenous, and there could be varying perspectives.
- Will the issue/decision impact neighbouring communities? If so, how and what might be the consequences of this impact?
- What could the political ramifications be for one or more local politicians?

CAOs need to provide mentorship and leadership to their management team to put together information for Council. Materials prepared for a Council meeting should also be comprehensive, yet succinct. Summarize only the relevant points on a request for decision (RFD) template that is no longer than two pages and has a clear statement for Council's consideration and decision. An RFD template and sample RFDs have been included as a downloadable resource to this section.

## Additional Resources:

- Constantinou, P. (2017). Political Acuity and Staff-Council Relations. Canadian Journal of Local Government.

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## Downloadable Resources:

- Request for Decision (RFD) Template – See Appendix A
- Sample RFDs

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*

## Council Agendas

Part of adequately preparing for a Council meeting is planning an appropriate and achievable agenda. CAOs can be their own worst enemies by making agendas far too long or adding items that have no business being on a Council agenda. Agendas should be concise and only include topics that Council needs to approve or act on. Furthermore, Council agendas should align with the municipality's strategic plan. If the discussion item does not align with the strategy adopted by Council, it is not a priority for discussion, unless otherwise agreed by Council.

Items being provided for information only should be sent to Council outside of the agenda package. For example, cheque registries are often included on Council agendas for review when they should not be. If Council has approved a budget and a spending policy has been put in place, then the CAO should be able to issue cheques without discussing these matters with Council. The cheque registry can be provided to Council for information but should not be a standing item on the Council agenda.

In many jurisdictions, a Council Procedure Bylaw is the mechanism used to determine what is contained in the Council agenda. If you do not have a Procedure Bylaw or do not wish to adopt one then, with Council's support, you can implement whatever works best for your municipality. If your current Procedure Bylaw requires you to add items to the agenda that do not require a specific action from Council, then it may be worthwhile discussing a change to this



procedure with Council. Procedural changes such as these are often best deliberated immediately following an election when shifts are already happening. Alternatively, you can gradually lighten the agenda by removing items slowly. However, this should always be done with Council's input and awareness.

Agendas should only include what is required by legislation, regulation or bylaw, and what Council is required to act on by adopting a bylaw or approving a resolution. For example, if there is only one new business item to be discussed, the agenda can be as simple as this:

1. Call to Order and Related Business
2. New Business
  - a. *New Business Item*
3. Adjournment

However, there is also a need to balance a lean agenda with transparency. Agendas should not be so brief they miss important information that should be provided to Administration, Council or the Public. Administration needs to inform Council of key issues, and councillors should report their activities to Council as a whole and by extension the public. Finding the balance between transparency and brevity requires political acuity.

Some municipalities hold a meeting with their Senior Management Team and the Head of Council to set the Council agenda a week in advance. Preparing the agenda with this group can help ensure agenda items are strategically placed and prevent items that may seem contradictory to the public from being added. This is also an appropriate forum to discuss and decide which items should be discussed in an open or in-camera session.

Please see the agenda template and samples included as downloadable resources online at <http://politicalacumen.camacam.ca/> for more information on developing effective council agendas.

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#### **Downloadable Resources:**

- Council Agenda Template – See Appendix B
- Council Agenda

British Columbia

**Port Coquitlam, BC – Committee of Council Special Agenda**

Alberta

**Edmonton, AB – Council Agendas**

**High River, AB – Regular Council Meeting Agenda**

**Lloydminster, AB – Regular Council Agenda Package**

Ontario

**Greater Sudbury, ON – Council Agendas**

**Zorra Township, ON – Council Agenda**

New Brunswick

**Moncton, NB – City Council Meeting Agenda**

**Riverview, NB – Council Agendas**

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*

## **Council Remuneration**

Council remuneration can be an uncomfortable and challenging topic to tackle for both the CAO and elected officials. Further complicating matters is public opinion, which can considerably influence the overall process. Here is one approach to handling the issue of Council remuneration that has been successful in some municipalities. Note that this public engagement strategy can also be applied to a variety of contentious topics coming before Council.

### **Public Perception & Public Participation**

One of the best strategies for addressing public perception and opinion is public participation. Engagement specialists can offer multiple strategies for involving the public, but one approach that works well is establishing a citizen's committee. A citizen's committee, sometimes referred to as a citizen jury, is a group of randomly selected citizens brought together to review a complex issue and make recommendations. This group should be made up of a diversity of representatives from varying demographics. Citizen committees can be either paid or volunteer. While paid committees may receive more interest, volunteer committees are recommended whenever possible as they remove the politics from the situation for both the CAO and Council.

A citizen's committee can make recommendations, but they still need to be implemented by Council through a resolution or bylaw. However, while the final decision-making authority still lies with Council, the public is often more supportive of the decision as they believe an independent group has determined how the issue should be addressed. The public will also see Council as being open and transparent on the subject matter, improving overall public perception.

This strategy also promotes a positive relationship between Administration and Council because it offers a solution that maintains Council's decision-making power while still making them look good in the eyes of the public. This, in turn, demonstrates political acuity on the part of the CAO. For these reasons, this approach is becoming increasingly popular for resolving a variety of contentious issues, including Council remuneration.

For an example of how a citizen's committee has been used, please see the St. Albert Council Remuneration Review Committee Final Report from 2016.

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#### Downloadable Resources:

- **2016 St. Albert Council Review Committee Final Report**

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*

## Council Ethics

Many CAOs face challenges in navigating Council ethics. Whether it is harassment, failing to disclose a conflict of interest, a breach of confidentiality, or a Councillor attempting to strong arm a decision in their political favour, the CAO plays a significant role in ensuring ethics are maintained and enforced. Council Orientations for newly elected officials should always address this topic, and when needed, other tools such as policies or bylaws can be put in place to support and encourage best practices in this area.

## Harassment

Recent articles by both Municipal World and the CBC have highlighted a prevalent issue for municipal administrators across the country, namely harassment of municipal staff by Council members. In **Municipal World's article, Councillors Behaving Badly**, the authors cite an Ontario survey where "77 percent of respondents reported harassment and bullying by elected officials, with 76 percent stating that they had personally been at the receiving end of harassment by a member of Council". The **CBC exposé, Toxic Towns**, further describes the issue in Saskatchewan where administrators face bullying, harassment, and even physical abuse with limited avenues for recourse. The effects of harassment can be substantial emotionally and physically, from extreme stress, anxiety, and depression to even more severe health impacts.

## Maintaining Council Ethics - Speaking Truth to Power

Standing up to Councillors who are harassing you or acting outside the bounds of ethics and proper Council behaviour can be challenging. While clear protocols for reporting often exist in staff to staff relationships, they are blurred in an administrator to Council relationship. This is mainly because Council's accountability to an external entity is either unclear or non-existent. How do you enforce protocols if Council is accountable only to themselves? Code of Conduct policies and Council Orientations can help educate but often do little in the way of truly compelling good behaviour by including and enforcing some form of reprimand. Indeed, a lot more can be done to support education, training and assistance in this area across the Country.

Some strategies for preventing and addressing harassment and other unethical behaviours from Councillors include:

- **Implementing a Code of Conduct or Council Ethics bylaw or policy:**

Implementing strong bylaws and policies is the first step to ensuring everyone knows the requirements. In addition to outlining proper behaviour, these documents should also describe protocols for reporting complaints and consequences for contraventions of the code, bylaw, or policy.

In some provinces and territories, the legislation governing municipalities requires Council to pass a Code of Ethics or a Code of Conduct Bylaw, but this should be put in place even where not required. While any sanctions against an elected official may be limited, an ethics bylaw does serve the purpose of providing Councillors with a set of rules on how to behave as an elected official. Examples of penalties that have been included for Council members who violate a policy include:

- o Censure or reprimand
- o Education/training on ethics, harassment, etc.
- o Removal from an advisory committee or local board
- o Removal from being the Chair of a committee or local board
- o Removal as Head of Council or Deputy position
- o Repayment or reimbursement of monies received
- o Returning property or items, or reimbursing their value
- o Issuance of a formal apologize to Council, the complainant, or both
- o Suspension of remuneration paid for a period of up to ninety (90) days

Sample bylaws and policies from across the country can be found online at <http://politicalacumen.camacam.ca/> for your reference. Many of them include strong examples of procedures, forms, and protocols for issuing an informal or formal complaint regarding a breach of conduct.

- **Council Orientation:**

Council orientations are mandatory in some jurisdictions but not all. Either way, including a module on your Code of Conduct or Council Ethics within an orientation session is fundamental to ensuring new Councillors are aware of what constitutes appropriate behaviour.

When including Council ethics as part of a Council orientation session, it is advisable to bring in external legal counsel to speak to various topics, such as conflict of interest, breach of confidentiality, etc. Elected officials are often more receptive and less likely to challenge advice from external legal counsel than they would be advice from the CAO or other staff. Please see the Council Orientations section for more information.

- **Provide training to Councillors and Staff:**

In addition to reviewing ethics during a Council orientation session, it is important to provide training opportunities that further educate Councillors on the subject matter. Training should also be provided to staff to ensure everyone is on the same page. Offering this training on a regular basis and not just at the outset of a Council's term can also help drive appropriate behaviours over the long-term.

- **Create a harassment-free culture:**

Encourage an environment where harassment is not tolerated. Get Council on board with promoting a workplace culture that encourages others to speak up when they witness harassment occurring without fear of reprisal. Undeniably, one of the greatest tools we have as a society to correct unwanted behaviour is to speak up on other's behalf when we see unethical and corrupt conduct occurring.

- **Using investigators when needed:**

Another option is to bring in the help of a third-party mediator or an investigator provided by lodging a complaint with Occupational Health & Safety (OH&S), WorkSafe or other regulatory/legislative bodies overseeing workplace ethics and harassment. Bringing in an external expert on harassment can help bring objectivity to the situation. While many administrators and staff members fear this step will lead to their dismissal, this process can help resolve the issue and make it clear that your organization will not tolerate harassment.

**Best Practices:**

- Establish a Code of Ethics or Code of Conduct Bylaw and Policy that all Councillors must review and sign.
- Provide education on Council ethics through Council orientation and training sessions.

## Relevant Case Studies – See Section 8 of the Toolkit

- Conflict of Interest in Council
- Council Allegations Against Mayor
- Council Divide
- Council-Staff Relations
- Disclosure of Confidential Information
- Falsified Expense Account
- Mayor Intimidation
- Persuasion from Ratepayers
- Unethical Dismissal
- Union Negotiations

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### Additional Resources:

- Fountaine II, Thomas (2018, February 27). [Ask an ICMA Manager: Three Key Elements of Council-Manager Relations.](#)

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*

## Council Orientation

Council orientations are mandatory in some jurisdictions but not all. No matter what your requirement is, a Council Orientation is one of the first training sessions that should be contemplated after a general municipal election. A best practice that has been adopted by some municipalities is the creation of a Candidate's Information Handbook that contains valuable information for those running for office. Among many other things, this handbook should outline dates for a required Council Orientation session with all elected officials. This ensures those running for office are aware they will be expected to attend an orientation if they are elected. Depending upon the complexities of your municipality, the orientation should take no less than a half day and up to as many as five days to cover all the required information. The longer the orientation, the more likely it will need to be spread over different days/weeks.

In some jurisdictions, the legislation identifies what the Council orientation is required to address. For example, one province requires the following:

- The role of municipalities
- The municipal organization and its functions
- Key municipal plans, policies and projects
- Roles and responsibilities of Council and Councillors
- The municipality's code of conduct (see Council Ethics).
- Roles and responsibilities of the CAO and staff
- Budgeting and financial administration
- Public participation
- Any other topic prescribed by the regulations.

The mentorship presentation included as part of the Political Acumen Toolkit provides multiple slides that can be useful when developing your Council orientation presentation. Sections that may be useful, include Council-CAO Roles, Strategic Planning, Ratepayer and Resident Associations, Tax Recovery, Public Hearings, Appeal Boards, Public Engagement, Intermunicipal Organizations, Talking to the Media, and Social Media. Sample presentations from various locations have also been included as downloadable resources online at <http://politicalacumen.camacam.ca/> to provide inspiration when developing your own council orientation.

While the agenda may vary across jurisdictions and municipalities, the overarching purpose and importance of an orientation session is to ensure elected officials understand their role in governance and municipal service delivery. By providing each new Council with the information they require to get off to a good start and govern successfully, a CAO can build trust from the get-go, establishing a strong Council-CAO working relationship and ensuring Council has confidence in the CAO's abilities.

Typically, Council orientations are conducted by a neutral third party. However, this does not mean that Administration cannot complete all or part of the orientation. Many administrations prepare and circulate an Elected Officials Handbook after each election that contains the information Council members should have at their fingertips and provides links to other relevant documents. Providing each new Councillor with a copy of all relevant municipal legislation is also a good idea. The more effort you put into onboarding your municipality's elected officials, the more likely they and you will get off to a good start.

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#### Downloadable Resources:

- Please visit the *Political Acumen Toolkit* online at <http://politicalacumen.camacam.ca/> to access all additional resources.

## Council & CAO Relationship

A positive working relationship between a Council and their CAO is vital for a municipality to achieve their goals. A municipality that loses confidence in its CAO is a municipality that begins travelling down the road to replace that individual. Always remember that a CAO is hired at the pleasure of Council. Strong political acuity can help to identify when Council's direction may be changing, and adjustment is needed. This section outlines various strategies for CAOs to build and maintain a strong relationship with their Council.

### Relationship with Council

As a CAO, it is important to be mindful of the relationship you develop with your Council as a whole and with individual Council members. As their one and only employee, you are subject to their whims and wishes. For this reason, you must always put in your best effort to respect the office they are elected to.

Speaking negatively about Council internally or externally is never a good idea. Even when a request from Council seems out of left field and completely irrelevant, remember that the request was made for a reason. While it is easy to be

tempted to roll your eyes or make a joke to another staff member, these interactions are rarely unseen. When you are frustrated with Council or a particular Council member, try to look for the root of the issue and find a way to address it positively.

In some cases, such as when sensitive issues go sideways, elected officials will try to redirect blame to preserve their reputation and standing in the community. Typically, this blame is deflected to the CAO. For example, in one municipality, a newly elected Council requested that their CAO review and make changes to transportation services as this was one of the issues they heard while campaigning. When action was not forthcoming from the CAO on this issue after repeated requests, that individual was informed the municipality would be moving in a different direction. A new CAO was brought in and, after hearing the same request from Council, undertook the steps necessary to review and make the changes required to transportation services. Because this was a priority for Council, it also became an immediate priority for the CAO and an action plan was put in place. This is just one example of how political acuity and being sensitive to the needs of Council and the political environment can either make or break you as a CAO.

These dynamics necessitate paying careful attention to how close of a relationship you build with your Council. Certainly, you are expected to have a solid business relationship, but you should exercise caution on how involved you get personally as it could have repercussions. As CAO, you will find that each member of Council is different and unique. Some you can joke with; others you need to be very careful what you say. Either way, it is important to be mindful that they are your boss and that you should treat them all equally and fairly. Treating some Councillors one way and others differently can lead to problems that could easily be avoided. When functioning as a CAO in a smaller community, this can become particularly challenging as everyone knows almost everyone and, in many cases, have pre-existing relationships. There is no specific line in the sand; instead, political acumen is about maintaining the right balance that is appropriate for your particular context.



**Remember:** Elected officials are employers, not friends. It is important to always maintain a professional relationship, even at social events.

For more information on harassment between elected officials and the CAO, please see Council Ethics.

## No Surprises

One key to success in building and maintaining a positive relationship between the CAO and Council is to establish a culture of “no surprises.” Politicians do not like to be surprised, so it is imperative as a CAO to keep them informed on any anticipated or ongoing issues. As a general rule, you never want your Council to hear about something in the community, or read about something online or in the newspaper, first.

Keeping the lines of communication open and taking a collaborative approach to issues management helps to build trust and a relationship where your Councillors will also keep you informed as the CAO so that you also do not have any surprises. That said, providing regular updates is not without risk. For example, sharing information with Councillors increases the likelihood of sensitive information getting shared publicly. In other cases, it can result in a breach of confidence between the CAO and Council/Staff if Councillors try to get information from other staff members the CAO is legitimately unable to provide (e.g. the names of the employees involved in sensitive issues that should not be released). For this reason, it is always important to be upfront with your elected officials about the information you can and cannot share and the reasons why. All sensitive communications should also be labelled “confidential.”

In some jurisdictions, if one member of Council requests information on the operation and administration of the municipality, the legislation requires that this information be provided not only to the Council member making the request but to all members of Council. No matter where you are, this is a best practice to follow. It can also help to address the issue of all Council members having the same information. However, there will be occasions when a request for information from a member of Council is considered to be private

and confidential. In these instances, you will need to rely upon the provisions of your provincial/territorial legislation that deals with access to information and privacy protection.

**Tip:** Sending a weekly update email to Council builds trust and keeps them informed on all relevant issues. It also reduces the time and number of messages required to keep Council up to date on each topic individually.

## Strategic Planning

Strategic planning is an indispensable municipal process, and the strategic plan can become an effective tool for managing the CAO-Council relationship. Strategic plans outline the priorities and desired results of a municipal efforts over a specific period of time. The strategy is also directly linked to the budget for the municipality in that it provides direction to Administration regarding Council priorities. While a municipality may have multiple strategies, it is essential to develop one overarching strategy that is inclusive of all municipal activities and services that is used to guide the organization as a whole.

Strategic planning allows Council and Administration to work together collaboratively to achieve a vision for their municipality and remain focused on key goals with limited resources. Without a strategic plan, a municipality runs the risk of going from “urgent” matter to “urgent” matter, or never looking beyond what is required to “keep the lights on” each day. For this reason, the plan needs to focus on the big picture or the future vision of the municipality to allow it to be a useful tool in addressing opportunities and challenges of the current situation.

For CAOs, the strategic plan becomes a yardstick for municipal accomplishment. It allows the CAO to demonstrate the effectiveness of their Administration to Council and the community. It also helps the CAO manage their own workload as well as that of their employees by providing a guideline for establishing priorities. Every effort of a municipality should be connected to a focus area in the plan. Therefore, CAOs can use the strategic plan as a tool for keeping Council attentive to the goals of the municipality and denying Council requests, when needed.

## Praise & Criticism

Because we are all human, positive and negative feedback alike can influence how we operate in the workplace. Praise can create a boost of energy and motivation for your work; criticism can be the incentive needed to make necessary changes in the way you approach your job. However, taken too far, both can become a detriment through either overconfidence or inertia.

For this reason, it is important not to internalize the highest praise or harshest criticism. Political winds are continually changing and what is satisfaction today could be total displeasure tomorrow. Even recipients of CAO awards for outstanding achievements have been terminated shortly thereafter.

## Power Dynamics of One Versus the Whole

A CAO needs to be cautious of an elected official who begins to make “unofficial” requests. While in some cases it may be appropriate to work with a Councillor one-on-one, in other cases it may be seen as preference or worse, collusion. As mentioned above, it is often a requirement to provide information requested by any Council member to all.

Sometimes it can be beneficial for a CAO to work directly with an individual Councillor. For example, when you have one elected official that disagrees on a particular issue that Council is dealing with, it is appropriate for the CAO to spend time with this Councillor to help them better understand the topic. As with all aspects of the CAO position, it is important to remain neutral while explaining so that you are not viewed as lobbying for any one perspective.

**Remember:** While it may seem obvious, always remember who your boss is. It is Council as a whole, not the Head of Council or any individual Council member.

## Councillor Alliances

Sometimes elected officials will form alliances to achieve political objectives. While it is important to be aware of these alliances, it is equally important not to be seen as being part of or favouring one group over the other. For instance, when Council breaks for dinner and they sit in two different groups, do not sit with either group; stay neutral.

## Rogue Elected Officials

A Council member who feels disenfranchised by the CAO is often a dangerous one. They will often go to almost any length to discredit the CAO and to find or create issues. The best way to avoid this is to treat all elected officials respectfully and equally, providing all of them with the same information in a transparent way.

Sometimes political acumen is nothing more than a gut feeling. If your gut is telling you something is off in your relationship with a Council member or with their behaviour in general, it probably is, so tread carefully and avoid situations that could leave you vulnerable. When in doubt, find a mentor to talk to who can provide an outside perspective on how to proceed.

## CAO Performance Reviews

CAOs should look forward to and, when needed, even demand an annual performance review. In many provinces and territories, an annual CAO review is a requirement. However, even when it is not mandatory, it is advisable to request a yearly evaluation. Appraisals are your opportunity to officially hear from your Council how well you are discharging your duties from their perspective. It is your report card. It is also an excellent opportunity to confirm what your political acuity radar is telling you. It is critical to you as a CAO to ensure you consider the feedback offered and put in your best efforts going forward.

Please see [CAMA's CAO Performance Evaluation Toolkit](#) for additional information and resources relating to this topic.

## Relevant Case Studies – See Section 8 of the Toolkit

- Building Rapport with a New Council
- Council Divide
- Disclosure of Confidential Information
- Falsified Expense Account
- Managing Election Turnover
- Mayor Intimidation
- Stakeholder Perception
- Unethical Dismissal

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### Downloadable Resources:

- CAMA CAO Performance Evaluation Toolkit

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*

## Council & Staff Relationship

Interaction amongst Council and Staff is a subject matter that requires clear direction and lines of communication from the CAO. This is often more challenging in smaller municipalities than it is in larger municipalities with more complex organizational structures. Without clear lines of communication and leadership, staff communication with Council can become a challenge for the CAO. In some cases, it can even lead to the CAO being undermined by having a “mole” in the organization.

### Clarifying Roles & Responsibilities

It is imperative that the CAO work with and provide leadership to the senior management team to make sure they have a good understanding of political acumen and the role of Council versus that of management. Namely, the role of Council in making decisions versus the role of Administration in providing subject matter expertise and professional advice. Mentorship on this topic should be ongoing to build the overall competency of the municipal organization.

