



How to Build a Successful Council Orientation

Setting every Councillor up for success!

Know Your Relationships...Know Your Councillors...Know Your Role...Building Trust & Respect

Table of Contents

Introduction	1
Transition Period	2
Checklist for Staff for Incoming Elected Officials	3
Checklist for Outgoing Elected Officials	4
Swearing-in Ceremony	5
Council Orientation	7
• Getting to Know Each Other	7
• Know Your Councillors – Building Trust and Respect	7
• CAMA's Top 10 Tips for Political Acumen & Political Acumen Toolkit	7
• Team Building Exercises	8
• Mentorship Program for Elected Officials	9
• Know Your Role – Know Your Relationships	10
• Governance & Explanation of Local Government	10
• Conflict of Interest	11
• Confidentiality, Right To Information and Protection of Privacy Act & Code of Conduct & Ethics	11
• Inclusion & Diversity	13
• Council & Committee System	13
• Decision Making Process of Council	13
• Governance During A State of Emergency	14
• How to Chair a Meeting	14
• Administrative Report	15
• The Life of a Capital Project	15
• Overview of Organization	15
• Media Relations	16
• Community Engagement	16
• Budget Financial Overview	16
• Top Ten Plans	16
• Council Professional Development	16
• Councillor's Handbook	17
• Governance Working Committee	17
• Priority Setting Exercise	17
• Staff Orientation on Council	18
Appendices	19
• Appendix "A" – Mock Council Meeting	19
• Appendix "B" – Administrative Report	21
• Appendix "C" – Life of a Capital Project	22

Acknowledgement

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Introduction

This toolkit is meant to be a high-level guide to provide you with some helpful hints in building a successful Council Orientation. Every Province and Territory has their own legislation on how local government operates. Also, not every municipality is set up in the same way, so sections of this guide may not be applicable to your situation.

CAMA's **Political Acumen Toolkit** provides some preliminary information on **Council Orientations** which will be referred to in this document; however, it is our goal to provide you and your staff with recommendations, best practices and resources to ensure that your Councils are trained properly after a municipal election. Council orientations are mandatory in some jurisdictions but not all.

Council changeover happens any time there is an election or by-election. Municipal elections in Canada fall within the jurisdiction of the various Provinces and Territories. With municipal elections mostly occurring every four years, the probability of change is high. 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.

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. Visit the **CAO/Council Relationship** section in the Political Acumen Toolkit to learn more about various strategies that you can use to build and maintain a strong relationship with your Council.

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, establish a strong Council-CAO working relationship and ensure Council has confidence in the CAO's abilities.



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 to accommodate the schedules of the elected officials as some are full-time and others are part-time and aren't as flexible.

In some jurisdictions, the legislation identifies what the Council orientation is required to address. Check with your Provincial/Territorial Municipal Affairs Department and your Elected Official and Administrator Associations as some provide training and resources following elections.

The Mentorship presentation included as part of the [Political Acumen Toolkit](#) provides multiple slides that may be useful when developing your Council orientation presentation. Sections that may be valuable 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 to provide inspiration when developing your own Council orientation.

It is also important to note that your orientation should be customized to your own community and will also depend on the number of newly elected officials and their previous elected experience. If you only have one or a few newly elected officials you may opt to have more informal one-on-one sessions with the CAO and senior staff however it is important to include everyone when having sessions that are intended to be teambuilding exercises or setting the vision for the municipality.

Tours of departments and facilities are very informative and useful in addition to reports and formal presentations. Tours give the new Council members a feel for the services and show how decisions of the governing body affect the work accomplished along with the operations behind the scenes. Allow time for questions and demonstrations by staff that show rather than tell the local government story. Some municipalities plan a bus tour and each Councillor have an iPad with a [GIS map](#). They drive around on a bus and follow along the maps plus have their Directors narrating during the drive.

Often, Council orientations are conducted by a neutral third party. However, this does not mean that administration cannot complete all or part of the orientation. 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.

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. This ensures those running for office are aware they will be expected to attend an orientation if they are elected. Some municipalities host sessions prior to the election to explain how local government works, the role of elected officials, time commitments, expectations, rules of engagement and to also learn from past Council members' experiences.

This toolkit will outline some suggestions that we feel will help you build trust and respect from the first day your Council starts its term. It is also recommended that you hold interviews with your current Council and staff for suggestions on an orientation program. This will assist you with the buy-in and implementation from all parties.

Transition Period

There is usually a period of up to a month between the old Council and a new Council being sworn in. During this transition, there may be issues around governance, office space, staff assistance and other responsibilities. There needs to be clear direction to staff on when the previous Council needs to vacate their existing office space and when their powers are no longer in place. Some of these rules can be found in your Provincial/Territorial legislation.

If you have returning Council members, encourage them to participate in the orientation sessions and reiterate the importance of their attendance in building the new team.

Checklist for Staff for Incoming Elected Officials

Following the election there are several duties that must be undertaken by staff to ensure that the incoming elected officials are prepared for office after the Swearing-In Ceremony.

The Mayor/Reeve is typically the first point of contact with the incoming elected officials. Staff should prepare the Mayor/Reeve for this responsibility and perhaps help to arrange one-on-one meetings.

Below is a checklist for consideration based on your own municipality's policies and procedures:



Mayor's/ Reeve's Office

- Order new stationary (business cards, letterhead, and envelopes) if customized.
- Arrange for a professional photo in high resolution format (head and shoulders).
- Arrange an office computer (and possible home computer if this is your policy) with the Information Technology Division.
- Issue security pass and parking pass to City Hall and/or City facilities as per your policy.
- Ensure an employee status form is submitted to the Human Resource Division for the incoming Mayor/Reeve.
- Prepare a biography of incoming Mayor/Reeve.