## Managing Staff-Council Relationships

It is also important for the CAO to support staff in their relationship with Council by helping to manage Council requests. The CAO needs to be cautious about overcommitting both their own and staff’s time and ability to respond to these requests. When you make a commitment to Council, you need to be able to deliver and if not, inform your Council as soon as possible with the reason for the delay. Be upfront, transparent, and open. Do not hide anything.

A best practice includes establishing a protocol for Council inquiries that includes a timeline for response. One strategy used by many municipalities to manage Council demands of staff time is the requirement for Council to make a motion whenever a request is being made. This is particularly relevant if the request represents a substantive amount of work. By requiring a motion, the CAO ensures it is Council as a whole soliciting the efforts of staff and one-off requests are minimized.

Another approach for managing Council requests is to use the strategic plan as a reference point when making commitments to Council. The strategic plan should act as the roadmap for your municipality’s efforts. If a request does not align with the strategic direction of the organization, it may not be required and therefore the strategic plan can provide the rationale to deny unnecessary requests.

The CAO should always lead by example. While we are all human and prone to venting about frustrating situations, the CAO has a duty to reflect Council in a positive light to staff. While the CAO should certainly never speak negatively about Council or any particular Council member publicly, the same rule applies within the organization. Showing staff how to manage frustrations with Council professionally helps ensure they exhibit the same level of competence and political acuity in their Council interactions.

More information on working with staff to provide information to Council can be found in the Council Meetings section of this toolkit.

## Staff – CAO Challenges

Addressing challenges employees have with the CAO is never an easy problem to solve. It is important for senior staff to know they have a place to go to discuss any issues they have with their CAO, especially those issues that they may not feel comfortable talking about directly with the CAO. However, deciding where to direct staff is difficult because of the lack of a direct line between these employees and Council.

As the leader of your municipal organization, it is important to provide an environment where staff are comfortable bringing forward issues. In many cases, CAOs have an open-door policy where senior staff are aware that they can come to talk to the CAO about issues, including concerns with them, with no fear of retribution or judgement. Sometimes, this is not possible for various reasons.

If an issue cannot be addressed directly with the CAO and needs to be elevated there are a variety of possible approaches that can be taken. Here are just a few:

1. Bring in a third-party investigator (e.g. from Occupational Health & Safety, WorkSafe, etc.) to examine and identify a possible resolution to the issue.
2. The employee can request that a mediator is brought in to resolve the situation.
3. If a mediator is refused or is not able to be brought in for other reasons, the employee can request to be placed on Council's agenda at the next meeting to review the concern. This should be treated as an in-camera issue.
4. If the employee is uncomfortable approaching the CAO to get on the Council's agenda, they can also go to the Head of Council to request a caucus of Council.

Employees should always speak to Council as a whole and not any individual Council member to minimize the situation becoming a political issue.

The best approach for any situation will vary by location. Part of political acuity is being able to read your local situation to decide the best course of action. In many cases, the process for addressing an issue with the CAO is outlined in the municipality's Code of Conduct policy. Always review the policy before taking any action. If your municipality does not have a Code of Conduct policy, encourage senior management to draft one according to the requirements of your province or territory's legislation.

It is important to note that any of these elevated approaches can create risk for both the staff member and the CAO. For example, this opens up a direct line of communication between staff and Council that could lead to termination of one or both of the individuals involved. For this reason, the best approach is for a CAO to treat their staff fairly and create a positive environment where staff are comfortable coming to talk to the CAO directly.

Sometimes it helps to find a mentor to talk to about the best course of action in addressing issues with a CAO.

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### Relevant Case Studies – See Section 8 of the Toolkit

- Council Allegations Against Mayor
- Council-Staff Relations
- Persuasion from Ratepayers
- Unethical Dismissal

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### Downloadable Resources:

- West Lincoln Council-Staff Relations Policy
- Kingsville Council-Staff Protocol

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*

## Council Changeover

Council changeover happens any time there is an election or by-election. With municipal elections mostly occurring every four years, the probability of change is high. For example, in a recent municipal election there was over 40% turnover in elected officials.

Even if all the same individuals are voted in, each term brings a new Council. With each election, the culture of Council may differ, the politics may vary, and return Councillors may become more confident in their role. Return Councillors sometimes feel more comfortable “flexing their muscle” due to a perceived authority or a desire to be more visible within the community. They could also have their eyes set on being the Head of Council for the next term and therefore push an agenda to try to make themselves more successful and well-viewed within the community.

Council changes also bring different priorities and different approaches. CAOs need to be able to adapt and immediately start building a relationship with the new Council. If you see signs that there could be a significant departure from how you and the old Council did business,

you need to adjust your style quickly, so you are not at risk with the new Council. That said, sometimes it is better to accept when the writing is on the wall and prepare to begin a new chapter elsewhere. Developing the ability to read an election for these signs is a fundamental part of building your political acumen as a CAO.

**Tip:** When preparing to work with newly elected officials, pay attention to the candidate’s election materials to understand their priorities. While these priorities may change after the election, it helps to understand the newly elected Councillor’s motivations and will provide insights as to whether the community supports his or her initiatives.

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### Relevant Case Studies - See Section 8 of the Toolkit

- Building Rapport with a New Council
- Managing Election Turnover

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*





# RESIDENTS & RATEPAYERS

Many administrators and councillors have remarked how much easier their jobs would be, “if only we didn’t have all these residents complaining all the time.” However, residents and ratepayers form the very foundation of our role in local government.

Without them, municipal governance and administration would be unnecessary. Indeed, all municipal positions are driven by how many people require the delivery of municipal services. Whether you are a municipality with one employee in rural Saskatchewan or the City of Toronto with almost 36,000 employees, municipal staff are there to serve the ratepayers and residents of that municipality.

While staff, including the CAO, are not directly accountable to residents or ratepayers, we all know how critical a municipality’s citizens are to the success of an administration. Ignore ratepayers and Council is sure to hear about it; address concerns in a timely manner and you are likely to have the backing of your community during difficult situations. While an individual or group may not be speaking on behalf of the majority of your population, it is important to be sensitive to their issues. The quicker you address a situation, the less likely you are to require Council intervention.

Staying in-the-know about your community by being involved in community activities, keeping your ear to the ground, ensuring your eyes are alert to what is going on, and having a nose for recent developments, will help keep your political antennae tuned to community needs and demands. The following section offers best practices in political acumen as it relates to residents and ratepayers. Topics include:

- Ratepayer and Resident Associations
- Tax Recovery
- Public Hearings
- Appeal Boards
- Public Engagement

## Ratepayer and Resident Associations

Many resident and ratepayer associations are created as a result of a difference of opinion regarding key issues, taxation, or financial accountability between those who govern and those who reside. If the direction a municipality is heading is fundamentally different from the values and beliefs of a significant group of residents in the community, a ratepayer’s association may be formed as an advocacy group to ensure those values and beliefs are maintained on a fiscal level within the community.

Remember, a municipality’s Administration and Council are there to serve its residents. If your municipality has a newly-formed ratepayer’s association, it may be a sign that you are heading in the wrong direction with the priorities set by your Council or the initiatives undertaken by Administration. That said, many ratepayer associations are longstanding and can provide valuable feedback to the municipal decision-making process.

Ratepayer associations should be taken seriously. It is crucial that the CAO and other senior staff take the time to understand the values and concerns of the association and listen to what they have to offer to the policymaking process. It is equally important to take note of their requests and do what you can to achieve their goals without jeopardizing the strategic direction of the municipality. If a ratepayer association’s goals are met, they may no longer have a cause to pursue and are more likely to lose steam or even disappear. CAOs who can address these situations positively and successfully without Council intervention show a high level of political acuity.

When a ratepayer or resident association of any kind is created and begins to advance an agenda that is different from what Council has adopted, always try to obtain a listing of who is part of the committee. It may be that they represent only a few people and are trying to create chaos within the community. Conversely, they may have a membership of hundreds of people, making their issues and concerns more legitimate. CAO's can be thrust into very awkward situations if they make incorrect assumptions. Be sure to do your homework and get to know who these groups represent before assessing how best to respond to their issues and concerns. If you find yourself in an adversarial position with the association, always keep to the facts, remain impartial, and treat their representatives fairly and respectfully. Remember, body language speaks volumes, even if you do not say much.

**Best Practice:** Always do your homework with ratepayer and resident associations. Find out who they represent and what their agenda is before deciding how to respond to their concerns.

**Remember:** Always act reasonably and respectfully toward representatives from ratepayer and resident associations, even if discussions become antagonistic.

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### Relevant Case Studies – See Section 8 of the Toolkit

- Persuasion from Ratepayers
- Union Negotiations

## Tax Recovery

One of the many challenging aspects of being a municipal administrator is finding yourself at odds with citizens who are unable to pay their property taxes or pay for essential municipal services such as water, sewer, or power. This is particularly true in small municipalities where you are likely to know those who are unable to pay, personally.

Most provincial or territorial legislation will have content in their municipal acts that provide procedures on what to do when landowners have fallen behind on the payment of their

property taxes. Everything from describing different ways to recover taxes in arrears, to the seizure of goods, up to and including the sale of the property and what to do with the proceeds are prescribed. Once a property falls within the tax recovery provisions, the municipality is obligated to follow the procedures contained in the legislation regardless of the reason for the situation.

In many cases, individuals have fallen upon hard times and can no longer afford to cover all of their debts. Unfortunately, paying property taxes is not something any of us can avoid. Individuals can declare bankruptcy and absolve themselves from certain obligations; however, property taxes do not fit into this category. Hence the often-heard expression, "the only things in life that are certain are death and taxes."

Does the CAO or municipality have any discretion in this regard? In many jurisdictions, the answer is "yes." If a ratepayer is able to provide the municipality with a plan on how they will pay any outstanding amounts in full, Administration can exercise some discretion before the delinquent ratepayer is put on the tax recovery list and subject to the tax recovery process. However, this needs to be closely monitored to ensure the payment plan does not also fall into arrears. Administrations who are seen as doing as much as possible to help the ratepayer are likely to be perceived positively by Council and, more importantly, by the community. Tax recovery should be viewed as a last resort, and all ratepayers should be treated fairly, equitably, and with compassion when it comes to being in arrears on their property taxes.

**Best Practice:** Putting ratepayers into a tax recovery process is a serious decision. Not only can it make them feel embarrassed or ashamed, it also has significant consequences and can result in them losing their property. When possible, give them the benefit of the doubt and always treat them with dignity, respect and compassion. If you do exercise discretion, be certain the ratepayer understands the consequences if they do not fulfill their obligations.

## Public Hearings

In many jurisdictions across Canada, the legislation governing municipalities requires formal hearings on issues of public importance. Public hearings offer residents and other stakeholders the opportunity to express their views on a given subject directly to Council. In many cases, these hearings are a requirement of the land use planning provisions in the legislation.

It is impossible for any Administration or Council to anticipate every impact of a new rule or law. Hearings allow Council to learn of any unintended consequences that were not previously contemplated and provides them with an opportunity to present the public with different options. Before Council renders a decision on the matter, it is the responsibility of Administration to assess the input provided by the public and offer recommendation to Council on how to move forward to achieve the best possible outcome. This presents an opportunity for the CAO to provide a solution to the issue at hand, and in doing so, make Council look good.

Often the key to a successful hearing is an appropriate level of public engagement in advance of the proceeding itself. For more information on public engagement, please see that section of the toolkit.

### Addressing Differences of Opinion

Sometimes there are differences of opinion expressed at a hearing. In these situations, Administration needs to ensure that they have listened to resident concerns carefully and have taken the time to respond to the concerns raised. One of the most common rebuttals heard from individuals who do not support a given course of action is “you did not listen to what I had to say.” Always remember to indicate to people that while you certainly heard what they had to say (and repeat to them what you heard), you have determined a different course of action is more appropriate for specific reasons (and list what those reasons are).

If residents know they have been listened to and treated with respect, they are more likely to accept the decision and move on. Even those who continue to disagree with the outcome will be more likely to respect Council and Administration because they were heard. Remember that public hearings are for residents to express their point of view. Be sure to allow them the opportunity to do so, even if the amount of time it takes is longer than anticipated.

**Best Practice:** When responding to the public at a hearing, use the following approach: Demonstrate that you heard what they had to say (repeat to them what you heard) + Explain why you have chosen a different course of action (list the reasons).

### Bringing in Support

Some public hearings are very complicated and can take days to complete. When this happens, you may wish to consider bringing in a third party to assist with the process. For example, having a professional recording clerk or legal advisor(s) present to address any procedural issues or unanticipated events can help alleviate strain on your municipal staff. While this will cost the ratepayers, you will be further ahead if the actions of your municipality are questioned or a judicial review is undertaken.

## Appeal Boards

Appeal boards are quasi-judicial in nature and include, for example, sub-division appeal boards, assessment review boards, environmental protection appeal boards, weed control appeal boards, and more. Each of these boards is governed by the legislation of a municipality's province or territory. Their fundamental purpose is to offer each resident their “day in court” to refute an order or ruling imposed by the bureaucracy of the municipality.

When selecting board members for an appeal, it is important to confirm that those appointed do not have a pecuniary interest in the case being heard. Appeals should begin by asking those present if they have any objections to the board members who will be hearing the case. If there are no objections, you can proceed. If objections are raised, the board should take a recess and, in closed session, decide if the objection is legitimate. If it is, then excuse the member being objected to and continue. If there are not enough Board Members to continue, adjourn until another time. If the Board decides the objection is not legitimate, you can proceed with the hearing with the understanding that the decision may be appealed to the courts due to a procedural error.

When working with residents and ratepayers, it is always necessary to explain the municipality's decision. Whether it is why option "a" was chosen over option "b" in the implementation of a new service or the result of an appeal, taking the time to provide a solid description of the rationale behind a decision helps the public to accept it and move on. This becomes particularly important with unpopular outcomes. As with public hearings, if you can offer fair and just reasoning for the result, it becomes harder to argue, and negativity toward the decision can be deflected. Providing the right amount of information to achieve this is an indication of political acumen on the part of the CAO and senior management.

**Best Practice:** When responding to the public always demonstrate that you heard what they had to say (repeat to them what you heard), and explain why you have chosen a different course of action (list the reasons).

## Public Engagement

"Public participation," "stakeholder engagement," "social license to operate," "community relations," or any iteration thereof, all refer to one thing, your ability to work with those who are impacted by a decision to achieve buy-in and avoid opposition. Today, the public play a more significant role than ever in the decision-making process of organizations. Whether you are an oil and gas company trying to build a facility or pipeline, or a municipality trying to create a new subdivision or host the Olympics, you need to engage your stakeholders as part of the decision-making process. Social license to operate, specifically public support for your organization or an initiative (or in some cases merely a lack of disapproval), is vital to implementing any project or change successfully. Indeed, this was the foundation of the democratic system our governance structure is built upon, and citizens, particularly marginalized groups, are now beginning to reclaim their voice in the process.

In relation to public participation, political acumen is knowing when to engage residents and ratepayers and to what level. Engagement can range from one-way educational or informational transactions to a collaborative effort between residents, Administration and Council, or even the full transference of decision-making power to the public (e.g. through a plebiscite). As described in the Administration and Council section of this Toolkit, citizen committees have been a particularly effective means of public engagement in situations where public opinion can meaningfully influence the outcome of the decision, or there is a greater impact to the public from the decision-making process.

Hiring a public engagement specialist (contract or full-time) or training a staff member on public participation tools and techniques can help you wade the waters of when and how to consult the public. Developing a Public Participation Policy that outlines your municipality's standard for engaging stakeholders is also advisable as lets residents and ratepayers know what to expect. The **International Association of Public Participation - IAP2** is recognized internationally



by municipalities and other organizations as setting the standard for public engagement and provides training on the subject matter. They have also developed a **Public Participation Spectrum** that many municipalities use to guide their engagement efforts.

No matter what strategy is undertaken for public engagement, it is always important to let residents know where and how their feedback was used. Doing this shows the public that their input adds meaningful value to the decision-making process and that it is not a waste of their time or simply a matter of checking boxes. Releasing a summary of public comments that describes how they influenced the final report can be an excellent tool for closing the loop on your public participation process.

**Best Practice:** Be mindful in any form of public consultation to give voice to all affected stakeholders across different demographic groups. Only listening to those who speak the loudest or who want to control the process will provide you with an unrealistic picture of public opinion and could cause residents to question a decision if it is based on these results.

#### Relevant Case Studies - See Section 8 of the Toolkit

- Stakeholder Perception

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#### Additional Resources:

- IAP2 Spectrum of Public Participation.

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*





# INTERMUNICIPAL RELATIONSHIPS

One of the most important external relationships you can build as a municipality is with your municipal neighbours.

This is particularly critical when it comes to municipal services that are provided jointly or accessed by residents of another municipality. Progress in intermunicipal partnerships is made through common interests, understanding, and trust.

This section of the toolkit highlights the importance of intermunicipal relationships and offers recommendations on:

- Building Intermunicipal Relationships
- Collaborating on Municipal Services
- Intermunicipal Organizations

## Building Intermunicipal Relationships

One of the best places to start with intermunicipal cooperation is for the CAO of one municipality to build a relationship with his or her neighbouring CAOs. While this does not mean that you need to be friends with every other CAO, it is important to develop a positive working relationship that understands and respects the role each CAO plays in representing his or her Council.

A good place to start is creating an informal, recurring meeting between the chief administrators, such as a monthly breakfast or lunch meeting. Even if there is no agenda, meeting regularly will keep the lines of communication open and help solidify rapport between the CAOs and, in turn, between the municipalities. Ongoing dialogue with your neighbours also helps build political acumen as it keeps you in the know about information your colleagues have that you may not have access to. What have your colleagues in municipal administration heard about legislative or

administrative changes? Have there been rumours regarding your municipality that should be brought to your attention? Are residents from another municipality complaining about services in your jurisdiction? It is information like this that becomes a natural by-product of ongoing communication between administrations.

It is also a good idea to have the Councils from each municipality with a co-terminus boundary meet informally once or twice a year, especially if there is a high degree of collaboration between your municipalities. Building relationships between Councils provides a forum for creating understanding between jurisdictions and discussing common issues. Even in situations where elected officials from different communities are on opposing sides or dislike each other, providing opportunities for connection allows respectful discussion to take place so that Councils can jointly advance mutually-beneficial initiatives. When municipalities can work together to meet the needs of residents and ratepayers, both Administration and Council are seen in a positive light, and providing forums to achieve this outcome demonstrates political acuity on the part of the CAO and Senior Management.

**Tip:** CAOs who build relationships with other CAOs on a regional, provincial and national basis, are CAOs who are able to seek solutions and enlist feedback from others who have experienced similar situations. This adds to your toolbox, providing alternatives for your own Council to consider, and enabling you to be a more effective CAO. Sign up for the CAMA Mentorship Forum to connect with CAOs across Canada.

**Best Practice:** A senior administrator with a high degree of political acuity will stay abreast of the strategic planning efforts, annual reports, Council minutes, and initiatives of neighbouring municipalities, specifically on those issues that may affect their municipality or residents, directly.

## Collaborating on Municipal Services Sub-Page

### Municipal Service Negotiations

One of the key areas where municipalities work together is on the provision of municipal services such as water, wastewater, waste, transportation, recreation, emergency services and more. While most of the time discussions and negotiations regarding these services areas are cordial, occasionally they veer into becoming disputes. Establishing strong relationships can help avoid negative dialogues; however, when this is not possible, it is up to the CAO to come up with a successful strategy on how the conversation can move forward.

Recreation services are one of the main points of contention between neighbouring municipalities, particularly when an urban municipality believes that the rural municipality surrounding it is not contributing its fair share. Often, these discussions lead to negotiations, and if an understanding/agreement cannot be reached between Administration and Council, they can even progress to costly mediation or arbitration. Whether it is the use of a recreation facility or another service, it is the responsibility of the CAOs to demonstrate that a fair and reasonable contribution either is or is not being provided for the cost or provision of the service.

Occasionally, a Council decides it wishes to undertake a project they feel provides services to residents of other municipalities, in addition to their own. The decision to proceed often occurs without Council engaging in dialogue with their municipal neighbours, only to be followed by the municipality going to their neighbours and asking for a contribution toward the capital and operating expenses. This request can be met with limited support as the adjacent municipality was not involved in the original decision-making process.

We have all heard comments from councillors that the surrounding municipalities are not paying their fair share. One way to gain additional support is by engaging your municipal neighbours in funding discussions before reaching a decision. If these deliberations do not result in a favourable outcome, then a decision must be made by the municipality that wants the new service on whether to proceed.

How can a CAO deal with these kinds of situations? While there are any number of different options, here are a few worth considering.

- **Develop a Funding Formula:** Try to get your neighbouring CAO's to agree to take forward a funding formula to their own Council that is seen administratively as being fair and reasonable. While it is preferable to do this before your Council has made its final decision, nothing prevents you from taking this approach after the decision was made.
- **Depoliticize the issue:** Anytime administrations can depoliticize an issue, Council usually likes it. If the residents of the municipality support making a particular contribution for capital or operational costs to an adjacent municipality, it makes Council's decision very simple. A plebiscite can be held, a citizen committee can be formed, a survey can be sent out, or public meetings can be held to gauge public support.
- **Suggest Differential Fee:** In the absence of reaching an agreed upon contribution amount, introduce the concept of a differential fee for residents and non-residents. However, be aware that a two-price system may act as a deterrent for non-residents to use your facility and result in less operating revenue.
- **Deny Access:** A very hard nose approach would be not to allow non-residents access to the facility as they (or at least their municipality) did not contribute to the capital or operating costs. To do this, you must be confident that the number of users from your municipality are sufficient to generate the projected revenues in the original or modified business plan for the facility.

A best practice when approaching intermunicipal negotiations is to have the CAO meet with the other CAO(s) first to discuss the issue and possible solutions. If the CAOs can have an honest and transparent conversation, the approval of an agreement on joint service provision usually becomes much less of a controversial issue when Council approval is sought. Astute CAOs will know what their Council are likely and unlikely to accept and should represent this in any intermunicipal discussions. Doing this will help achieve a cordial and successful negotiation between the municipalities and provides both Councils with an accomplishment they can take credit for with voters.

**Best Practice:** When negotiating intermunicipal initiatives, meet CAO to CAO or Administration to Administration first to discuss the issue and potential solutions. This sets the path for success prior to getting Councils involved in the conversation.

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#### Relevant Case Studies - See Section 8 of the Toolkit

- Intermunicipal Recreation Agreement

### Intermunicipal Agreements

A common practice in the provision of services from one municipality to another or jointly between one or more municipalities is signing an informal or formal agreement. While many services are agreed upon through a handshake deal, it is always important to write down what was agreed. Even if it is a simple Memorandum of Understanding (MOU) or Letter between the parties, putting what was agreed in writing ensures both parties know the terms and future administrators or councillors understand what was decided upon previously.

In some jurisdictions, legislation and regulations are being put in place to make the formalization of intermunicipal agreements a requirement. For example, in Alberta, recent updates to the Municipal Government Act in October 2017 require all municipalities with a coterminous boundary to enter into an Intermunicipal Collaboration Framework agreement. This document must outline all services provided by

one municipality to another and the terms of the agreements, including cost-sharing provisions.

To support this process, the Rural Municipalities of Alberta (RMA) and the Alberta Urban Municipalities Association (AUMA) developed a handbook to guide intermunicipal discussions on services. While the **Intermunicipal Collaboration Framework Workbook** is specific to the requirements of Alberta's legislation, it provides some excellent tips for working through collaboration on municipal services that are relevant to municipalities across our Country.

Whether they are outlined in an overarching agreement or not, it is important for elected officials to be aware of the intermunicipal agreements their municipality has in place. This is particularly crucial following a municipal election when newly elected officials are unaware of these agreements. A best practice is to provide a briefing of all intermunicipal agreements during the Council orientation process.

Agreements can be bilateral (between two municipalities) or multilateral (between three or more municipalities). In many instances, it makes sense to adopt a multilateral or regional approach to the delivery of a service. This is most common with water, wastewater, and solid waste services. The cost of infrastructure makes it more fiscally viable when multiple municipalities are involved.

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#### Relevant Case Studies - See Section 8 of the Toolkit

- Intermunicipal Economic Collaboration
- Setting Intermunicipal Precedence

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#### Additional Resources:

- Intermunicipal Collaboration Framework Workbook

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*



## Intermunicipal Organizations

Intermunicipal organizations come in many shapes and forms across the provinces and territories of our Country. One thing they share in common is that they are almost all created to support the provision of one or more public services. While many of these organizations are formed through a simple intermunicipal agreement, others are set up more formally through the creation of a separate legal entity.

Examples of separate legal entities (or “third-party service providers”) that can act as intermunicipal organizations include:

- Regional Service Commissions
- Cooperatives
- Public/Private Partnerships
- Municipal Controlled Corporations
- Companies
- Non-Profit Societies

Each type of organization has a distinct purpose and benefits, and can be used to deliver the services agreed upon by the participating municipalities.

When entering into a third-party arrangement that includes the creation of a legal entity for the provision of intermunicipal services, municipalities need to remember that they may be delegating authority to this entity to deliver the identified service. This takes control over that service out of the hands of your municipality and Council and gives it over to this new organization instead. CAOs need to be cognizant of this and ensure your Council understand the implications of said arrangements.



# PROVINCIAL & FEDERAL RELATIONS

Provincial/territorial and federal governments are both important touch points for any municipality. Provincial and territorial governments fund and administer municipalities, and therefore it is critical for CAOs and their Councils to build strong relationships with their local representatives and the Ministers/Deputy Ministers overseeing the departments that govern, impact, and benefit their community.

While the federal government has less oversight as municipalities are not their jurisdiction, it too creates policy that directly impacts municipalities and provides grant funding for municipal initiatives.

In this section of the Toolkit, we look at the connections between municipal, provincial and federal and how to effectively work with representatives at higher levels of government. Topics include:

- Matters of Jurisdiction: Knowing Who to Work with
- Building Relationships Provincially & Federally
- Meeting with Ministers
- Government vs. Opposition
- Advocating & Influencing
- Changes in Government

## Matters of Jurisdiction: Knowing who to Work With

Politics are nebulous no matter what level you are working at: municipal, provincial or federal. Political acumen is demonstrated by learning and understanding matters of jurisdiction and knowing when and when not to step on the toes of another government body. However, this is not always as easy as it seems.

As described in an article from the March 2017 edition of McMillan LLP's Municipal Law Bulletin, "*Federal Jurisdiction in Municipal Matters*," there are areas of governance where the boundaries are not always clear. An excellent example, and one described in the article, is the environment. Indeed, it can be argued that environmental oversight is the responsibility of all levels of government. However, without clear rules of engagement, it can often lead to different tiers of government unwittingly overstepping their granted authority.

It is important to remember that municipalities do not have any power provided to them by the Constitution. Instead, they only receive power through their province or territory's legislation. Because of this, they are bound to and a product of this legislation. Taking the time to understand the division of power between different governance levels helps to ensure you are taking the right issues to the right people in power to achieve benefit for your municipality.



## Relevant Case Studies – See Section 8 of the Toolkit

- Falsified Expense Account

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### Additional Resources

- Flynn-Guglietti, M., Forristal, A. & Sutton, K. (2017, March). Federal jurisdiction in municipal matters: What happens when the provinces or municipalities step on federal toes?

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*

## Building Relationships Provincially & Federally

As the saying goes, “It’s not what you know, it’s who you know and who knows you.” Developing a working relationship between your Council, Ministers and your local Member of the Legislative Assembly (MLA) or Member of Provincial Parliament (MPP) is essential to gaining support for municipal initiatives requiring provincial/territorial approval or funding. Federally, it is important for Council to have a connection with your local Member of Parliament (MP) to encourage discussions on municipal matters at the pan-Canadian level. Likewise, CAOs should also build relationships with Deputy and Assistant Deputy Ministers provincially and federally that enhance engagement administratively.

**Best Practice:** When working with provincial and federal representatives it should always be elected to elected and administrative to administrative.

### Elected Officials

When working with other levels of government, elected officials should always be meeting with elected officials and administration with administration. That is, your Mayor, Reeve or Warden, and in some cases, other members of Council should be the ones addressing MLAs, MPPs, MPs and Ministers. While administrators will play a role in facilitating the connection between elected officials at various levels and may participate in the meeting, political protocol

and best practice favour elected officials taking the lead in this scenario.

Finding opportunities for the Head of Council to meet regularly with key elected officials at the provincial and, to a lesser extent, the federal level is important for advancing your municipality’s strategic priorities. Even if no specific request is being made, sitting down to discuss local matters of importance on a regular basis helps to build that connection. Another way to facilitate relationship-building between your Council and MLAs, MPPs or MPs is to have the head of your Council write a congratulatory letter to that individual when they are successful with an initiative. Copying this letter to their Party Leader can also help ensure your municipality’s name is seen in a positive light. If your local representative is appointed as a Minister, building this connection becomes even more critical as the individual has an even greater influence over policymaking.

Remember that there is nothing an elected official likes more than a good news story. Invite your local MLA/MPP or MP to grand openings, ribbon cutting ceremonies, or events that the provincial or federal government has funded. Even if there is no event attached to the initiative, keep them informed on its progress and consider providing them with a copy of the final deliverable, when relevant. This creates positive media coverage for both of you and provides them with material to add to their list of accomplishments while in office. Furthermore, when you highlight the positive outcomes of the funding provided, you become a reliable choice for future grant allocations.

### Administration

CAOs should also take the time to foster rapport with the Deputy Minister and other administrative staff of the government department that oversees municipalities. Likewise, you should consider if there is value in developing contacts with other departments influencing key municipal services such as transportation, health, etc. Having strong relationships at the administrative level will help ensure you are given the information you need in a timely manner and will streamline your efforts in building connections between elected officials.

## Meeting with Ministers

If your municipality requires an audience with a Minister, it is always best to coordinate that meeting through your local MLA, MPP or MP. Your local representative will know the proper procedures for scheduling a meeting and including them demonstrates respect for their office and builds trust.

Keep in mind that elected representatives at the provincial and federal levels have full calendars, multiple initiatives, and many stakeholders to address. For this reason, it is important to keep your meetings with them brief, to-the-point, and positive. Especially when you are requesting support or grant funding, you need to be very prepared. It cannot be emphasized enough how crucial it is to do your homework and anticipate all the questions that might be asked about the request you are making.

## Government vs Opposition

Navigating the waters of working with those in government versus those in opposition can be problematic. If your MLA, MPP or MP happens to belong to the party in opposition, it can be much more challenging to achieve your municipality's goals at the provincial and federal levels. Representatives that belong to the party in power and are in government control the provincial or federal agenda. If your representative is not in power, it can be much harder to influence the government to create change or drive progress on important issues.

Often the party in power will assign a shadow MLA, MPP or MP for constituencies that are represented by an opposing party. This may not be an "official" appointment, but this individual still represents someone who can help you achieve your municipality's goals. A CAO and the Head of Council should work to find out who this shadow representative is and get to know them in addition to the elected official. Having support from both the elected MLA, MPP or MP, in addition to a delegate from the party in government can help progress your municipal agenda more efficiently and translate your efforts into favourable results for your community.

## Advocating & Influencing

An important part of supporting your municipality involves letting governments at other levels know the issues and concerns affecting your community. Advocating for your municipality's needs and seeking to influence key issues at the provincial/territorial or federal level requires a high degree of political acumen. Often referred to as "lobbying," an official term which should only be used when someone is legally registered as a lobbyist, the art of political persuasion necessitates a keen awareness of the political environment to know when and how this type of activity should be undertaken.

Whenever you are attempting to influence policy, it is important to remember that things may not go as planned and there could be unintended consequences resulting in the exact opposite of what you were hoping to achieve. However, the strategic value of advocacy at provincial/territorial and federal levels can also have a very positive outcome that benefits your municipality. Therefore, as a CAO or other senior administrator within a municipality, you need to give careful consideration to the potential results when deciding whether or not to play this card.

Some strategies for effective advocacy include:

- **Ensure it is necessary:** Advocacy should only be undertaken when needed and when the subject matter is critical to your municipality. It takes a long time to build rapport at other levels of government and no time at all to destroy it. Therefore, it is important only to use these relationships when needed.
- **Go in with a single ask:** When approaching federal, provincial or territorial politicians or appointed officials, you are much more likely to have success with a single ask over multiple. Focus in on what is most important to your community and Council, and concentrate your efforts there. If you have more than one request, it may be better to delay additional items for another time. Whatever request you are making, also make sure you can provide all of the necessary backup information to support your position.

- **Do your homework:** Research the current goals, interests, policies, programs, and mandates of the government in power and the ministry you are meeting with. By aligning your request with what the government hopes to accomplish during their time in power, you are more likely to be successful than if you inquire about something that is not on the government's radar or list of priority items. Alternatively, astute CAOs and Councils may also decide to make some adjustments to their municipal priorities to align with government goals and benefit from the financial assistance made available. Showing that meeting your municipality's interests will also meet theirs is a win-win for both parties.
- **Offer to help:** Politicians and bureaucrats at other levels have large agendas and many individuals hoping to meet with them to make their own asks. Take the time to inquire how you can assist the individual(s) you are meeting with to pursue your request. Demonstrating that you are available to help builds rapport and shows goodwill on the part of your municipality.
- **Set meetings with the right individuals:** Always remember politician-to-politician and bureaucrat-to-bureaucrat when seeking to influence.

## Changes in Government

We have all seen unexpected changes in our provincial and federal governments at some point, if not more than once. With government turnover comes new MLAs, MPPs and MPs, all with varying levels of experience in the constituency they serve and the portfolios they are assigned to manage. Furthermore, a new government usually also signifies new policymaking endeavours and a departure from the previous administration's priorities.

When change happens at the provincial or federal level, the best strategy is to embrace it. While it can be frustrating and delay municipal initiatives, it is wise to accept it and get to know the new government's priorities. Doing this allows you to establish new strategies for achieving your municipality's objectives. While politicians can wear their platforms on their sleeves, CAOs should remain neutral and demonstrate the ability to work with whoever forms the government, whether this is at the municipal, provincial/territorial or federal level.



# MEDIA

Politics are performed in the public domain and as a result, are loved by the media.

Media, whether it be formal news institutions, online reporters/bloggers, or commentary on online social networks, act as a check and balance for elected officials by “keeping them honest.” This can either be a good or bad thing depending on a CAO’s political acumen and ability to work with media representatives. This section offers advice on:

- Managing Media Relationships
- Talking to the Media
- Media Interviews
- Social Media

## Managing Media Relationships

An administration’s relationship with local media is one of the most important relationships that can be cultivated by a CAO. Positive relationships with reporters and news outlets assist municipalities in three ways:

1. It ensures that when there is negative news coverage, the municipality’s input is given positive consideration in the report.
2. It also allows administration to use the media to the community’s advantage when there is a need to get information out to residents.
3. It supports the foundational planning for emergency preparedness where media will be used as a conduit to stakeholders in a crisis situation.

For these reasons, the communications strategy for your municipality should include media coverage as a key tactic. In addition to required public notices, media outlets should be used to provide exposure to important initiatives or changes in the community, especially if they will have a significant impact on the public. Building rapport with these organizations will allow you to get editorial content to speak to key issues facing your municipality at no cost. If this relationship is

not there, your municipality may be forced to rely on advertising content, which is less likely to receive attention.

Media should always be treated with respect. Doing so increases the probability that they will reciprocate and treat your Administration and Council with deference. Get on the bad side of a reporter, and it is more likely for your municipality to be reflected negatively in any news coverage. As a sign of good faith, it can also be a good strategy to reach out to reporters before they contact you occasionally. This shows that you are genuine and willing to share information, when appropriate.

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**Relevant Case Studies – See Section 8 of the Toolkit**

- Falsified Expense Account

## Talking to the Media

Every municipality should have a communications policy in place that outlines who is authorized to speak to the media on behalf of the municipality. Most often, this includes Council, the CAO, and in larger municipalities, a Director of Communications. In some communities, Council may prefer the CAO to speak on behalf of the municipality. However, as a general rule, the Head of Council should be doing the majority of the talking. As most CAOs will tell you, it is usually not a good thing if the CAO is ending up in the paper more than the Mayor. As Siegel notes, CAOs are leaders in the shadows: “things that work well are invisible” and “media take an interest only when things go wrong” (2015, p.3). While CAOs should be familiar with the media, representing the municipality is better left to elected representatives.

All staff members should be familiar with these media protocols and understand what their boundaries are. Always remember that nothing is “off the record.” Any information you provide formally or informally to a journalist becomes part of their arsenal of potential editorial content. If you have a communications team, use them for support in developing messaging that can be used with the media and preparing for interviews.

It is especially important to designate a specific media spokesperson during crisis situations to ensure consistent messaging. It can also be helpful to schedule media briefing times. This allows staff to stay focused on what needs to be done to support the emergency instead of fielding media requests. If there is an emergent situation, the spokesperson can always call the media together.

If your municipality frequently talks to the media it might be a good idea to offer media training to those authorized to speak for the municipality. There are many consultants out there offering various types of media training in anything from developing messages for media through to full on-camera and radio training. Prices can also vary from a couple thousand to tens of thousands. Do a bit of research and pick what is best-suited to the needs of your municipality. When seeking out qualified media trainers look to identify a trainer who will customize training to meet the needs of your organization and not offer a “cookie cutter” training session. Training should include the opportunity for on-camera mock interviews with critiques for each individual.

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#### **Relevant Case Studies – See Section 8 of the Toolkit**

- Managing Media During a Crisis
  - Media Relations Training
  - Union Negotiations
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#### **Additional Resources:**

- Siegel, D. Leaders in the Shadows: The Leadership Qualities of Municipal Chief Administrative Officers.

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*

## **Media Interviews**

### **Before the Interview**

- **Interviews are opportunities**

Media interviews are opportunities to present your municipality’s key messages to the public. Whenever possible, know who the interviewer is and what they want to discuss. Find out how long the final piece is likely to be. For television and radio, ask if it will be a live interview or pre-recorded and if it will be a phone or in-studio interview. This will help guide you on how to plan your responses. If there is time, research the audience of the publication or station they work for, and prepare by reviewing key messages and anticipating questions in advance.

- **Know your audience**

When developing key messages, consider the point of view of the audience. Do they have any concerns you need to address? When we are passionate about a topic, we believe everyone else shares our viewpoint, but this is often not the case. Remember to use the interview as an opportunity to educate your audience on the position your municipality is taking and why you are taking that position.

- **Deadlines and Requesting Questions in Advance**

Reporters often work to tight deadlines. Because of this, you should ask what their deadline is first. Once you know their timeline, it is reasonable to ask for some time to gather all the facts. While not always possible, it can be helpful to try to find out the angle or subject matter of the story prior to responding. One strategy that is often successful is to ask the journalist to send you the question(s), so you can get back to them when you have more time in your schedule to respond. However, when you ask for more time, it is imperative that you follow up within the agreed upon timeline as the story will run with or without your input.



- **Preparing Key Messages**

Prepare up to three key messages you want to share with the media. Practice these messages and make sure they are clear and concise; do not leave room for interpretation. Key messages should be developed with your audience in mind. For example, if you are talking about a municipal tax issue that is impacting residents, put yourself in their shoes as you select keywords. A message map can act as a guide and help you focus your messages. A template has been included as a downloadable resource in this section.

## During the interview

- **Start of the Interview**

Introduce yourself, be polite, smile and shake hands. If your interview is being taped, make sure you ask the reporter if you can say and spell your full name and position. This will help ensure the agency does not make any errors when they put your interview on the air.

- **Follow the ABC Method**

Acknowledge the question.

Bridge using phrases like: "Thank you for that question, but what matters most right now is...", "It would be more correct to say...", "While that may be true, it is more important to ..." etc.

Content (deliver your key messages).

- **Dead Air**

When talking to journalists, always remember that you do not need to fill dead air. They will leave pauses in the conversation to get you to speak more on the topic. Remember to stick to your key messages. The reporter will move to the next question when it is clear you have nothing further to say.

Similarly, journalists will often ask if there is anything else you would like to add at the end of the interview. Try not to get caught by this and provide unnecessary information. Instead, use this question to reiterate your two to three main points and end the interview on a positive note.

- **Leading Questions**

Reporters will often ask leading questions. These might be questions starting with "What if ...," "How come...," "Suppose this..." etc. Do not dignify anything you cannot confirm and do not repeat the negative or leading phrase when you answer the question. If you say it, the piece may be edited to seem as though you agreed with the statement.

- **"No Comment" is never a comment to make**

"No comment" is never a good response. Saying this implies that the question is valid, but you do not want to answer it. The public can also perceive this as guilt or avoidance of an issue. Instead, say why you are unable to respond (e.g. confidentiality, privacy, still assessing the situation, etc.). If possible, provide a timeline for when the information might be available.

- **To respond or not to ...that is the question**

Finally, as the CAO, you need to evaluate when to respond to the media and when it is best not to. When a municipality comments on a story, the story gains more authority. Because of this, it is sometimes better not to say anything and let the story fade away. However, if it could appear like the municipality is avoiding a contentious issue by not responding, this may not be the best strategy. Assessing this requires political acumen and a thorough evaluation of all the implications.

- **Nothing is ever "off the record"**

Anything you tell the media is part of the public domain. Asking them to keep something "off the record" does not change this, and they can use any information you provide at any point.

A brief Media Interview Checklist has been included as a downloadable resource to this section to help you keep these pointers in mind.

"There is no such thing as a bad question - only bad answers"

## After the Interview

After the interview has finished, do not continue talking about the issue. You never know when a microphone may still be on capturing your post-interview comments. Instead, thank the reporter and ask them if they have everything they need.

If they have requested follow up information, give them your business card or that of your communications team, and invite them to email any follow-up questions. Ask them when the piece is planning to air or be published. If it is taped, ask them if they can send you the clip when finished for your retention or a link to where it will be posted.

Be polite and cordial throughout. Journalists have a job to do – always remember they are a conduit to help you deliver important information to your stakeholders who are also your court of public opinion.

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#### Downloadable Resources:

- Message Map Template – See Appendix C
- Media Interview Checklist – Do's and Don'ts – See Appendix D

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*

## Social Media Use

Social media has become an intrinsic part of the social fabric of our society. What was once seen as a fad that would pass is now here to stay. Not only that, it has taken over as an indispensable communication tool for organizations in all sectors to reach their audiences. Municipalities are not immune from its impacts and it has become an essential means of sharing information with residents and ratepayers. Indeed, you are more likely to reach a larger segment of your audience through a well-followed Facebook page or Twitter account than you are printing a news article. Not only that, following community groups on social media can help keep your administration's political radar tuned to what is going on in your community, and in doing so, build your political acumen in the public domain.

One of the key benefits of social media for municipalities is that it allows you to have a two-way dialogue with your ratepayers on important matters in a timely and honest fashion. Individuals are more likely to be candid from behind a screen than face-to-face, and therefore, social media has become an essential tool for public engagement and learning what your citizens truly feel about an issue or topic at hand. It also provides a venue for keeping residents updated during emergencies and, in our modern world, is the most effective way of notifying citizens of relevant information or public hearings/meetings.

However, the online communications space does not come without its own pitfalls and challenges. "Fake news" and false information can spread quickly and easily on social networks, with very little that can be done to stop the proliferation of attention-grabbing yet inaccurate information that makes its way to the internet through gossip and rumour. Even worse is when negative, yet accurate information takes hold and becomes the topic of the day.