City Clerk's Office

- Set a date for the Swearing-In Ceremony.
- Arrange for nameplates for Councillor's mailboxes (if required).
- Arrange for nameplates for seats in the Council Chamber.
- Arrange for parking passes for Councillors.
- Order name tags to be worn during Council or community events.
- Ensure employee status forms are submitted to the Human Resources Division for incoming Councillors.
- Issue security passes and parking passes to City Hall and/or City facilities as per your policy.
- Arrange for a professional photo for each Councillor in high resolution format (head and shoulders) for the website and other communication.
- Arrange for a group photograph of City Council which typically includes the City Clerk and CAO. This usually takes place following the Swearing-In Ceremony or at the first Council meeting. These photos usually hang in the Council Chamber or in your Town/City Hall.
- Update the Mayor and City Council address list (home address, telephone numbers, e-mail addresses and spouses' names) for internal lists and also adapt the contact information for the municipality's website as well.
- Arrange with the Information Technology Division for the placement of technical assets at Councillor's homes in accordance with your Policy. Some communities offer an Information Technology allowance.
- Prepare biographies of new Councillors for the website to go live following the Swearing-In Ceremony.
- Consult with the Mayor and the Chief Administrative Officer regarding the preparation of an Orientation Session.



City Treasurer/ Finance Department

If there is a newly elected Mayor/Reeve:

- Arrange for a new signature for cheques on financial software; have the City Treasurer and incoming Mayor/Reeve sign at least two weeks in advance to ensure there is time to contact the financial software vendor to make the change to the cheque signature and there is time for testing.
- Order a new manual cheque stamp.
- Contact the City's bank and have them prepare new banking forms for the incoming Mayor/Reeve, City Treasurer and the City Clerk's signature.
- If this is part of the City policy, meet with the new Mayor/Reeve to discuss a vehicle lease or allowance option and make the appropriate arrangements.
- Issue corporate credit cards to the new Mayor/Reeve and Councillors if this is your policy.



Human Resources Division

- Make arrangements with new officials to have direct deposit and Income Tax forms completed.
- Ensure new officials are signed on to the appropriate benefits package in accordance with City Policy.
- Process Employee Status Forms.

Checklist for Staff for Outgoing Elected Officials

Equally important following the election are the duties that also must be undertaken by staff for the outgoing elected officials.



Mayor's/ Reeve's Office

- Retrieve security and parking passes from outgoing Mayor/Reeve.
- Ensure employee status form is submitted to the Human Resources Division for outgoing Mayor/Reeve.
- Arrange with the Information Technology Division for the removal of technical assets from outgoing Mayor's/Reeve's home (as per the policy).
- Have nameplate on Mayor's Chain of Office engraved with the name of outgoing Mayor and dates of office.



City Clerk's Office

- Retrieve security and parking passes from outgoing Councillors.
- Ensure employee status forms are submitted to the Human Resources Division for outgoing Councillors.
- Arrange with the Information Technology Division for removal of technical assets from outgoing Councillor's homes (as per the policy).
- Arrange with the Human Resource Division for Certificates of Appreciation for outgoing elected officials.



Finance Department

- Ensure the outgoing Mayor and Councillors have submitted outstanding expense reports and monies for any outstanding advances, i.e. travel advances.
- Retrieve corporate credit cards from outgoing Mayor and Councillors.
- Ensure all amounts outstanding are repaid.



Human Resources Division

- Process Employee Status Forms to terminate employment.
- Ensure benefits coverage is discontinued.

Swearing-in Ceremony

Your Provincial/Territorial legislation will outline a deadline following the municipal election that your Council must be sworn in during a Swearing-In Ceremony. Each community can customize this event with their own local flavour.

Typically the City Clerk administers the Oath of Office to elected officials at a special meeting of City Council which is affixed with the City's official seal. One copy is sent to the Municipal Returning Officer with the Province/Territory and the other copy is kept in the City Clerk's Office.

Here is a checklist that your staff can use as a guide when preparing for the Swearing-In Ceremony.

Set the Date	Set the date and ensure that there are no tours booked in the Council Chamber.
Notice of Meeting	A Notice of Meeting should be published along with the Declaration of Election Results.
Invitations	Even though this is a public event, invitations should be designed and sent to some of the community agencies (General Managers and Presidents of the Chamber of Commerce, Downtown Associations, business networks, etc.) and other VIPs.
Council Chamber Maintenance	Advise the Building Services/Maintenance Department of the date so that they can ensure that the Council Chamber is clean.
Councillors Desks	Ensure that the new Council desk signs are placed. Place copies of Disclosure of Interest forms inside each desk for future meetings along with a City pin and a Swearing-in Ceremony Program as a keepsake.
Seating	Ensure that there are enough chairs in the Chamber for the Council-elect. Make arrangements for staff members to direct guests to their seats.
Oaths of Office	Have two copies available for each elected official for signing. A Bible should also be available if the elected official chooses to do their Oath of Office on it.
Mayor's Robes and Chain of Office	Ensure that the Mayor's Robe and Chain of Office is placed somewhere elegantly in the Chamber.
Photographer	Book the photographer well in advance of the ceremony to capture all the special moments of the event.
Chaplain	A City Chaplain should be booked for this event if this is the practice of your community.
Catering	Typically a small reception is held following the ceremony so food and refreshments need to be arranged.
Aide-de-Camps	One firefighter and one police officer is a nice gesture to escort each Council member to the desk for the signing of their Oath of Office.
Media and Communication	<ul style="list-style-type: none">• A press release should be issued announcing the details of the Swearing-In Ceremony.• An additional release should also be ready to be sent following the ceremony naming the Deputy Mayor and a list of Councillors.• The bios and temporary photos should be updated on the website and made live following the event.• Facilitate a media scrum following the ceremony.

Council Orientation

Getting to Know Each Other

When a new Council is formed it is very unlikely that everybody knows each other, even in the smaller communities. It is important to provide them with an informal opportunity to gel but also to have the opportunity for you, as the CAO, to get to know them. As the first activity of your Council Orientation, the CAO could host a meet and greet at City Hall for Council and possibly also invite some members of your senior management team. This networking event should be intimate and not too overwhelming and one where the CAO can provide some welcoming remarks.

Know Your Councillors – Building Trust & Respect

Now that everybody has had a chance to meet each other in a relaxed atmosphere it is important to start building a team through some team building exercises similar to what you would do with your staff. The purpose of these types of activities is to motivate people to work together and to develop their strengths and to address any weaknesses. Any team building exercise should encourage collaboration rather than competition which in turn will build trust and respect.