What is a municipality's best defence against misinformation? Developing a strong and active social media presence that is able to effectively reach the public.

For municipalities, social media is a resource to invest in. Like a fire truck that sits in the hall unused most days of the year, but is extremely valuable when it is needed, social media is a tool that may generate minimal interest on most days, but can play a vital role when a critical notice regarding public safety needs to reach residents. A case in point is the 2016 **Fort McMurray Wildfires** where social media played a significant role in keeping residents safe during the mass evacuation. When asked two years later what he thought about the use of social media in that emergency, former Fire Chief Darcy Allen said "it worked" (Wood, 2018). Because of this, it is highly recommended that municipalities use social media and establish their social media presence early on. Building active social media accounts and establishing a following of residents now, ensures you are ready to go when you really need it in support of an issue or a crisis.

Part of having an effective social media presence is providing the resourcing, mostly staff time, to allow this to happen. Often social media ends up as an add-on to somebody's already full-time job. Bringing on somebody with social media experience as part of your communications team or sending a staff member to social media training can be a valuable addition to your organization. However, there are also many experts available who can provide support on a contracted basis.

## Social Media Best Practices

For municipalities participating in the world of social media, it is important to provide information regularly, early on, transparently, and honestly. It is also crucial to address the negative commentary in addition to positive.

- **Post Regularly**

Social media is designed for regular updates and communications. Social platforms such as Facebook and Instagram have taken a stand against mismanaged and underused pages that were created but rarely get used. Moreover, algorithms have specifically been built to weed out content from organizations that rarely post or do not provide quality information.

This means that if your municipality only posts once a month (or less), only ever uploads content from other sites (e.g. shares from one social media site to another or links to other sites), or does not create posts that your followers engage with, your posts are unlikely to appear in the newsfeed of your residents. Social platforms want to create a positive experience for users that is not inundated by low-quality, spam-like posts. If it is not interesting and not receiving attention, it may not be seen. Furthermore, not responding to inquiries that come through your social media channels will further discredit your online reputation and presence in social networks.

Best practices in social media management include posting at least one to two times per week on each platform and responding to questions in a timely fashion. It is also important to respond to both positive and negative comments. While it is easy to accept praise and offer gratitude, it is equally valuable to address criticism and offer explanation, information, apology, or resolution.

- **Communicate Early and Often**

In an emergency, or even in the day-to-day operation of an organization, it is easy to get caught up in work and forget to tell stakeholders what is going on. Even professional communicators are guilty of this. However, it is critical to remain in control of the information about your organization to the greatest extent possible.

Whenever possible, you should be the first to inform the public of new regulations or policies that impact them, and you should provide early and ongoing communication during emergencies. Doing this will help establish your municipality's social media channels as the authority for information. Providing updates after the initial communication is also important for retaining this trust and ensuring that the information you share is prioritized over other information being circulating on the internet.

Even if you do not have all of the information and facts, it is more important to say that and communicate what you do know with your residents and ratepayers, than to avoid the conversation and let the rumour-mill take hold. Particularly in emergencies where people may be afraid for their safety, it is crucial to provide any public information available sooner rather than later. Even if it is as simple as a holding statement saying that something has happened, emergency services have responded and are addressing the situation, and more information will be provided as it becomes available, it is better to establish your municipality as the source of information than to stay silent. Alternatively, if there is another authority that should be providing information, it is equally important to ensure your residents and ratepayers are directed to those channels (e.g. fire department, police, etc.) instead of your own.

- **Transparency and Honesty**

There is always a small amount of hesitation that comes with sharing information to a venue as open to the public as social media. This can create reluctance on the part of those approving the messaging to be as transparent and honest as possible for fear that whatever is said will be misinterpreted or taken the wrong way. However, with the rapid speed of information sharing in our modern world, it is necessary to be as transparent and honest as possible in all of your online communications. If you do not say it, somebody else will.

- **Addressing the Negative Head-On**

Social media has become infamous for “mean tweets,” online rants, and more seriously, online bullying. There is something about the false security of a screen and a keyboard that allows individuals to say what they genuinely feel, often in a less than polite way. This can make social media one of the primary sources for learning about criticism toward your Council and your Administration.

It can be tempting to ignore the negative, attribute it to those crazy residents who only want to vent or complain, and move on. However, with every negative comes a positive. It provides your municipality with the chance to learn more about resident concerns and is the perfect opportunity to educate the public on municipal initiatives and policies. Better yet, it allows you to inform ratepayers of the accomplishments and actions of Administration and Council to address an issue. Even taking the time to apologize for someone’s negative experience can go a long way toward building your community’s trust in its Administration and, in turn, its Council. Anything you can do to support the positive perception of the municipal organization will demonstrate your political aptitude to your Council.

**Best Practice:** When it comes to social media communicate early, often, and honestly, and pay as much attention to the negative, as the positive.

## Social Media Strategies for Smaller Municipalities

For smaller municipalities, it can be challenging to keep up with social media, especially if it is being done off the side of one employee’s desk. Here are some strategies to keep your accounts active:

- **Contract someone:** Working with a consultant who has training in social media to develop a social media strategy and manage your posts can help alleviate the workload from you and your staff. Not only will experts in this area plan out quality content, they will also help make sure resident inquiries get answered, and your accounts are properly managed.

- **Use automatic response tools:** The messaging systems on many social media sites allow you to set up automatic responses. These auto-replies can say anything from “Thank you for contacting us. We will respond to your inquiry in 1-2 business days,” to “Thank you for your inquiry. We check this account every Friday. If you require more immediate assistance, please contact the municipality at \_\_\_\_.” Automatic replies help keep your response times low and let the public know when they can expect an answer.

- **Give access to others:** Social media platforms allow you to set up other users with various permission levels. It can be helpful to provide access to key individuals in other departments (public works, recreation, emergency management, etc.) so that they can post about their own events when needed. This also helps ensure that if there is important information that needs to get to the public immediately (e.g. a water main break), the departments addressing it can post about it directly without having to take the time to contact another individual. Giving access to others will require your municipality to develop detailed social media policies and procedures to ensure everyone knows the rules about what can and cannot be posted and maintains a similar tone/style when representing the municipality.

- **Be clear about the purpose of your page:** If your municipality does not have the time or resources to post regularly, make sure you are clear to the public about the intent of your social media pages. For example, you may only use your page to provide important notices and emergency updates. If this is the case, state this in the description and ask your followers to also sign-up to be notified about your posts to ensure they see them. If you will not be checking messages regularly, set up an auto-reply to inform the public and direct them to contact you another way.

- **Be strategic in the platforms you choose to use:** Every social media site is good for different forms of communication, and there is no need to use them all. For example, Facebook is good for events, news and other regular updates. Twitter is effective for brief but important communications and for sharing links. It has also become a go-to platform for emergency communications. Instagram is more visual in nature and therefore requires captivating images to accompany every post. However, Instagram does not allow you to put links in your comments and therefore is not ideal for sharing articles or connecting to other websites. YouTube can be an excellent resource for sharing informational videos. Evaluate what each platform does and only choose to use those that will serve a strategic purpose for your municipality.

## Social Media Policy & Guidelines

Social media has become a mainstay of municipal communications, and because of this, it is necessary that every municipality have a policy that addresses the use of social media by the organization as well as by elected officials and administrative staff. In addition to defining what can and cannot be posted on the municipality's social media accounts and guidelines for engaging with the public, this policy should outline protocols for Council and staff when it comes to sharing municipal information on their personal accounts. While there should be no concerns with individuals sharing information from municipal pages on their own accounts, it needs to be made clear that sharing personal opinions regarding municipal matters is unacceptable. Social media policies can be either embedded within an overarching communications policy or enacted as a separate document.

Providing social media training can help clarify what is and is not acceptable. Training should outline why, when and how to use social media. Often it is recommended that councillors create a separate page for their office that they can use to engage ratepayers and share information. This helps keep a division between the personal and professional activities of an elected official.

However, it is important to stress that it is virtually impossible for public figures, such as elected officials, to remove their personal lives from the public eye. When you have a public role, you must act like you are always operating in that role. Individuals in these positions are never "off the clock," and there is no ability to put on the "private citizen" hat and not be under scrutiny.

Anything that is said, whether it be on a personal or professional social media account, will be seen as attached to an individual's public role. For this reason, it is imperative that those in the public sector be mindful of their presence in the social realm. Once it is online, it is forever accessible there by anyone. This applies equally to municipal staff and as it does councillors. Once you are connected to the municipality in any way, you are seen as representing that organization and therefore should also be attentive to your online activities. While you may not face legal recourse for careless tweets or posts, you can lose your social license to govern or the authority to act on behalf of your community.



# MENTORSHIP

Mentorship, formal or informal, is an important part of career development. Learning from those who have real-life expertise gained through years of hands-on experience is not only valuable but essential to advancing our career pursuits.

Indeed, many CAOs who profess to be successful often attribute some of that success to building a strong relationship with someone they could confide in and learn from. For this reason, and others, mentorship has become a focus of the professional development plans of many individuals.

It is through mentorship that we learn the subtle art of workplace politics and skills that cannot be acquired through books. Political acumen is one skill that falls in this category. Working in municipal management and leadership requires learning how to read between the lines and be ahead of the curve. Bouncing ideas off of mentors and learning from their experience is one way of adding this skill set to your resume.

In this section, we look at some of the tools you can use to build strong mentor-mentee relationships. Please contact the CAMA National Office at [admin@camacam.ca](mailto:admin@camacam.ca) if you would like staff to connect you with a CAO or Senior Municipal Administrator across Canada. We would love to provide you with an experienced municipal manager so that we can help ensure the municipal leaders of tomorrow are well-prepared to take on the challenging and rewarding work of leading local government.

Topics covered in this section include:

- Building a Mentor/Mentee Relationship
- The Role of a Mentor
- The Role of a Mentee
- Mentorship & Political Acumen
- Mentorship Forum

## Building a Mentor/Mentee Relationship

While some mentor-mentee relationships evolve naturally, often they are formed at the request of someone who is looking for guidance in their career. For some, the idea of going out and finding someone to mentor you may seem daunting, but the rewards of this endeavour far outweigh the effort. Here are some best practices in building mentor-mentee relationships that work for both parties.

- **Ask for recommendations:** There are mentorship programs of various kinds across Canada, often connected with municipal education programs, that can help match you with a potential mentor. However, you are more likely to find a useful match by doing your own research and approaching someone yourself. If you are interested in finding a mentor but are unsure who to choose, ask around. Talk to respected colleagues and let them know you are looking for a mentor; ask if they have any recommendations.

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- **Be clear about your goals:** When approaching a potential mentor, be clear about what you are looking for, including the areas you need guidance in and the type of relationship you envision. Is this a short-term arrangement to get support as you navigate a challenging scenario? Is this an on-going relationship that will allow you to bounce ideas off of an experienced individual, garner insight into an issue, or stay accountable in your career development? Are you looking for someone to help you get to the “next level” or are you looking for advice in a particular subject matter area? How regularly do you want to talk or meet? Do you prefer to meet in person or are you okay with phone calls? Know exactly what it is you want and how much time you are asking the potential mentor to contribute.

If you are the mentor being approached, it is equally important for you to be upfront about what you are willing to offer. What are your time restrictions? What areas are you able to effectively provide support? How do you see the relationship unfolding?

- **Stay connected:** As with any relationship, mentorship is a two-way street of communication. It is as essential for a mentor to check in and provide encouragement, as it is for the mentee to report back and stay accountable to their mentor.
- **Be respectful:** As the American Psychological Association (APA) notes in their [Introduction to Mentoring](#), “respect is a cornerstone of the mentoring process.” This may seem obvious, but it is crucial for both the mentor and the mentee to be considerate of each other in their interactions and treat each other professionally and ethically. Whether this is respect for each individual’s background and opinions, or simply the act of valuing the other person’s time, being polite is the key to developing a positive and fruitful relationship.

- **Know when to move on:** It is common to have multiple mentor-mentee relationships throughout your career. Indeed, it is part of the natural evolution of a mentorship relationship for it to end or evolve into something new (friendship, colleagues, etc.) when the original goals are met. Either party can be the one to signal this transition when the time has come. It is also beneficial to the mentee to develop a network and find different advisors with a wide range of perspectives, skill sets, and experiences to further build their toolbox.

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#### Additional Resources:

- American Psychological Association. (2006). [Introduction to mentoring: A guide for mentors and mentees.](#)

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*

## The Role of a Mentor

The role of a mentor is to provide information, guidance, and encouragement to an individual, specifically concerning how they might approach various situations, advance their career, or build their skill set. Inherent in the mentor-mentee relationship is the assumption that the mentor will help the mentee develop their career in some way, whether it be through their work performance or professional development. However, the benefits of this relationship flow to the mentor as much as the mentee.

In 2006, a presidential task force was organized by the President of the American Psychological Association (APA) to examine mentorship relationships. While the value to mentees is apparent, research by the APA has found that mentors can also benefit from these relationships through the gratification felt from shaping the next generation of leaders. Not only that, mentoring acts as a way to continue your own career development and learn more about new issues and perspectives that are important to the field you work in.

## How to Mentor

Mentors are usually more experienced and further along in their careers than mentees, and therefore it can be tempting to accidentally fall into an “I know best” mindset in working with less-experienced individuals. However, as mentorship, leadership, and coaching books all reveal, the key to working with other individuals in this capacity is not to tell them what to do, but rather help them to discover the answers to the questions themselves. As the bestselling Canadian book, *A Tale of Two Employees* by Dr. Chris Bart (2003) demonstrates, mentorship is about helping those you are working with to understand the what, why, and how of a situation by guiding them to find their own solutions.

Mentorship is really about leadership in a one-on-one relationship. Leadership is never about having the authority to tell someone what to do but rather demonstrating and inspiring others toward a course of action. In *The Leadership Challenge* by Kouzes and Posner (2017), the authors identify “five practices of exemplary leadership.” These practices include modelling the way, inspiring a shared vision, challenging the process, enabling others to act, and encouraging the heart.

In other words, effective leaders, and by extension mentors:

- Lead by example and demonstrate effective values that achieve success.
- Help others envision their successes and career possibilities by sharing in their ambitions. Whether this is as simple as seeing the other side of a challenging situation or believing that it is possible to become the City Manager of the largest municipality in Canada, showing your interest in their vision is crucial to motivating a mentee.
- Challenge assumptions and identify areas for improvement. Part of the role of being a mentor is helping someone achieve career growth. Respectfully providing constructive criticism is important to the role, as is encouraging mentees to be innovative and take risks, when needed.
- Support mentees in developing the confidence to take action. By providing advice that comes from experience, mentors can play a significant role in giving an individual the courage to take the needed steps to address a problem or achieve success.
- Celebrate progress. Recognizing mentees who achieve their goals strengthens the mentorship relationship, builds trust, and encourages continued effort.

When working with mentees, it is also important to adapt your knowledge to the individual. Remember, not everyone will approach a scenario exactly as you did in the past, and your mentee will have their own professional style. Provide advice in a way that allows the mentee to understand it within their own context and modify it to suit their personality and situation. Doing this creates the opportunity for them to synthesize the information you have to offer with their knowledge base and add a unique new skill set to their toolbox.

Every mentorship connection will be unique, and there is no specific formula for success. However, one book that provides some insight into how to approach the mentor-mentee relationship is *The Power of TED* by David Emerald (2010). *The Power of TED* is the story of a mentor, Ted, and his mentee, David, and the practical advice Ted offers David to support him through a challenging time. While this could be taken as a self-help book teaching people how to empower themselves, it demonstrates many of the qualities of being an effective mentor. Not only does it show how to empower those who seek advice from you to take effective action in their own lives, it also highlights the true nature of a coach as someone who supports others through listening and asking questions rather than taking control and trying to fix the situation themselves.

### Additional Resources:

- American Psychological Association. (2006). [Introduction to mentoring: A guide for mentors and mentees.](#)
- Bart, C. (2003). [A Tale of Two Employees: & the person who wanted to lead them.](#)
- Emerald, D. (2010). [The Power of Ted: The Empowerment Dynamic.](#)
- Kouzes, J. & Posner, B. (2017). [The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations.](#)

Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.

## The Role of a Mentee

A mentee is someone who enters a mentorship relationship with the objective to learn and grow professionally. As the American Psychological Society has discovered, individuals who have mentors are more likely to earn more, perform better and progress faster in their careers. While it may seem like the primary responsibility of a mentee is to find someone to work with, there is a lot more that can be done by the mentee to build a positive relationship that creates value not only for them but also for their mentor. Here are some tips on how to be a good mentee.

- **Be prepared.** Show up to your mentor meetings knowing what you want to talk about and the questions you want to have answered. Being prepared shows you respect your mentor's time and are receiving value from the relationship. While communication is a two-way street in the mentorship relationship, it is still up to the mentee to take the lead in maintaining contact and scheduling meetings.
- **Be open.** By asking someone to be your mentor, you are telling them that you are open to hearing the feedback they have to offer. While this does not mean you have to agree with everything they say, it is important to be receptive to their suggestions and constructive criticism. If they only agreed with you, they would not be adding value to your professional development.
- **Be realistic.** While we all hope to receive that one piece of advice that will make all the difference, it is important to remember that

your mentor is there to provide support, not fix the problem. Their role is to act as a sounding board, offer perspective, and provide advice from their past experiences. However, it is up to you how you take the information they provide and act upon it.

- **Be punctual.** Mentors have offered time out of their schedules to support you in your career. For this reason, it is important to be punctual and respectful of their time.
- **Be inquisitive.** In addition to knowing the questions you want to ask your mentor, do not be afraid to ask for clarification or to dive deeper into the conversation. Showing your genuine interest will help build the relationship, and meaningful discussion will lead to greater learning.
- **Be thankful.** In addition to the obvious and thanking your mentor for their time and advice, gratitude can also be shown by taking the time to provide updates and mentioning where their feedback was useful along the way.

To encourage mentorship in Canadian municipalities, CAMA has compiled career advice from nine experienced and respected municipal administrators across Canada. *Cultivating Leadership: A Guide for the Next Generation in Local Government* is a valuable resource providing information on the challenges CAO's and Senior Administrators face, the requirements of the job, and advice for those who are interested in entering municipal leadership. This document is the perfect starting point for anyone who would like to progress their career in municipal management but is unsure where to start.

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### Additional Resources:

- American Psychological Association. (2006). [Introduction to mentoring: A guide for mentors and mentees.](#)
- American Psychological Association. ["Tips for Mentees"](#)
- CAMA. [Cultivating Leadership: A Guide for the Next Generation in Local Government](#)
- Forbes. ["How to be a Great Mentee."](#)

Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.



## Mentorship & Political Acumen

Often, the advice given by a mentor to a mentee is less procedural and more directional. That is to say, it relates more to navigating the politics of an organization or an industry and advancing one's career, than how to do one's day-to-day job. For this reason, mentorship is a critical component of learning political acumen.

We have included a PowerPoint presentation as a downloadable resource for CAMA members to use as part of their mentor-mentee relationships. The presentation covers every topic included in the Political Acumen Toolkit and can be used by CAOs or Senior Administrators to support the professional development of their management teams or aspiring leaders. Many parts of this presentation can also be used to support Council Orientation sessions on various topics such as Council Ethics, Social Media, and more. We hope you will find it to be a valuable resource to inspire the future leaders of local government in Canada.

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### Downloadable Resources:

- Mentorship Presentation – Political Acumen – See Appendix E

*Please visit the Political Acumen Toolkit online at <http://politicalacumen.camacam.ca/> to access all additional resources.*



# CASE STUDIES

The following case studies have been compiled from CAOs across Canada on a variety of political acumen topics.

These stories reflect key learnings from the Political Acumen Toolkit and provide further insight into the role political acumen plays in the day-to-day dealings of local government as well as how to use your acuity to deal with unexpected situations. Each case study relates to one or more sections of the toolkit where you can learn more about each of the topics covered.

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## Building Rapport with a New Council

**Location:** Nova Scotia

**Topic(s):** Council & CAO Relationship, Council Changeover

### Please describe the situation.

We have all experienced the ups and downs of the Council/CAO relationship. Following an election which saw significant change to the occupants of the Council table, it quickly became obvious that change was in the air. We had left behind, mainly due to retirements, a well-functioning Council that understood and appreciated our respective roles and the positive results that can occur when it works.

### What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

Our new councillors, who now formed the majority of Council, were ready to sweep Town Hall clean. They came with the preconceived ideas that all the things we did were done wrong and believed we did very few things right.

They did not understand or appreciate the role of councillors or Council, and didn't much care. They simply wanted to change things immediately without process or discussion and hoped to do this by micro-managing all aspects of municipal operations. The final straw for me was when Councillors openly criticized staff in Council meetings and whenever the opportunity presented itself.

Council attended the Councillor training as provided by their provincial association and other training opportunities that the Province made available. None of this resonated with them. They knew better but were not prepared to settle for their role. They wanted to manage and change everything.

### How did you respond to or address the situation?

My initial reaction to this change was to close shop and attempt to control and limit Council communication with all staff members. I viewed this new Council's approach as an attack on our organization and decided that a strategy would be to bring this deteriorating relationship to the edge of the cliff. Maybe this wasn't a wise career move. This did, however, force us to the next step which turned out to be very beneficial. I recommended that we needed help and suggested the formation of a committee to review our current operations and develop a go-forward plan. The committee would be made up of supportive and non-supportive members of Council and myself as CAO. I further suggested that we required some outside professional help. Council agreed that we work at finding a solution and supported both requests. We hired a local government consultant, interviewed Council, staff and members of the public and provided a go-forward plan that everyone could support.

### What lessons did you learn from this scenario?

This was an “ah ha” moment for all of us. Following what can best be called a necessary intervention, we went from having the worst Council/CAO relationship to one of my best. A meeting of the minds and an appreciation for each other’s roles and responsibilities developed. I learned that although we both have our distinctive roles and responsibilities, there is grey area in the middle that we both periodically visit. And that’s ok, if its properly managed.

### What advice would you give to someone going through a similar situation?

For us to move forward we needed help. Be strategic, get in front of it and lead the process. Sometimes we need to put our careers on the line. For me this was a win /win option. If this worked out, great, I enjoyed the Town and the great people who work there. If it didn’t, and my leaving was the result of this process, that was ok as well. Sometimes we just can’t make it work and personalities can complicate the situation. Sometimes the fit between CAO and Council determines how successful a relationship and the future of an organization can be.

There is no hard-fast rule in dealing with such situations. As a CAO you should be prepared to find common ground and build on early successes. Know when you require outside help. Having outside professional help, chosen by the committee turned out to be what we required to move forward.

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## Conflict of Interest in Council

**Location:** Prince Edward Island

**Topic(s):** Council Ethics

### Please describe the situation.

A development permit application was submitted to the Town. It involved re-purposing a home into a daycare. Our bylaw was silent on this type of development in the zoning of the area (residential multi-family) but we already had three daycares in more restrictive zoning areas. One of the Planning Board members lived next door to the house to be repurposed and was not in favour of having the development next to them. The Chair of the Planning Board, a council member, was good friends with the Planning Board member who was against the development.

### What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

Although advised by staff that there was a definite conflict of interest, due mostly to the friendship of the Chair and member, the member was allowed to attend the meeting and sit in on the discussion surrounding the application. The member was asked not to vote on the matter, but their presence in the room and obvious disapproval of the development led to the Planning Board making a recommendation against the application, which in turn was accepted by the Council on the grounds that “it was not listed as an allowable use in that zone.”

### How did you respond to or address the situation?

As Development Officer and CAO, I was in a difficult spot. I wanted to back Council, but I knew that we didn’t have a legal leg to stand on. There was an obvious conflict of interest, and that was exacerbated by the fact that the Planning Board member sat in on the discussion about the application. The argument was put forward by the Chair that “the member didn’t vote, therefore they didn’t impact the outcome”, but I was not confident the argument would hold water more than the one stating that “the use was not listed as allowable in the zone.” We had three similar uses in more restrictive zones which also did not list them as an allowable use. I told Council that there was little chance of winning an appeal.

### What lessons did you learn from this scenario?

Always be mindful of a conflict of interest and understand that the perception of a decision (in this case, that Council was against youth or facilities for youth) can create more issues than the reality. The reality was, there was a conflict and the excuse for not approving the application was not clearly stated.

### What advice would you give to someone going through a similar situation?

Every decision will influence every other decision. You can't defend allowing something in a more restrictive zone and then try to limit it because someone objects to it. Also, always be aware of conflict or perceived conflict of interest. Public perception will usually assume the worst if it can be shown that a decision is questionable, so try not to make any decisions questionable.

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## Council Allegations Against the Mayor

**Location:** Ontario

**Topic(s):** Council & Staff Relationships

### Please describe the situation.

Council launched a judicial inquiry into a conflict of interest against the Mayor. The conflict centered around the Mayor's role in a development project. As a result, many of our planning and legal staff were involved in providing documents, being questioned at discovery, and testifying in front of the inquiry. Our Council of twelve members was divided seven against five, with a majority on this issue voting against the Mayor. This caused a rift and significant tension which became a challenge for staff to navigate on issues whether they were related to the inquiry or not.

### What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

The situation developed when a newly elected Councillor, who was not a supporter of the Mayor, was able to convince the majority of the Council to launch an investigation into a potential conflict of interest. For those who may not be familiar with a judicial inquiry, it is an independent investigation that, once launched, is under the control of a commissioner of inquiry (in our case it was a judge). The municipality must fund the costs of the inquiry and the commission, like any tribunal, has the ability to subpoena documents, question witnesses and compel appearance at the hearing. All of these things took place during the course of an inquiry that lasted two years, and cost \$7 million. Because of the time it took to complete the inquiry, tensions were high for a significant period of time and staff often felt caught in the middle of the two sides.

### How did you respond to or address the situation?

First, this was a complex legal process, so I surrounded myself with the best advisors I could find. That allowed me to feel confident when dealing with the Council. In order to navigate the challenges, I knew it was critical for staff to remain completely neutral during the inquiry process. The Mayor had been a long-standing elected official who was beloved in the community and so the temptation to support her and those who considered the inquiry unfair was certainly present. However, it was also clear that in our system it is the will of Council and not the will of any individual councillor, including the Mayor, that prevails.

Staff were directed to bring forward quarterly reports on the expenses of the inquiry. Each time they were presented it resulted in very difficult, tense conversations around the council table. In one-on-one conversations with the Mayor, she expressed frustration at the actions that staff took which she perceived as supporting the Council position. I explained the importance of staff neutrality and that staff had no option but to implement the council direction. It was difficult because she felt staff were being disloyal to her.

### What lessons did you learn from this scenario?

I think the lessons learned really centered around the issue of never showing bias toward any member or group of Council. Staff independence must be the top priority when there is a divided Council. Recommendations that appear to support one side or the other must be carefully explained, justified with evidence and carefully vetted in order to ensure that the appearance of bias is completely removed if possible. It was also a requirement that courageous conversations take place between the CAO and members of Council any time accusations of bias were made so they could be refuted and hopefully resolved. When the judicial inquiry report was released it was determined that staff actions in relation to the substance of the inquiry were shown by the commissioner to be professional, impartial and appropriate under the circumstances, and that staff showed no bias despite any involvement they may have had in the project.

### What advice would you give to someone going through a similar situation?

My advice through a situation like this is first be patient, understanding that things like this are not resolved quickly, and there is nothing you can do to accelerate the outcome. Understand the difficulty a situation like this places on the staff in and that they are looking to you for both an example and coaching on how to handle a challenge of this complexity. You need to be there for them, even when you are struggling yourself.

Find a way to deal with the stress and try not to take it home. Find a person or something that can help you cope with the tension that inevitably comes from being caught in the middle of a drawn-out conflict. I wish I had done this more effectively.

Keep your options open. In my case, the Councillor who led the push for the inquiry lost the next election and the Mayor was re-elected with very strong support from the community. Had that not happened, I believe I would have been terminated. As a precaution, I was reaching out to recruiters and looking at job opportunities in other municipalities. Fortunately, the next election resolved the issue and I was able to stay on in my municipality and have continued in my role now for an additional eight years. I know that could have turned out very differently.

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## Council Divide

**Location:** Ontario

**Topic(s):** Council & Staff Relationships

### Please describe the situation.

Early in my tenure at the Municipality of Kincardine in Bruce County, Council was embroiled in a controversial and conflict-laden industrial wind turbine project. As a result of the provincial Green Energy Act, municipalities were left with little authority in matters concerning renewable energy projects. Along with more formal requirements associated with the provincial approvals regime, such as completion of road and infrastructure impact and mitigation agreements, a more informal protocol had evolved for wind energy developers to provide "community benefit" packages, typically included in an overall development agreement. Council direction was required to negotiate a community benefit package with the developer.



## What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

The industrial wind turbine program created deep division in communities across Ontario, which was often reflected in conflicting points of view at the Council table. Largely associated with the siting of the turbine towers, significant and wide-ranging concerns were raised regarding impacts on human and livestock health resulting from electrical leakage and sub-sonic sound emissions, the visual impact on the rural aesthetic, damage to roads and removal of trees from construction activity and restrictions on community expansion (and aviation) due to siting of the towers.

Council was divided between the pragmatists, who felt that the municipality was essentially powerless to control installation of the turbines, and the members who felt passionately that every effort must be made to oppose installation of the units, at virtually any cost. Then came the point when, as CAO, I sought Council's direction on opening talks with the developer to assemble a community benefit package for Kincardine.

## How did you respond to or address the situation?

In preparing my approach to Council, it was critical to assess and weigh a number of critical factors:

- Was I wasting my time in even raising the subject with Council? (This had been suggested to me)
- After all of the negativity and harsh criticism, would the developer even entertain the notion of negotiating a community benefit package?
- What benchmarks had been set in agreements then in place in other jurisdictions?
- Were there specific needs in the community that I could identify when engaging with the proponent?
- Would my training in Pacific Rim cultural and business protocols be useful in engaging with the developer?

When I did consult with Council, the direction was largely indifferent. The strong opponents felt that any contribution should be regarded as a shallow and transparent attempt to "buy-off" the community, and that any contribution would be regarded as "blood money". The pragmatists essentially shrugged their shoulders and sent me off, with very low expectations.

The eventual outcome, which was achieved after protracted negotiations that reached as far as Seoul, Korea, was a benchmark community benefit agreement that set a precedent at the time in Ontario, which will bring millions of new non-tax revenue to the municipality over the length of the twenty-year renewable energy license.

## What lessons did you learn from this scenario?

Understand that posturing in the public political context is often nothing more than that. Learn to filter out static and signal interference. Without negating the interests and concerns of a vocal minority, remain cognizant of the welfare of the broader community.

Individual members of Council have no authority, you work for Council. Your way will not always be Council's way but keep calm. Build a strong relationship with your Mayor.

When entering negotiations, assess the motivations and aims of the other party, and go into the process in a spirit of mutual respect. Always be guided by the facts and remain objective, use emotion as a tactic, but stay in control. When conflict arises, try to identify the underlying issue, which may not be aligned with what is being expressed.

## What advice would you give to someone going through a similar situation?

Know that your success will often be expressed as Council's achievement. Aim high, keep your head low.

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## Council-Staff Relations

**Location:** Nova Scotia

**Topic(s):** Council Ethics, Council & Staff Relationships

### Please describe the situation.

The Mayor was receiving information from somebody about a certain staff member that was very uncomplimentary. The Mayor walked into my office and demanded that I address the issue that was purported to be true. When I asked the Mayor what evidence there was for this and who she received her information from, the Mayor's response was she was told the matter "in confidence". I argued that I was not prepared to talk to the "offending" employee without properly validating the complaint with the person who made the allegation. She insisted that I should act on it on the basis of her word, I refused.

### What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

The Mayor knows a lot of people in the small town and personal agendas, rumours and innuendo fly around with people believing anything they hear. The particular staff person was only doing his job but people did not like the fact that he took a position contrary to theirs. The accusations they made were his attitude is poor, he has major morale issues in his department, his staff all complain about him, and he should be fired. There was no evidence of any of this from my close observations of his department or his staff in the past or present. But yes, I was aware of a couple of disgruntled employees who were recently disciplined.

### How did you respond to or address the situation?

The Mayor asked me what she is supposed to do when people tell her things in confidence. My response was if she was told it in confidence she should keep it to herself, or if she wants me to act on it she should tell the person that the CAO would be advised about it and would contact him/her for details, or better still, the aggrieved person could come to me directly so I could ascertain the facts, properly document the issue and have it looked into. Key to that would be a follow up that we have taken corrective action to prevent a future occurrence or alternatively, that we looked into it and the evidence did not bear out the complaint.

### What lessons did you learn from this scenario?

I could have been a tad more diplomatic with the Mayor in how I conveyed my message, however, she has gotten to trust me because I have been consistently honest and truthful about my advice. More importantly, I should have shared with her that I am in her confidence circle and we have an equal role in addressing organizational or political issues and when people tell her things "in confidence" we are part of that confidence circle.

## What advice would you give to someone going through a similar situation?

Have a conversation with elected officials on how we can take a lot of pressure off them by giving us the "bad cop" role. That is, they receive a complaint "in confidence" and they let the complainant know that the CAO is in the confidence circle. We call the person and assess the situation. We can then follow up after the review on what our findings were. This is about finding a political win for the elected officials by taking their complaint seriously but also by the complainant hearing that their elected official also wanted results. Whatever the outcome, whether in favour of or against the allegations made, all parties look good when a complaint is looked into.

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## Disclosure of Confidential Information

**Location:** Ontario

**Topic(s):** Council Ethics

### Please describe the situation.

I was on a conference call with a local Board (I participated as an ex officio member) and the Chair quoted what was said in a recent solicitor-client closed session of Council. This agency had made a FOI request and was threatening to sue the municipality and the closed session was related to how the municipality should approach the situation. I immediately spoke up and asked the Chair to stop speaking and advised him that what he was saying is confidential information from a closed Council session. He was a private business owner and did not understand municipal governance and rules of order. He replied by identifying that the Mayor had told him this information and he wanted to share it with the whole Board. Thankfully he stopped providing details but the damage was done. I was participating on the conference call with another Councillor who was extremely angry that the Mayor broke confidentiality and passed on our litigation strategy to our opponent.

### What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

The Mayor was a member of the agency Board and had more of an allegiance to the agency than to the municipality. He often forgot "which hat he was wearing". In my opinion, the Executive Director of the Agency made it a practice to use the Mayor to manipulate outcomes/votes of Council.

### How did you respond to or address the situation?

I immediately contacted the Deputy Mayor to advise him of the situation and told him that I intended to contact our solicitor as well as call a special Council meeting to advise Council of what transpired on the conference call. I was mindful of the fact that, as CAO, I report to Council as a whole body. I requested that the solicitor join me for the closed session, in part to provide Council with further legal advice given that the other side now knew our strategy and also to ensure that I delivered the information in a manner that was not insubordinate. My intent was to stick to the facts of what I knew based on the conference call and not make assumptions or accusations.

Obviously, the Mayor was very upset with me for advising Council. I asked to meet with him one on one afterward and explained to him that I had a responsibility to tell Council what I knew. Our relationship was strained following that but I gained the respect and trust of the rest of Council.

### What lessons did you learn from this scenario?

I am happy with how I handled the breach of confidentiality once I was aware of it. I have many more years of experience now and in hindsight, I wish I had done more to help prevent the Mayor from creating this problem for himself in the first place. Many people recognized the Mayor's misplaced allegiance to the agency. I wish I had taken him aside sooner to educate him on the perception of his allegiance and the risks involved. I am not sure he would have listened to me but at least I could have tried.

### What advice would you give to someone going through a similar situation?

CAOs need to be diligent and remember that they report to Council as a body and not just the Warden or Mayor. Do not let uncomfortable situations keep you from doing what is right. Do not sacrifice your respect and integrity for "being liked". It was very difficult to sit next to the Mayor and advise Council of what had happened, but I remind myself that I do not get paid to be comfortable or to be liked by everyone, I get paid to serve my Council.

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## Falsified Expense Account

**Location:** Quebec

**Topic(s):** Council Ethics, Provincial Government

### Please describe the situation.

In 1998, in my role as Director General (City Manager) I suspected the mayor of falsifying his expense account. This saga carried on for many months and created a political firestorm that ended up with this resignation in the spring of 1999.

I had been the City Manager for almost 10 years. It was my first job in that position with a series of mayors and councils, we had made tremendous progress in turning the finances of the Town around, renewing the major infrastructures and taking on the unions to control our spending and increase productivity. We developed a strategic plan that had the backing of the population and the level of satisfaction in the Town's services was extremely high.

### What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

The management team that I had put in place was young and determined to bring about change. Generally, we were backed by Council but with the newly-arrived CUPE becoming increasingly concerned with the improvements we were getting through negotiation and with the fire personnel, through arbitration, we became the target of more labour unrest up to a series of strikes by all unionized personnel. As a consequence, we had outside agitators join in the protests that, in turn, created a difficult atmosphere inside the organization as employees were made to choose between their employer and their union. Given that CUPE had told the Town employees that they would be getting better results with them than with the Teamsters, there was added pressure to deliver. It became apparent a few years later when all cities on the island of Montreal became merged that the unions were in sync with the ruling provincial government and knew that these "wins" on the labour front were a threat to their future with the new City of Montreal. Also, it was the unions plan to become the super-union for all employees of the new City of Montreal.

At the same time, the Parti Quebecois had started to move towards reducing the number of municipalities across the province and had proposed the merging of all on-island municipalities into the City of Montreal. This was a political nightmare for us as some of the province's arguments were that the smaller municipalities were not cost-effective, and were in fact private fiefdoms for their mayors who squabbled amongst themselves rather than working together for the benefit of their citizens.

So, at a time when things were heating up both locally and provincially, the need for solid leadership was important. To have the matter of the mayor's expenses become public would only exacerbate an already increasingly difficult situation.

### How did you respond to or address the situation?

As Director General, I had the authority to approve all expenses within my powers of delegation from the Council. This included the control over the administration's budget which also included the mayor's office. No payments could be made without my authorization, this was eventually ratified by Council at a subsequent public meeting. I realize that in some communities, no payments are made until the resolution of Council has been approved. In our Town, in the spirit of handling the Town's business more efficiently, suppliers were paid upon proof of services delivered, compliance with the PO's, etc. unless it was an expense that Council had requested to have first approval.

In the fall of 1998, I started noticing that many of the expense vouchers put forward by the mayor were missing dates. Most of the payments were paid by credit card which normally have the date and time stamped on the receipt. I reviewed previous expense claims that already had been processed and noticed this pattern had been in place for a few months. In essence, I was approving expense payments to the Mayor that were missing key information. This was legally not correct so I found myself technically involved in this matter if indeed it was proven to be correct. It was!

So, I doubled my checking of the mayor's accounts along with his schedule to see if this was just a small oversight on one or two occasions. It was not an oversight and had occurred at least a couple dozen times.

I put all of the information in a spreadsheet which included date of claim, who the meals were with, and the amount. I shared this document with no one until I was convinced there was impropriety. I met with the Town's lawyer who confirmed my concerns about both my legal situation and the Mayor's. I had to act to make sure the matter was resolved.

I met privately with the Mayor and asked why there were elements missing from his expense claims. I then explained that I was not going to process outstanding claims until full information had been produced. This was a difficult conversation since the Mayor and I had worked well together on many files since I first joined the Town. The Mayor was not pleased with me but said he would provide me with the missing information.

I waited four months and got nothing, despite repeated private reminders to him of what he had promised. As the matter was delicate for everyone's reputation I remained patient but it was not something that I could simply ignore, it had to be resolved.

Given that the matter could eventually leak out, I kept close communication with our legal representatives and documented every step I took in the matter. I transferred much of this documentation to our lawyers so as to keep the matter of access to information under control should a member of the public request reports before and after the matter could be resolved. In Quebec, we have very generous access to information legislation that allows the public to obtain copies of documents. Though the notion is good and I am all for transparency and accountability, many of the request are abusive and require hours of staff time to answer.



I contacted the Minister of Municipal Affairs (MAM) office and spelled out the situation. My objective was to seek confirmation of what I already knew. I had to act on the matter as the four-month stalling by the Mayor had produced no results and was not acceptable. I had to involve the Council since I had no authority over the Mayor but in doing so, the risk of the matter becoming public increased. At this point I was no longer concerned about the public aspect since I was stressed out by all the secrecy required to protect the Town's image and that of the Mayor. I thought the Mayor was a reasonable man, but felt that he thought very little of me since he ignored my request for information in hopes that I or the matter would go away.

I chose to make the matter known to a veteran councillor who was retiring. I knew the matter had to be presented to Council eventually and through this means it made it easier to introduce the subject with his understanding of what was to be presented. His advice was to proceed.

I put together a confidential report that I presented to Council in a caucus meeting where the Mayor was not present. In this report I outlined the matter and the steps taken since I was first made aware of the discrepancies. Council in caucus decided that they would meet with the Mayor and ask for justification for the discrepancies, failure to do so would leave them no choice but to bring the matter forward at the monthly public meeting. I was no longer directly involved in the discussions with the Mayor but the delegation from Council had no more success with the mayor than I had. Prior to the public meeting one of the councillors gave my report to the local paper who reported it, almost verbatim.

The Council passed resolutions requesting information and deadlines, any failure to do so would see a resolution to disqualify the mayor from office. The Mayor remained silent and quit in May, citing that any further action would upset his family.

It turned out that the Mayor who had been a successful business man was broke. His paycheques had also been garnished by the federal government for non-payment of taxes. He was too proud to tell anyone or ask for help. He elicited a lot of sympathy from the population who thought that this matter was a witch hunt by the Council but that was only at the very end. The actions by the member of Council to leak a confidential report to the press (see attached article) was unacceptable and this did little to enlighten the population to why the actions (or lack thereof) of the mayor were not part of the values of the Town.

The laws do not give an amount or a range where unjustified payments are acceptable in the public sector. The City Manager has no discretion under Quebec law to provide funds without any valid justification. I was left burnt out and had to take time off. The matter and the subsequent actions that I was forced and asked to do left me feeling that I had been the bad guy and not the "poor old mayor". I had given the Mayor sufficient time to reply to my questions, treated him with utmost respect throughout and kept the matter confidential until I had no further choice.

### **What lessons did you learn from this scenario?**

Check everything, even when things are going well and check it twice. Document any and all suspicions and keep a diary of what is going on. Understand the environment you are working in. In our case the municipal world has lots of different actors so be aware of the role you play. You have a job to do and council has a job to do, never trade jobs.

### **What advice would you give to someone going through a similar situation?**

Don't take things for granted and when you need to seek advice to confirm if your suspicions are correct, do it discreetly. Treat everyone with respect, a person's reputation is very important and fragile.

# COMMUNITY NEWS

COMMUNITY NEWS EDITOR: BRENDA O'FARRELL (514) 987-2563

TOWN OF MOUNT ROYAL

## h Schwartz resigns

Steps down to avoid 'agonizing' legal battle with town

BECKER  
Gazette

Royal Mayor Harry Schwartz from office yesterday to avoid a "prolonged" legal battle with

council launched legal action against Schwartz from office yesterday to avoid a "prolonged" legal battle with council. Schwartz was not properly received re-expense account. Council also lawyers to bring an clarification of disqualification of Quebec Cities and could bar him from municipal council. Reference yesterday, welfare of his community and family was an his political career or personal reasons to destroy the people. This isn't an admission," said Schwartz, occasionally as he

Because his resignation comes less than a year before the next scheduled election, the town doesn't have to hold a by-election to choose a new mayor. The next election in T.M.R. will be in November.