If there were any negative comments and/or actions between Council members (new and old) during the election, it would be advisable to have a facilitated forum with a trained mediator that could assist in setting the scene for a more positive relationship with the new Council.

CAMA'S Top 10 Tips for Political Acumen & Political Acumen Toolkit

During this teambuilding session, it would be the appropriate time to introduce [CAMA's Top Ten Tips for Political Acumen](#) along with the [Political Acumen Toolkit](#) which can be a great resource to CAOs, senior managers and elected officials:

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:** Maintain integrity in all your actions and support ethical behavior.
- ② **Roles:** Understanding the boundaries between the roles of Council, the CAO and other Administration helps mitigate the risk that comes with blurred lines.
- ③ **Priorities:** Ensure actions and resources align with Council priorities.
- ④ **Trust:** Establishing trust through the actions you take is a cornerstone of leadership and lays the foundation for political acumen.
- ⑤ **Respect:** Demonstrate equal respect to political leaders and the decisions they make, as well to staff and the public.
- ⑥ **Transparency:** Maintain a culture of no surprises and no secrets between Council and Administration.
- ⑦ **Relationship-Building:** Whether it is with staff, Council, municipal neighbours, the media, or at the provincial or federal levels, relationship-building is critical for achieving your municipality's goals.
- ⑧ **Neutrality:** Leave the politics to the politicians while Administrators and staff remain neutral on all issues.
- ⑨ **Communication:** Take the time to listen to Council, Administration leadership, residents and other stakeholders to understand their position and be honest in the information you provide.
- ⑩ **Feedback:** Ensure mechanisms exist for feedback from/to Council to ensure actions are aligned with strategic plans or from a Mentor or colleague for support in working through challenging situations.

Team Building Exercises

There are several different team building exercises that can be found on the internet to help build the perfect Council team. The CAO may wish to hire a third party to facilitate this session with the focus being on what type of traits make a good Councillor. Following is a list, in no particular order, of the skills, qualities and attributes of the "perfect" Councillor. You can put these on separate sticky notes and have each member of Council choose a certain number and then re-group to see if there are similarities followed by a discussion.

- Communicative and responsive (to e-mails sent out by Clerk).
- A good listener and a skilled communicator.
- Be generally honest and decent.
- Prepared for meetings (i.e. has read the Agenda and background information in advance).
- A team player - not trying to control everyone else.
- Focused on and passionate about the community.
- Available for meetings and accessible in between meetings.
- Be skilled, knowledgeable and confident.
- Have vision, be forward thinking and proactive.
- Ability to think strategically and to understand the Council's strategy and to think long term (more than four years!)
- Be knowledgeable on the Council's financial position and forward plan.
- Be flexible and prepared to consider different routes to the same goal.
- Understands their responsibilities and takes them seriously.
- Accepts corporate responsibility.
- Understands the role of management and that the Council is a governing body.
- Not always focused on one issue but interested in everything.
- No personal agendas or vanity projects.
- Don't treat Council as a personal fiefdom. Be focused on community outcomes.
- If dual or triple hatted, don't bring principal authority agenda or politics to Council.
- Know when the time is right to retire/resign.
- Respect the professional knowledge and objectivity of administration.
- Understands the powers of the Council and that it is spending public money.
- Willing to learn and develop and undertake training.
- Come up with and be open to new ideas, challenge old working practices, and demonstrate leadership.
- Stay awake and alert in meetings.
- Be supportive of staff and understand the constraints of the job and be approachable and available.
- Have respect for the contracted working hours of management and recognize the right of employees to have a work/life balance.
- Willing to participate and get involved - don't sit back.
- Be polite and respectful to other Councillors and staff.
- Treat others with respect and dignity, no inappropriate contact or comments.
- Understand and abide by the Code of Conduct.
- Be committed, enthusiastic, have a positive outlook and a can-do attitude.
- Be computer literate and willing to work electronically.
- Understand and accept how (slowly!) local government works and be patient but tenacious.
- Have a sense of humour!



Training, or continuous professional development, is essential for all Councillors and over time they become a stronger, better, and more united team.

Mentorship Program for Elected Officials

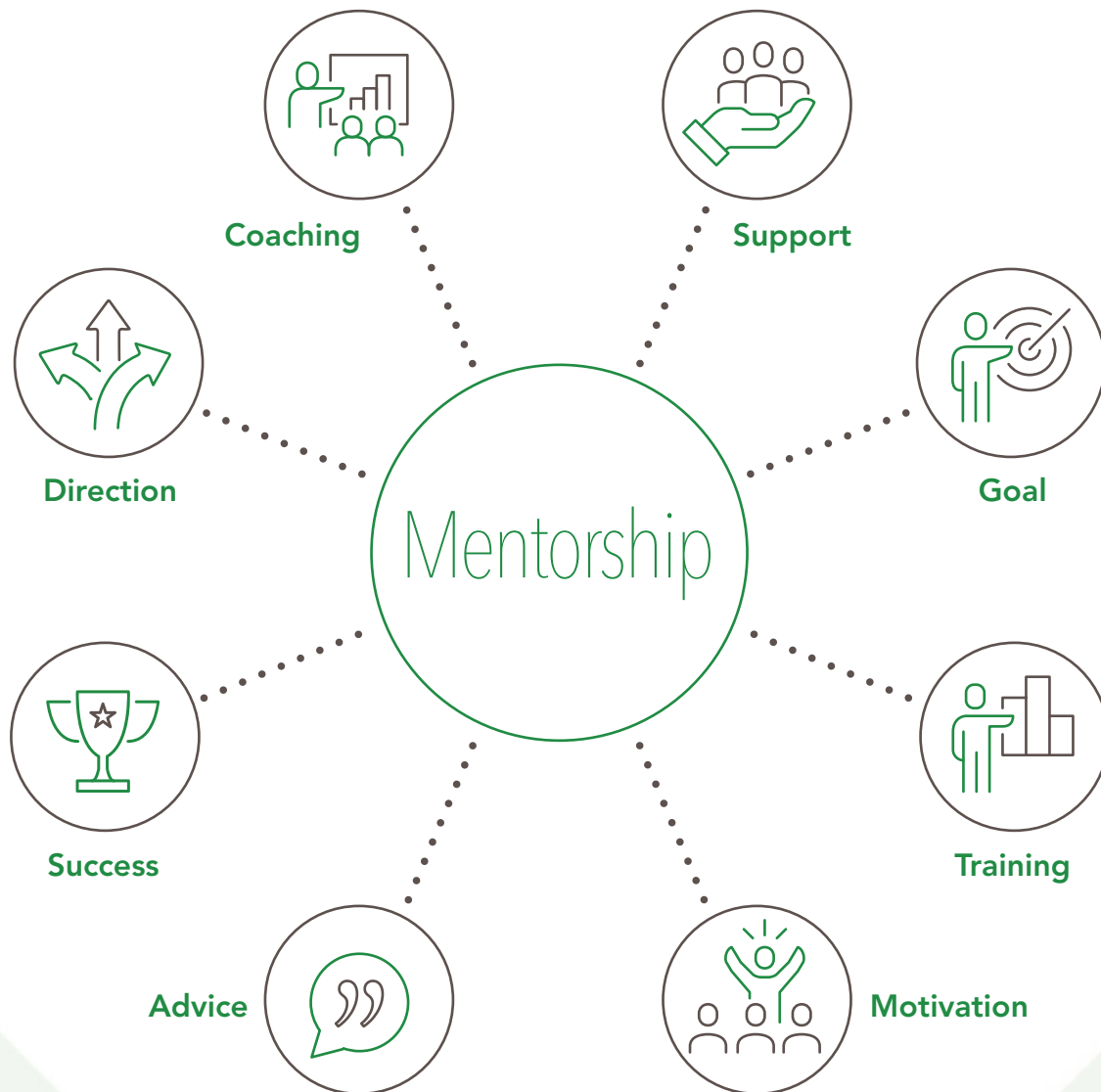
Mentorship, formal or informal, is an important part of career development for your staff, but also another effective team building activity for your new Council. Learning from those who have real-life expertise gained through years of experience in the political environment is not only valuable but essential in building a team.

We would recommend creating a Mentorship Program for senior Councillors and newly elected officials to provide guidance as they navigate their way through the municipal world which can be overwhelming at first glance especially during the orientation period. Senior Councillors can garner insight into an issue or a subject area and provide encouragement while respecting each

other's opinions. It may also be beneficial to the mentee to develop their own network and find different mentors on Council who can provide a wide range of perspectives on municipal issues. Retired CAOs could also be great mentors to your new elected officials.

CAMA's Political Acumen Toolkit has a [**Mentorship Section**](#) that covers the following topics that can assist you in this area:

- [**Building a Mentor/Mentee Relationship**](#)
- [**The Role of a Mentor**](#)
- [**The Role of a Mentee**](#)
- [**Mentorship & Political Acumen**](#)



Know Your Role - Know Your Relationships

The purpose of this next session of your Council Orientation is to familiarize Council with the mechanics of the governance of the municipality. This could be held in one day or divided into shorter presentations. A third party/consultant can be hired to provide a presentation on the governance topic. Sometimes the regions get together and do a regional presentation which also provides comradetrie between the communities.

In this section, we recommend that you hold a Mock Council/Committee Meeting with real issues that your community is facing so that new Councillors can see how staff and Council interact in a simulated situation. This will assist in the understanding of basic Council processes, roles and key protocols.

Appendix A will provide you with a sample of a Committee meeting with an Agenda and scripted issues and topics. Throughout the meeting a narrator will stop the proceedings at teachable moments. The characters would be Councillors and staff and they will reverse roles. Senior Council members should be provided with parts to encourage participation. Staff will also provide a mock media scrum. Some items that we feel should be addressed during this type of exercise would be as follows:

- 1 **Decision Making and Voting**
- 2 **Resolutions: Asking questions and when to speak to a topic**
- 3 **Adding items to a Consent Agenda**
- 4 **Roles and Relationships between the Chair, Councillors and staff.**
- 5 **Conflicts of Interest**

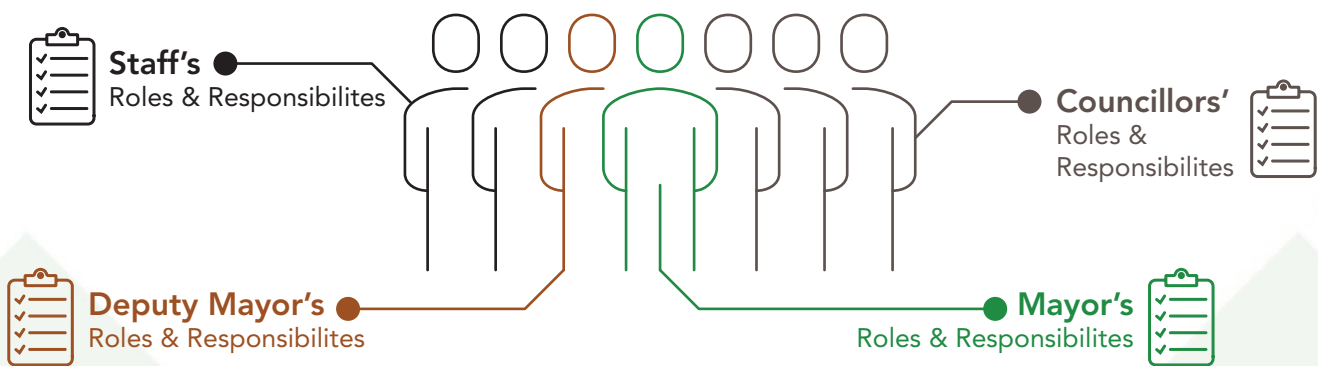
The other topics that should be covered in a Council Orientation, but are not limited to, are as follows:

Governance and Explanation of Local Government

It is important to begin with explaining the general role of local government in your community and the local services that you provide. You should also provide a list of what a municipality can and cannot do and explain the other levels of governments and their responsibilities. More information can be found in the **Provincial & Federal Relations** section of the CAMA Political Acumen Toolkit.