Councillors will be meeting in the coming days to choose an interim mayor.

The resignation came as an about-face since a defiant Schwartz last month said he planned to stay on as mayor after council adopted the resolution to remove him from office.

"In the days and weeks following council's resolution, it was my stated intent to carry on in the office of mayor of T.M.R.," said Schwartz as his wife, Maxine, sat at a nearby table, wiping tears from her eyes.

"However, as the battle evolved, I became acutely aware of the enormous pressure and increasingly heavy toll it was taking on our community, my wife and my family," Schwartz said.

Schwartz's resignation comes just as town manager Duncan Campbell said the town was planning to deposit a motion in Quebec Superior Court this

the amount reported to be in dispute with town officials.

Schwartz said he paid back the amount because he wanted to put an end to demands calling for his removal from office. But town officials remained steadfast in their intent to remove Schwartz from office.

Schwartz's relationship with town officials soured further last month after they went public with the fact four creditors had placed seizures on Schwartz's salary.

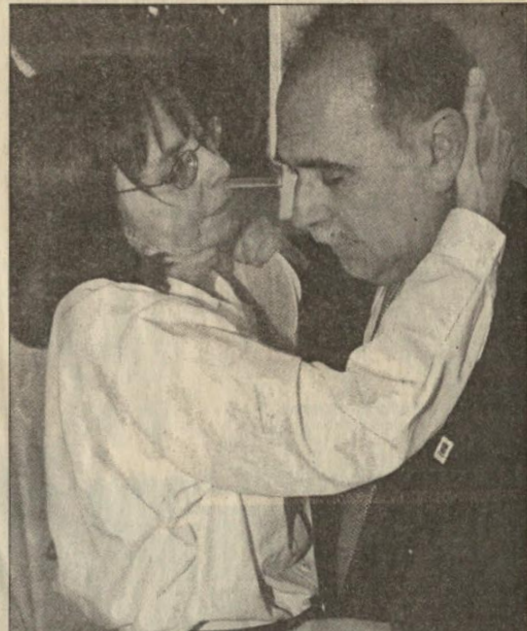
Yesterday, Campbell said Schwartz's resignation could have been avoided.

Campbell said town officials repeatedly tried to resolve the issue of Schwartz's disputed expense accounts since November, but to no avail.

"The situation could have been rectified, but, for reasons only Mr. Schwartz knows, he chose to say nothing," Campbell said.

Schwartz, who has served on council since 1987, was first elected mayor in a by-election in 1994.

"This not a happy moment for the town," said Ed Ropoleski, president of



## Intermunicipal Economic Collaboration

Location: Saskatchewan

Topic(s): Building Intermunicipal Relationships

### Please describe the situation.

In 2016, the City of Prince Albert entered into a Prince Albert Region Intermunicipal Business License (IMBL) Agreement with the Town of Duck Lake, The Town of Rosthern and the Town of Shellbrook. This agreement was a two-year pilot project with the intent to reduce the amount of regulations for businesses that want to work in more than one municipality in the area.

Under the pilot project, a business with an annual business license in one of the participating communities would have the option to purchase an IMBL which would allow the business to legally operate in each of the participating municipalities. The annual licence fee is split with 50% going to the municipality where the IMBL was purchased and 50% divided equally amongst the remaining participating municipalities.

## **What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?**

Over the last few years, there have been many changes in local, provincial and national economies. Today businesses, industry, municipalities, agencies and others are continually challenged to understand how to best position themselves for success within a changeable economic environment. Economic development, then can be understood as the effort to increase wealth and improve the quality of life within a community or region. The most successful economies are often organized on a regional basis.

There is a long history of the Prince Albert Planning District (PAPD) and member municipalities working cooperatively, overcoming challenges, and working towards a shared vision for the future of the region.

## **How did you respond to or address the situation?**

Recognizing this, stakeholders within the Prince Albert region wished to pursue an economic development approach that would be tangible, practical and sustainable. The desire is to create a regional framework for an organization which would play a critical role in the connection, coordination and implementation of economic development planning and projects. This organization would be the cornerstone of support for regional economic development. As it evolves, it will help bring financial and technical resources to the table in support of projects and initiatives. It will also serve as an important link to related agencies and organizations as well as proactively market both the province and the region.

In 2017, Prince Albert City Council commissioned the development of an economic development framework for the region. While there was a professed need for enhanced coordination and support for regional economic development activities, further research, analysis and consultative facilitation were completed to clarify the circumstances whereby an economic development organization might be established. Differentiation and efficiency were two primary drivers for stakeholders to consider a regional partnership.

The result was a recommendation for the establishment of a regional, non-profit economic development alliance, supported by four strategic focus areas and funded by six regional shareholder members through an incremental, flat-fee approach.

## **What lessons did you learn from this scenario?**

This IMBL project has allowed the City to collaborate with our neighbours to promote business and economic prosperity in the region. During the first year of the project the City received \$1,500 in additional business license revenue and \$4,125 in year two.

There is a long history of the Prince Albert Planning District and member municipalities working cooperatively, overcoming challenges and working towards a shared vision for the future of the region. The Prince Albert District Planning Commission has been a successful partnership that spans over 60 years, one of the oldest planning districts in the province.

## **What advice would you give to someone going through a similar situation?**

In order to recognize and support economic opportunities, regional collaboration must become the standard operating procedure. Regions best understand their assets and what is important for long-term prosperity as players can come together to establish priorities and successfully implement initiatives.

# Intermunicipal Recreation Agreement

**Location:** Alberta

**Topic(s):** Building Intermunicipal Relationships/Collaborating on Municipal Services

## Please describe the situation.

City Council was on the verge of passing a resolution which would dissolve the Joint Recreation Agreement between the Municipal District and the City.

What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

Simply put "honesty", annexations had created a lot of mistrust. The two Councils could not see "eye to eye" on anything.

## How did you respond to or address the situation?

The Joint Recreation Board had made a recommendation to City Council to build a multi-purpose Leisure Centre to meet the growing demand for recreation in a very fast-growing City. The Municipal District advised the City it would not be contributing to any capital to the Centre even though the Recreation Agreement called for them to do so. City Council directed Administration to continue negotiations while the facility was being constructed.

The facility was close to completion and negotiations stalled. City Council was prepared to pass a resolution to dissolve the Recreation Agreement. Minor Sports Associations had been advised that if Council was to pass the resolution it would mean Municipal District residents could not register their kids with the City Leagues. Municipal District residents were of course not happy with this decision nor were the Leagues. In fact, some of them claimed they would ignore the directive.

Just before the City Council meeting, where the vote would be taken to dissolve the Recreation Agreement, I requested a "one-on-one" meeting with the Municipal District CAO. He agreed and at the meeting I simply asked for the real reason the Municipal District would not honor the existing Recreation Agreement. The Municipal District CAO was relatively new to the municipality and as a result he did not have a lot of history or bias. He informed me that the Municipal District was fearful to invest a lot of money into this facility and then be in a position ten years from now wanting to build their own. I suggested we structure a new agreement whereby they could contribute capital to the facility in five-year increments, much like a time share. The life of the building would be fifty years. In five, ten, or twenty years if the Municipal District wanted to build a facility of their own they could withdraw from the capital contributions towards this facility. He felt this would address the Municipal District's concerns. Both Councils unanimously supported the new agreement. The agreement initiated a "new attitude" between the two municipalities.

## What lessons did you learn from this scenario?

Life is all about communication and trust. By reducing the negotiations to two parties we were able to develop some trust which allowed us to fully understand the situation and therefore address it appropriately. The removal of both Councils from the negotiations allowed the CAO's to reach an agreement, that in the end allowed both Councils to be seen as working together for the betterment of both municipalities.

## What advice would you give to someone going through a similar situation?

When negotiating with what may be considered “an adversary,” it is crucial to eliminate any potential negotiators who have lots of “negative history or issues” with the other party. Keep the size of the negotiation team small, make sure they are open-minded and give them autonomy to be creative.

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## Managing Election Turnover

**Location:** Alberta

**Topic(s):** Council & CAO Relationship, Council Changeover

### Please describe the situation.

During every municipal election the opportunity exists for citizens to provide a report card on their incumbent elected officials as well as decide upon any new entries into the political arena. This case study is about the CAO/Council relationship after a municipal election.

In Alberta, the municipal elections occur every four years with the last one in October 2017. There are about 345 municipalities in the province. An informal pool was conducted amongst a number of CAO's to provide a guess as to how many CAO's would be terminated within one year of that 2017 election. The one-year concluded in October 2018. Based upon an informal network of people, it was concluded that in excess of 30 CAO's received the proverbial "golden handshake". For some it was likely less golden while for others it was very golden. This represents close to 10% of all Alberta CAO's which seems to be an incredibly high number. This is a trend that seems to be on the increase as more and more CAO's are told "Council has decided a change in management is required and that your services are no longer required".

### What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

A new Mayor was elected (who was a Councillor on the previous Council) along with three new Councillors (three incumbents were also re-elected). The new Mayor was a vocal opponent to most things that were of any consequence while he was a Councillor. As soon as the elections results were confirmed, it was known that things were about to change in a significant way. The Mayor-Elect had a specific agenda in mind and went about in a methodical way ensuring it was implemented. As a CAO with over 30 years of experience, and now a Mayor who went about things a much different way, I became an obstacle for him to achieve his goals. As conversations between the Mayor and myself became fewer and fewer, the situation became more untenable. Knowing the writing was on the wall, it became obvious that my days as CAO were limited and that the only thing not known was when the axe would fall. It took six months. Quite simply the Mayor needed/wanted me out of the way so he could go about doing things his way with his people.

### How did you respond to or address the situation?

From election night until my services were no longer required was tenuous to say the least. Those six months required a mind set of doing what Council decided despite the distractions. It became obvious unofficial meetings were occurring with certain Council Members prior to the official Council meeting. Notwithstanding as CAO, a job still needed to be done, staff still needed to be provided direction, leadership needed to be demonstrated, and the municipality was still obligated to deliver its services.

As CAO you are the one most staff look to for confidence, calmness and demeanour. It was important to "keep it together" despite what was happening in the background.



## What lessons did you learn from this scenario?

A CAO is most definitely hired at the pleasure of Council. Regardless of the circumstances, if Council decides you are no longer a good fit, that is their prerogative. Accept their decision with dignity and mentally prepare yourself to move on. Do not try and figure out where you went wrong or failed simply accept the fact Council has made a decision and it is time to close the chapter on this segment of your career.

As long as you can look yourself in the mirror and say that you gave it your best, your integrity and reputation as an Administrator will survive. New opportunities always seem to appear. So do not despair, as things usually happen for a reason. Many times we do not know what that reason may be, but more often than not we are better off afterwards.

While circumstances are different for each of us, the common thread is we are suddenly thrust into a situation of upheaval and uncertainty. An extra ordinary Administrator/CAO is someone who maintains a positive attitude and is determined not to let this have a detrimental impact on their disposition and/or impact their character.

## What advice would you give to someone going through a similar situation?

Ensure that you have a solid termination provision in your employment contract that protects you in the event Council exercises its prerogative. There are many colleagues and friends who can offer support. Accept that support and continue to dialogue with your peer network. There are fewer and fewer CAO's who remain in that capacity with the same municipality for a lengthy period of time. Consider your options and re-evaluate your personal goals after serving the same municipality for a long time.

And lastly, when your spidey senses start telling you something is not quite right or is about to change (your political acuity), re-evaluate your situation and take whatever corrective action best suits you. For some that may mean sharpening up the resume, for others an early retirement, or for others padding the bank account with a nice severance. Do not stick your head in the sand and think things will change when you look up. Be proactive versus reactive.

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# Managing Media During a Crisis

**Location:** Saskatchewan

**Topic(s):** Managing Media Relations, Talking to the Media, Social Media Use

## Please describe the situation.

In 2016 the City of Prince Albert experienced a water crisis affecting all residents, businesses and visitors as well as surrounding communities who rely on our City water system. The presence of Hydrocarbons had been found in the North Saskatchewan River, immediate measures had to be undertaken, and it was critical that the public was notified. Media involvement became crucial to informing the public of the urgency of the situation while ensuring that all information was accurate and consistent. An Emergency Conservation Bylaw quickly came into effect and it was very important that the public be aware and obey the Bylaw to ensure the continued supply of safe water.

## What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

A Public Information Officer within the Emergency Operations Centre (EOC) was appointed to implement our communications plan throughout the two months of the crisis. Having one individual oversee communications, prepare scripts for staff, draft the media releases and speaking notes for the City Manager and Mayor, record questions being received, monitor social media as well as be the contact for any other inquiries allowed for accurate information to be relayed consistently. The media were encouraged to attend daily press conferences wherein the City Manager would provide an update and answer any questions; a technical expert from the Public Works Department was also present to stand alongside the City Manager in the event more specific technical information was needed. To maintain separation between City operations and political involvement, the Mayor held a media scrum following each press conference to respond to any political inquiries but continued to refer regular questions to the City Manager. As per our EOC protocol, the City Manager provided Mayor and Council with all necessary information as it was received and was the sole liaison between the EOC and City Council.

## How did you respond to or address the situation?

There was focus throughout the crisis of managing the information that was going out to the public. This was accomplished through the immediate formation of a Call Centre within City Hall, the creation of a dedicated website with current information and answers to Frequently Asked Questions and daily press conferences with the media. As this quickly became a national story, the City Manager set aside time each day to respond to phone messages received from various media outlets across Canada. Dedicated resources were assigned to our social media accounts with over 100,000 visits to our Facebook page within the first week of the crisis. As a result of the daily press conferences and our focus on keeping the public updated as regularly as possible through interactive media efforts, calls received by the call centre (which averaged 150 per day), dropped down to a handful after the first week.

## What lessons did you learn from this scenario?

This is a great example of how involving the media and keeping them informed as an emergency situation evolves is absolutely critical. It shows transparency on behalf of the City and also helps to prevent the spread of misinformation which can often lead to panic and make an already difficult situation worse.

## What advice would you give to someone going through a similar situation?

When challenging situations arise, the media can be your friend if you keep them informed with accurate and consistent information to share with their followers.

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## Mayor Intimidation

**Location:** British Columbia

**Topic(s):** Council Ethics, Council & Staff Relationships

### Please describe the situation.

As a new CAO, the Mayor requested I join him to meet with a developer out of the office. At the meeting the developer expressed complaints about the development application and approvals process. The Mayor wanted the development to happen and without all the bureaucratic nonsense associated with it. I felt pressured by the Mayor to approve the development application without it going through its due process.

## What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

The political environment was one where the elected officials, mainly the Mayor, made all the decisions and staff were there to assist only when asked. The Mayor made it very clear that staff were to be silent during the Council Meetings unless requested to speak. The Mayor also advised that all communications to Council need to go through him first. This culture was long established and the community had a reputation of going through several administrators.

## How did you respond to or address the situation?

When I returned to the office I sent an email to all of Council advising them what had occurred at the meeting, the concerns I had ethically, as well as the requirements set out in the municipal bylaws. I was respectful in the email although made it very clear that Council directs the CAO through resolution or bylaw, not the Mayor through verbal communications. I also reminded Council that the processes I was following were the processes that they as Council collectively put in place. If they wanted to review or amend these bylaws we could do that collectively in an open meeting. It was well-received by Council and we discussed the situation at length at the next closed Council meeting. Basically, Council advised the Mayor to stop this type of behavior, which of course he did not.

## What lessons did you learn from this scenario?

Above all stand up for ethics. Your integrity is everything and do not let anyone jeopardize this. Always be respectful and treat all members of Council the same, everyone gets equal information. Be strong, positive and always be willing to listen.

## What advice would you give to someone going through a similar situation?

Integrity is your most important attribute and ethics are the most important aspect of good governance and relationships between the CAO and Council.

Always consider how your reaction and body language during communications with members of Council can affect your relationships. Emotional Intelligence is essential to success, it's not what you say, but how you say it. Always be respectful and aware of this.

## If you would like more information regarding this case study, please contact:

Tom Kadla  
250-540-0320

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## Media Relations Training

**Location:** Alberta

**Topic(s):** Managing Media Relationships, Talking to the Media

### Please describe the situation.

The stretch of road between Highway 16 (runs east/west from Edmonton to BC border) and Westlock (north west of Edmonton about an hour) was formerly known as Secondary Highway 794 (Sec HWY), but due to a large increase in traffic it was eventually upgraded to Highway 44 in 1999. Traditionally the area was predominately a farming community. Between 1997 and 1998 there was a rapid influx of new development to the area, both commercial and residential. This resulted in large traffic volumes especially during peak hours. This included farming equipment, gravel trucks and passenger vehicles.

The Sec HWY was not designed to handle this volume of commuters and inevitably this stretch of road was responsible for causing many serious and life-threatening vehicular collisions, some unfortunately were fatal.

Residents and businesses in the area had made presentations to Council requesting the County lobby the Province to get the road designated to a Provincial Highway so that changes could be made to the road that would accommodate the increase in traffic making it safer for travel. Although Council was meeting regularly with the Province for the re-designation, it was a very slow and drawn out process and more vehicular collisions continued to occur.

### **What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?**

The Council was not media savvy; generally, they dealt with only local community reporters who were not overly intimidating. As a rural community, they had for the most part managed to stay under the radar of the larger urban media, especially live radio and television.

A recent onslaught of serious collisions occurring on the Sec HWY immediately generated outrage by the public. The frustration from residents was beginning to amplify with the most recent collision. This piqued the attention of the larger urban centre's media and now the story was no longer contained to just the local community paper. The larger newspapers, television and radio were interested in this small rural County and wanted to know what steps had been taken and what they plan on doing to expedite the process of getting the Sec HWY re-designated to a Provincial Highway.

### **How did you respond to or address the situation?**

It was clear that this story would be frontpage news and be the headline story for awhile. It was necessary to prepare a statement for the media. Discussions were held and the key messages were developed. Statement and Media kits identifying the steps taken and the history of events were prepared.

Since it was a high-profile story, the newspapers, radio and television all wanted interviews. The phone calls were coming into the County office requesting comment from the Reeve. The Communications Specialist had suggested that it may be more efficient and effective to hold one media conference. The Reeve insisted that he would be more comfortable doing individual interviews, and so interviews were scheduled and the Reeve proceeded to conduct several one-on-one interviews. This process was very laborious and exhausting for the Reeve and as the interviews continued it was getting increasingly more difficult for him to stay on-point.

### **What lessons did you learn from this scenario?**

More effort should have been made to persuade the Reeve to hold a single Media Conference. In the end it was clear that it would have been much less stressful on the Reeve and a better way to handle the media. The Reeve would have only had to give his statement once and answer questions at one sitting, thus ensuring that everyone received the same information at the same time.

### **What advice would you give to someone going through a similar situation?**

Especially in a rural municipality, when the Council may not be very media savvy, it is a good idea to provide them with formal media training. This training will give them the much-needed skills required to handle the gravity of the pressing issue during a media interview and the sensibility of dealing with intimidating reporters. Don't wait for a media opportunity to arise where your Council is faced with a high-profile situation that requires them to be confident, concise and able to stay on-point.

# Persuasion from Ratepayers

**Location:** New Brunswick

**Topic(s):** Council Ethics

## Please describe the situation.

Our City was stuck in a period of low development growth amid rapidly rising services costs. Council was under considerable pressure, faced with either dramatic service cuts or a sharp tax rate increase to property owners. At the same time, a group of contractors who had a history of developing property in the City, as well as providing roadway maintenance and underground infrastructure services to the City, approached several Councillors to complain about how "difficult" our professional staff were to deal with. In particular, they identified the Head of Engineering and the Chief Building Inspector as problem employees and called for their immediate removal.

## What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

The Councillors involved were seen as being "business friendly" and in some cases, had well known and long-standing community relationships with these contractors. The individual employees involved were both somewhat reserved, soft-spoken, but very professional and dedicated employees.

The group of Councillors requested a meeting with me to demand that I "fix" the situation, which I interpreted to mean dismissal of the employees.

## How did you respond to or address the situation?

My approach was to request time to investigate the complaints. I organized a meeting with the group of contractors to hear their complaints and to record their version of events which led up to this conflict. At the same time, I met with the employees to make sure their side of the story was also captured. I concluded that the City employees were simply following good contract management practices, administering City policies and ensuring that contractors lived up to their obligations, including enforcement of financial penalties, where appropriate. Both were performing their duties in the best interest of the City. Following my investigation, I informed the Councillors of my findings and also made it known that I would not be doing anything other than ensuring that good communication flowed between the City and the contractors, but that no disciplinary measures were going to be taken because there existed absolutely no grounds for such steps.

## What lessons did you learn from this scenario?

I learned that elected officials can at times be influenced by their own network more than the staff of the municipality. In many cases, Mayors and Councillors have little management experience nor background in operating large organizations where policy, procedure and standards are normal. Often times their solutions are simplistic for complex situations and for the most part, they want problems to go away but are commonly misguided in how to make that happen effectively. In this case, they were easily influenced by these business people and gave them more credibility than the professional staff.



## What advice would you give to someone going through a similar situation?

I have found that everything is built on a foundation of trust between the administration and the elected officials. Maintaining objectivity, making decisions based upon factual information, allowing people to have their say and share their perspectives, active listening and always remaining fair are critical to keeping that level of trust. It is also very important to protect employees from political criticism and to coach them in best practices in dealing with elected officials. I have also observed that some personality types will jump to a solution before adequately examining a problem, which leads to potential conflict when there is a difference of opinion.

In this case, the complainants did have some legitimate observations, but they were easily addressed with clearer communication practices and reinforcement of the municipal standards. The elected officials were also satisfied that the complaints were being dealt with and they accepted the outcome even though they had jumped to a "solution" beforehand.