City Council is like the Board of Directors of a corporation and in this case the collective community. This is generally referred to as the policy arena and is the domain of the elected officials. It is not unusual for individuals that run for Council to not have any experience governing. Therefore, what you include in the Council Orientation is a critical educational component to achieving long-term organizational and governance success.

The roles and responsibilities of the Mayor, Deputy Mayor, Councillors, Senior Staff and the Council/Staff relationship should be clarified.



Conflict of Interest

Upon assuming office and on an ongoing basis, each member of Council should file with the City Clerk a statement disclosing any conflict of interest to which he or she has knowledge or should reasonably have knowledge. The form, which is prescribed by regulation under the *Municipalities Act* (or applicable legislation) must be completed at the beginning of each Council member's term of office and reviewed/updated on a periodic basis.

At the commencement of every meeting, senior appointed officers and members of Council should examine the agenda to ensure that they do not take part in discussions or vote on matters in which they may be in a conflict of interest. The *Municipalities Act* (or applicable legislation in your Province/Territory) details what constitutes a conflict of interest.

It is left up to an individual member of Council to decide whether he or she has a conflict of interest. If he or she is unsure, it is advisable to remove themselves physically from the meeting room as a precautionary measure. Council members may also wish to consult with their own personal lawyer to obtain an opinion.

This is a topic that should be covered in detail during your Council Orientation.

Confidentiality, Right To Information and Protection of Privacy Act & Code of Conduct & Ethics

The following topics (Confidentiality, Right To Information and Code of Conduct) are very important in building a successful team.

Confidentiality

Councils operate in an environment of public accountability and scrutiny and it is important that you reiterate the risks of a breach of confidentiality to your Council.

Each organization informs the public of issues under consideration and the decisions made by Council. In order to contribute to a transparent environment of decision making, Council aims to ensure that the number of matters which are considered In-Camera by Council are kept to a minimum.

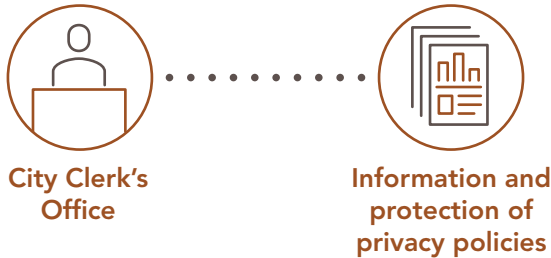
All decisions of Council shall be made in a regular or special meeting of the Council and adopted by a by-law or resolution of the Council. All regular and special meetings of Council shall be open to the public, except for the following matters (which are those noted in the *Municipalities Act* in New Brunswick however may vary in each Province/Territory):

- (a) Information of confidentiality of which is protected by law;
- (b) personal information;
- (c) information that could cause financial loss or gain to a person or the municipality or could jeopardize negotiations leading to an agreement or contract;
- (d) the proposed or pending acquisition or disposition of land for a municipal purpose;
- (e) information that could violate the confidentiality of information obtained from the Government of Canada or from the Province;
- (f) information concerning legal opinions or advice provided to the municipality by a municipal solicitor, or privileged communications as between solicitor and client in a matter of municipal business;
- (g) litigation or potential litigation affecting the municipality or any of its agencies, boards or commissions, including a matter before an administrative tribunal;
- (h) the access to or security of particular buildings, other structures or systems, including computer or communication systems, or the access to or security of methods employed to protect such buildings, other structures or systems;
- (i) information gathered by police, including the Royal Canadian Mounted Police, in the course of investigating any illegal activity or suspected illegal activity, or the source of such information; or
- (j) labour and employment matters, including the negotiation of collective agreements.

Some municipalities have a Confidentiality Policy that all members have to sign when they are elected to office.

Right To Information and Protection of Privacy Act

The City Clerk's Office is typically responsible for access to information and protection of privacy policies and procedures for the corporation according to the provincial *Right to Information and Protection of Privacy Act* (this may be referred to by another name in your jurisdiction).



Any person has the right to request and receive mandated municipal government records and public information. It is important that all elected officials understand that any e-mails and text messages under the City's domain can be requested and are part of the public domain.

Code of Conduct & 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.

Visit the CAMA Political Acumen Toolkit ([Council Ethics section](#)) to learn more about harassment and speaking truth to power during instances that are outside the bounds of ethics and proper Council behaviour.

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 that all Councillors must review and sign. This is often required by Provincial legislation.

- Including a module on your Code of Conduct or Council Ethics within the Council Orientation Session is fundamental to ensuring new Councillors are aware of what constitutes appropriate behaviour. It is advisable to bring in external legal counsel to speak to various topics, such as conflict of interest, breach of confidentiality, etc.
- Provide training to Councillors and Staff. In addition to reviewing ethics during a Council Orientation Session, it is important to provide a training opportunity that further educates Councillors and staff on the subject matter.
- Create a harassment-free culture. Get Council on board with promoting a workplace culture that encourages others to speak up when they witness harassment occurring without fear of reprisal.
- Using investigators when needed. Bring in the help of a third-party mediator or an investigator for a harassment complaint to help bring objectivity to the situation.

Sample bylaws and policies from across the country are attached to this section of the Political Acumen Toolkit for your reference along with some case studies of some of the experiences of your colleagues. Many of them include strong examples of procedures, forms, and protocols for issuing an informal or formal complaint regarding a breach of conduct.

Recommendation: To assist Council in understanding the Code of Conduct, ethics and confidentiality you may wish to do a tabletop exercise where they can "Name That Breach" based on real national scenarios. Working in groups of two to three, they can review the scenario, identify the breach and the potential path for a resolution or sanction.

City of Meadow Lake, Saskatchewan

Inclusion & Diversity

Council's leadership plays a critical role in how the organization prioritizes, supports, and invests in diversity, inclusion and equity.

Communities already have Community Diversity and Inclusion Strategies to build a welcoming community, honour all people and listen and respond to the voices of those who are marginalized.

Recommendation: As part of your Orientation Session, you may wish to have your Human Resources staff provide a presentation to Council on your strategy of respecting others, learning, acknowledging biases, and celebrating the diversity and history of your staff and the community.

The **GBA+ Course** (Gender Based Analysis) is an on-line tool that your Council and staff members may also wish to complete. The total estimated time required is less than two hours, however if time is limited, Module 4 - What does GBA+ look like "in action" is the one section that is recommended.