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## Setting Intermunicipal Precedence

**Location:** Alberta

**Topic(s):** Collaborating on Municipal Services

### Please describe the situation.

Over a two-year period, our town went through an amalgamation process including an arbitration process for recreation funding. Both initiatives were a first for the Town and the Province. The Town initiated forced amalgamation discussions under a section of the Municipal Government Act. The reason to do so was to let the County know that the partnership was broken and we could no longer carry the financial burden of providing a variety of services. The amalgamation study was completed and submitted to the Minister. The minister decided that amalgamation was off the table and instructed both municipalities to focus on a recreation study and agreement. The study was completed however the parties could not agree on a few factors. Since there was no agreement the next step was arbitration.

### What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

The political environment at the time between both municipalities was at an all-time low even though we worked out a fire agreement. The Town told the County that over 50% of the users of recreation services were county residents and they refused to accept those numbers.

### How did you respond to or address the situation?

Knowing the reasons the town took such drastic steps, and being the first town in Alberta to do so, I knew that we were entering a new turf. I needed to remain strong and objective. Our Council members spent two years on both of these issues and they remained strong with conviction that this was the right time and way to make a difference. It was one of the most positive experience I've had in local government, even though there was a lot of extra work and emotions were high.

### What lessons did you learn from this scenario?

Sometimes you need to jump off the diving board without knowing how deep is the water. Having a strong Council is everything when going into controversial issues and possibly setting precedents in your own province.

## What advice would you give to someone going through a similar situation?

Be there for your Council, be as informed as possible, and recognize stress factors for your staff, Council members and yourself.

## If you would like more information regarding this case study, please contact:

Martin Taylor, CAO, Town of Barrhead, Alberta, (780) 674- 3301

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## Stakeholder Perception

**Location:** Alberta

**Topic(s):** Public Engagement

### Please describe the situation.

In my last municipality we had a Town beach area that was used by all. Years previous we had diesel spill and fire from the railway. We received some funding to upgrade the beach area. The consensus of some of the stakeholders was that we were covering up the spill by doing the construction.

### What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

Council was at the end of their term and an election was looming. I set up a working group with the railway, contractors and the funders to discuss how to move forward with the construction and address the spill at the same time.

### How did you respond to or address the situation?

There came a point in the situation that I had to meet with Council and suggest that the best course of action was to put the construction off for a year. This was extremely challenging because the election was looming and the public had by this point had no access to the beach for two (2) years due to other gateway construction in the area. I had to convince Council this was the best course of action as putting off the construction for another year would allow us to address the spill and then move forward with no issues. I came up with a concrete plan with Council on how to address the public. It was a tough one.

### What lessons did you learn from this scenario?

No matter how careful you are about addressing the stakeholders and public often they jump to their own conclusions. Council will, when given good valuable advice, usually make the right decision.

### What advice would you give to someone going through a similar situation?

Don't jump to the first solution. Think long and hard and think strategically. Use your resources, others who have gone through similar situations. This is why we are in our role often we have to make the hard decisions.

## If you would like more information regarding this case study, please contact:

Ann Mitchell - CAO  
Lethbridge County  
amitchell@lethcounty.ca

# Unethical Dismissal

**Location:** British Columbia

**Topic(s):** Council Ethics, Council & CAO Relationship, Council & Staff Relationships

## Please describe the situation.

After a Council meeting was adjourned I was leaving Council chambers when I noted that the five members of Council were remaining at the table. I inquired as to what was going on and was informed that Council was going to have a meeting to make a decision on a matter. I was told not to worry that the decision was not about my employment.

A while later, the Mayor came into my office and told me that they were “firing” an employee. The Mayor informed me that he was comfortable with carrying out the “firing”.

## What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?

The political climate or relationship with the administration could best be described as intrusive and demanding. Council wanted to “make decisions” however, they were not focussed on making policy decisions, their focus was on day-to-day administrative matters.

The Mayor had a persona that exhibited the need to exert power and illustrate to people in the community and in the organization that he had authority. Another member of Council had worked in the role of an Executive Director and he thrived on making administrative decisions. A third member of Council was very new and easily influenced by the Mayor. Two members of Council met regularly with the Mayor to discuss town matters outside of Council and were often a bloc vote.

The staff member unknowingly got on the mayor bad side due to a personal conflict or “small-town politics”. The wife of a member of council was on an advisory committee and wasn’t happy with the advisory role. She wanted the committee to have an operational and project function because of her expertise in the subject matter. The staff member was the communication conduit that had to communicate the committee role which placed him in a difficult situation. To the best of my knowledge, the wife of the Council member passed on misleading information about the expertise and the character of the staff member to her husband. These actions and the conflict with the Mayor led to Council wanting to fire this staff member.

## How did you respond to or address the situation?

Once I was told that Council was going to have a decision-making meeting I informed Council that their actions were contrary to the BC Community Charter of needing to advertise a legal special meeting. This information didn’t deter Council as I was told to leave the meeting. Once I was told of the results from the meeting I reaffirmed to the Mayor that the meeting wasn’t legal and the decision had no foundation to me or the organization. I also informed the Mayor that their methodology was unethical in the scope of local government operations, as the CAO or the employee had no opportunity to speak to the allegations that led to the decision and that Council was opening the Town to a legal action. As result of this discussion, the Mayor requested that a special meeting be advertised next day. At this meeting, I was given details of the decision and an opportunity to defend the person and the position.

My information had no impact on Council and the position was cut from the organizational chart. On my advice Council, made a decision to cut the position rather than “fire” the employee. This recommendation was made to avoid a constructive dismissal lawsuit, having to explain a “firing” in the community and a feeble attempt to decrease the negative impacts on organization morale.

I made three requests of Council all of which were granted. First, I was to carry the message to the employee because it was part of my role and not that of the Mayor. Second, I requested that Council take a more ethical approach with the employee and provide a generous compensation package. Third, I requested that the Mayor come to a manager’s meeting and tell the managers that this was a Council decision and that they didn’t have the support of the CAO.

### **What lessons did you learn from this scenario?**

Looking back on this situation I could have taken a more proactive role in explaining the role of the committee to the members and try to diffuse the situation with the wife of the council member. Having that second voice with more authority may have assisted in working through the issues.

Trust is a foundation of the relationship between the CAO and Council. Trust takes time to develop and a single ill-conceived decision can destroy years of relationship development. I can honestly say that I never trusted the members of that Council from that day forward and Council’s actions were viewed very negatively in the community. I also know that taking the stance I did sent Council a strong message that I was working in the best interests of the community and the organization.

### **What advice would you give to someone going through a similar situation?**

Your strength as an individual and as a professional will be tested and you will have to know “what hill to die on”. In this situation, standing by ethical processes and practises served me well in the long-term in developing relationships with key individuals in the community, my staff and the members of council which I experienced conflict. Use a professional approach that is backed by knowledge of the legal environment, your authorities, and look after your staff.

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## **Union Negotiations**

**Location:** Alberta

**Topic(s):** Council Ethics, Ratepayer and Resident Associations, Talking to the Media

### **Please describe the situation.**

The Public Works, Utility and Firefighters were the only union staff in the municipality. Every two to three years, meetings were held to negotiate new multi-year collective agreements. The majority of the municipal staff were non-union. The Human Resources department would conduct a survey annually reviewing and assessing the salaries paid to a broad range of union and non-union positions and would recommend annual cost of living salary adjustments and any position salary and/or classification adjustments for non-union staff based on their research. Positions in high demand with a shortage of qualified person would require adjustments beyond the cost of living.

The unions would seek and get multi-year contracts and often find after two to three years that they needed to catch up and seek to get ahead of the adjustments given annually to non-union personnel.

Historically, Council had two representatives on the negotiating team and the unions encouraged this as well. This made negotiating very challenging! The union would look at and address the councillors, exclaiming their worth and complaining how poorly they were treated by management and how the unreasonably low pay was demoralizing and disrespectful. Also, the union representatives would often call all the councillors to have them approve settlements beyond that which management was recommending and more in line with what they were seeking.

### **What was the current political environment? What factors led to the situation? What were the events that unfolded in this particular scenario?**

During election years some incumbent councillors and candidates would be targeted by union representatives seeking support for their salary and classification demands with the promise of their members support on the ballot. Those incumbents and candidates who accepted the support assertively sought the positions on the negotiations team causing friction amongst their fellow councillors who saw through their 'political agenda' and would not support their appointment or sought their fellow councillor's support for one of their priorities in return for their support.

The politicization of any human resource function like compensation and classification, recruitment or organizational design, sets a dangerous precedent that erodes the role of Council and its relationship with the CAO and the CAO's role in the leadership and management of personnel.

In the year leading up to the fall election, the two unions took a very aggressive position in negotiations with extraordinary demands. They started having off duty members walking in front of firehalls with placards declaring "poorly treated". The Public Works union threatening to strike or walk off the job with the election and winter snow weeks away.

### **How did you respond to or address the situation?**

Senior management, led by the CAO, prepared a detailed plan for managing the threats, settling the disputes and managing post settlement relationships. While reluctant to present the approach and details to Council, given the support the unions had from a minority of Council, this was done in-camera (personnel issue) with the Mayor reminding councillors that what was being presented was highly confidential and not to be discussed outside of the meeting. To manage the threat, our first objective was to enhance the communication of our position emphasizing three points. The offers were fair given what other municipalities of our size were paying, Council's commitment to a modest tax increase required to pay for the offer, and our overall benefits package. We valued our employees and the work they do for our residents.

To resolve the dispute, we proposed voluntary arbitration thereby removing the elected officials from the process. We assured residents all the work that had been done to ensure public works services could be provided by the private sector and the provision of emergency services through mutual aid agreements.

In preparation for post settlement recovery we wanted to ensure that the Mayor and Council would be viewed as having ensured a balance between respecting staff and tax payers. Only when the settlements were reached did the Mayor speak thanking management and union staff for their commitment to the municipality and their joint efforts in reaching a settlement.



At no time did the CAO make any public statements. There is unnecessary risk when the CAO is speaking publicly about sensitive personnel issues. The position must be and must be seen to always be providing council with rational objective recommendations within council's priorities. Becoming embroiled in a public war of words in what had become a very emotionally charged situation would detract from the role and image of the position of CAO. The same rationale is true for the head of Human Resources. The view of that position and its incumbent should be one of an objective person caring for and ensuring the well being of all employees.

Someone had to be the 'bad guy' sticking to the script and assuring the public that critical services would be provided in the event of a strike or walk outs. The General Manager of Operations was the official spokesperson for the municipality prefacing all remarks by emphasizing Council's direction to pay employees slightly above the average to encourage retention and recruitment, and that our offer achieved that direction based on all our research.

### **What lessons did you learn from this scenario?**

Maintain as much distance as possible between Council and employee negotiations; they are difficult and challenging at the best of times without political interference.

Always focus on how you want the relationship with staff to be post-settlement. Chose your messages carefully to maintain a positive supportive approach despite the current tension.

Choose a spokesperson who is an effective public communicator. It is critical that the municipality's spokesperson is articulate, calm and speaks clearly. Image matters. Do not get caught up with "well it is their responsibility". Very few people are effective 'toastmaster' speakers.

Do not compromise the role of the Mayor or the CAO by making them the spokesperson in controversial, emotional conflicts. There are many times when the position of Mayor should be the public spokesperson – but negotiations with employees is not one of those times.

### **What advice would you give to someone going through a similar situation?**

In some municipalities, unions are trying to run a slate of candidates for seats on council. The result is CAO's will need to be willing and able to be an adaptable and advocate for a rationale. Maintain an objective approach to employee relationships that respects the need for cost effective delivery of municipal services.

Most Municipal Government Acts clearly define Council's role. CAO's will need to create the environment and encourage councillors and their Councils to adhere to and respect the law governing their actions.

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Logo]*

## REQUEST FOR DECISION

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Date:

Report Number:

Prepared By:

**Subject:**

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### SUMMARY

[Insert 1-3 sentence summary of the topic/issue for discussion. The summary should be clear and concise, use common language, be meaningful to the public.]

### RECOMMENDATION

[Insert recommendation statement based on your analysis and in keeping with municipal planning documents, policy, legislation, and bylaws.]

### BACKGROUND

[Describe the topic/issue, how it arose, and any information that justifies the recommendation. State previous action, discussion or Council decisions related to this item including dates and motion numbers, where applicable.]

Refrain from referring to specific landowners and including personal information. Landowner, resident, or applicants are all appropriate references. If personal information is relevant to the decision, it can be provided as a separate document and issued separately from the agenda package.

Describe all public participation activities and their results, including the forums used to share information (e.g. ads, road signs, newspaper, social media, community meetings, website, etc.). Include those tactics used prior to the formulation of the RDF as well as those that will be used after the decision is made.

List applicable policies or Federal/Provincial legislation.

Background should be as brief and to the point as possible. Do not provide information that is not relevant to the decision at hand.]

**ALTERNATIVES**

[Describe the alternatives considered as part of the analysis, including the recommended alternative.]

**IMPLICATIONS**

[Identify the potential implications of the alternatives including their alignment with strategic priorities and potential impacts to the budget, the organization and the public.]

**PROPOSED MOTION**

[Motions should be:

1. Stated in the affirmative
2. Stated clearly and concisely
3. Contain all necessary information
4. Unambiguous (allow for only one interpretation)
5. Possible to execute

Format: use action words like:

- \*That Council approve (to confirm or sanction formally),
- \*That Council endorse (to support proceeding in a particular direction)
- \*That Council authorize (to give authority, vs the use of direct administration)
- \*That Council execute (used for agreements)]

**ATTACHMENTS**

1. [List any relevant attachments that support the RFD]

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**REVIEWED BY:**

[Insert the names/titles of any Manager, Director, or CAO who will review the content of the RFD prior to submission.]

\_\_\_\_\_  
Name  
Title

\_\_\_\_\_  
Date



**[Municipality Name]  
Council Meeting**

Date: [insert Date]

Time: [Insert Time]

Location: [Insert Location]

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**AGENDA**

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- |   |                      |
|---|----------------------|
| <b>1. Call to Order</b>   | <i>[Insert Time]</i> |
| <b>2. Adoption of Agenda</b>  | <i>[Insert Time]</i> |
| <b>3. Adoption of Minutes</b>                                       | <i>[Insert Time]</i> |
| 3.1. [List Minutes]   |                      |
| <b>4. Presentations*</b>  | <i>[Insert Time]</i> |
| 4.1. [Name of Presenter, Subject Matter]                            |                      |
| <b>5. Public Hearings*</b>  | <i>[Insert Time]</i> |
| 5.1. [Subject Matter]   |                      |
| <b>6. Business Arising from the Minutes [Unfinished Business] *</b> | <i>[Insert Time]</i> |
| 6.1. [Item 1]   |                      |
| 6.2. [Item 2]   |                      |
| <b>7. New Business*</b>   | <i>[Insert Time]</i> |
| 7.1. [Item 1]   |                      |
| 7.2. [Item 2]   |                      |
| <b>8. Bylaws*</b>   | <i>[Insert Time]</i> |
| 8.1. [Bylaw #, Bylaw Title]   |                      |
| <b>9. Mayor &amp; Council Inquiries / Updates</b>                   | <i>[Insert Time]</i> |
| <b>10. In Camera Session</b>  | <i>[Insert Time]</i> |
| <b>11. Adjournment</b>  | <i>[Insert Time]</i> |

*\*Note: Omit any Sections of the Sample Agenda that are unnecessary.*

Scenario	Stakeholder	Concern	Channels	Internal/External	Date/Time	Approved By

Key Message 1.	Key Message 2	Key Message 3
Support point 1.1	Support point 2.1	Support point 3.1
Support point 1.2	Support point 2.2	Support point 3.2
Support point 1.3	Support point 2.3	Support point 3.3

## MEDIA INTERVIEWS DO'S AND DON'TS

When conducting media interviews:

### DO:

- ☐ Actively listen to the interviewer.
- ☐ Watch your body language.
- ☐ Demonstrate that you are interested in the questions being asked.
- ☐ Demonstrate that you acknowledge the interviewer (make eye contact, nod).
- ☐ Speak clearly and professionally.
- ☐ Use bridging phrases like: "Thank you for that question, but what matters most right now is...," "It would be more correct to say...," "While that may be true, it is more important to ...," etc.
- ☐ Dress appropriately for the setting or issue.
- ☐ Be confident – YOU are the authority on the subject matter.

### DO NOT:

- ☐ Lie.
- ☐ Say "no comment."
- ☐ Speculate.
- ☐ Reporters will often ask "leading questions." These might be questions starting with "What if ...," "How come...," "Suppose this...," etc. Do not dignify anything you cannot confirm and do not repeat the negative or leading phrase when you answer the question.
- ☐ Voice unrelated opinions.
- ☐ Fight with the interviewer.
- ☐ Speak on behalf of others who you do not represent.
- ☐ Over-answer or try to "fill the silence" – State your key messages and stop talking!
- ☐ Rush to answer the question. Take your time.



CAMA  ACAM

# Political Acumen Toolkit

*Mentorship Presentation*

# Toolkit Topics

- [Introduction](#)
- [Administration & Council](#)
- [Residents and Ratepayers](#)
- [Intermunicipal](#)
- [Provincial & Federal](#)
- [Media](#)
- [Mentorship](#)



## INTRODUCTION

- Defining Political Acumen
- Politics and the Role of a Senior Administrator
- Top 10 Tips for Political Acumen
- Using the Toolkit

# Defining Political Acumen

A way of thinking and behaving that:

- **Understands** and navigates the power structures, motivations, and influences at play in the municipal decision-making process.
- **Sees** the implications of these decisions at policy-making and public levels.
- **Uses intuition and learned skills** for understanding, mitigating, or influencing decisions, processes, and their impacts on a municipality.
- Needs to be acquired and practiced, through experience, observation, and talking to colleagues you trust and respect.
- Lynda.com [Online Leadership & Political Acumen Course](#)

# Politics and the Role of a Senior Administrator

- Remain apolitical and impartial on all matters.
- Adapt to ever-changing political waters and build a level of trust and credibility with politicians.
- Trust-building is a key ingredient for political acumen and for leadership in general. Four key behaviours for increasing perceived trustworthiness are:
  1. Behaving predictably and consistently
  2. Communicating clearly
  3. Taking your promises seriously
  4. Being forthright and candid in what you communicate

*From Kouzes, J. & Posner, B. (2010). The Truth About Leadership*

# Top 10 Political Acumen Values

1. Integrity
2. Roles
3. Priorities
4. Trust
5. Respect
6. Transparency
7. Relationship-Building
8. Neutrality
9. Communication
10. Feedback

# Political Acumen – Top 10

- **Integrity:** Maintaining your integrity is crucial to achieving success as a CAO. This rings true in all of your actions as well as supporting ethical behaviour on the part of your elected officials.
- **Roles:** Council, the CAO and other Senior Administrators must all have a clear grasp of their role in municipal governance.
- **Priorities:** As a CAO, your actions should be aligned with those of Council. Take the time to learn what Council's priorities are, and do not be afraid to clarify if needed.



# Political Acumen – Top 10

- **Trust:** Establishing trust is a cornerstone of leadership and lays the foundation of political acumen. Trust is not a given and must be earned through your actions.
- **Respect:** Even if you do not agree with your political leaders or the decisions they make, you must always respect them and demonstrate this respect to your staff and the public.
- **Transparency:** Maintain a culture of no surprises and no secrets between you and your Council.
- **Relationship-Building:** Work at building rapport at all levels. Regardless of who it is with, relationship-building goes a long way toward achieving the goals of your municipality.

# Political Acumen – Top 10

- **Neutrality:** Leave the politics to the politicians.
- **Communication:** Communication is not only what you say but what you hear. Be open and respectful in your discussions with Council and never take anything personally.
- **Feedback:** Do not be afraid to ask for feedback. Meeting with your Council formally and informally can help ensure you are aligned with the strategic plan they have set for the municipality. Finding a mentor can also be a valuable resource for working through challenging situations and having someone to go to for support.

## ADMINISTRATION & COUNCIL

- Council Meetings
- Council Remuneration
- Council Ethics
- Council Orientations
- Council & CAO Relationship
- Council & Staff Relationships
- Council Changeover

# Council Meetings

- **Role of Administration** – Attend as advisors and to provide recommendations on various issues.
- **Body Language** – Often it is not what is said, but rather how one reacts with body language that demonstrates the CAO/Administration-Council relationship.
- **Seating** – Whenever possible, separate staff from elected officials.

# Council Meetings, cont.

- **Prepare, Prepare, Prepare** – the CAO needs to anticipate every possible angle. Be comprehensive, yet succinct. Summarize only the relevant points on a request for decision (RFD) template.
- **Council Agendas** – As CAO, don't be your own worst enemy. Be concise and only include topics that Council needs to approve or act on. Items should align with the municipality's strategic plan.
  - Consider including guidelines for Council Agendas in the Council Procedure Bylaw.
  - Agendas should always be prepared in advance, and ideally prepared with a group (Senior Management Team and the Head of Council).



# Council Remuneration

- Address public perception and opinion regarding council remuneration (or other contentious issues) with public participation (e.g. citizen's committee / citizen jury).
  - Final decision-making authority lies with Council, but decisions often have better public support given the belief that an independent group has determined how to address the issue.
  - Promotes a positive relationship between Administration and Council as it respects decision-making power, but also improves public appeal.

# Council Ethics

Strategies and best practices for maintaining Council Ethics:

- Implement a Code of Conduct or Council Ethics bylaw or policy.
- Develop a strong Council orientation process.
- Provide additional ethics training to Councillors (and staff).
- Create a harassment-free culture.
- Use investigators when needed.

# Council Ethics – What to Include

Best practices for Council Ethics bylaws and policies include:

- Address both what is and is not acceptable
  - **Acceptable**: Outline the values and behaviours (guiding principles, general conduct, respectful workplace, etc.) your municipality strives for in the actions of councillors and staff.
  - **Not Acceptable**: What constitutes harassment or a conflict of interest, protocols regarding gifts and benefits, breach of confidentiality, business/employment relations, the roles of Council, the CAO and Staff and how to work together, etc.
- Include a process for filing complaints at all levels (i.e. complaints regarding other staff members, the CAO or an elected official).

# Knowing your Role

Council	CAO	Senior Administration
<ul style="list-style-type: none"><li>• Policy/Legislation Focused</li><li>• Elected by the public</li><li>• Set and approve policy</li><li>• Provide direction to Administration (CAO)</li><li>• Establish municipal strategic plan</li><li>• Approve Budget</li><li>• Provide political direction</li><li>• Represent constituents</li></ul>	<ul style="list-style-type: none"><li>• Direction/Leadership Focused</li><li>• Report to and take direction from Council.</li><li>• Establish tactical plan to achieve the strategic plan</li><li>• Advises and makes recommendations to Council.</li><li>• Liaison between Council and Staff</li><li>• Direct implementation of Council's policies</li><li>• Hire and develop a team of competent staff</li></ul>	<ul style="list-style-type: none"><li>• Operation / Implementation Focused</li><li>• Report to and take direction from the CAO.</li><li>• Research policy and programs</li><li>• Advises and makes recommendations based on professional expertise</li><li>• Implement decisions of Council</li><li>• Fulfill statutory duties</li></ul>

# Case Study: Persuasion from Ratepayers

- Situation:
  - Low development growth and rapidly rising service costs.
  - Council under considerable pressure to make dramatic service cuts or a sharp rate increase to property owners.
  - Influence from developers and complaint about working with administrative staff – called for immediate removal of certain individuals.
- Best Practice Actions Taken:
  - Requested time to investigate complaints, took the opportunity to meet with all parties involved.
  - Relied on existing best practices, policies, and stated duties of the roles.
  - Remained neutral and kept interested Councillors and Council as a whole fully informed of the findings without suggesting a course of action

“Active listening and always remaining fair are critical to keeping that level of trust.”

# Council Orientations

- One of the first training sessions and opportunities to set expectations.
  - Great opportunity to build trust and strong Council-CAO relationship with confidence in the CAO's abilities.
- **Purpose:** as CAO, ensure elected officials understand their role in governance and municipal service delivery.
- Consider developing Candidate's Information and Elected Officials Handbooks with key information for new Councillors.
- Typically conducted by a neutral third party, but not void of Administration participation.
  - No less than half a day, and may take as many as five.



# Council Orientation Topics

Example list of topics for orientation:

- The role of municipalities
- The municipal organization and its functions
- Key municipal plans, policies and project
- Roles and responsibilities of Council and Councillors
- The municipality's code of conduct
- Roles and responsibilities of the CAO and staff
- Budgeting and financial administration
- Public participation
- Any other topic prescribed by the regulations / legislation

\*Make sure to follow the Council Orientation requirements/standards for your Province or Territory.

# Council & CAO Relationship

- The CAO is subject to the wishes of Council, and there must always put in their best effort to respect the office councillors are elected to.
  - The priorities of Council are the priorities of the CAO.
  - Do not internalize the highest praise or the harshest criticism.
  - Seek out annual performance reviews and evaluation opportunities to ensure you are aligned.
- Always look for the root cause of issues and find a way to address it positively.
- Maintain solid business relationships, and be mindful to treat all Councillors equally and fairly.
- ***Remember:*** Elected officials are employers, not friends.

# Council Relationship – Best Practices

- Establish a culture of “no surprises” – keep Council informed on key issues.
- Keep lines of communication open and take a collaborative approach to issues management.
- Be upfront with Council about information that can and cannot be share and the reasons why (e.g. FOIP).
  - Label sensitive communications as “confidential.”
- **Best Practice:** Information requested should be provided not only to the Council member making the request, but to all members of Council.
- **Tip:** Send a weekly update email to Council to build trust and keep them informed on all relevant issues.

# Importance of Strategic Planning

- Strategic plans outline the priorities and desired results of municipal efforts over a specific period of time.
  - Directly linked to budget.
- Allows Council and Administration to work together collaboratively to achieve a vision for their municipality and remain focused on key goals with limited resources.
  - Focus on the big picture and future vision of the municipality.
- The strategic plan is the CAO's yardstick for municipal accomplishment.
  - Use it to keep Council attentive to the goals of the municipality, establishing priorities, and denying Council requests, when needed.

# Working with Councillors

- Consider all Councillor requests as a request from Council as a whole.
  - Work only with individual Councillors when clarifying or helping them to understand a particular topic.
  - Remember to always remain neutral while explaining – never be seen as lobbying for one perspective.
- Treat all elected officials equally, and provide all of them with the same information in a transparent way.
- Be aware of alliances and their political objectives at all times.
- ***Remember:*** While it may seem obvious, remember that the CAO's boss is Council as a whole, not the Head of Council or an individual member.

# Case Study: Green Energy Act

- Situation:
  - Controversial and conflict-laden industrial wind turbine project.
  - Provincial Green Energy Act, left municipalities with little authority in matters concerning renewable energy projects.
  - Council required to negotiate a community benefit package with the developer.
- Best Practice Actions Taken:
  - CAO as liaison in opening talks with the developer.
  - Weighed all critical factors and considered best practices and actions taken by other similar jurisdictions.
  - Take the time to understand political posturing, and that the CAO reports to Council as a whole, not individual members.
  - Assess the motivations and aims of the other party.
  - Foster a spirit of mutual respect.

“Know that your success will often be expressed as Council's achievement.

Aim high, keep your head low.”



# Council & Staff Relationships

- Work with and provide leadership to the senior management team to make sure they have a good understanding of political acumen and the role of Council vs. management.
- Be cautious about overcommitting both your own (CAO) and staff time and ability to respond to requests.
  - Always be able to deliver, and if not, be upfront, transparent and open about why you can't.
- Consider managing Council demands through motions, to ensure it is Council as a whole making the request as opposed to one-offs.
  - Fall back on the strategic plan as a roadmap for your municipality's efforts.
- Always lead by example – the CAO has a duty to reflect Council in a positive light.

# Addressing Staff – CAO Challenges

- Provide an environment where staff are comfortable bringing issues forward.
  - Consider an open-door policy.
  - Treat frustrations with staff or Council alike, professionally and with the same level of competence and political acuity.
- Possible approaches when further action needs to be taken:
  - Bring in a third-party investigator.
  - Enable the request for a mediator.
  - Allow for in-camera agenda items before Council – either through the CAO or via the Head of Council.
- Fundamentally, treat staff fairly and and create a positive environment where they feel comfortable coming to talk to the CAO directly.

# Council Changeover

- Can occur any time there is an election or by-election.
- Each Council brings in a new culture, politics, and level of confidence of Councillors.
- Priorities and approaches may change – be able to adapt and immediately start building a relationship with the new Council.
- Adjust your style, but also be prepared in the instance that you need to move on.
- **Tip:** Pay attention to candidate's election materials to understand their priorities. Look for insights into motivations and whether the community supports his or her initiatives.

## RESIDENTS & RATEPAYERS

- Ratepayer and Resident Associations
- Tax Recovery
- Public Hearings
- Appeal Boards
- Public Engagement

# Ratepayer & Resident Associations

- Are often created as a result of a difference in opinion regarding key issues, taxation, or financial accountability between those who govern and those who reside.
  - May be formed as an advocacy group to ensure values and beliefs are maintained on a fiscal level within the community.
- Equally important to take note of the requests of ratepayer associations, and do what you can to achieve their goals.
  - Do not, however, jeopardize the strategic direction of the municipality.
- Always do your homework – be conscious of the size of the associations, and the legitimacy or political and community will of their agenda.
- Keep to the facts, remain impartial, and treat representatives fairly and respectfully.

# Tax Recovery

- Most provincial or territorial legislation governing municipalities provide procedures for tax recovery.
  - Once a property falls within these provisions, the municipality is obligated to follow the procedures, regardless of the reason for the situation.
- CAO or municipality may have discretion. However, it needs to be closely monitored and a plan does not fall into arrears.
  - Be certain the ratepayer understands the consequences if they do not fulfill their obligations.
- **Best Practice:** Putting ratepayers into tax recovery is a serious decision. When possible, give them the benefit of the doubt and always treat them with dignity, respect and compassion.



# Public Hearings

- Hearings offer residents and other stakeholders the opportunity to express their views on a given subject directly to Council.
  - Also allows Council to learn of any unintended consequences that were not previously contemplated and provides them with an opportunity to present the public different options.
- Often the key to a successful hearing is an appropriate level of public engagement in advance.
- Listen carefully and take the time to respond to concerns raised.
  - If residents know they have been listened to and treated with respect, they are more likely to accept a decision and move on.
- Consider bringing in support when needed (e.g. Recording clerk or legal advisors).
- **Best Practice:** Respond by first demonstrating that you heard what they had to say, and second explaining why you have chose a different course of action (list the reasons).

# Appeal Boards

- Appeal Boards are quasi-judicial and governed by the legislation of a municipality's province or territory.
- Offers each resident their “day in court” to refute an order or ruling imposed by the bureaucracy of the municipality.
- Confirm that those appointed do not have a pecuniary interest in the case being heard.
- Do your best to offer fair and just reasoning for the result.
  - Providing the right amount of information to achieve this is an indication of political acumen on the part of the CAO and senior management.

# Public Engagement

- Refers to your ability to work with those who are impacted by a decision to achieve buy-in and avoid opposition.
- Social license to operate, specifically public support for your organization or initiative, is vital to implementing any project or change successfully.
- Use political acumen to know when to engage ratepayers, and to what level.
- Always let residents know how and where their feedback was used
- ***Best Practice:*** Be mindful in any form of public consultation to give voice to all affected stakeholders across demographic groups.

# Levels of Public Participation

The International Association for Public Participation (IAP2) is recognized internationally by municipalities and other organizations as setting the standard for public engagement and have established the following [Public Participation Spectrum](#):

INCREASING IMPACT ON THE DECISION					
	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

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## INTERMUNICIPAL

- Building Intermunicipal Relationships
- Collaborating on Municipal Services
- Intermunicipal Organizations

# Building Intermunicipal Relationships

- Create informal, recurring meetings between CAOs, particularly those in your neighbouring municipalities.
  - Ongoing dialogue helps build political acumen and knowledge.
- Have Councils from each municipality with a co-terminus boundary meet informally once or twice a year, particularly when there is a high degree of collaboration.
- **Tip:** Building relationships with other CAOs on a regional, provincial or national basis allows you to seek solutions and enlist feedback from others who have experienced similar situations.



# Collaborating on Municipal Services

- One common area that municipalities work together is on the provision of municipal services.
  - Establishing strong relationships can help avoid negative dialogues, but be prepared for developing successful strategies on moving conversations forward.
- Options for dealing with municipal service negotiations:
  - Develop a funding formula.
  - Depoliticize the issue by gauging public support.
  - Suggest a differential fee for residents and non-residents.
  - Deny access (only if needed).
- **Best Practice:** When negotiating intermunicipal initiatives, meet CAO to CAO or Administration to Administration first to discuss the issue and potential solutions. This sets the path for success prior to getting Councils involved.

# Collaborating on Municipal Services

- Sign informal or formal agreements to ensure both parties know the terms, and future administrators and Councillors understand what has been decided upon.
- Provide a briefing on all intermunicipal agreements during the Council orientation process.
- Agreements can be bilateral or multilateral.
- **Tip:** Consider Alberta's [Intermunicipal Collaboration Framework Workbook](#) as a basis for working through projects.

# Intermunicipal Organizations

- Almost all intermunicipal organizations are created to support the provision of one or more public services.
- Can be intermunicipal agreements or formal separate legal entities.
  - Examples of separate legal entities: Regional Service Commissions, Cooperatives, Public/Private Partnerships, Municipal Controlled Corporations.
- When creating a legal entity, municipalities need to remember that they may be delegating authority to this entity to deliver the identified service.
- Be cognizant of what control the municipality is giving up, and ensure Council understands the implications of said arrangements.

# Case Study: Joint Recreation Agreement

- Situation:
  - Potential to dissolve a Joint Recreation Agreement between the Municipal District and the City, over dispute regarding a large multi-purpose Leisure Centre.
  - Challenges with “honesty”, a high degree of mistrust, and a lack of being able to see “eye-to-eye.”
  - Administration directed to continue negotiations while a facility was being constructed.
- Best Practice Actions Taken:
  - Asked for one-to-one, CAO-to-CAO, meetings to get to the root of the problem.
  - Reduced negotiations to parties who were as neutral as possible and were able to set aside past differences and challenges.
  - Considered long-term strategic plans for both the Municipal District and the City.
  - Aim for solutions that show collaboration, and result in the betterment of both municipalities.

“Keep the size of the negotiation team small, make sure they are open minded and give them autonomy to be creative.”

## PROVINCIAL & FEDERAL

- Matters of Jurisdiction: Knowing Who to Work With
- Building Relationships Provincially & Federally
- Meeting with Ministers
- Government vs. Opposition
- Changes in Government

# Matters of Jurisdiction: Knowing Who to Work with

- It is important to remember that municipalities do not have any power provided to them in the Constitution. Power is only received through the Province or Territory's legislation.
- Without clear rules of engagement, it can often lead to different tiers of government unwittingly overstepping their granted authority.
- **Tip:** Take the time to understand the division of power between different governance levels, and ensure you are taking the right issues to the right people in power to achieve benefit for your municipality.



# Building Relationships Provincially & Federally

- Develop working relationships with between your Council/Administration and your:
  - Member of the Legislative Assembly (MLA) or Member of Provincial Parliament (MPP) and Member of Parliament (MP)
  - Deputy and Assistant Deputy Ministers provincially and federally – both in municipal oversight and other key service delivery areas (e.g. Transportation, health, etc.)
- Find and facilitate opportunities for the Head of Council to meet regularly with key elected officials at the provincial and federal level, to advance your municipality's strategic priorities
  - Find opportunities for positive media coverage and material to add to their list of accomplishments while in office
- **Best Practice:** Meetings with provincial and federal representatives should always be elected to elected, and administrative to administrative.

# Meeting with Ministers

- Coordinate through your local MLA, MPP or MP.
  - Helps to demonstrate respect for their office and build trust.
- Keep meetings brief, to the point, and positive.
- Be very prepared, do your homework and anticipate all the questions that might be asked about your request.

# Government vs. Opposition

- Representatives that belong to the party in power and are in government control the provincial or federal agenda.
  - Conversations to influence, create change, or drive progress may be harder if your representative is not in power.
- Look for shadow MLA, MPP, or MP for constituencies that are represented by an opposing party.
  - Know both them and the elected official.

# Changes in Government

- New government signifies:
  - A turnover in new MLAs, MPPs, and MPs with varying levels of experience in both the constituency they serve and the portfolios they are assigned to manage.
  - New policymaking endeavours and a departure from the previous administration's priorities.
- Best strategy? Embrace it.
- Always remain neutral and demonstrate the ability to work with whoever forms the government, at whatever level.

## MEDIA

- Managing Media Relationships
- Talking to the Media
- Media Interviews
- Social Media Use

# Managing Media Relationships

- Positive relationships with reporters and news outlets assist municipalities in three ways:
  - Ensures that when there is negative coverage, the municipality's input is given positive consideration in the report.
  - Allows Administration to use the media to the community's advantage when there is a need to get information out to residents.
  - Supports the foundational planning for emergency preparedness where media will be used as a conduit to stakeholders in a crisis situation.
- Use media outlets to provide exposure to important initiatives or changes in the community, especially if they will have a significant impact on the public.
- Treat the media with respect, show signs of good faith, and be genuine and willing to share information where appropriate.

# Talking to the Media

- Be aware of and adhere to your organization's communications policy.
- Identify who can speak to the media on behalf of your municipality.
- Always remember that nothing is “off the record.”
- Designate a specific media spokesperson during crisis situations to ensure consistent messaging and schedule media briefing times.
- Offer media training to those authorized to speak for the municipality.



# Media Interviews

## Before an interview:

- Remember interviews are opportunities: know what you want to say to your stakeholders.
- Know your audience: what are their concerns?
- Be aware of deadlines and request questions in advance where possible.
- Prepare key messages and use a Message Map.
- Review the Media Interview Checklist.

# Message Map Template

Scenario	Stakeholder	Concern	Channels	Internal/External	Date/Time	Approved by

Key Message 1	Key Message 2	Key Message 3
Support Point 1.1	Support Point 2.1	Support Point 3.1
Support Point 1.2	Support Point 2.2	Support Point 3.2
Support Point 1.3	Support Point 2.3	Support Point 3.3

# Media Interviews

## During the interview:

- Introduce yourself, be polite, smile and shake hands.
- Follow the ABC Method:
  - **Acknowledge** the question
  - Use **bridging** phrases
  - Deliver your **content**
- Remember you do not always need to fill dead air.
- Do not dignify anything you cannot confirm and do not repeat negative or leading phrases.
- “No comment” is never a good response.
- Always evaluate when to respond to the media and when not to.
- Nothing is ever “off the record”, and anything you tell the media is part of the public domain.

# Media Interviews

## After the Interview:

- Do not continue talking about the issue after the interview.
- Thank the reporter and ask them if they have everything they need.
- Provide your business card or that of your communications team, and invite them to email any follow-up questions.
- Ask when the piece is planning to air or be published.
  - Ask if you can be sent a copy of the clip or article for your retention.
- Be polite and cordial throughout.

# Social Media Use

- Social media has become an essential tool for public engagement and a way to receive candid feedback about an issue or topic at hand.
- Best defense against misinformation? Develop a strong and active social media presence that is able to effectively reach the public..
- ***Best Practices for Social Media:***
  - Post regularly
  - Communicate early and often
  - Be transparent and honest
  - Address the negative head-on
  - Provide the resourcing to allow this to happen

# Case Study: Water Crisis

- Situation:
  - Presence of Hydrocarbons in the North Saskatchewan River impacted the City of Prince Albert water system.
  - An Emergency Conservation Bylaw came into effect.
  - Media – traditional and social – was critical in ensuring safe use.
- Best Practice Actions Taken:
  - Appointment of a Public Information Officer within the Emergency Operations Centre (EOC) – sole liaison for officials.
  - Provided direct training for the City Manager and Mayor.
  - Scheduled daily press conferences and had access to a technical expert.
  - Creation of a dedicated website, and dedicated resources for social media channels in addition to a traditional call centre.

“When challenging situations arise, the media can be your friend if you keep them informed with accurate and consistent information to share with their followers.”

# Social Media Use

- Strategies for smaller municipalities:
  - Work with a consultant with social media training
  - Use automatic response tools
  - Give access to others in key departments
  - Be clear about the purpose of your page or account
  - Be strategic in the platforms you choose to use



# Social Media Use

- Develop a policy that addresses the use of social media by the organization, as well as elected officials and administrative staff.
- Remember that Councillors and Municipal Staff are never really “off the clock.”
  - Anything that is said, whether it be on a personal or professional social media account, will be seen as attached to an individual’s public role.
  - Once online, it is forever accessibly there by anyone.
- Sharing information from municipal pages? ***Great.***
- Sharing personal opinions regarding municipal matters? ***Unacceptable.***
- It all contributes to your social license to govern or the authority to act on behalf of your community.

# Best Practices for Social Media Use

- Maintain a separate page for professional use and be clear about its use.
  - Make sure you do not use your personal page or one that was previously used for another purpose.
- Always behave like you're "on the clock" and "on the record."
  - Nothing ever goes away online, it will always be available to whoever whenever.
- Share information from official sources, such as the municipal page or provincial and federal sources.
- Keep personal opinions out of the mix, focus on policy, platform, and strategic plan points specific to the municipality.
- Remember that the page represents the office or role that you're in.
- Refer to your social media training and communications guidelines when you're stuck and don't be afraid to ask an expert for help.

# MENTORSHIP

- Building a Mentor/Mentee Relationship
- The Role of a Mentor
- The Role of a Mentee
- Mentorship Forum

# Building a Mentor/Mentee Relationship

- **Ask for recommendations:** find a useful match by doing your own research and consider approaching someone yourself.
- **Be clear about your goals:** know exactly what it is you want and how much time you're asking a potential mentor to contribute.
- **Stay connected:** it's a two-way street.
  - Mentors – check-in and provide encouragement
  - Mentees – report back and stay accountable
- **Be respectful:** of background, opinions, and time.
- **Know when to move on:** mentorship relationships will evolve as your career does and as your original goals are met.

# The Role of a Mentor

- A mentor can provide:
  - Information
  - Guidance
  - Encouragement
  - Advice on how to approach situations
  - Help advancing career
  - Building a skill set
- A mentor receives:
  - Gratification
  - Opportunity to shape the next generation of leaders
  - Continued career development
  - Learning opportunities about issues and perspectives

# The Role of a Mentor

- The key to working with others as a mentor is not to tell them what to do, but help them to discover the answers to the questions themselves.
- Each partnership is unique, don't forget to adapt your knowledge to the individual.
- Mentorship is one-to-one leadership – demonstrate and inspire others toward a course of action.
- Be a coach – support others through listening and asking questions; don't forget to cheer them on.

# The Role of a Mentor

- Five practices of exemplary leadership:
  1. Model the way – lead by example
  2. Inspire a shared vision – share in their ambitions, successes and challenges
  3. Challenging the process – help growth through challenging assumptions and identifying areas for improvement, be constructive
  4. Enable others to act – support and help to develop confidence
  5. Encouraging the heart – celebrate progress and achievement of goals

*From Kouzes, J. & Posner, B. (2017). The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations.*



# The Role of a Mentee

- **Mentee's objective:** to learn and grow professionally
- Key tips on being a good mentee:
  - Be prepared
  - Be open
  - Be realistic
  - Be punctual
  - Be inquisitive
  - Be thankful
- **Take advantage of resources!**  
[CAMA's Cultivating Leadership: A guide for the Next Generation in Local Government](#)

# For More Information

[camacam.ca/UpdateWithWebsite](http://camacam.ca/UpdateWithWebsite)