GBA+ is an analytical process that the Government of Canada committed to using in 1995 to advance gender equality in Canada. It is used to assess how diverse groups of women, men and non-binary people may experience policies, programs and initiatives. GBA+ goes beyond biological (sex) and socio-cultural (gender) differences and also considers many other identity factors, like race, ethnicity, religion, age, and mental or physical disability. Building a framework to support GBA+ in your organization provides a foundation for your Council and staff to learn to apply the information to your policies.

Council and Committee System

Council must understand your Council and Committee system along with the types of Committees and Boards that Council has representation on, either through a Councillor or a citizen appointment (i.e. Planning Advisory Committees, Commissions, Standing Committees, Special Advisory Committees, Citizen Committees, etc.). An explanation of the Open and Closed meetings and providing a schedule along with the deadlines for items and how the Agendas are organized would also be critical.

Decision Making Process of Council

A review of the municipality's Procedural By-law (conduct at meetings, public participation, voting on resolutions, how to ask questions, when to speak to a topic, etc.), Consent Agendas, Rules of Engagement (what constitutes a quorum, Conflict of Interest, Code of Conduct, Code of Ethics), and Motions of Council should be addressed.

It is also important that the new Council is made aware that their authority to make decisions and provide direction comes from Council as a whole and not individually.

*Town of Chestermere,
Alberta*





*City of Pitt Meadows,
British Columbia*

Governance During a State of Emergency

Typically, a municipality has a Community Emergency Planning By-law and there is an appointed Director within the organization that Chairs the Emergency Operations group in the event of a declared State of Emergency.

During a State of Emergency when a municipality activates its Emergency Operations Centre, municipal Councils usually stand down from most of their regular governance activities. This can be especially difficult for the Mayor and Council to relinquish control to another body. As a CAO, it is very important that you include a training session on governance during emergencies in your Council Orientation. This is critical in cases where the municipality operates the Emergency Operations Centre and can help alleviate any misunderstanding of roles during the State of Emergency.

How to Chair a Meeting

The Chairperson has a very special role and is responsible for making sure that each meeting is planned effectively and that matters are dealt with in an orderly and efficient manner. The Chair must allow all Committee members equal opportunities to speak and to maintain an unbiased view of the topics discussed. The Chair is expected to oversee the meeting and not to influence the outcome. Once the Chairs of your Committees are chosen, you may wish to hold a training session with the Mayor/Reeve (conducted by a third party) to show them how to run an effective meeting.

This is a very important part of leading and building a team.

Administrative Report

The Council Orientation is a good time to set boundaries with respect to administrative report requests which can become overwhelming if they are not managed properly.

It is 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.

It is also important to provide Council with a template of the Administrative Report that your staff use with an explanation on each section. As noted above, this is an opportunity to remind Council that every time an Administrative Report is requested it requires staff resources to complete. Each request should not be taken lightly.

A best practice includes establishing a protocol for Council inquiries that includes a timeline for the 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.

Appendix B displays the flow chart of an Administrative Report that you can use during your Orientation Session to explain each section to your Council. It displays the process from the beginning of when a request is received and the impact of what seems to be a simple ask on the entire corporation.

The Life of a Capital Project

Every size community has capital projects. These are long-term, capital-intensive investment projects with a purpose to build upon, add to, or improve a capital asset. It is important that capital projects are properly managed because they require a significant commitment of resources and time.

Your Council should be educated on the planning for capital projects and budgets, infrastructure deficits, asset management, construction communication efforts and one year, five year and ten-year capital plans if available. A flow chart outlining the process for capital budgeting could be provided. **Appendix "C"** includes a sample graphic of a major and intermediate capital project.

Overview of Organization

Provide the new Council with the role and portfolios of each of the Directors/Commissioners and other senior staff that they may interact with. It is also important to review the services that each Department provides.



Media Relations

Politics are performed in the public domain and as a result, are loved by the media. Training should be provided to Council on the following as noted in the **CAMA Political Acumen Toolkit**:

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

Community Engagement

Today the public play a more significant role than ever in the decision-making process of organizations and community engagement is the ability to work with those who are impacted by a decision to achieve buy-in and avoid opposition. You need to engage your stakeholders as part of the decision-making process as it is vital to implementing any project or change successfully.

CAMA's Political Acumen Toolkit's **Public Engagement Section** provides some great tips on knowing when to engage residents and ratepayers and to what level. Council should be aware of some of the tactics that your community uses for public engagement.

Budget/Financial Overview

Your Treasurer should provide an overview on the annual budget process including the programs and services within the general fund, the capital budget, utility budget and any other municipal budgets (Example: Commissions).

City of St. Johns, Newfoundland

Top Ten Plans

Each community has many plans such as the Corporate Strategic Plan, Municipal Plan, Long Term Financial Plan, Asset Management Plan, Infrastructure Deficit Plan, Community Secondary Plans, Economic Development Plans, etc. It is important that Council are familiar with the general concepts within each plan and are provided a copy of each.

Council Professional Development

An additional session on communication including dealing with the public, doing media interviews and public engagement, and the use of technology are also recommended. It may also be helpful to hold Lunch and Learns or other sessions for Council throughout the year in a similar way that staff do in their own professional development. This continues to assist with the networking and teambuilding of Council in an atmosphere outside of the Council Chamber.



Councillors' Handbook

Many administrations prepare and circulate the new Council with a Handbook after each election that contains information Council members should have at their fingertips and provides links to other relevant documents. Providing each new Council with a copy of all relevant municipal legislation is also a good idea. Below is a list of supporting documents that should be included. A number of these documents would be helpful when making presentations on the above-noted topics.

- Roles and Responsibilities of the Mayor/Reeve, Deputy Mayor, Councillors, Senior Staff and the Council/Staff Relationship
- Council Meetings
- Conflicts of Interest
- A list of the Provincial/Territorial Acts
- Code of Conduct and Ethics and Conflict of Interest (a one page summary would also be recommended)
- Role of Council in the Community Planning Process
- Use of Council Chamber and Committee Rooms
- Mayor and Council Compensation and Benefits
- Council Travel Arrangements
- Organizational Chart and a Profile of each Department and their Responsibilities
- City Policies
- Council Procedural By-law
- Freedom of Information
- Governance (Accountability, Strategic Plan, Relevant Legislation)
- Professional Development
- List of Committees and Boards
- Contact Information for Departments and Staff. It would also be advantageous to provide a one page summary for Council to have for frequently asked questions from constituents and who to contact.
- Performance Objectives and Goals for the Organization
- High Level Budget Document
- Plans and Acts
- Frequently Asked Questions

Governance Working Committee

To assist with the roles and responsibilities, the CAO may wish to establish a Governance Committee that consists of the CAO/Deputy CAO, City Clerk, two Councillors (appointed), one Director, and a strategic staff member.

The purpose of this Committee is to act as an advisory group to the CAO and guide and provide Council with the support and policies to make informed decisions on behalf of residents. This Committee can meet bi-weekly, monthly or as required.

Following are some examples of some topics that may be considered by this Committee:

- Review the Council Code of Conduct and Code of Ethics policies to address accountability. These documents should be presented to Council so that they are familiar with them along with providing some scenario-based review and familiarization sessions to understand the bylaw and the processes.
- Review the orientation process for the new Council.
- Review the Plan for a Council Strategic Priority Setting process using the Municipal Plan and other guiding documents in your community.
- Review and comment on the Staff Council Orientation Program.
- Define the Terms of Reference for the Governance Committee going forward into the next Council.
- Review the Administrative Report template and other identified reports or documents that are considered by Council on a regular basis.
- Review any suggestions for improvements made by City Council.

Priority Setting Exercise

It is recommended that not long after Council has had its initial Council orientation sessions, a meeting be set for Council and senior staff to meet to have a brainstorming session on setting the priorities for the community. This is especially important to capture the conversations they have had with their constituents in the months leading up to the election.

The outcome of this planning session would include a vision document that sets the priorities and implementation strategies for Council and staff to follow during their term.

To support the conversation there are a number of documents that would be useful to have at this session including the Municipal Plan, Management Framework and an overview of your community's Programs and Services.

Staff Orientation on Council

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.

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.

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 the Political Acumen toolkit.

It is therefore recommended that senior staff take part in an orientation session that includes the role of Council and staff, the legislation under which they operate (Bylaws, Conflict of Interest, Code of Conduct, etc.) how meetings are conducted, etc. This orientation would also focus on providing staff with a better understanding of the pressures that elected officials face in this world of social media and the difficult community issues that they deal with.

Staff should also be reminded that during the election campaigns, they should treat all candidates the same. For example, if a request is received by one individual it should be sent to all.

*City of Yellowknife,
Northwest Territories*



Appendix A

Mock Council Meeting

The purpose of this exercise is to assist in the understanding of basic Council processes, roles and key protocols.

Mock Council Agenda Draft:

Based on your Council procedures, create a full Mock Council Agenda. For each item, determine who will be speaking (Characters) and script what they will say.

Where appropriate, you can also have Councillors and staff reverse roles; senior Council members will be provided with parts to encourage participation.

You can also include a media scrum using internal staff playing the role of media. It is recommended that if there are new Councillors that they participate in the media scrum.

The topics covered in the Mock Agenda can be determined by interviewing current Councillors, Directors and the Chief Administrative Officer. A sample list of topics is included at the end of this document.

A senior/returning Councillor should play the role of Narrator. Throughout the Mock Council, the meeting should be paused to allow for an explanation from the Narrator of key items.

Mock Council Agenda and partial script example below.

① Call to Order

Characters: Mayor

Script:

Mayor: Good evening ladies and gentlemen, welcome to the regular City Council meeting of May 11 and welcome to those in attendance this evening and those watching on Rogers.

② Movement of Reflection

③ Approval of the Agenda

Characters: Mayor and City Clerk

Statements:

Mayor: Call for the approval of the agenda City Clerk.

City Clerk: Thank you Your Worship. We have one item to add to the agenda with Councils consent. The addition of the appointment of the Ad hoc Committee on Gender Diversity that would be 7.5 under of the Consent Agenda.

Mayor: That will be moved by Councillor XXX and seconded by Councillor YYY. On the question? All those in favor? All those against? Motion is carried.

④ Conflict of Interest Declarations

Characters: Mayor, Councillor A and Narrator

Statements:

Mayor: Does anyone have a conflict of interest declaration on any of the items on the agenda tonight?

Councillor A: Your Worship, I have a conflict of interest on item 5.2 - Hotel Levy of the consent agenda.

Narrator: A conflict of interest occurs when you answer yes to the following questions: Does your position as a Councillor give you an advantage over any other private citizen?

Councillor A has removed themselves from this item because they own a hotel and motel within the City therefore creating a conflict of interest. The Councillor would have or will complete the Disclosure of Interest Form from the Municipalities Act and filed it with the City Clerk's Office.

⑤ Approval of Minutes

⑥ Presentations (Awards)

⑦ Consent Agenda (Routine agenda items)

⑧ 1st & 2nd Reading - By-laws

⑨ 3rd Reading - By-laws

⑩ Other Matters (Non-routine agenda items)

⑪ Adjournment

Mock Council Topics to be included:

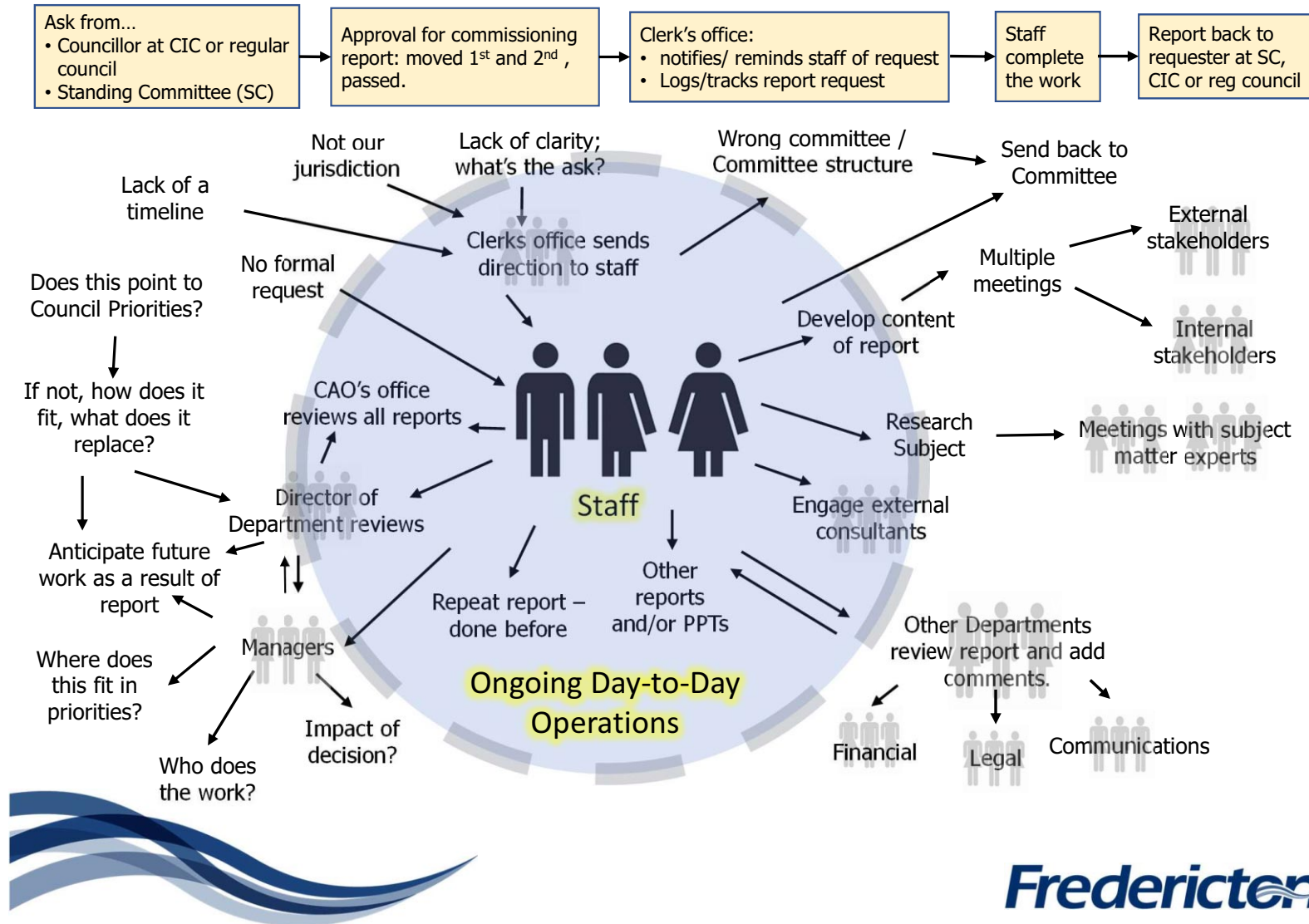
- Decision Making - Voting
- Resolutions - asking questions; when to speak to the topic
- Consent Agenda - adding items
- Roles and Relationships: Chair, Councillors and staff.
- Conflict of Interest.

Supporting Documents for Mock Council

- Councillor's Handbook (City Clerk's Office)
- Bourinot's Rules of Order
- Councillor Code of Conduct and Ethics By-law and Schedules
 - o *Code of Ethics*
 - o *Code of Conduct*
 - o *Code of Conduct and Ethics - One page summary*
- Conflict of Interest
- Administrative Report Graphic
- Life of a Capital Project Graphic
- RTIPPA - one-page summary
- GBA+ - one-page summary & website reference

Appendix B

I'd like a staff report...

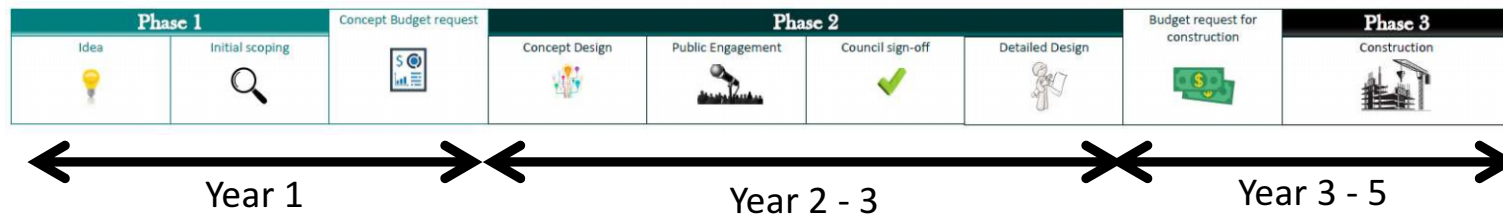


Appendix C

LIFE OF A CAPITAL PROJECT...

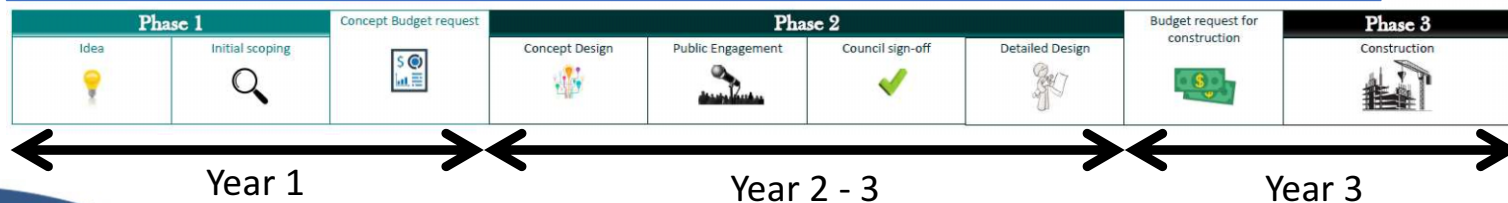
Life of a major capital project

For example: New Regional Aquatic Facility, New Performing Arts Centre



Life of a Intermediate capital project

For example: Transition from a wading pool to a splash pad (new), changing to Pavers on Carleton Street.
(Changes to current infrastructure)



Fredericton